

TRASER Software GmbH

TRASER Release Note

TRASER Dealer Management System

TRASER TEAM
7.3.2017

Index

1	Introduction	3
2	Timing	4
3	New Function (CRM & Sales)	5
3.1	Prepopulate Salesperson Code	5
3.2	Comment a Completed To-do.....	5
3.3	Setup John Deere Profile Interface	6
3.4	Extend Machine Table with John Deere Profile Equipment ID.....	6
3.5	Extend Customer Card with John Deere Profile ID.....	7
3.6	Next To-dos for a Salesperson	7
3.7	Evaluation in Segment Line	8
3.8	Opportunity based on a To-do.....	8
3.9	Skip creating to-dos for contacts in segment lines.....	9
3.10	Customer Discounts based on John Deere Product Hierarchy.....	10
3.11	New Naming in John Deere Database	10
3.12	Pricelist in „Brand“, „Line“ and „Model“	11
3.13	Schedule To-dos.....	11
3.14	Create and Manage To-dos easily	12
3.15	Do not separate Calculation Projects and Opportunities	14
3.16	Estimated delivery date for each ordered machine.....	14
3.17	Simplify „Phone Call“ Wizard from to-do card/list.....	15
3.18	Warning if campaign ends	16
3.19	Simplify „Opportunity“ Wizard.....	17
3.20	Simplify „Interaction“ Wizard.....	18
3.21	„CRM Statistic Data Entries“	18
3.22	Cue in Role Center with not delivered Machines from John Deere.....	19
3.23	Additional Opportunity Status.....	20
3.24	Create „V-Card“ on Contact	20
3.25	Warranty Date is equal than Shipment Date	21
3.26	John Deere Product Hierarchy on Segment, To-do and Opportunity	21
3.27	Create Machines from Order	22
3.28	Assign Activities on Sales/Service Order.....	22
4	New Function (Parts).....	22
4.1	Single and Multiple Substitution	22

4.2	<i>Purchase Conditions per Vendor with Order Types</i>	23
4.3	<i>Commodity Codes.....</i>	24
4.4	<i>Critical Codes.....</i>	25
4.5	<i>Check Availability</i>	26
4.6	<i>Parts Information on Check Availability Page</i>	27
4.7	<i>Extend Approval Management.....</i>	28
4.8	<i>Archive Purchase Orders before deleting</i>	29
4.9	<i>CORE Value for Parts</i>	29
4.10	<i>Remanufactured (Reman) Parts</i>	30
4.11	<i>Temporary Bin for Work in Progress (WIP)</i>	30
4.12	<i>JD Return Indicator on Item.....</i>	30
4.13	<i>Package Quantity from Nonstock Item</i>	31

1 Introduction

Dear Readers,

we are pleased to provide you with this document.

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Your contacts from our teams will be happy to help you. Ask us!

Your
TRASER Software GmbH

2 Timing of this release

- Preliminary release note is provided by TRASER about 1 week before the update
- The update is also imported into the customers test system.
- Before the update, there is a webcast for it. In this, the functions are explained and questions answered.
- On the webcast mainly key users participate, who have previously discussed the points of the release note.
- In this release note, tasks are defined, which are carried out by TRASER and planned by the customer.
- A developer from the developer team is available on the day after the update from 8 o'clock by telephone, in case of errors.

Dies entspricht demnach folgendem Zeitfenster:



3 New Functions (CRM & Sales)

3.1 Prepopulate Salesperson Code

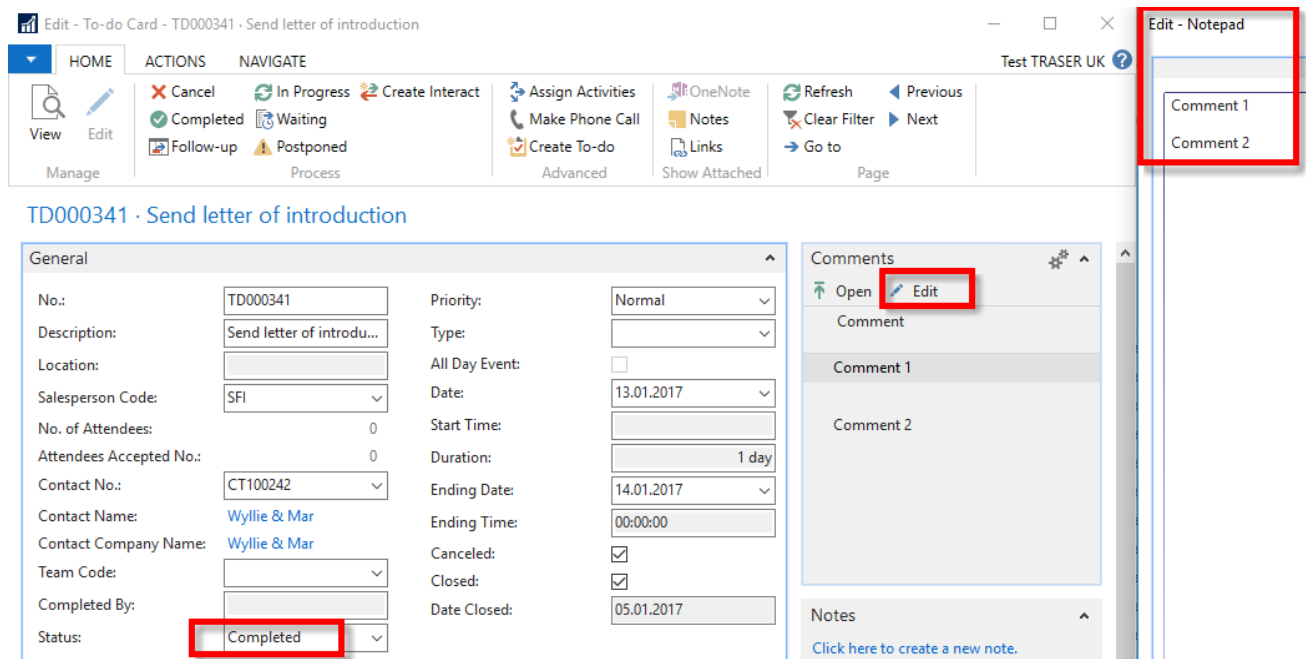
Traser User Setup contains the salesperson code of each USER in the system. Should be prepopulated in segment, campaign, activities, to-do and opportunity-headers and contacts. Also in all wizards.

TRASER User Setup ▾

User ID	Create Item	Create Machine	Show Ship-To ...	Allow to change...	Addin: Drag Dro...	Blo... Cu...	Purchaser Code	Purchase Permissions	Salesperson Code
TRASER\SFI	Normal	Normal	☐	☒	☒	☒	SFI	Receive and .	SFI

3.2 Comment a Completed To-do

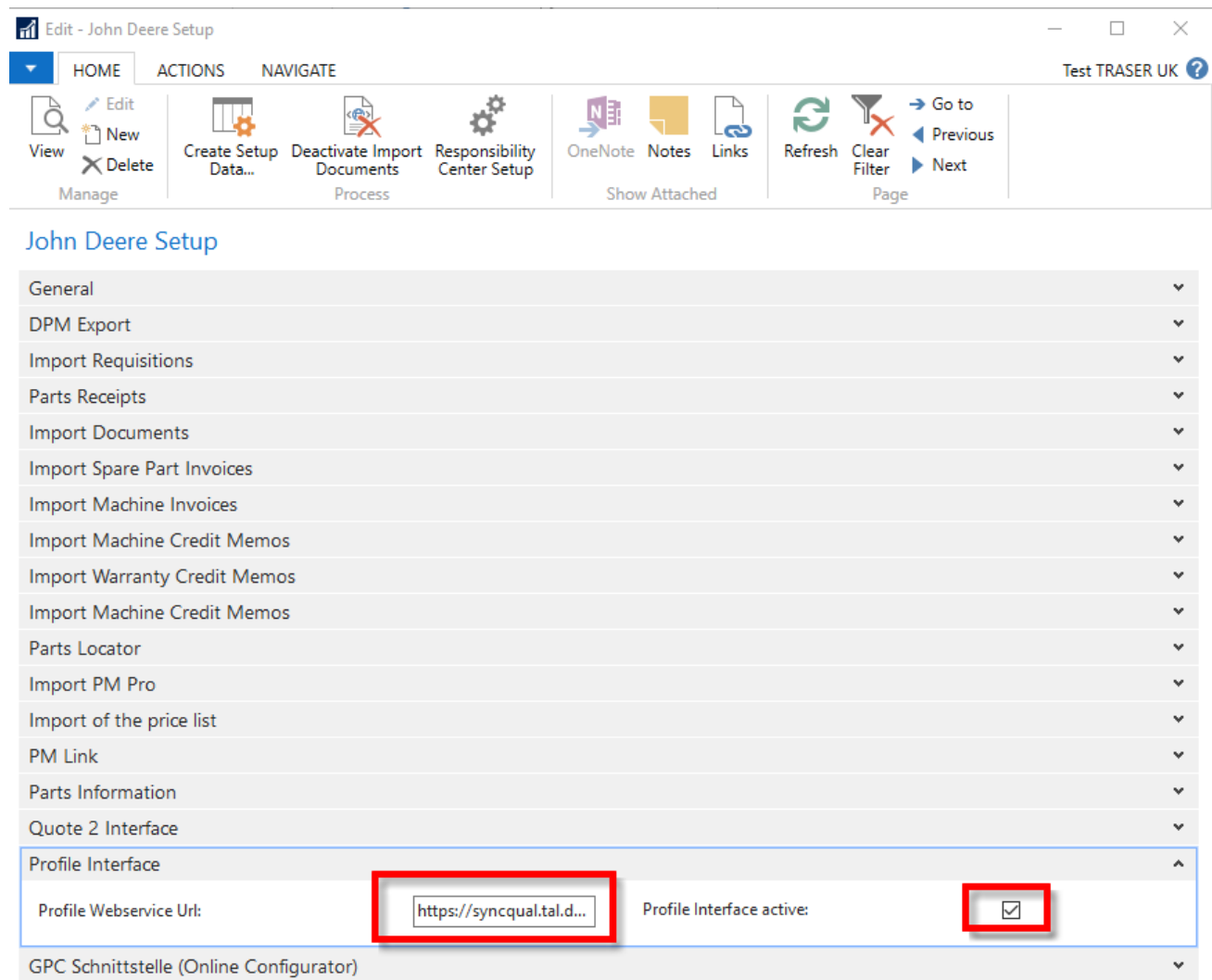
Now it's possible to comment a completed to-do. This comment will be shown in a factbox on the to-do card/list page.



