

TRASER Software GmbH

TRASER Release Note

TRASER Dealer Management System

TRASER TEAM
7.3.2017

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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 Overview

Bug

- [\[JD-326\]](#) - Repairstatus from posted service invoice copies value from function "copy document"
- [\[JD-327\]](#) - Function "Copy Document" has also copied the new Service Order Structure
- [\[JD-467\]](#) - Substitution in Purchase Order looks strange. Vendor Item No is missing and parts level is not shown
- [\[JD-470\]](#) - Delete Contact No. on Machine Record, when machine comes into stock from Trade-In
- [\[JD-477\]](#) - Update Opportunity to first sales stage
- [\[JD-478\]](#) - Creating and Completing a to-do for an opportunity
- [\[JD-496\]](#) - CodeUnit 333 Enhancement Service
- [\[JD-500\]](#) - Create Purchase Order from Offer without definition of series and model on opportunity
- [\[JD-507\]](#) - Warranty Interface Hours not Work Time
- [\[JD-509\]](#) - After pushing "new rental object" on machine card a confusing message appears
- [\[JD-511\]](#) - Rename Group Caption Job Task on Service Order Page
- [\[JD-530\]](#) - RetrieveWarrantyInfo Function
- [\[JD-535\]](#) - Missing/Fault Values after transferring Warranty Claim
- [\[JD-547\]](#) - Error code if partially receiving in warehouse receipt.
- [\[JD-560\]](#) - Description lost if no std. job is chosen in service documents
- [\[JD-575\]](#) - Some config. files had a problem with the dot or comma, so the amount was too high
- [\[JD-582\]](#) - Availability Page in Serv. Order --> New Line Issue with Order Type
- [\[JD-586\]](#) - In a Service Order in some cases the resource line disappears while creating a service line with a resource and only a quantity. Additional: Do not allow new service line without job line to be attached to it
- [\[JD-587\]](#) - After Posting the service order in some cases the message "there is nothing to post" appears
- [\[JD-590\]](#) - Type in or choose a model from product hierarchy in equipment card, the system is asking to create a new model
- [\[JD-607\]](#) - Duplicate "Models" in the model table
- [\[JD-613\]](#) - A Sales Quote which is more than 1 page long does not print and repeat the line header in rdic
- [\[JD-615\]](#) - Discretionary Discount influenced every equipment line
- [\[JD-639\]](#) - Mark-Up for Over-Allowance wasn't shown for combine+tractor multi equipment deal
- [\[JD-650\]](#) - If you validate Variant Code in Sales and Purchase line after "Service Item No." the description will be overwritten
- [\[JD-657\]](#) - Error while creating a machine for a customer using the "new" button on the "machines" factbox

Story

- [\[JD-53\]](#) - Possibility to manage Adjustments (Fixed amount depending from the product)
- [\[JD-117\]](#) - If parts are not available in inventory, Service Manager needs this information on job Level in a cue
- [\[JD-122\]](#) - Overview to the next services from service contracts.
- [\[JD-124\]](#) - Service Manager Dashboard / Rolecenter
- [\[JD-127\]](#) - Incentives in Calculation
- [\[JD-172\]](#) - Spare Part Calculation after purchase (is already a TRASER functionality) not only by user but per vendor
- [\[JD-189\]](#) - parts rolecenter
- [\[JD-196\]](#) - batchjob overnight to import price book and price subs file

