

TRASER Software GmbH

TRASER Release Note

TRASER Dealer Management System

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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.

3 Bug fixes

3.1 Incorrect TRASER Menu Suite in W1, DACH and STUE

Fixed the menu suite in the 2018 databases.

3.2 Calc No. is missing in Sales Quotes for Trade Ins

Fixed an issue, where the Calc. No. was not correctly transferred into the lines of a sales quote.

3.3 Function "Copy" from machine record will copy dimension values which is partially correct

Fixed a problem, where the function "Copy" from the machine card would copy dimensions like machine no. which was not intended.

3.4 Open Service Quote from Machine record

Fixed an issue, where the system would not open the service quote out of the machine record.

3.5 Firm Price needs to be validated again after change of responsibility center

Fixed. The firm price does not have to be validated again after changing the responsibility center in a service order.

3.6 New machine record will lose variant code when validating field "item no."

Fixed a bug, where the variant code of a new machine record was lost after validating the field item no.

3.7 Description of fields in the TRASER Setup is wrong

Captions of fields in TRASER setup had to be corrected.

3.8 Option Value is displayed in warranty claim

Fixed.

3.9 Opportunity Process: Sales Quote fact box displays misleading information

Removed the fact box from the sales quote, because the information shown was not coherent with the opportunity.

3.10 Missing Objects/Meta Data for Workflow/Approval

Fixed.

3.11 Information if Line is Equipment Line was lost if Quote was converted to Order

Fixed the problem, that while transferring a sales quote into a sales order during the opportunity process, the information if one of the sales lines was an equipment line was lost.

3.12 PIP warranty claims contain a test field on field "Failure Part" which is not mandatory for PIP's

For the claim type PIP, we changed that the field "failure part" is mandatory. For this claim type it is not needed.

3.13 Change responsibility center in sales order (from opportunity) will cause an error

Fixed that an unintended error message came up when changing the responsibility center in a sales order (from an opportunity).

3.14 Time Tracking Report - 5446219 has no content if just absence time is available

Fixed a bug, where the above-mentioned report has no content if only absence times were recorded but no service times so far.

3.15 Qty. returned from WIP bin with relation to PO cause an error

Fixed the problem that when trying to reclass inventory from a WIP bin into stock an error message comes up, when these parts were sourced via purchase order and the purchase order was not invoiced yet. The system will now allow the user, to reclass these parts into the warehouse although the purchase order was not invoiced yet.

3.16 Customer Template necessary for contact person of company contact with existing customer record

Fixed an issue, where the customer no. was not correctly filled in an offer when creating an opportunity for a contact person of a company contact. The system will now fill the customer no. correctly with the corresponding value of the company.

3.17 Create Standard Job from Machine record shows an error

Fixed an issue where it was not possible to create a new standard job out of the machine card.

3.18 Wrong offer price if you haven't got a mark-up setup

Fixed an issue where the system would calculate the wrong offer price during the opportunity process if no mark-up setup was specified for the equipment.