The screenshot shows the 'Edit - To-do Card - TD000341 - Send letter of introduction' window. The 'Status' is set to 'Completed'. The 'Comments' section is visible, showing 'Comment 1' and 'Comment 2'. The 'Edit' button in the comments section is highlighted with a red box. A separate window titled 'Edit - Notepad' is also visible, showing the same comment text.

3.3 Setup John Deere Profile Interface

Necessary information for the Profile interface (URL and activation) can be entered in John Deere setup.



Edit - John Deere Setup

HOME ACTIONS NAVIGATE Test TRASER UK ?

View Edit New Delete Create Setup Data... Deactivate Import Documents Responsibility Center Setup OneNote Notes Links Refresh Clear Filter Go to Previous Next

John Deere Setup

- General
- DPM Export
- Import Requisitions
- Parts Receipts
- Import Documents
- Import Spare Part Invoices
- Import Machine Invoices
- Import Machine Credit Memos
- Import Warranty Credit Memos
- Import Machine Credit Memos
- Parts Locator
- Import PM Pro
- Import of the price list
- PM Link
- Parts Information
- Quote 2 Interface
- Profile Interface
 - Profile Webservice Url:
 - Profile Interface active: ☒
- GPC Schnittstelle (Online Configurator)

3.4 Extend Machine Table with John Deere Profile Equipment ID

The profile equipment id is deposited on the machine table. This id is not shown on the machine card. It's only for the profile interface in the background.

Profile Id (5446207):

3.5 Extend Customer Card with John Deere Profile ID

The John Deere Profile ID will show on the customer card if the Profile interface is active on John Deere setup. It will be filled, if a customer is on Profile.

John Deere Interfaces

Skip DPM Transfer: ☐

Dealer Account ID:

User ID (PMLink):

Password (PMLink):

John Deere Profile No.:

3.6 Next To-dos for a Salesperson

A new fact box on contact and customer card/list will show all next to-dos for a salesperson for his customer. If the salesperson has not a salesperson code in the TRASER user setup, the factbox will hide.

Customers

WoodMart Supply Co. Name

No.	Type	Name	Name 2
C00080	Company	WoodMart Supply Co.	

Contact Persons

To-Do

New Card Call Follow-up Cancel Completed

Date	Type	Status	Priority	Description	Salespe... Code
05.01.2017		Not Start...	Normal	todo 2	SFI
28.02.2017		Not Start...	High	Verify quality of opportunity	SFI
07.03.2017		Not Start...	Normal	Identify key persons	SFI
15.01.2017		Not Start...	Normal	make phone call on 15.01.17	SFI

A new cue group for to-dos was added in role center for the sales manager. If the user is a sales manager (it can be set up in TRASER user setup with a flag) the cue will show all to-dos. If the user is not a sales manager the cue will only show the to-dos for the salesperson himself.

Role Center

Salesperson/Salesmanager

Salesperson Activites

130	121	7	2
ToDo - Open	ToDo - Not Started	ToDo - In Progress	ToDo - Waiting

3.7 Evaluation in Segment Line

In segment lines there are new values ("follow-up", "negative" or blank) for opportunity evaluation.

SM00004 · New Segment

General	
No.:	SM00004
Description:	New Segment
Salesperson Code:	SFI
Date:	22.12.2016
No. of Lines:	0
No. of Criteria Actions:	2
Brand:	
Line:	
Model:	

Lines									
Line	Make Phone Call	To-dos	Create To-do	Interaction Log Entries	Opportunities	New	Find	Filter	Clear Filter
Contact No.	Correspond...	Contact Company Name	Contact Name	Description	Salesperson Code	Interaction Template...	Language Code	Subject	Opportunity Evaluation
	Type								Follow-Up Negativ

3.8 Opportunity based on a To-do

Possibility to create an opportunity directly from a to-do with following relations:

- Campaign
- Segment
- Contact

All follow-up to-dos which are related to this contact, segment or campaign will be cancel.

View - To-do List - untitled

HOME	ACTIONS	NAVIGATE
Edit Organizer To-Do Cancel Completed	Follow-up In Progress Waiting General	Postponed Create Opportunity Open Opportunity Functions

To-do List

Show results:

- Where Contact Company No. is CT000233
- And System To-do Type is Contact Attendee

3.9 Skip creating to-dos for contacts in segment lines

It's an check-mark button on the „Log Segment“ report named "exclude contacts with opportunity from folllow-up segment" while logging segment. This function will exclude all contacts from segment lines they should have a value in the new field "opportunity exists" which is related to the campaign, contact and segment.

Edit - Segment - SM00010 · Follow-up on segment SM00009

HOME ACTIONS NAVIGATE

Edit View New Delete Log Add Contacts... Print Cover Sheets Criteria Opportunities To-dos Create To-do

Manage Process Advanced

SM00010 · Follow-up on segment SM00009

Edit - Log Segment

ACTIONS Test TRASER UK ?

Clear Filter Page

Options

Send Attachments: ☒

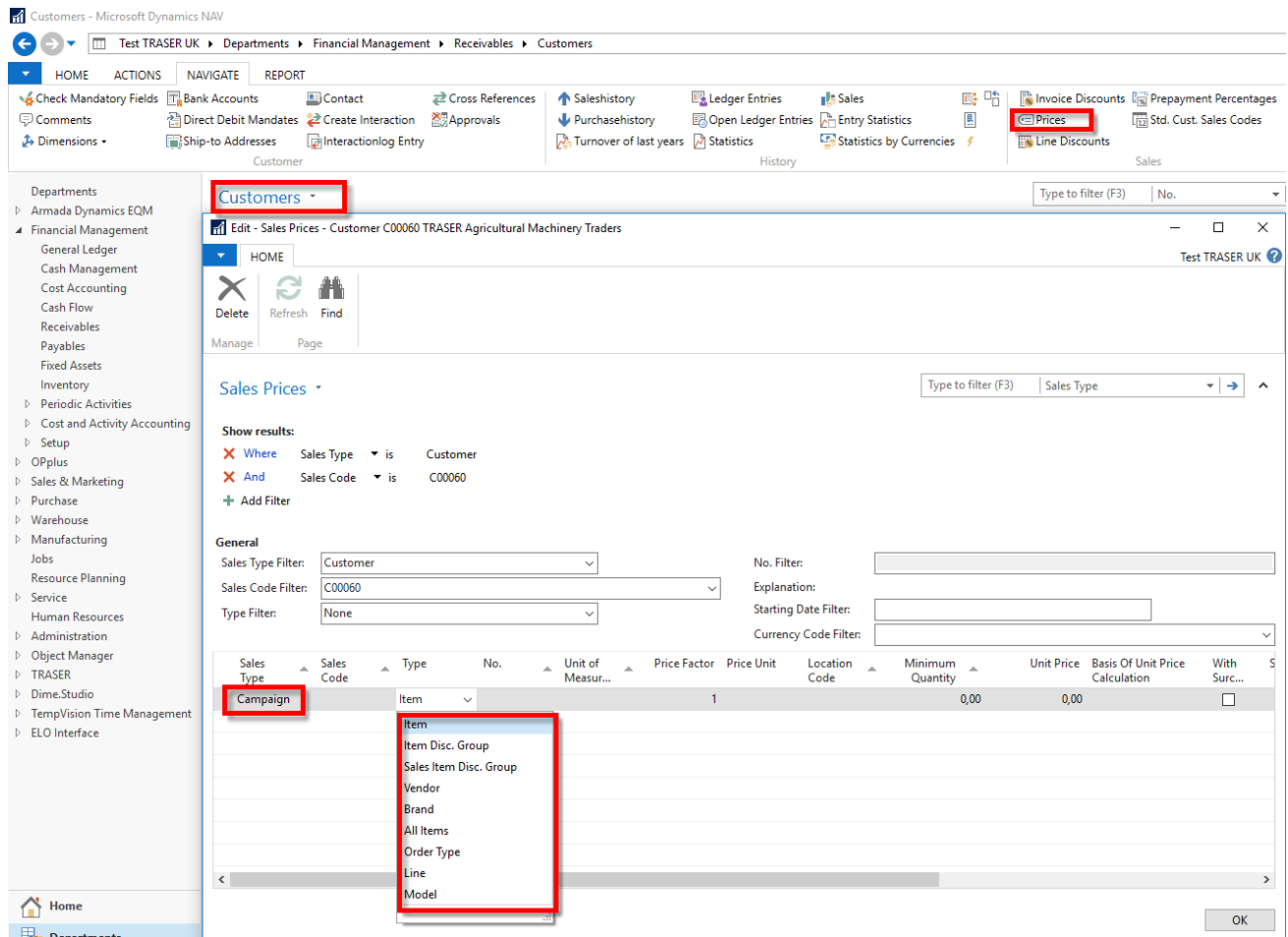
Create Follow-up Segment: ☒

Exclude Contacts with opportunity from follow-up segment: ☐

OK Cancel

3.10 Customer Discounts based on John Deere Product Hierarchy

Possibility to configure discounts and prices of a campaign related to the John Deere product hierarchy (Brand – Line – Model) including best price agreement.



