

TRASER Software GmbH

TRASER Release Note

TRASER Dealer Management System

TRASER TEAM
7.3.2017

Index

1	Introduction	2
2	Timing of this release	3
3	Overview	4

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

- [\[JD-293\]](#) - WIP: First 10 Chars of Serv. Order Code and first 10 Chars of Job Code to create the temp. BIN
- [\[JD-325\]](#) - Item substitution was deleted after using function "create item" on nonstock item
- [\[JD-331\]](#) - Fill Base line when onle Transfer Order is used
- [\[JD-351\]](#) - Bugs from Service Review Meeting
- [\[JD-465\]](#) - Empty sales order created after "Make Order" from quote which ends with error
- [\[JD-468\]](#) - Archive Message pops up when receive sales return order document
- [\[JD-469\]](#) - Entry for CORE Price in Purchase price list is missing
- [\[JD-471\]](#) - Create Stockkeeping Unit for Item which are remanufacturable
- [\[JD-472\]](#) - Standard Job in Service Quote is empty, because machine isn't written in service item line
- [\[JD-473\]](#) - Rename TAB in Service Quote
- [\[JD-475\]](#) - Contact Lookup in Opportunity Card
- [\[JD-476\]](#) - Sales Stage after creation of opportunity
- [\[JD-482\]](#) - Interaction Log Entries in Segment Lines has no filter. It should be filtered on contact no.
- [\[JD-483\]](#) - After closing the Opportunity Wizard pages goes into background
- [\[JD-484\]](#) - Transfer Quote to Order from Calculation
- [\[JD-485\]](#) - After Validation of Service Item in Opportunity Model Code is not set
- [\[JD-486\]](#) - Posting warehouse receipt for Purchase order with machine not possible
- [\[JD-487\]](#) - Move Calls from Calc. Opportunity Card to Std, Opportunity Card
- [\[JD-490\]](#) - Hide Message for Warranty if Service Order Type is checkmarked as warranty
- [\[JD-491\]](#) - While posting Sales Return Order from warehouse receipt a confusing error appears
- [\[JD-492\]](#) - Carry out Purchase order out of req. worksheet which has been initiated from sales order does not set the correct status

Story

- [\[JD-51\]](#) - Improve handling and creating of opportunities
- [\[JD-128\]](#) - Template to create Equipment
- [\[JD-132\]](#) - Extend Sales Price and Sales Discount Table
- [\[JD-155\]](#) - Equipment improvements
- [\[JD-179\]](#) - parts ordering with order type TS
- [\[JD-227\]](#) - After Posting less than expected qty. in Warehouse Receipts, the warehouse receipt document should be deleted.
- [\[JD-229\]](#) - Add more fields to "Warehouse Receipts (Page 7332)" and "Warehouse Receipt (Page 5768)"
- [\[JD-232\]](#) - Modify Report 5751 "Put-away List" and add more fields regarding the jd parts receipts interface
- [\[JD-237\]](#) - To Change Dimensions in Warehouse Receipts should be possible, it's a nightmare to jump every time into source document
- [\[JD-238\]](#) - show service item no. in warehouse receipts and put-away lines
- [\[JD-241\]](#) - enter more than one "vendor shipment no." per warehouse receipt line. if you "get source documents" for more than one purchase order
- [\[JD-288\]](#) - Price List Importer: JD File Log Line Column "Involved Purchase Documents"
- [\[JD-289\]](#) - Price List Importer: JD File Log Line "No. Of Campaigns involved"
- [\[JD-290\]](#) - Price List Importer: Process File and log changes
- [\[JD-291\]](#) - WIP: After WIP Bin is not used anymore it should be deleted.
- [\[JD-292\]](#) - WIP: Shortcut for Undo WIP Bin needs to be changed from F9
- [\[JD-298\]](#) - Design of Availability Page

- [\[JD-321\]](#) - Archive claims
- [\[JD-339\]](#) - Add new column in the service line "returned" which will be filled if the technician brings the parts back (modifying the qty)
- [\[JD-355\]](#) - Prepopulate some more warranty claim fields like finishing date
- [\[JD-391\]](#) - PM Link - Direct Shipment - Customer Shipment Address
- [\[JD-406\]](#) - Update Bin Code of new Item on Sales Order
- [\[JD-409\]](#) - On the Reman Item List Hide "Last Direct Cost" and Unit Cost from List
- [\[JD-423\]](#) - Create Opportunity from Segment Line for Contact
- [\[JD-441\]](#) - Create Machines while releasing a purchase order
- [\[JD-462\]](#) - Purchasing Machines (Stock Order) should be integrated in purchase orders
- [\[JD-489\]](#) - Price List Importer: after a certain time process the data into the system
- [\[JD-493\]](#) - Report 5445854 need a new column "Purchasing source code"

Improvement

- [\[JD-216\]](#) - Insert Order Type in Warehouse Receipt Document
- [\[JD-217\]](#) - Change and sync. "Quantity to Receive" in Warehouse Receipt to Source Order