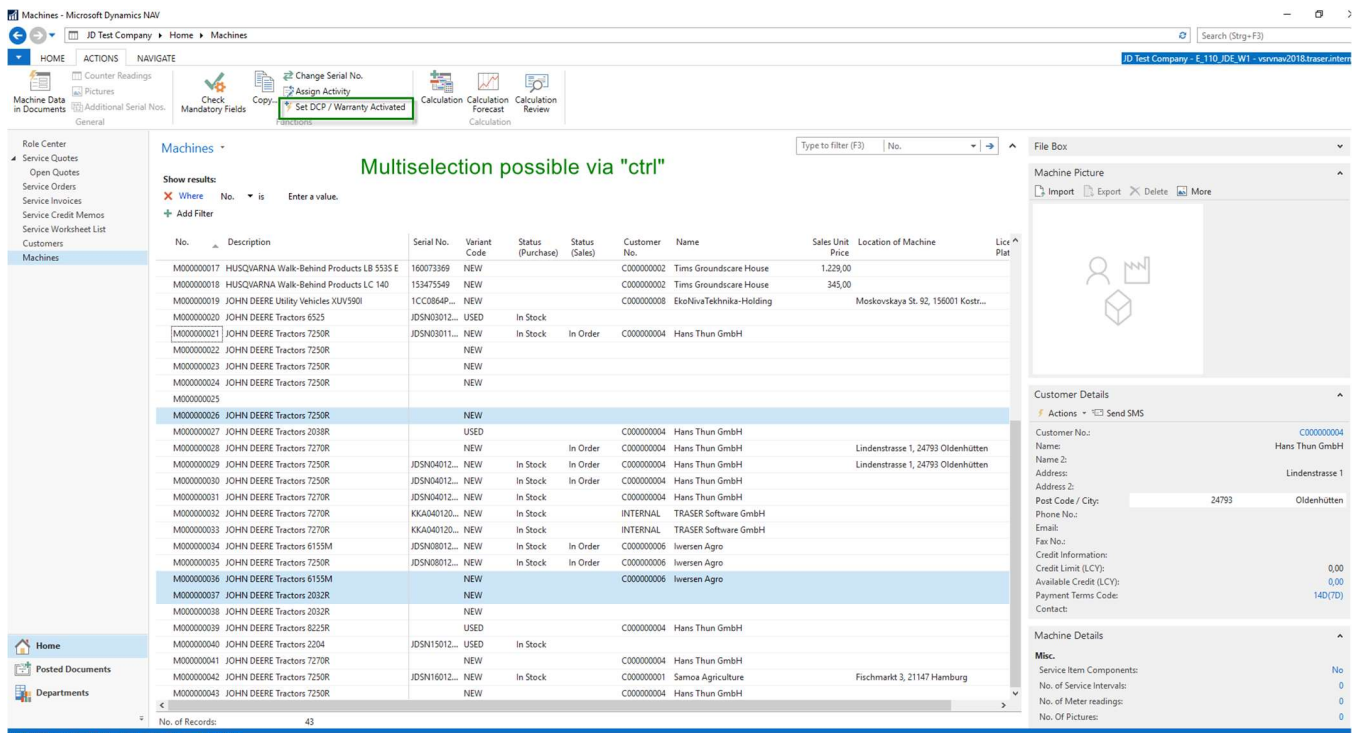
3.19 Issue with message to "Rename" Sales Line when choosing a substitution in a new sales line without leaving the sales line

Fixed that for a special case during the substitution process, the system would give a wrong error message.

4 New Developments

4.1 616 Add checkbox to Machine card 'DCP / Warranty Activated'

This new development is intended to be used by sales admins to record, when a machine was registered in DCP. This should help them monitor what actions of the sales to delivery process were completed.



The screenshot shows the TRASER Software interface for managing machines. The ribbon at the top includes buttons for 'Set DCP / Warranty Activated', 'Assign Activity', 'Calculation', 'Forecast', and 'Review'. The main area displays a list of machines with columns for No., Description, Serial No., Variant Code, Status (Purchase), Status (Sales), Customer No., Name, Sales Unit, Price, Location of Machine, and Lic. Plat. A green text overlay states 'Multiselection possible via "ctrl"'. The right sidebar shows details for a selected machine, including Customer Details and Machine Details.