The screenshot shows the Microsoft Dynamics NAV interface. The top navigation bar includes 'HOME', 'ACTIONS', 'NAVIGATE', and 'REPORT'. The 'NAVIGATE' tab is active, showing a list of modules. The 'Customers' module is selected, and the 'Edit - Sales Prices' window is open for Customer C00060. The 'Sales Prices' tab is active, and the 'Campaign' item is selected in the list. A dropdown menu is open, showing the hierarchy: Item, Item Disc. Group, Sales Item Disc. Group, Vendor, Brand, All Items, Order Type, Line, and Model. The 'Campaign' item is highlighted in the list.

3.11 New Naming in John Deere Database

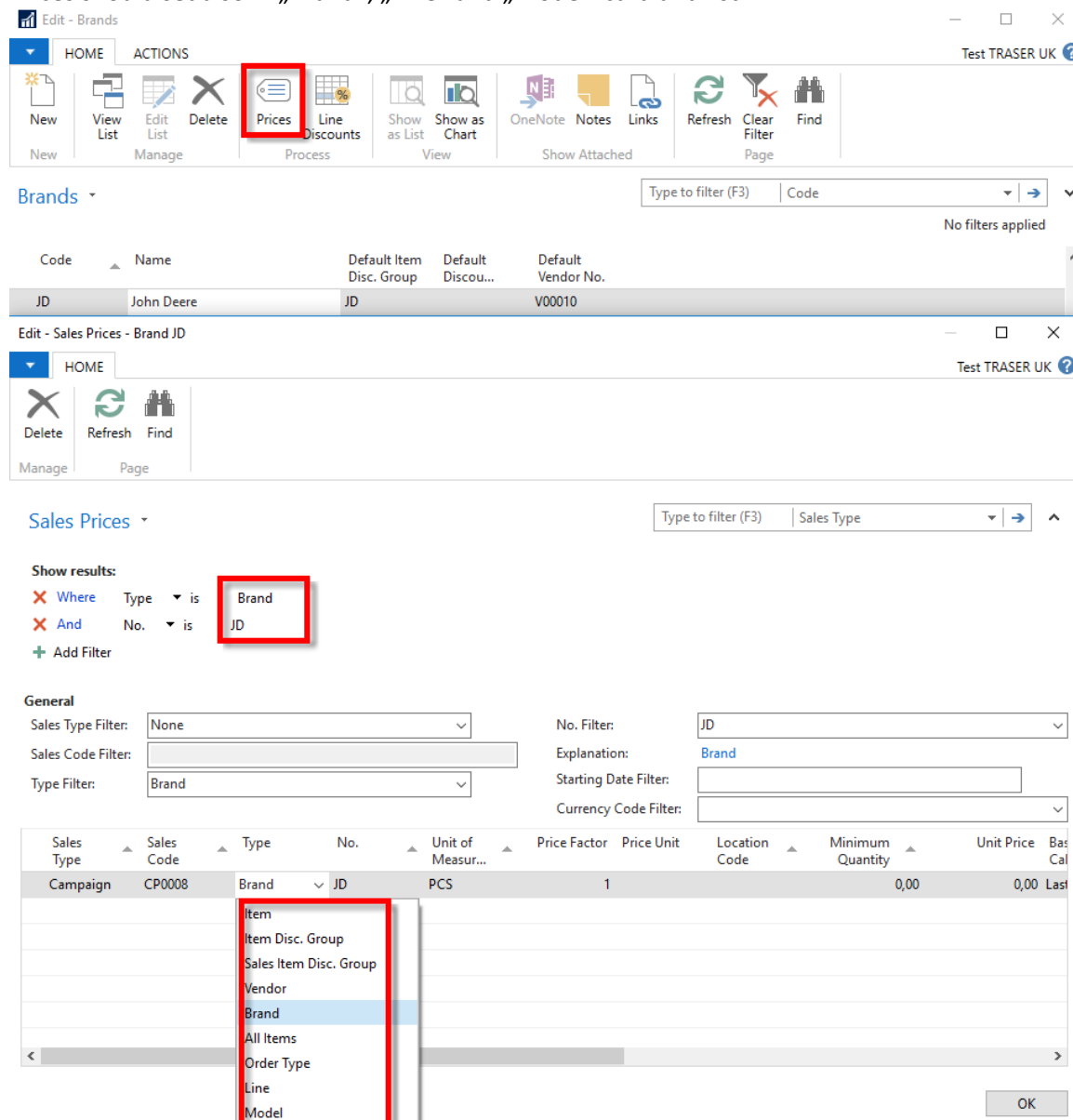
Following entities in the hole John Deere database have changed:

- Service Item = Machine
- Manufacturer = Brand
- Service Item Group = Line
- Service Item Model = Model

Model is the lowest level on John Deere product hierarchy. If a user types the model name the system fill in the brand and the line automatically.

3.12 Pricelist in „Brand“, „Line“ and „Model“

Prices should set also in „Brand“, „Line“ and „Model“ card and list.



Edit - Brands

HOME ACTIONS

New View List Edit List Delete Prices Line Discounts Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Brands

Code	Name	Default Item Disc. Group	Default Discou...	Default Vendor No.
JD	John Deere	JD		V00010

Edit - Sales Prices - Brand JD

HOME

Delete Refresh Find

Sales Prices

Show results:

Where Type is Brand

And No. is JD

+ Add Filter

General

Sales Type Filter: None No. Filter: JD

Sales Code Filter: Explanation: Brand

Type Filter: Brand Starting Date Filter:

Currency Code Filter:

Sales Type	Sales Code	Type	No.	Unit of Measur...	Price Factor	Price Unit	Location Code	Minimum Quantity	Unit Price	Bas Cal
Campaign	CP0008	Brand	JD	PCS	1			0,00	0,00	Last

Item

Item Disc. Group

Sales Item Disc. Group

Vendor

Brand

All Items

Order Type

Line

Model

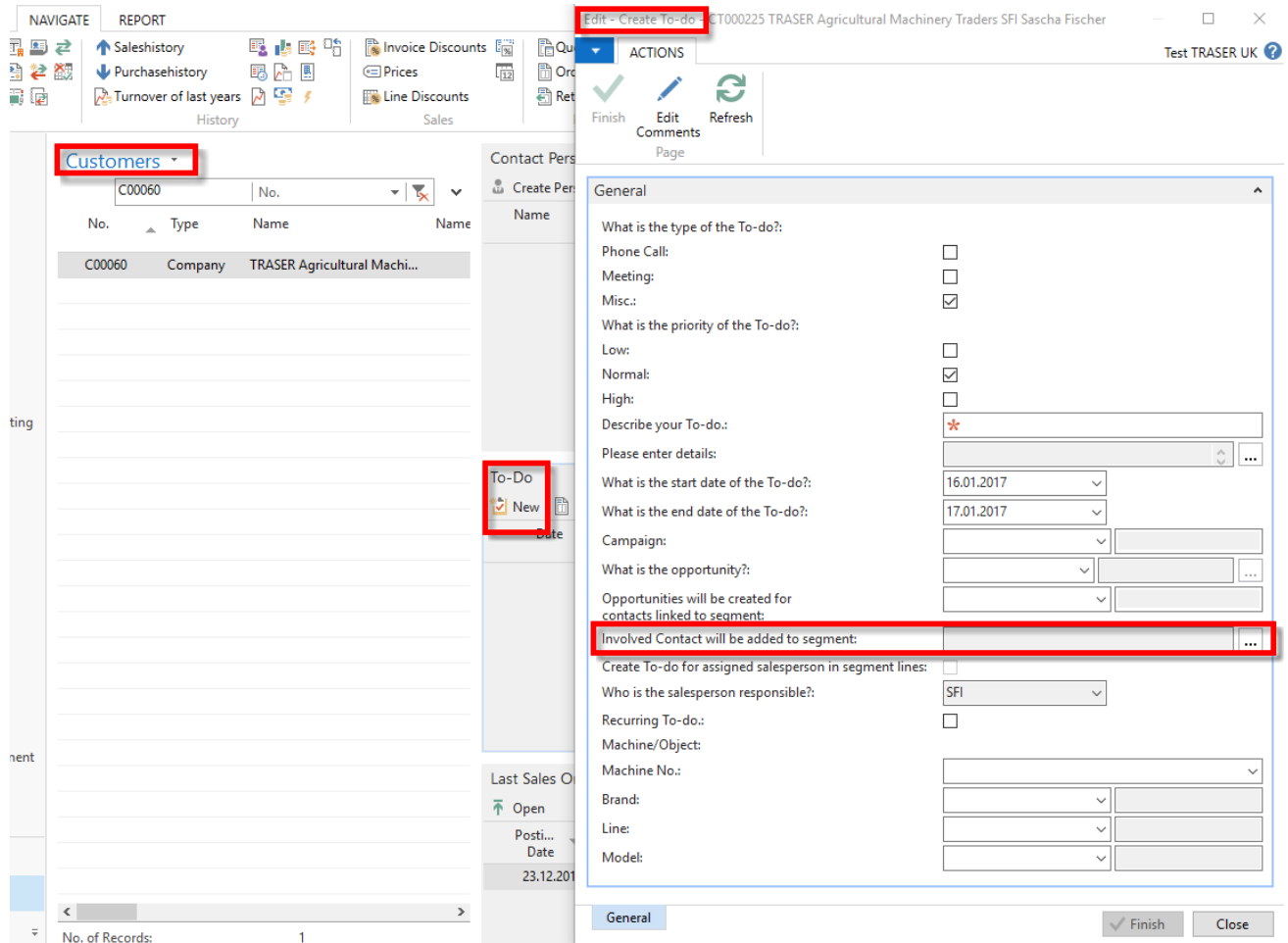
OK

3.13 Schedule To-dos

Possibility to schedule to-dos depending from the to-do before.