- [\[JD-225\]](#) - Sorting Method should be: MD, Service Order (without MD), Sales Order (without MD), SO, TS Order, Transfer Order in Warehouse Receipts
- [\[JD-233\]](#) - Add Service/Sales Order Information in Page "Put-Away" regarding the parts, to use the "split line" and "change unit of measure" functionality in a efficient way
- [\[JD-270\]](#) - Absence Wizard
- [\[JD-278\]](#) - use max. four triggers to create a service invoice out of service contracts
- [\[JD-285\]](#) - Product Group and Commodity Code needs to be in extra Entity and Default Dimensions
- [\[JD-295\]](#) - Show "Critical Code" description on factbox on service line and sales line
- [\[JD-364\]](#) - Create Service Order directly on Service Contract
- [\[JD-384\]](#) - Set Description from standard job in service order job line
- [\[JD-412\]](#) - Product Hierarchy: Also Import "PAST" Entries
- [\[JD-421\]](#) - Multiple Contact in Segments for Machine
- [\[JD-422\]](#) - Closing Interaction should ask later for finishing
- [\[JD-424\]](#) - Remove Button to create BLANK Opportunity on Segment
- [\[JD-425\]](#) - Simplfy Interaction Wizard
- [\[JD-434\]](#) - Calculate Labor Cost from Std. with a certain Rate "INTERNAL" that is set in a Setup
- [\[JD-437\]](#) - Create Sales Person and Sales Manager Role Center
- [\[JD-440\]](#) - Ordering Machines (Stock Order) should be integrated in purchase orders.
- [\[JD-498\]](#) - Used Equipment Manager Role Center
- [\[JD-506\]](#) - Warranty Work Types
- [\[JD-519\]](#) - PDIs in Calculation --> We need a tile in the role center of the service manager to see all Opportunities won without related service order
- [\[JD-521\]](#) - Set Variant Code of a machine to "USED" if Trade Number is increased from 1 to 2
- [\[JD-551\]](#) - Custom Change Log Setup for Protecting Records
- [\[JD-552\]](#) - Create Service Contract from Calculation without a machine for customers quote
- [\[JD-574\]](#) - Hide Sales Circle tab and field in opportunity card/list
- [\[JD-612\]](#) - Bing Map Add in should show on resource list/card the position of the resource and his servicer orders
- [\[JD-623\]](#) - Batch Job witch runs through Table 5445572 "Standard Jobs" and fills Fields 51,52,53 based on Table 5445663
- [\[JD-626\]](#) - Change Caption "Line" to "family"
- [\[JD-627\]](#) - Remove "family" from caption "model/family"
- [\[JD-628\]](#) - "active" fields in calculation tables should be renamed into "show in quote"
- [\[JD-629\]](#) - Add "show in quote" or "show sales price" fields in attachments, PDI, service contracts and misc expenses
- [\[JD-630\]](#) - service contracts, PDIs, misc. expenses dont have any affect on profit calculation
- [\[JD-631\]](#) - Remaining Discretionary Discount of the Salesperson should be shown after "Profit" line
- [\[JD-632\]](#) - Sum the costs of attachments lines and use it for profit calculation
- [\[JD-633\]](#) - Improve Attachment Dealer Net Price with Reference
- [\[JD-634\]](#) - Adding an over-allowance which is higher than the max. discretionary amount in page Calc. Over-Allowance (5445897) should raise the approval workflow for discretionary discounts
- [\[JD-635\]](#) - Missing Customer Quote FactBox
- [\[JD-636\]](#) - Link between Purchase Orders and Sales Order/Quote should be done out of the opportunity card (create Sales and purchase order)
- [\[JD-638\]](#) - List price on Cover Sheet should show the Price List Price of Selling FactBox
- [\[JD-640\]](#) - Add "Cart No." in Sales Quote Subform on Base Machine Line
- [\[JD-641\]](#) - Releasing the purchase Order while approval workflow is activated should also create the machine
- [\[JD-643\]](#) - While creating machines in purchase orders we need to hide some things

- [\[JD-647\]](#) - Forecast and Review Comparison should look like EAC Calculation FactBox and Selling Price FactBox
- [\[JD-648\]](#) - Created by USERID should be shown in Get Configuration List (compare recfid with userid)
- [\[JD-649\]](#) - Hide Warranty Confirm and Notification Confirm while creating the service invoice out of the service contract
- [\[JD-654\]](#) - Usa a Template Header for Saving Master Configurations and create them out of the calc. Equipment level.

New Feature

- [\[JD-458\]](#) - Generate Standard Jobs from Machine Card
- [\[JD-580\]](#) - Consider extra hours when prices are calculated

Improvement

- [\[JD-395\]](#) - Add Filter in Item Price Information Page (5445789)
- [\[JD-505\]](#) - The Service Invoice Page Structure should be the same like the Order Structure (Header, Job Task and Service Line)
- [\[JD-512\]](#) - Service Order / Quotes: Field Machine should be before Service Order Type
- [\[JD-514\]](#) - Service Order: Estimated Time on Service Line Level and not on Job Level
- [\[JD-518\]](#) - Parts Clerk Role Center
- [\[JD-545\]](#) - Hide lost reason code message if transfer neg. sales line to sales return order
- [\[JD-573\]](#) - Add customer name in service notification list
- [\[JD-584\]](#) - Set "Qty. to ship" in sales/service document to zero if an order type exist
- [\[JD-588\]](#) - Show Message in function "transfer to purchase order" from calculation like message from function "Transfer to sales quote"
- [\[JD-592\]](#) - Add "Nonstock Item List" and "Put Away List" to all Parts Rolecenter
- [\[JD-599\]](#) - Show total percentage of purchase discount in calculation in factbox "Equipment Acquisition Cost"
- [\[JD-605\]](#) - Create a new cue on role center on service line with filter (type = " ") and (Vendor Item No. <> " ")
- [\[JD-611\]](#) - Comma, point problem by import a online configuration file from JD UK
- [\[JD-617\]](#) - Create Warehouse Clerk Role Center