No.	Description	Serial No.	Variant Code	Status (Purchase)	Status (Sales)	Customer No.	Name	Sales Unit	Price	Location of Machine	Lic. Plat
M00000017	HUSQVARNA Walk-Behind Products LB 5535 E	160073369	NEW			C000000002	Timms Groundscare House	1,229,00			
M00000018	HUSQVARNA Walk-Behind Products LC 140	153475549	NEW			C000000002	Timms Groundscare House	345,00			
M00000019	JOHN DEERE Utility Vehicles XUV590I	1CC0864P...	NEW			C000000008	EkoNivaTehnika-Holding			Moskovskaya St. 92, 156001 Kostr...	
M00000020	JOHN DEERE Tractors 6525	JDSN03012...	USED	In Stock							
M00000021	JOHN DEERE Tractors 7250R	JDSN03011...	NEW	In Stock	In Order	C000000004	Hans Thun GmbH				
M00000022	JOHN DEERE Tractors 7250R		NEW								
M00000023	JOHN DEERE Tractors 7250R		NEW								
M00000024	JOHN DEERE Tractors 7250R		NEW								
M00000025	JOHN DEERE Tractors 7250R		NEW								
M00000026	JOHN DEERE Tractors 7250R		NEW								
M00000027	JOHN DEERE Tractors 2038R		USED			C000000004	Hans Thun GmbH				
M00000028	JOHN DEERE Tractors 7270R		NEW		In Order	C000000004	Hans Thun GmbH			Lindenstrasse 1, 24793 Oldenhütten	
M00000029	JOHN DEERE Tractors 7250R	JDSN04012...	NEW	In Stock	In Order	C000000004	Hans Thun GmbH			Lindenstrasse 1, 24793 Oldenhütten	
M00000030	JOHN DEERE Tractors 7250R	JDSN04012...	NEW	In Stock		C000000004	Hans Thun GmbH				
M00000031	JOHN DEERE Tractors 7270R	JDSN04012...	NEW	In Stock		C000000004	Hans Thun GmbH				
M00000032	JOHN DEERE Tractors 7270R	JDSN04012...	NEW	In Stock		C000000004	Hans Thun GmbH				
M00000033	JOHN DEERE Tractors 7270R	KKKA040120...	NEW	In Stock		C000000004	Hans Thun GmbH				
M00000034	JOHN DEERE Tractors 7270R	KKKA040120...	NEW	In Stock		C000000004	Hans Thun GmbH				
M00000035	JOHN DEERE Tractors 6155M	JDSN08012...	NEW	In Stock	In Order	C000000006	Iversen Agro				
M00000036	JOHN DEERE Tractors 7250R	JDSN08012...	NEW	In Stock	In Order	C000000006	Iversen Agro				
M00000037	JOHN DEERE Tractors 6155M		NEW			C000000006	Iversen Agro				
M00000038	JOHN DEERE Tractors 2032R		NEW								
M00000039	JOHN DEERE Tractors 822R		NEW								
M00000040	JOHN DEERE Tractors 2204	JDSN15012...	USED			C000000004	Hans Thun GmbH				
M00000041	JOHN DEERE Tractors 7270R		NEW			C000000004	Hans Thun GmbH				
M00000042	JOHN DEERE Tractors 7250R	JDSN16012...	NEW	In Stock		C000000001	Samoa Agriculture			Fischmarkt 3, 21147 Hamburg	
M00000043	JOHN DEERE Tractors 7250R		NEW			C000000004	Hans Thun GmbH				

To new functionality can be found in the machine list in the ribbon register "Actions". The user will select one or multiple machines (since we are in a list view he can filter as he likes) and use the new function "Set DCP / Warranty Activated".

The information is then stored in the machine record and can be found in the register "Warranty" including the date the "DCP / Warranty Activated" was activated.

The checkbox can be unflagged and fields and information will be deleted.

Edit - Machine Card - M000000021 - JOHN DEERE Tractors 7250R - JD - 50 - 7250R

HOME ACTIONS NAVIGATE

New Item New Rental Object New Service Order

Manage Edit View Delete Service Instruction Tools Components Retrieve Warranty Info Refresh Previous Next

M000000021 - JOHN DEERE Tractors 7250R - JD - 50 - 7250R

General

No. / Trade No. / SLB: M000000021 1 No

Brand: JD JOHN DEERE

Family: 50 Tractors

Series: 7R SERIES 7r Series

Model: 7250R 7250R

Variant Code: NEW

Description: JOHN DEERE Tractors 7250R

Serial No.: JDSN03011902

Linked with: Item

Item No.: M000000065

Item Description: JOHN DEERE Tractors 7250R

Status (Purchase): In Stock

Status (Sales): In Order

Location of Machine:

License Plate Code: D

Registration Date:

Year of Construction:

Operating Hours: 0,00

Last Service Date:

Rental

Ownership Status:

Current Rental Location Code:

Extended Information

Customer: C00000004 Hans Thun GmbH

Detail

Warranty

Warranty Starting Date (Parts):

Warranty % (Parts):

Warranty % (Labor):

Ext. Warranty Powertrain Starting Date:

Ext. Warranty Powertrain Ending Date:

Ext. Warranty Comprehensive Starting Date:

Ext. Warranty Comprehensive Ending Date:

Preferred Resource:

Powergard Deductible Amount: 0,00

Powergard Max. Hours: 0,00

DCP / Warranty Activated: ☒

DCP / Warranty Activated at: 23.01.2019

Shipping

Dimensions

Contract

Vendor

File Box

Machine Picture

Import Export Delete More

Customer Details

Actions Send SMS

Customer No.: C00000004

Name: Hans Thun GmbH

Address:

Post Code / City:

Phone No.:

Email:

Fax No.:

Credit Information:

Credit Limit (LCY):

Available Credit (LCY):

Payment Terms Code:

Contact:

Machine Details

Misc.