- To-dos can create easily from customer/contact card/list
- A follow-up to-do can be created based on the current one, which is going to be closed

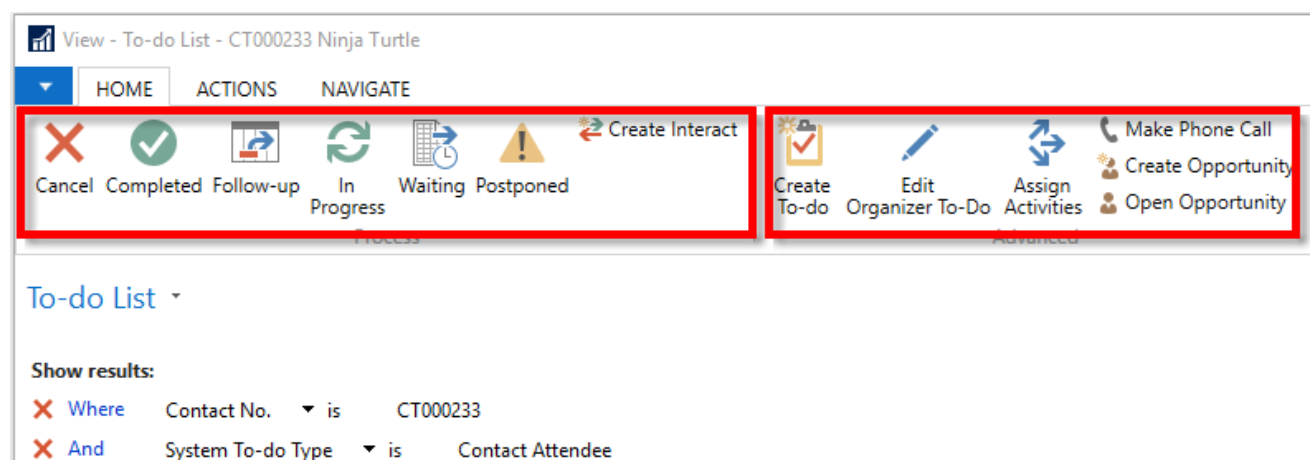
A new field "Involved Contact will be added to segment" on "create to-do wizard" page, which adds the contact directly into the selected segment line.



The screenshot shows the TRASER software interface. At the top, there's a 'NAVIGATE' and 'REPORT' menu. Below it, a list of icons for various functions like Sales, Purchase, and Turnover is visible. On the left, a 'Customers' dropdown menu is highlighted. In the center, a table lists customer records, with one record highlighted. On the right, a 'To-Do' button is highlighted. A 'Create To-do' wizard is open, showing the 'General' tab with various fields for creating a to-do item, such as 'What is the type of the To-do?', 'What is the priority of the To-do?', 'Describe your To-do:', 'What is the start date of the To-do?', 'What is the end date of the To-do?', 'Campaign:', 'What is the opportunity?', 'Opportunities will be created for contacts linked to segment:', 'Involved Contact will be added to segment:', 'Create To-do for assigned salesperson in segment lines:', 'Who is the salesperson responsible?', 'Recurring To-do:', 'Machine/Object:', 'Machine No.', 'Brand:', 'Line:', and 'Model:'.

3.14 Create and Manage To-dos easily

To-dos can now manage easily directly from the to-do card/list. The status can change with push on a button in the ribbon menu. Additionally the



The screenshot shows the 'View - To-do List - CT000233 Ninja Turtle' window. The ribbon menu at the top has three tabs: 'HOME', 'ACTIONS', and 'NAVIGATE'. The 'HOME' tab is active, showing a series of icons for managing to-do items: Cancel, Completed, Follow-up, In Progress, Waiting, Postponed, Create Interact, Create To-do, Edit Organizer To-do, Assign Activities, Make Phone Call, Create Opportunity, and Open Opportunity. Below the ribbon, the 'To-do List' section shows search filters: 'Where Contact No. is CT000233' and 'And System To-do Type is Contact Attendee'.

The "Create To-do" wizard has been simplified.

ACTIONS

Finish
 Edit Comments
 Refresh

Test TRASER UK ?

General

What is the type of the To-do?:

Phone Call: ☐

Meeting: ☐

Misc.: ☒

What is the priority of the To-do?:

Low: ☐

Normal: ☒

High: ☐

Describe your To-do.: *

Please enter details:

What is the start date of the To-do?: 16.01.2017 ▼

What is the end date of the To-do?: 17.01.2017 ▼

Team To-do: ☐

Campaign:

What is the opportunity?: ...

Opportunities will be created for contacts linked to segment:

Involved Contact will be added to segment: ...

Create To-do for assigned salesperson in segment lines: ☐

Who is the salesperson responsible?: SFI ▼

Recurring To-do.: ☐

Machine/Object:

Machine No.:

Brand:

Line:

Model:

General

✓ Finish

Close

It is also possible to create a to-do directly from segment lines.

Edit - Segment - SM00017 - New Segment for campaign CP0008

HOME ACTIONS NAVIGATE

Edit View New Log Add Contacts... Print Cover Sheets Criteria Opportunities To-dos Create To-do OneNote Notes Links Refresh Clear Filter Go to Previous Next

Manage Process Advanced Show Attached Page

SM00017 - New Segment for campaign CP0008

General

No.: SM00017 No. of Lines: 2

Description: New Segment for campaign CP0008 No. of Criteria Actions: 3

Salesperson Code: SFI Brand:

Date: 09.01.2017 Line:

Model: 6120M 6120M Cab Tract...

Lines

Line Make Phone Call To-dos Create To-do Interaction Log Entries Opportunities New Find Filter Clear Filter

Contact No.	Correspond... Type	Contact Company Name	Contact Name	Description	Salesperson Code	Interaction Template...	Language Code	Subject
CT000223	E-Mail		Sascha Fischer	New Segment for campaign CP0...	SFI			

3.15 Do not separate Calculation Projects and Opportunities

Possibility to show all opportunities/calc. project in the opportunity list view.

3.16 Estimated delivery date for each ordered machine

In the role center of a sales manager there are new cue groups which show expected machines with an estimated delivery date behind the cue. The first 3 cues are sales lines with a date filter on the field "Expected Receipt Date" and the second 3 cues are with a date filter on the field "Promised Receipt Date". The date filter can be setup in the TRASER Filter Setup.

Verkaufsleiter - Microsoft Dynamics NAV

Test TRASER UK Home

ACTIONS Refresh

Page

Role Center

Verkaufsleiter

Salesperson Activities

Expected Machines

Expected

16	0	0
..27.01.17	20.02.17..20.03.17	03.02.17..10.02.17

Promised

16	0	0
..27.01.17	27.01.17..03.02.17	03.02.17..10.02.17

Pending JD Machines

3.18 Warning if campaign ends

Users can only choose valid campaigns in quotes. If the ending date of the campaign in a sales/service quote is close to the workdate, the system will show in the TRASER Setup on the field "Campaign end warning". This field calculates the quote validity. If the quote in relation of the campaign is valid, a notification in the sales/service line subform will show a warning message with the rest of the days. If the campaign is already expired a message text will show this on the same place.

Edit - Sales Quote - 1001 - TRASER Agricultural Machinery Traders

HOME ACTIONS NAVIGATE

View New Delete

Send... Document Texts Copy Document...

Print... Email

Calc. Sales VAT Tax Make Order Send Approval Request

Cancel Approval Request Statistics

OneNote Notes Links

Refresh Clear Filter

Go to Previous Next

Manage Process Show Attached Page

1001 - TRASER Agricultural Machinery Traders

General

Sell-to Customer No.: C00060

Sell-to Contact No.:

Sell-to Customer Name: TRASER Agricultural Machinery Traders

Sell-to Customer Name 2:

Sell-to City: Kiel

Order Date: 10.02.2017

Document Date: 10.02.2017

Requested Delivery Date:

Posting Description: Quote 1001

Your Reference:

Salesperson Code: SFI

Person in Charge Code: SFI

Sales Order Type: QUOTE

Campaign No.: CP0002

Quotation is valid to: 01.03.2017

Opportunity No.:

Status: Open

Quote Status: CREATED

Cash Customer: ☐

Lines

Line	Bold	Con...	M...	Type	Item Search	No.	Vendor Item No.	Su...	Machine No.	Trade No.	Description	Description 2
	☐	☒	No	Item		9000000001	3BP20015				Oil Filter	
	☐	☒	No	Item		9000000031	05W0RW				John Deere Tractors 7250R Tracto...	FT4
	☐	☒	No	Item		9000000024	4457243				Spacer	
	☐	☒	No	Item		9000000026	4625199				Motor	
	☐	☒	No	Item		9000000001	3BP20015				Oil Filter	
	☐	☒	No	Item		9000000031	05W0RW				John Deere Tractors 7250R Tracto...	FT4

Firm Price (Total): 0,00

Firm Price (Parts): 0,00

Firm Price (Labor): 0,00

Invoice Discount Amount:

Invoice Discount %:

Adjusted Profit %:

Attention! The price of campaign CP0002 is only 1 day(s) valid.

