

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

- [\[JD-251\]](#) - After posting a service order it should be archived. Also the estimated, current and invoiced hours should be saved in the service item line archive table as values
- [\[JD-517\]](#) - Reduce Prices when Warranty Amount does not fit to the Amount on Service Order
- [\[JD-530\]](#) - RetrieveWarrantyInfo Function
- [\[JD-565\]](#) - Job Line Desc. was overwritten when PIP requested or manual creation
- [\[JD-658\]](#) - filter on time sheets gets the wrong week no.
- [\[JD-659\]](#) - Tablet version don't know the CRLF function in factboxes. Example: Fault text box in service order
- [\[JD-666\]](#) - If select Return reason code in sales trade-in, the lines should also be prepopulated with this reason code
- [\[JD-668\]](#) - Push function "Transfer to Purch. Order" in Opportunity twice times, then all equipment lines will be deleted
- [\[JD-672\]](#) - Choose Std. Job in Service Order (PDI) tab from opportunity has not the related job to a specific machine
- [\[JD-673\]](#) - Add/Copy function from PCL to update documents after change serial no. of a machine
- [\[JD-675\]](#) - Error when add response center in sales order
- [\[JD-678\]](#) - Field "Series" in "Create To-Do wizard is missing
- [\[JD-679\]](#) - (Purchase) Service Item Ledger Entries will be deleted after changing the serial number
- [\[JD-684\]](#) - Transfer Order link from Sales/Service order should be removed after posting transfer order

Story

- [\[JD-6\]](#) - CodeUnit Funktion AddEquipmentToCustomer
- [\[JD-9\]](#) - CodeUnit Funktion DeleteEquipmentOfCustomer
- [\[JD-10\]](#) - Process: Sale Equipment and Equipment to customer
- [\[JD-11\]](#) - Process JD Trade In - Add Equipment to customer
- [\[JD-79\]](#) - Potential Customer Flag on Contacts
- [\[JD-80\]](#) - Contact Table/Card Enhancement with Profile Fields
- [\[JD-110\]](#) - New Field "Send to Dime.Scheduler" on Service Header with NAS
- [\[JD-177\]](#) - Calculation for minimum qty needs to take care of lost sales
- [\[JD-201\]](#) - PMLink enhancement order types
- [\[JD-205\]](#) - transfer process for john deere dealers
- [\[JD-212\]](#) - Fill item vendor no. automatically when a substitution is created manually.
- [\[JD-274\]](#) - post time sheet corrections from role center
- [\[JD-297\]](#) - Substitution Overview
- [\[JD-299\]](#) - Order Type: Hide JD Order Type when it is not john Deere
- [\[JD-302\]](#) - Lost Lines / Lost Sales
- [\[JD-340\]](#) - Overtime: handle extra cost for example for labour on non-working days
- [\[JD-359\]](#) - Posting not allowed if claim is open or has different amount
- [\[JD-360\]](#) - Printout for non JD Claims in general
- [\[JD-381\]](#) - Adjust Resource lines if amount is lower as expected
- [\[JD-417\]](#) - Special Allowance Billing Functionality
- [\[JD-419\]](#) - New Service Order Status "Delivered to Customer"
- [\[JD-464\]](#) - E-Billing Interfaces
- [\[JD-495\]](#) - Implement PM Manage Interface
- [\[JD-522\]](#) - TS-Program: Add Parts with a certain Percentage based on R12
- [\[JD-537\]](#) - Additional Warranty Information on Service Order and Machine Card

- [\[JD-564\]](#) - Additional Field Total Net Amount in Warranty Claim Header and Page
- [\[JD-567\]](#) - Creating a function for fetching Incentive Information
- [\[JD-624\]](#) - Create a sales price statistic, so you can see how the sales price has been calculated. Incl. Surcharges, sales order surcharge, currency etc.
- [\[JD-642\]](#) - Close opportunity, none fields should be prepopulated in "closing wizard"
- [\[JD-651\]](#) - Hide all Buttons to close/complete a todo. Just one: "Log" and there is only a boolean where you can create afterwards a followup-todo
- [\[JD-652\]](#) - Do Phone Call on Opportunity of a Todo out of a campaign and the opportunity evaluation should be set by making the phone call
- [\[JD-653\]](#) - Create Todo out of Segment, Customer and Opportunity
- [\[JD-674\]](#) - Add new field "External Document No." in service document like the field from the sales header
- [\[JD-686\]](#) - Create Parts Counter Person Role Center
- [\[JD-687\]](#) - Create Showroom Responsible Role Center
- [\[JD-688\]](#) - Create Outlet Parts Manager Role Center
- [\[JD-690\]](#) - Missing Values in Group Parts Manager and Sales Admin Role Center

New Feature

- [\[JD-328\]](#) - Worktime <-> Hour Calculation in Service Order

Improvement

- [\[JD-147\]](#) - Warranty starting Date
- [\[JD-415\]](#) - Create Service Invoice when have a Special Allowance or Powerguard Warranty Claim
- [\[JD-526\]](#) - Improvement of Opportunity Probabilities
- [\[JD-532\]](#) - Redesign Interfaces
- [\[JD-546\]](#) - Labor prices are based on Work Type rather than on Ressource
- [\[JD-571\]](#) - Check warranty flag from service order type before create a warranty claim
- [\[JD-604\]](#) - Add Function "Retrieve Warranty Information" on machine card
- [\[JD-669\]](#) - Function "Show Purch. Order" in Opportunity should be not editable if purch. order does not exist
- [\[JD-676\]](#) - Standard Opportunity Card should be the same like the TRASER Opportunity Card
- [\[JD-677\]](#) - Show Description of a job in time sheet line service details
- [\[JD-683\]](#) - Hide Message for substitution in opportunity process when transfer to purchase order
- [\[JD-691\]](#) - Improve Parts Clerk Role Center