Service Item Components:

No. of Service Intervals:

Nb. of Meter readings:

OK

4.2 634 Check open time sheets while posting service orders

This enhancement will ensure, that it is not possible to invoice a service order, when there are submitted time sheet entries behind that were not approved yet. The user will get an error message, telling him that open time sheet entries exist, when he tries to invoice the service order.

Edit - Service Order - SVO0000036 - Samoa Agriculture - Open Time Sheets

HOME ACTIONS NAVIGATE

New Edit View Delete Post... Post and Print... Print... Document Send... Statistics Send Retrieve Warranty Info Request PIPs Print Warranty Order... Refresh Previous Next

Manage Process Dime Scheduler Warranty

SVO0000036 - Samoa Agriculture - Open Time Sheets

Customer Details

Contact Name:

Service Order Type: SERVICE

Machine No.: M000000013

Machine Description: JCB Telehandlers 525-60 AGRI

Serial No.: JCB SN2012201801

Cash Customer: ☐

Campaign No.:

Status: Finished

Your Reference:

Release Status: Open

Service Location:

Print Template Code:

Warranty

Warranty Ending Date:

Ext. Warranty Powertrain Ending Date:

Ext. Warranty Comprehensive Ending Date:

Powergard Deductible Amount:

Powergard Max. Hours:

Expected Finishing Date:

Fix Price / Discount Method: 0,00 Parts & Labor

Jobs

Line Functions Print Post Picking List Machine Card Components Job Details Add File

Standard Job Code Description Estimated Hours Current Hours Invoiced Hours Repair Status Amount

Open Time Sheets 0,75 COMPLETE 1,5

Job Lines

Functions Line History Edit Open Purchase/Transfer Order Create Requisition Worksheet Select Item Substitution Open Card Clear Purch. Order Assoc. Update Amounts Inventory Order Find Filter

Indicator Item Search Type No. Vendor Item No. Description Subst... Reman is Location Bin Code Unit of Measur... Work Type Code Quantity Unit Price Excl. VAT Line Discount %

Microsoft Dynamics NAV

You cannot post the service order, because unapproved time sheets exist.

OK

4.3 628 Total hits and 1st pass fill in PM Manage report to be calculated correctly

We changed the calculation logic for the two metrics "Total Hits" and "1st Pass Fill" according to the interface definition by John Deere so that the export of the PM Manage report will produce the numbers according to the definition.

4.4 629 Date Added in DPM Export report to be extended to date when part was added to DBS

We enhanced the DPM export routine for the field "Date Added" to show the information for corresponding parts when the part was first added to the DBS. For this purpose, the field has now three possible content options:

Option 1: Date that the part was first received in the dealer's warehouse

Option 2: if Option 1 not available, date when the part was first ordered from manufacturer

Option 3: if options 1 and 2 not available, the date, the part was first added to the warehouse is sent

If none of the above is possible the report will be filled with 1-1-1900 as "Date added". For tracking this date in the system, we introduced a new field "Created at" in the item table. This field is filled according to the options above when a new record is created. To take care of old records see the section "Tasks".

4.5 654 Make returned parts from service or customer with a "core" value non-available for other SO & SvO

We changed the logic for the calculation of available inventory of items in the system to not consider stock that has the item variant code "CORE". These stock quantities were returned from a service or by a customer and are supposed to be shipped back to John Deere for remanufacturing. For correct calculation the system will exclude all quantities in stock that have as a variant the "Default Core Variant Code" defined in the John Deere Setup.