3.19 Simplify „Opportunity“ Wizard

The “Opportunity” wizard has been simplified and shows only the important and related information.

Edit - Create Opportunity - CT000225 TRASER Agricultural Machinery Traders — □ ×

ACTIONS Test TRASER UK ?

✓ Finish
 Edit Comments
 Refresh

Page

General

Which contact is involved?: TRASER Agricultural Machinery Traders ...

Describe the opportunity.: *

Please enter details: ...

Which salesperson is involved with this opportunity?: ▼

What is the date of the opportunity?: 02.03.2017 ▼

Campaign: ▼

Opportunities will be created for contacts linked to segment: ▼

Machine/Object:

Machine No.: ▼

Brand: ▼

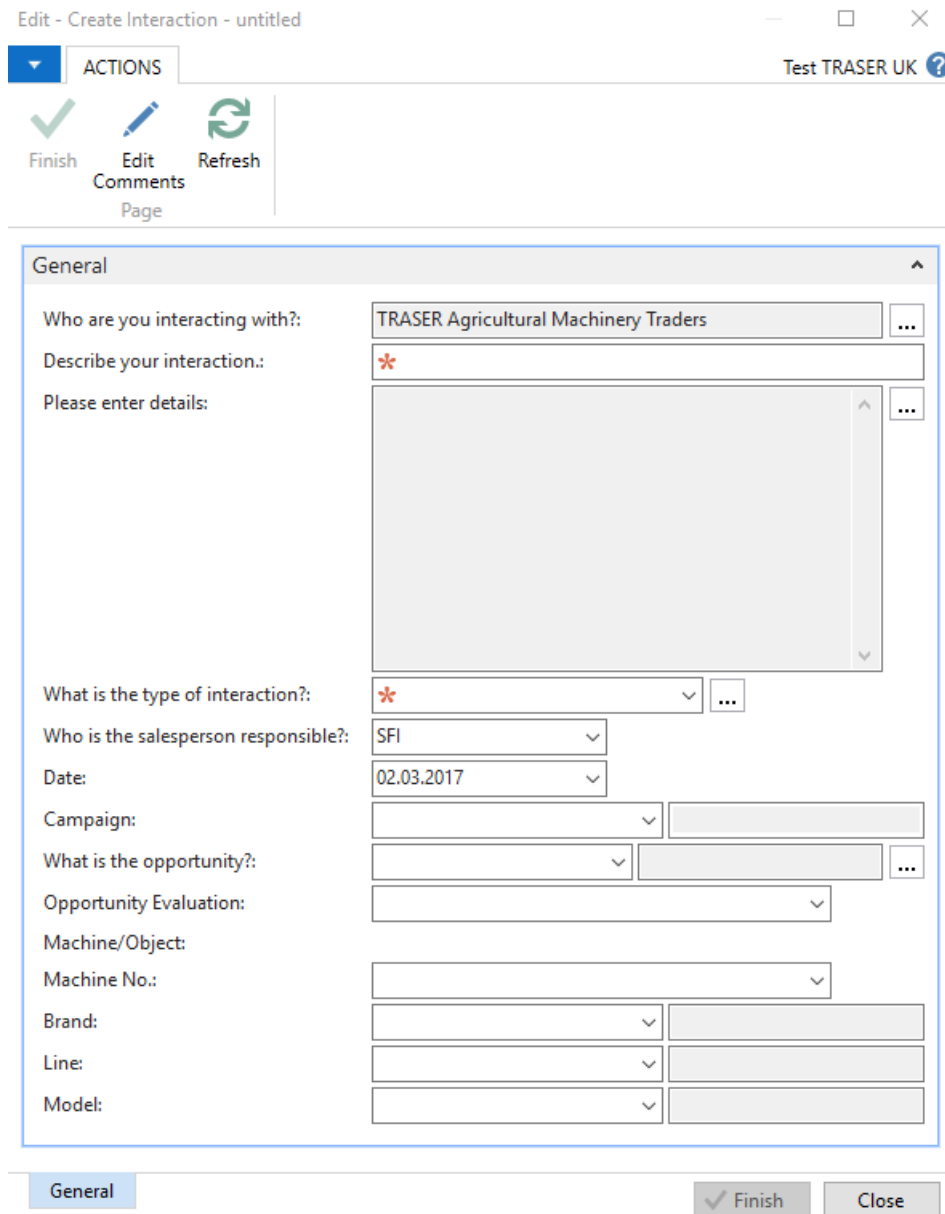
Line: ▼

Model: ▼

General ✓ Finish Close

3.20 Simplify „Interaction“ Wizard

The „Interaction“ wizard has been simplified and shows only the important and related information.



3.21 „CRM Statistic Data Entries“

A new feature in TRASER DMS is the „CRM Statistic Data Entries“. There are all interactions with a contact and their history. The following activities leads to an entry in the „CRM Statistic Data Entries“:

- Part of
 - a campaign
 - a segment
 - a to-do
 - an interaction
 - a opportunity → Sales Quote → Sales Order → Sales Invoice

The “CRM Statistic Data Entries” shows all important information of the interaction and related documents.

View - CRM Statistic

HOME NAVIGATE Test TRASER UK

Expand All Collapse All Show Sales Document Show Opportunity Refresh Find

Type	Description	Date	Brand Code	Model	Line Code	Opportun... No.	Status	No. of Opportun...	Sales Docume...	Sales Docume...
Opportunity	Jira-71 testing	12.01.2017 16:42				OP000021	Lost	1		
Interaction	Jira-71 interaction testing	12.01.2017 16:46								
▲ To-Do	Jira-71 To-do testing	12.01.2017 16:50								
Interaction	Test	13.01.2017 08:44								
▲ To-Do	Jira-71 To-do testing	12.01.2017 16:52								
Interaction	Jira-71 testing - interaction from t...	12.01.2017 16:52								
To-Do	To-do-->interaction-->opportun...	12.01.2017 16:57								
▲ To-Do	To-do-->interaction-->opportun...	12.01.2017 16:58								
Interaction	To-do-->interaction-->opportun...	12.01.2017 16:58								
To-Do	Again To-do-->interaction-->op...	12.01.2017 17:00								
▲ To-Do	Again To-do-->interaction-->...	12.01.2017 17:01				OP000021	Lost	1		
Interaction	Again To-do-->interaction-->op...	12.01.2017 17:01				OP000021	Lost	1		
To-Do	To-do-->activities-->interaction	12.01.2017 17:04								
Logged Segment	Follow-up on segment SM00018	12.01.2017 17:35				OP000024				
▲ Campaign	Summersale 20% Off 2017	12.01.2017 17:44				OP000027	Won	2	Invoice	103032
Logged Segment	Follow-up on segment SM00019	12.01.2017 17:44				OP000027	Won	2	Invoice	103032
▲ Logged Segment	Follow-up on segment SM00022	13.01.2017 13:43								
Interaction	Ninja Turtles	13.01.2017 13:43								
Segment	Follow-up on segment SM00023	13.01.2017 14:13				OP000031				

The “CRM Statistic Data Entries” can be opened from contacts, machines, brands, lines and models.

3.22 Cue in Role Center with not delivered Machines from John Deere

In the role center of a sales manager there is a new cue group that shows not delivered machines from sales and purchase lines filtered for John Deere machines and the salesperson code from the TRASER User Setup. Additionally, the sales line is filtered by the field “Qty. shipped” and in the purchase line by the field “Quantity Received”. If the user is a sales manager (it can be setup in TRASER user setup with a flag) the cue will show all lines. If the user is not a sales manager the cue will only show the lines for the salesperson himself.

Salesperson/Salesmanager - Microsoft Dynamics NAV

Test TRASER UK Home

ACTIONS

Refresh

Page

Role Center

Salesperson/Salesmanager

Salesperson Activities

Expected Machines

Pending JD Machines

Pending JD Machines Purchase 0

Pending JD Machines Sale 0

3.23 Additional Opportunity Status

Status for an opportunity should be “Won”, “Lost” and “No-Buy”. Related to the status it should be possible to schedule follow up todos.

