

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

- [\[JD-386\]](#) - Salesperson code is missing after create to-do on segment

Story

- [\[JD-16\]](#) - List Table and Page with all machine configurations
- [\[JD-46\]](#) - Introduce three different Cost Calculation Methods
- [\[JD-52\]](#) - Separation of cost and price calculation for machines
- [\[JD-54\]](#) - improvements while importing machine configuration file
- [\[JD-55\]](#) - improvements while importing attachment files
- [\[JD-57\]](#) - Before ordering a machine, there should be an approval workflow
- [\[JD-96\]](#) - New Buttons on model list to filter records
- [\[JD-97\]](#) - Open Machinelist from Contact List/Card
- [\[JD-98\]](#) - Hide Customer Information on Opportunity Card
- [\[JD-99\]](#) - Contact should be mandatory on Opportunity Wizard
- [\[JD-100\]](#) - Add Machine Series information in all wizards and build a new table
- [\[JD-101\]](#) - Hide customer relations in CRM Department
- [\[JD-106\]](#) - Customer "Type" on Customer which needs to be prefilled and synched from Contact
- [\[JD-107\]](#) - Delete Vendor fields from calc. offer table linked to opportunity
- [\[JD-112\]](#) - Finance data from machine must be implemented in segments (add contacts)
- [\[JD-113\]](#) - Add a "Finance Card" Page to Table 5445667. Otherwise the list is very uncomfortable.
- [\[JD-114\]](#) - Reimport of Hierarchy
- [\[JD-116\]](#) - Approval workflow for offers in opportunities should be deactivated
- [\[JD-129\]](#) - Price Model with Product Hierarchy
- [\[JD-130\]](#) - Prepopulated Equipment Header from Config File
- [\[JD-131\]](#) - Extend Machine Attributes
- [\[JD-134\]](#) - Hide Customer on Offer Card
- [\[JD-135\]](#) - Remove Vendor from Offer and Equipment Card
- [\[JD-137\]](#) - Delete doubled fields on offer table, which already exist on opportunity table
- [\[JD-324\]](#) - CodeUnit Function RetrieveClaim
- [\[JD-353\]](#) - PIP request should fill estimated hours
- [\[JD-380\]](#) - Handle NAV RTC-timeout for time tracking
- [\[JD-382\]](#) - Error Handling Warranty Interface
- [\[JD-383\]](#) - Adding Date to PIP Header after claiming PIP
- [\[JD-399\]](#) - Create new opportunity from opportunity list
- [\[JD-402\]](#) - Import one or more machine configuration directly from the GPC portal

Task

- [\[JD-91\]](#) - Create Service Item from Contact Card/List

Improvement

- [\[JD-94\]](#) - Fill Contact no. on Service item card when customer is filled.