Edit - John Deere Setup

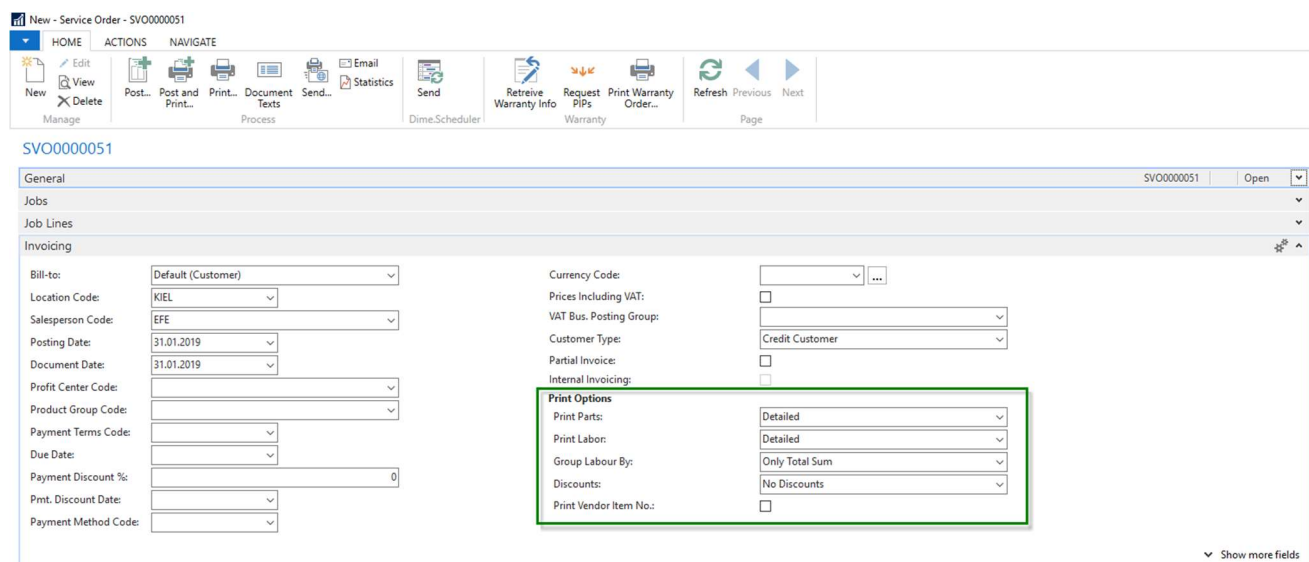
HOME		ACTIONS	
View	New	Create Setup Data...	Get Profile Customer Data
Manage	Delete	Process	
Initialize Interface	Show Telematic Card	Request Telematic Data	Purge History
		Clear Interface Data	
OneNote	Notes	Links	Refresh
			Clear Filter
			Go to

John Deere Setup

General	
Dealer Nos.	
DPM Stock Mgt. Export	
Import Requisitions	
Parts Receipts	
PM Manage Export	
Import Documents	
Parts Locator	
Parts Advisor Import	
Import of the price list	
Default Unit of Measure per Piece:	PCS
Default Unit of Measure per Package:	PCS
Default Item Template Code:	PARTS
Default Core Variant Code:	CORE
Default Process Dateformula:	SD
Import TS Programs	
PM Link	
Parts Information	
Profile Interface	
GPC Interface (Online Configurator)	
IBS Interface (Incentive Bulletin System)	
Warranty Interface	
DFA	
JD Link	

4.6 472 Add Printing Options for Service Quotes and Invoices (Parts and Labor options)

With this development the already existing functionality of defining very specific options for the printout of all available service documents was reorganized and cleaned up. All the options can now be found in the "Invoicing" register of the corresponding service document.