In TRASER Setup it can be defined whether an opportunity can be closed without selecting an „Close Opportunity Code” for lost Opportunities

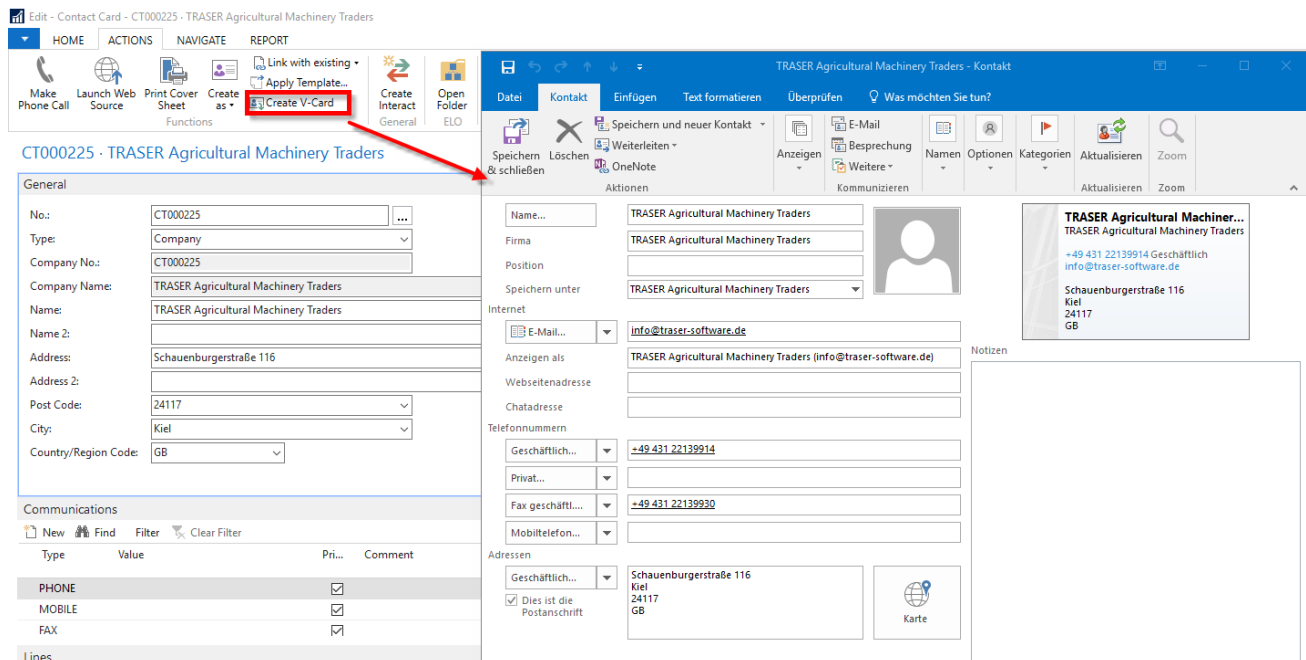
TRASER Setup

Service Item		▼
Forecast Calculation		▼
Calculation Preview		▼
TempVision		▼
Warehouse		▼
Purchase		▼
Sales		▲

Contact Person No. Series:		Return Reason Mandatory:	☐
Warning if unit price is zero while posting:	☒	Quote Expiration:	3W
Synch. Drop Shipment for Sales Lines:	☒	Campaign end warning:	-3W
Create Shipment Info Text in Sales Order for partial deliveries:	☐	Close Opportunity Code Mandatory	
Insert Order No. in Combine Invoice:	☒	Win:	☐
Registration No./VAT Reg. No. Mandatory At Credit Memo:	☒	Lost:	☐
Responsibility Center Mandatory (Sales):	☐	No-Buy:	☐
Discount Calculation:	NAV Standard		

3.24 Create “V-Card” on Contact

New button on contact card/list will create a “V-Card” for this contact.



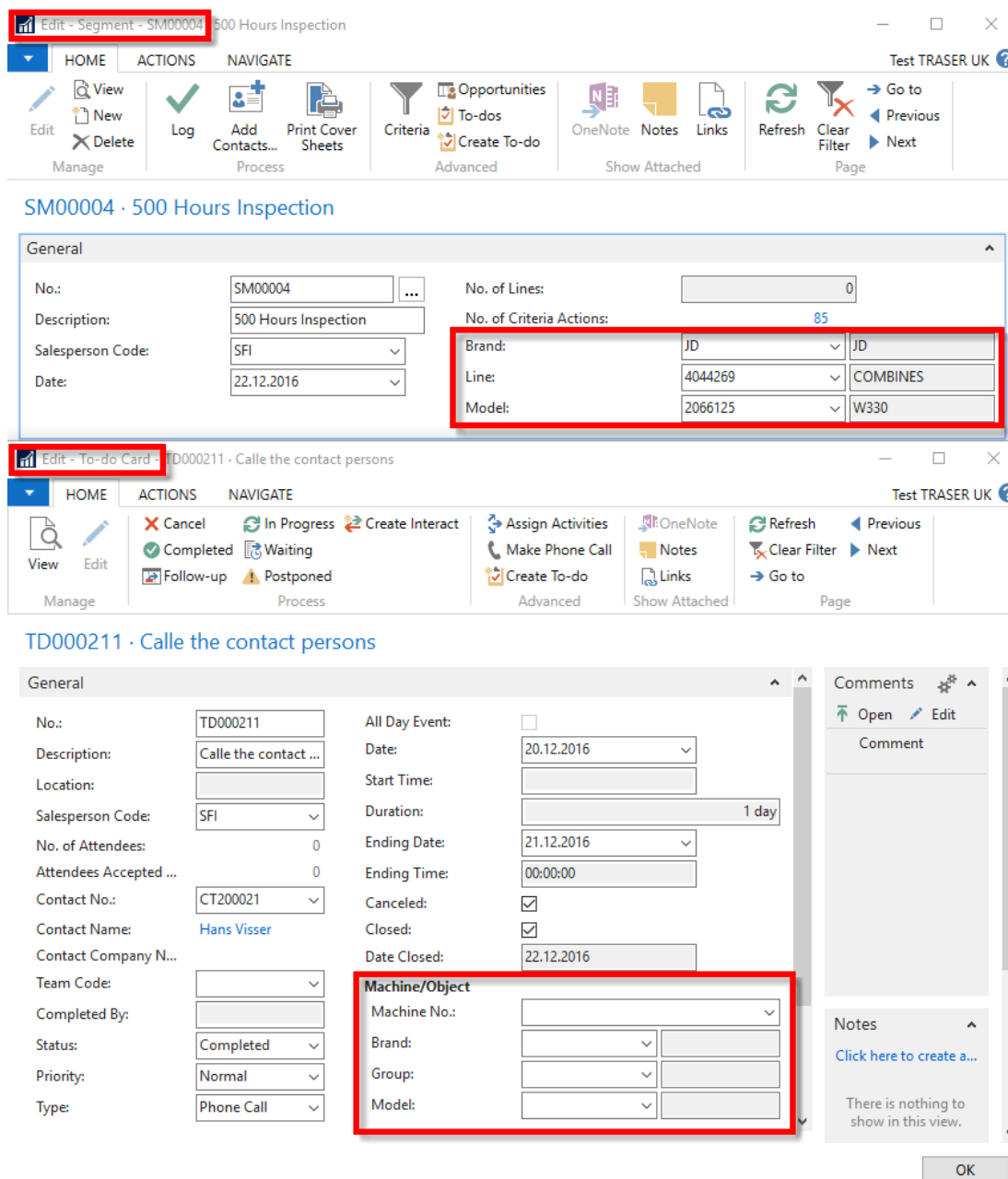
The screenshot shows the 'Edit - Contact Card - CT000225 - TRASER Agricultural Machinery Traders' window. In the top ribbon, the 'Create V-Card' button is highlighted with a red box and an arrow. The main area displays the contact details for 'TRASER Agricultural Machinery Traders' (CT000225), including address, phone, and fax. A V-Card is shown on the right, containing the company name, address, and contact information.

3.25 Warranty Date is equal than Shipment Date

After machine was shipped from an order, the warranty start date should be set with shipment date.

3.26 John Deere Product Hierarchy on Segment, To-do and Opportunity

The John Deere Product Hierarchy is also available on the segment header, segment line, to-do card and Opportunity card. It is possible to select directly a machine no. (unless segment header) in the corresponding wizards or cards. After that the fields "Brand", "Line" and "Model" will be filled automatically. It is also possible to choose a model without a machine. The system also fills the mentioned fields.



Edit - Segment - SM00004 500 Hours Inspection

Test TRASER UK ?

HOME ACTIONS NAVIGATE

Manage Process Advanced Show Attached Page

General

No.: SM00004 No. of Lines: 0

Description: 500 Hours Inspection No. of Criteria Actions: 85

Salesperson Code: SFI

Date: 22.12.2016

Brand: JD JD

Line: 4044269 COMBINES

Model: 2066125 W330

Edit - To-do Card - TD000211 Calle the contact persons

Test TRASER UK ?