The screenshot displays the 'Invoicing' register for service document SVO0000051. The 'Print Options' section is highlighted with a green box, showing the following settings:

- Print Parts: Detailed
- Print Labor: Detailed
- Group Labour By: Only Total Sum
- Discounts: No Discounts
- Print Vendor Item No.: ☐

It is now possible to separately decide for labor and parts lines how they are supposed to be shown in the printout:

- *Detailed*: Will show the NAV standard with all information (incl. prices)
- *Only Quantity and Unit of Measure*: Will exclude prices for single lines
- *Hide*: Will not show single lines at all

It can also be decided in general for the whole service document how discounts are supposed to be printed:

- *Show Line Discount*: Standard NAV behavior showing the discount for each line if applicable
- *No Discounts*: Will not print any discounts at all
- *Show Labor and Parts Discounts*: Will show totaled up discounts for parts and for labor separately but not on the line level
- *Only total Discount*: Will total up all discounts and will show one number for the whole document

The last option the user can decide upon, is how labor is supposed to be grouped in the printout:

- *None*: No grouping is done by the system and labor will be printed line by line
- *Only total sum*: Will total up all labor lines and only show the total

- *Total sum and resource groups:* Labor lines will be grouped by resource groups and then the total per group is shown
- *Total sum and work type:* Labor lines will be grouped by work type and then the total per work type is shown

The printing options were not only cleaned up and restructured for each of the service documents. The "Service Print Templates" were changed accordingly to everything that was done on a document level.