HOME ACTIONS NAVIGATE

Manage Process Advanced Show Attached Page

General

No.: TD000211 All Day Event: ☐

Description: Calle the contact ... Date: 20.12.2016

Location: Start Time:

Salesperson Code: SFI Duration: 1 day

No. of Attendees: 0 Ending Date: 21.12.2016

Attendees Accepted ... 0 Ending Time: 00:00:00

Contact No.: CT200021 Canceled: ☒

Contact Name: Hans Visser Closed: ☒

Contact Company N... Date Closed: 22.12.2016

Team Code:

Completed By:

Status: Completed

Priority: Normal

Type: Phone Call

Machine/Object

Machine No.:

Brand:

Group:

Model:

Comments

Open Edit

Comment

Notes

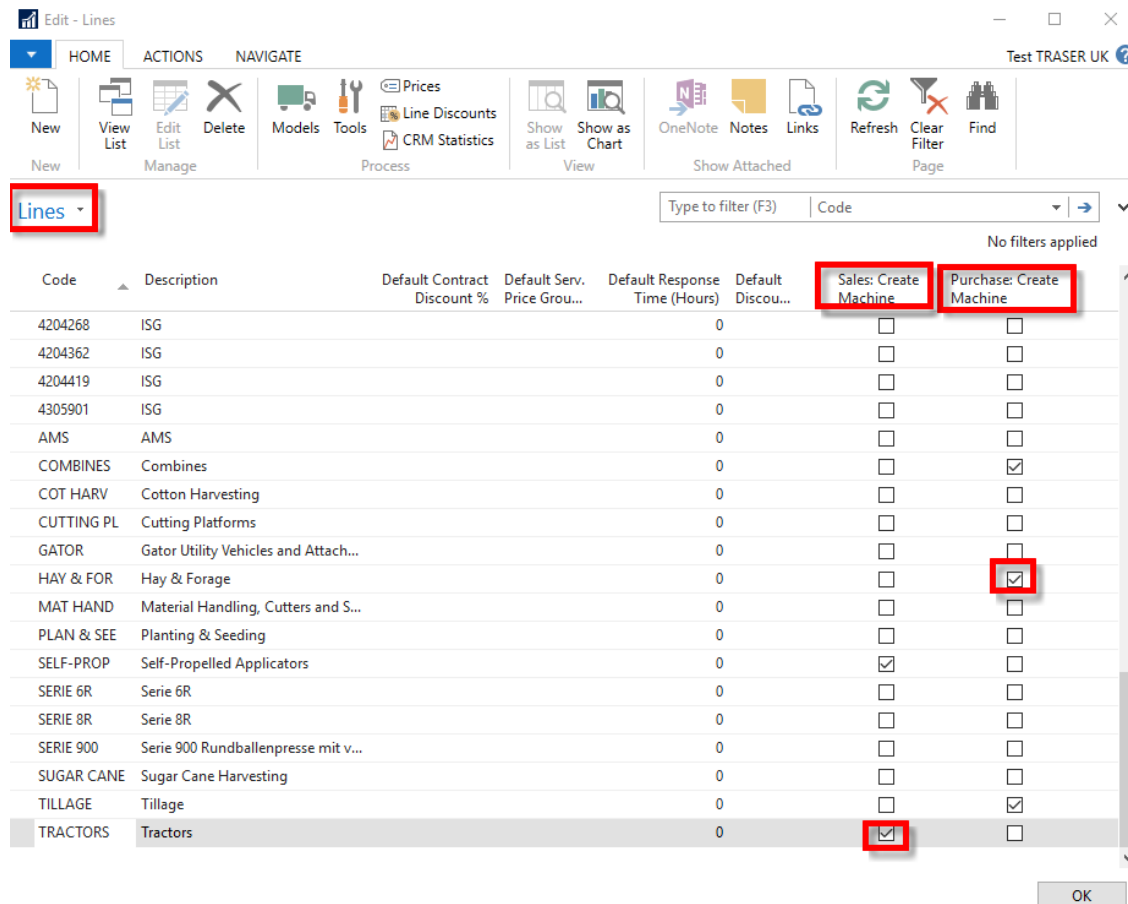
Click here to create a...

There is nothing to show in this view.

OK

3.27 Create Machines from Order

It is possible to create a machine directly from an order (purchase and sales). Precondition is, that in the list of the "Lines" are a checked flag on the desired record. It can be choosing between a flag in the field "Sales: Create Machine" or "Purchase: Create Machine". According to which flag is set, a machine will be created automatically from the order with the item in combination with the serial no.



Code	Description	Default Contract Discount %	Default Serv. Price Grou...	Default Response Time (Hours)	Default Discou...	Sales: Create Machine	Purchase: Create Machine
4204268	ISG			0		☐	☐
4204362	ISG			0		☐	☐
4204419	ISG			0		☐	☐
4305901	ISG			0		☐	☐
AMS	AMS			0		☐	☐
COMBINES	Combines			0		☐	☒
COT HARV	Cotton Harvesting			0		☐	☐
CUTTING PL	Cutting Platforms			0		☐	☐
GATOR	Gator Utility Vehicles and Attach...			0		☐	☐
HAY & FOR	Hay & Forage			0		☐	☒
MAT HAND	Material Handling, Cutters and S...			0		☐	☐
PLAN & SEE	Planting & Seeding			0		☐	☐
SELF-PROP	Self-Propelled Applicators			0		☒	☐
SERIE 6R	Serie 6R			0		☐	☐
SERIE 8R	Serie 8R			0		☐	☐
SERIE 900	Serie 900 Rundballenpresse mit v...			0		☐	☐
SUGAR CANE	Sugar Cane Harvesting			0		☐	☐
TILLAGE	Tillage			0		☐	☒
TRACTORS	Tractors			0		☒	☐

3.28 Assign Activities on Sales/Service Order

It is possible

4 New Function (Parts)

4.1 Single and Multiple Substitution

It is possible to show or create single and multiple substitution from an item or nonstock item.

Edit - Item Substitution Entries

HOME

ACTIONS

Expand All

Collapse All

Condition

Item Card

Nonstock Item Card

Refresh

Find

Manage

Process

Page

General

Description:

Piston-Liner Kit

Variant Code:

Vendor Item No.:

1878133910

Shipment Date:

09.03.2017

Vendor Item No.	Description	Inter...	Inventory	Item Substitution Qty.	Quantity Avail. on Shpt. Date	Location Code	Quantity
1878133910	Piston-Liner Kit	☒		1,00			
1878133911	Piston-Liner Kit	☒		1,00			
1878133912	Piston-Liner Kit	☒		1,00			
1878133913	Piston-Liner Kit	☒		1,00			
1878133914	Cylinder Kit	☒		1,00			

This feature is also available from sales and service documents. In documents, there is a hint if a substitution is available or not. It is possible to choose one or more substitute parts for this document.

Lines

Line

Functions

History

Edit

Open Purchase/Transfer Order

Create Requisition Worksheet

Select Item Substitution

Machir

I...	Con...	M...	Type	Item Search	No.	Vendor Item No.	Substitution Available	Reman is available	Machine No.	T
☒	☒		Item		9000000005	3BP20061				
☒	☒		Item		9000000002	4003385				
☒	☒		Item		9000000008	3BP20285				
☒	☒		Item		*					

Microsoft Dynamics NAV

?

Item Substitutions exist.

Do you want to choose an item substitution?

Yes

No

This kind of tree will show all items that will be substituted. If there any parts in stock for these substitution, you can choose also this in documents to use or sell it.

4.2 Purchase Conditions per Vendor with Order Types

New field "Order Type" in sales and service documents will be available on sales and service lines. This field describes how the part will be purchased. This setting can be different per vendor and includes the standard purchasing code.

Select - Order Types — □ ×

HOME John Deere Test - E_90_JDE_... ?

 New

 Edit

 View

 Delete

 Show as List

 Show as Chart

 OneNote

 Notes

 Links

 Refresh

 Clear Filter

 Find

New Manage View Show Attached Page

Order Types ▾ Type to filter (F3) | Code ▾ → ^

Show results:

✗ Where JD Order Type ▾ is SO; IS; MD; TS

+ Add Filter

Code	Vendor No.	Description	Purchasing Code	JD Order Type
10:30 MD	V00010	10:30 Machine Down	SPECIAL	MD
14:30 MD	V00010	14:30 Machine Down	SPECIAL	MD
16:30 MD	V00010	16:30 Machine Down	SPECIAL	MD
IS	V00010	Initial Stock	SPECIAL	IS
SO	V00010	Stock Order	SPECIAL	SO
TS	V00010	Special Terms	SPECIAL	TS

With “JD Order Type” you can prioritize purchase orders in the system. This order type is specially from John Deere and their interface.

4.3 Commodity Codes

A commodity code will be related to an item and nonstock item and filled automatically from the pricelist. This code describes from which category the part is came from. It is also possible to set this code manually.

 Edit - JD Commodity Category Code

HOME
John Deere Test - E_90_JDE...

 New
New

 View List
Manage

 Edit List
Manage

 Delete

 Refresh
Page

 Find

JD Commodity Category Code

Commodity Code

▼

→

▼

Comm... Code	Category Code	Commodity Description	Category Description
01A	01S	Oil, engine	Oil
01B	01S	Oil, two cycle	Oil
02A	01S	Oil, transmission	Oil
02B	01S	Oil, GL5 gear lubricant	Oil
03A	03S	Lubricant, spindle & wetting agent, cot...	Cotton lube
03B	01S	Hydrau / Hydrau XR Hydraulic Fluid	Oil
03C	01S	Hydrau Hydraulic Fluid Bulk	Oil
04A	01S	Grease guns & grease fittings	Oil
04B	01S	Oil, other	Oil
04C	04S	Anti-freeze	Coolant

OK

4.4 Critical Codes

Critical codes will be filled automatically in nonstock item and item table from the pricelist. This codes shown the status of this part.

Code	Description
11	Periodic Service and Consumable and/or Competitive Parts
12	Machine-Down, Less Than 2 Hours to Install
13	Dealer-Fabricated Parts
14	Machine-Down, More Than 2 Hours to Install
15	Wear/Repair
20	Product Re-Life
21	Hardware
50	Slow-Moving CC 20
51	Slow-Moving CC 11
52	Slow-Moving CC 12
54	Slow-Moving CC 14
55	Slow-Moving CC 15
90	Auto PIP
91	Optional PIP
99	Merchandised Parts

4.5 Check Availability

If a part is not available on specific quantity in a specific location and bin code (if is mandatory), you can manage this in the “Check Availability” page. If you choose a part in a sales or service document which is not in stock, then a “Check Availability” page will open to manage this process. On this page, it is possible to transfer parts from different locations or to purchase this part with a specific order type. In the background the system will create new lines in the document for each selection.