Edit - Service Print Templates

HOME

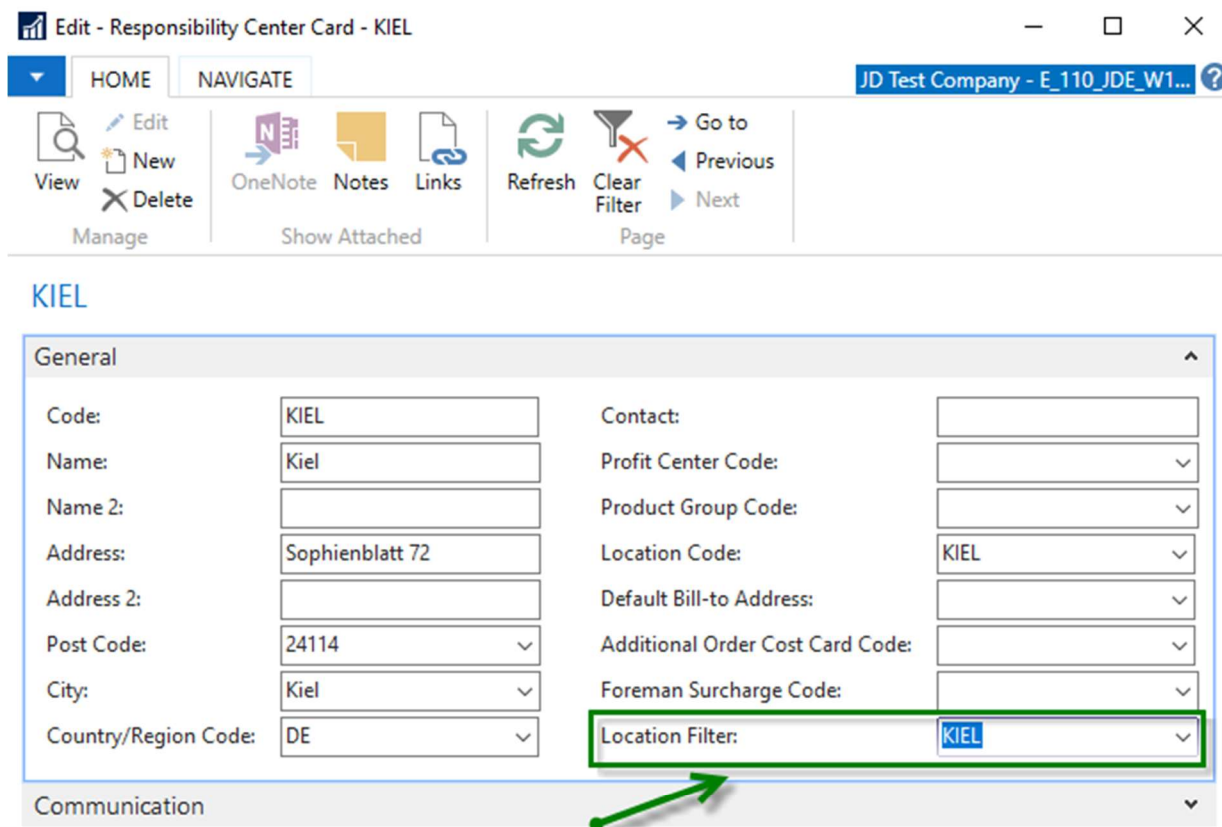
JD Test Company - E-110-JDE-W1 - v

Service Print Templates

Code	Description	Print Customer	Print Customer Machine No.	Hide Salesperson Information	Print Job Instructions	Print Campaign Text	Print Parts	Print Labor	Group Labour By	Discounts	Show Ven...
DETAILS	Show all Details	Sell-to Custo...	☐	☐	☐	☐	Detailed	Detailed	Total Sum And Work Type	Show Labor and Parts Discounts	☐
FIX PRICE	Fix price, no details	Sell-to Custo...	☐	☐	☐	☒	Detailed	Detailed	None	No Discounts	☐

4.7 50 Change traffic light to amber if item available in another location

During this enhancement, we amended the TRASER Indicator Setup with a new additional color (in the standard setup for JD Kernel "Amber") for sales and service documents. This color is intended to show immediately to the user, when inventory for an item is available at another location outside his responsibility center. To be able to amend the system with this the responsibility centers have been enhanced with a new field, used to filter locations for the responsibility centers (one or multiple locations that belong to one responsibility center).



Edit - Responsibility Center Card - KIEL

JD Test Company - E_110_JDE_W1...

General

Code:	KIEL	Contact:	
Name:	Kiel	Profit Center Code:	
Name 2:		Product Group Code:	
Address:	Sophienblatt 72	Location Code:	KIEL
Address 2:		Default Bill-to Address:	
Post Code:	24114	Additional Order Cost Card Code:	
City:	Kiel	Foreman Surcharge Code:	
Country/Region Code:	DE	Location Filter:	KIEL

Communication

Filter for one or multiple locations belonging to one responsibility center.

OK

We also had to enhance the TRASER Indicator Setup with an additional option field. The correct standard setup that is deployed to the JD Kernel will now look as following.

Edit - TRASER Indicator Setup - 089

HOME ACTIONS

View New Delete Import Picture Delete Picture OneNote Notes Links Refresh Clear Filter Page Go to

089

ID	HTML Color	B...	Table	Field 1	Field 1 Name	Condition	Type 2	Field 2	Field 2 Name	Available Inventory	Consider Responsibility Center
089	#DF0101	●	37		Available Inventory	<	Value	0		☒	
090	#FF8000	●	37		Available Inventory	>=	Field	5416	Outstanding Qty. (Base)	☒	
091	#04B404	●	37		Available Inventory	>=	Value	0		☒	
110	#DF0101	●	5902		Available Inventory	<	Value	0		☒	
115	#FF8000	●	5902		Available Inventory	>=	Field	5416	Outstanding Qty. (Base)	☒	
120	#04B404	●	5902		Available Inventory	>=	Value	0		☒	
125		●	5902	5446208	WIP Bin Status	=	Value	1		☐	
130	#DF0101	●	27		Available Inventory	<=	Value	0		☒	
131	#04B404	●	27		Available Inventory	>	Value	0		☒	
140	#DF0101	●	5997	5445558	Inventory	<=	Value	0		☐	
141	#04B404	●	5997	5445558	Inventory	>	Value	0		☐	

Sales Service

Consider Responsibility Center

In Responsibility Center

Outside of Responsibility Center

In Responsibility Center

Outside of Responsibility Center

In Responsibility Center

The new option field "Consider Responsibility Center" has three different values. If it is left blank, the location filters defined on the responsibility center level are ignored for the indicator.

"In Responsibility Center" will filter on the responsibility center defined for the user in the TRASER User Setup and the corresponding new location filter.

"Outside of Responsibility Center" will filter for everything outside of the user responsibility center and the corresponding location filters.

By setting up the TRASER Indicator Setup in the right order and in the correct way, the indicator will now turn to orange when the item has inventory at another location not belonging to the users responsibility center.

5 Improvements

5.1 Button in ribbon of finance manager is not coherent with everything

After merging the 2018 databases, some buttons in the finance manager role center were not displaying the correct images.

5.2 Page update for edit button on Standard Job Instruction

Changed the behavior of the "Edit" button in the instruction fact box of standard jobs. It is now available immediately after creating a new standard job.