Edit - Check Availability

Details

No.:

Description:

Inventory:

Current Quantity:

Total Quantity:

Earliest Availability Date:

Unit of Measure Code:

Vendor No.

Substitution

Substitutes Exist: No

No. of Substitutes: 0

Alternative Item No.:

Purchase and Transfer Orders

Bin Contents Ledger Entries Find

Code	Phone No.	Rolling Twelve (R12)	Inventory	Available Inventory	Action	Order Type	Quantity Assigned
		0,00			Purchase Order		10,00
BIRMINGHAM		0,00	10	10	Transfer Order	TRANSFER	0,00
LONDON		1,00	14	13	Transfer Order	TRANSFER	0,00
MANCHESTER		0,00	20	20	Transfer Order	TRANSFER	0,00

John Deere Item Availability

Inventory Order

Quantity:

Due Date:

4.6 Parts Information on Check Availability Page

On “Check Availability” page you can use a function which called “Request Data”. This will get directly the parts information from the website of John Deere.

John Deere Item Availability

 Request Data

Web Service

Web Service Status:

SUCCESS: Information requested successfully

Inventory

SO:

0

MD:

14 (PDC Milan)

MD 2:

17 (Atlanta)

General Part Information

Description:

Elec. Connector Terminal

Qty. Per Package:

1

Part No.:

4003385

List Price:

1,91 (EUR)

Is Returnable:

No

Weight:

0.001 KG

Package Dimensions (HxWxD):

152x114x3 MM

4.7 Extend Approval Management

If you use the approval function in the system, you can control several documents in relation with workflows. Additional it is possible to use ranges of amount limits which must approval. When the value in a document is below as the amount limit from the "Approval User Setup", an approver must check and approve this process. Also, a setup for discount amount and limits per order type is possible.

Edit - Approval User Setup

HOME ACTIONS NAVIGATE

New View List Edit List Delete Approval User Setup Test **Purchase Order Type Limits List** Notification Setup Show as List Show as Chart OneNote Notes Links Refresh C F P

Approval User Setup

User ID	Salespers./Purch. Code	Approver ID	Sales Amoun...	Unlimited Sales Approval	Discount Amount Approval Limit	Purchase Amoun...	Unlimited Purchase Approval
TRASER\ABU	ABU			☐			☐
TRASER\...	DGO	TRASER\HPA	500	☐	100		☐
TRASER\DKO				☐			☐
TRASER\HPA	HPA			☒			☒
TRASER\JKO				☐			☐
TRASER\KKA	KKA			☐			☐
TRASER\PKL	PKL			☐			☐
TRASER\SFI	SFI			☐			☐

Edit - Purchase Order Type Limits List

John Deere Test - E_90_JDE_DACH - vsrv...

HOME

New View List Edit List Delete Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Purchase Order Type Limits List

Type to filter (F3) User ID Filter: TRASER\DGO

User ID	Order Type	Purchase Order Type Amount Limit
TRASER\DGO	10:30 MD	500

OK

4.8 Archive Purchase Orders before deleting

Deleted purchase orders will also be archived.

4.9 CORE Value for Parts

The "Core Value" will understand as a return credit for a remanufactured part from John Deere. This value comes from the pricelist and will set automatically in the nonstock item record.

John Deere

Return Indicator:	E	Inventory Class:	E
Cr. Memo Unit Cost:	71,00	Core Value:	24,00
Commodity Code:		Reman is available:	No
Critical Code:	52	Qualified For Stock Order Discount:	☒

For example:

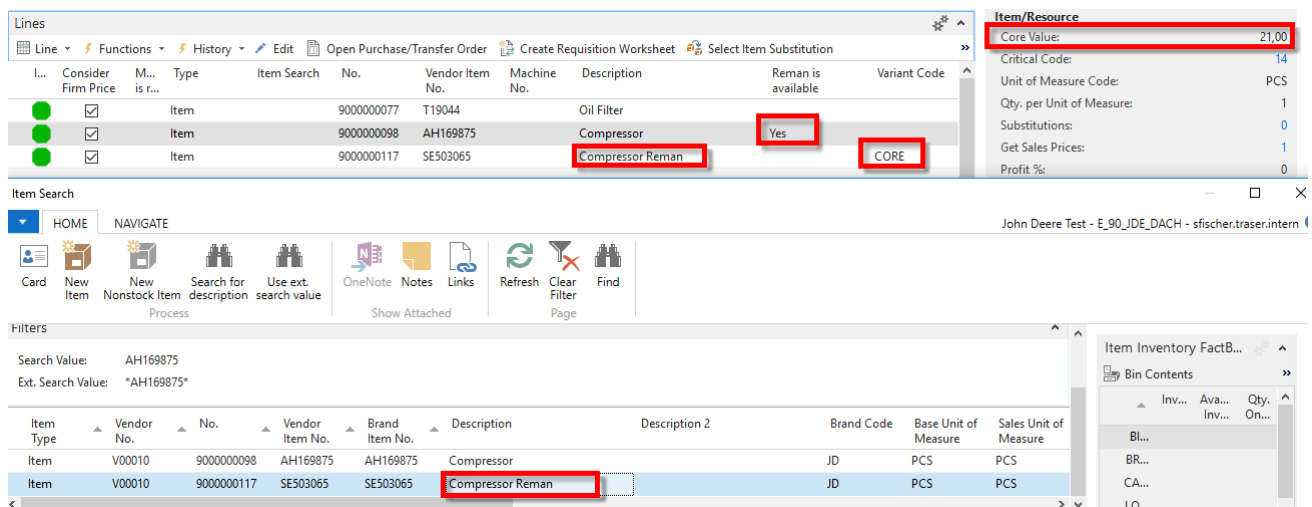
There is a "Core Value" of 24€ and cost of 427€ for a part:

That means, that this part has cost from 427€ for customers and generic 298€ for the dealer. If the dealer sends the part back to John Deere, it is possible that the dealer will get maximum 24€ as a return credit.

On customer site the dealers do not mention this option, because it is not sure that the dealer gets the return credit. The amount of payment is related to the condition of the part. John Deere proves the condition from a foreign service provider. In around 80% of all cases, the dealer will get the full payment.

4.10 Remanufactured (Reman) Parts

Remanufacturing parts are parts which can send back to John Deere to be manufactured. In this case, it is possible to get a return credit for the dealer (example in section before). Remanufactured parts have a checkmark on nonstock and item table and be shown on sales and service documents.



The screenshot displays the TRASER software interface. The main window shows a list of lines with columns for 'Consider Firm Price', 'M... is r...', 'Type', 'Item Search', 'No.', 'Vendor Item No.', 'Machine No.', 'Description', 'Reman is available', and 'Variant Code'. The third line is highlighted, showing 'Compressor Reman' with 'Reman is available' checked and 'Variant Code' set to 'CORE'. The 'Item/Resource' factbox on the right shows 'Core Value: 21,00'. The 'Item Search' section at the bottom shows search results for 'AH169875' and 'SE503065'.

When you click on the "Reman is available" information in a sales or service line column, the system will show a new page with these original part and the reman part which can be choose. If the parts manager chooses the reman part, they will substitute the line with the original part. If a "CORE" value for this original part is available, it will also be shown in a factbox next to the lines.

When the customer will replace a part. The parts manager has to create a new document which called "Return Order" to handle this process. In this document, you can choose the original part which have to replace. Important is to fill the field "Variant Code" with the value "CORE" in document line. The unit cost of the part will have predefined with the "CORE" value.

4.11 Temporary Bin for Work in Progress (WIP)

A new bin code for "Work in Progress (WIP)" (prepopulated from "TRASER Setup") is now available in the service documents. With this feature, you can switch your part from the standard bin code to a temporary "WIP" bin code. This will help to see, where the part is at the moment.

4.12 JD Return Indicator on Item

The return indicator will show the possibility for a part to send it back to John Deere. This following values came with the pricelist:

- N or blank = Not returnable

- R = Returnable
- D = Returnable, but is on the delete list and will not be returnable after this year. Monthly surplus dealerships have three months to return a part that is on the delete list.
- E = Not (never) returnable (European PDC sourced parts only)
- B = Recalled part, and should be returned on the next surplus returns cycle.

4.13 Package Quantity from Nonstock Item

Pricelists from John Deere has a number of quantity for packages. If these field are filled, the nonstock item will set the "Purch. Unit of Measure" field with a prepopulated code from the "John Deere Setup" and the quantity with the package quantity.

Import of the price list

Vendor No. (Spare Parts):	V00010	Default Item Category Code:	PARTS HIGH
Default Unit of Measure per Piece:	PCS	Default Core Variant Code:	CORE
Default Unit of Measure per Package:	PACK		

General

Entry No.:	1000624696	Sales Unit of Measure:	PCS	Qty. of Base Unit of Measure per Sales Unit	1
Catalog Code:	JD	Purch. Unit of Measure:	PACK	Qty. of Base Unit of Measure per Purchase Unit	200
Brand:	JD John Deere	Suspend Nonstock Item From Price Update:	☐		
Brand Item No.:	12H246	Tariff No.:	7318210095		
Vendor No.:	V00010	Substitute Vendor Item No.:			
Vendor Item No.:	12H246	Substituted By:			
Item No.:		Qty. Per Package:	200,00		
Description:	Lock Washer	Last Date Modified:	28.11.2016		
Description 2:					
Unit of Measure:	PCS				