5.3 Improve Warranty Interface Information for DTAC Case ID and DTAC Solution ID

Added two additional fields to the table and page "Warranty Claim":

- DTAC Case ID
- DTAC Solution ID

The fields will also be saved and transferred to the JD warranty system.

5.4 Trade-In: Creating a Trade-In Order from opportunity should not set any discounts

Change system behavior so that when creating a sales trade in document the system does not draw any active purchase or sales discounts defined.

5.5 "Complaint" text fact box needs a function to copy text from fault text fact box

For service orders we added the function "Copy Text from Fault" to the "Operator complaint" fact box analogue to the "Service Resolution" fact box.

5.6 Trade-In Order Types need for German Solution for tax reasons

From an accounting perspective in the German market (might be the case elsewhere) it is necessary to sometimes use different VAT Prod. Posting Groups for used equipment when purchasing it contrary to selling it. The solution so far did not allow this, when in the trade-in process of an opportunity.

Now when in the trade-in card of an opportunity the user can select a sales order type (needs to be setup specifically with VAT Prod. Posting Group) for trade-ins where the customer uses specific VAT %, that differ from the ones the dealer uses, when reselling the trade-in machine.

By choosing the correct sales order type, the trade-in document and accordingly sales quote and the print outs of the offer will correctly consider the specific VAT % used by the customer, but do not change the VAT Prod. Posting Group of the machine record.

Edit - Trade-In - Trade-In JOHN DEERE Tractors 2204

HOME ACTIONS JD Test Company - E

View Edit Delete Create Trade-In Order Open Trade-In Order Process Print Trade-In Order Determination of EAC Report OneNote Notes Links Refresh Clear Filter Page Go to

Trade-In JOHN DEERE Tractors 2204

General	
Brand:	JOHN DEERE
Family:	Tractors
Model:	2204
Type / No.:	M000000040
Description:	JOHN DEERE Tractors 2204
Document:	SRO0000009
Sales Order Type:	TRADE IN 1
VAT Prod. Posting ...	VAT 10
Unit Price:	50.000,00
Purchase Price:	50.000,00
Over-Allowance:	

7030 SERIES LARGE-... USED

Over-Allowance Calculation

Increase Offer Price % Decrease Mark-Up Reset Values Confirm Find

Entry No.	Description	Offer Price	Max. Discretionary Discount	On Price	On Mark-Up
1	JOHN DEERE Tractors 7270R	168.413,78	2,00		

5.7 Time Tracking Report - 5446216 for absence time which is canceled, values should be shown with minus

Change the sign of absence time values for above-mentioned report, so it is clearer to the user that negative values are shown.

5.8 Vendor no. in opportunity should be mandatory before creating a sales quote or sales order

In an offer of an opportunity it is now necessary to have a vendor number in the offer before the user can transfer his offer into a sales quote.

5.9 Lost sales tracking, when transferring Service Quote to Service Order removed

The lost sales tracking was removed for the case that a service quote is transferred into a service order. It did not make sense to track this here.

5.10 Prevent to create a new warranty claim without a service order

The possibility to create a warranty claim without a corresponding service order was removed. A service order is always needed to create a warranty claim.

5.11 Misleading Error Message when releasing sales order

Improved the error message that is shown in the system, when trying to release a sales order for a machine that has no Serial no. (meaning no inventory). The error message that came up during the opportunity process was misleading and did not give enough information to the user.

5.12 Enhance Opportunity list with column "Contact Name"

We added the field "Contact name" to the list of opportunities.

5.13 Merge TRASER-1981: Workflow eventing

Had to merge some code passages for the 2018 version of the software to make workflows work.

5.14 Operating Hours improvements

We improved how operating hours are being tracked on the machine record level and corrected how the numbers are being rounded.

6 Tasks

6.1 TRASER

6.2 Partner/Customer

Regarding 4.4:

Run batch (Codeunit 50005) provided by TRASER for old records in customer system, so that every item record has the information needed.

Regarding 4.6:

Run batch (Codeunit 50005) provided by TRASER that will translate all previous printing options defined in old records and in old Service Printing Templates to the new restructured version.

Regarding 4.7:

Update TRASER Indicator Setup according to the one provided by TRASER.