TRASER Software GmbH

TRASER Release Note

TRASER Dealer Management System

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25.3.2019

Index

1 Introduction

Dear Readers,

we are pleased to provide you with this document.

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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 Parameter Issue on function in service order

An error came up when opening the "Job Details" card from a service order and trying to fill in a value behind the field "operating hours". This is solved.

3.2 Caption in printing dialogue wrong

For sales trade-ins and posted sales trade-ins the printing dialogue still contains an option value where instead of “Machine No.” the system uses “Service Item No.”. This is changed.

3.3 Service Instruction text is duplicated if a new Standard Job is created based on a product hierarchy

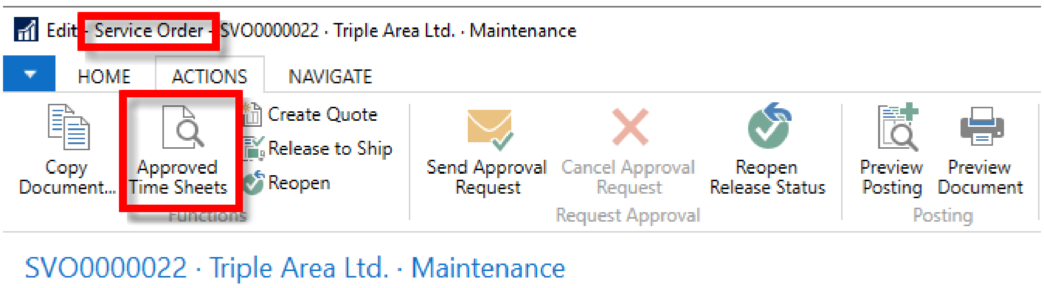
When creating a new standard job which should be based on an empty product hierarchy, the service instruction text was created twice. This was solved.

3.4 Time sheet issue related to repair status code "Complete"

Service orders with a time sheet in the background (created manually) showed an error when the repair status was changed to “Complete”. This happened, when the time sheet contains insufficient data like a starting time but no ending time. This is solved.

3.5 Approved time sheet page cannot be open from service order

On a service order, there is a button which is called "Approved Time Sheets". This button did not work in special cases. This is solved.



4 New Developments

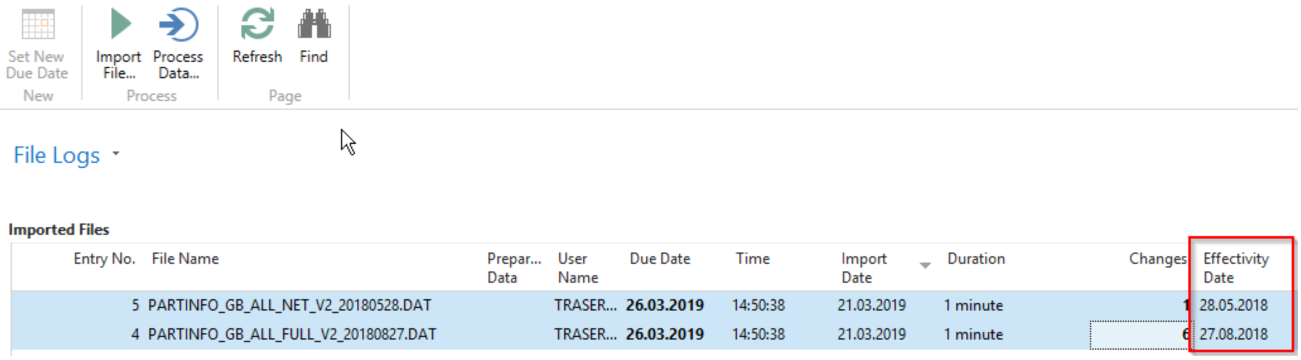
4.1 675 Role Center Simplification – Parts (should not be rolled out to HFG)

Tiles which are not needed or contain incorrect data have been removed. Details on all changes can be viewed in the attached excel file.

RoleCenter_Parts.xlsx

4.2 596 Automatic import of John Deere price & substitution files into NAV (JDNF-198)

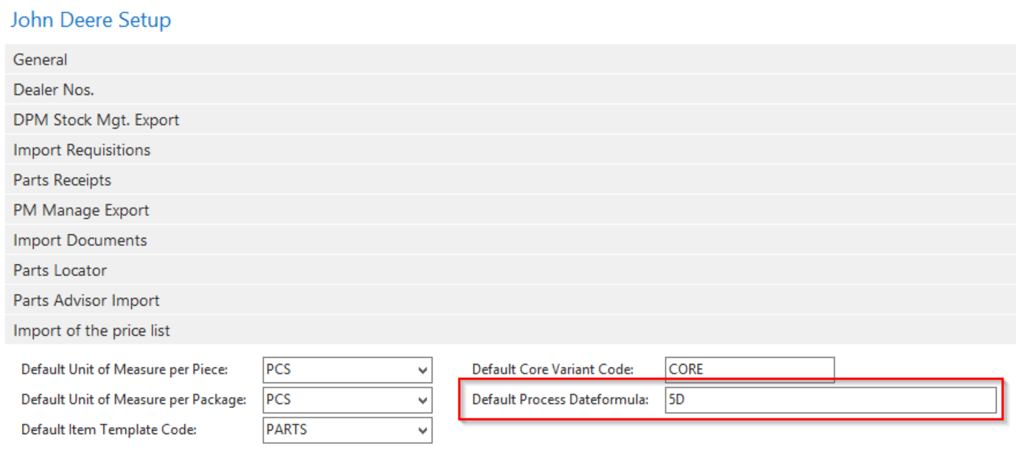
If the dealership receives price and substitution files via the John Deere DTF-Client, NAV will now import these files automatically. This happens with a job queue in the background. The system will import the content of the price files (Initial & Delta) into a buffer table where the responsible person can see all changes related to existing items. Each price file contains an "Effectivity Date" which NAV is using to set the starting date in the related item price tables if the price file import was processed by the job queue. This date is visible in the list of price changes and will be the trigger to import the new price files.



As soon as the due date ("Effectivity Date") is reached, the import will be done in the night if a job queue exists.

After the file import (price & substitution), NAV will move the files into a predefined archive directory. This path is defined in the "John Deere Setup".

The field "Default Process Date formula" in the "John Deere Setup" is not needed anymore and has been removed.

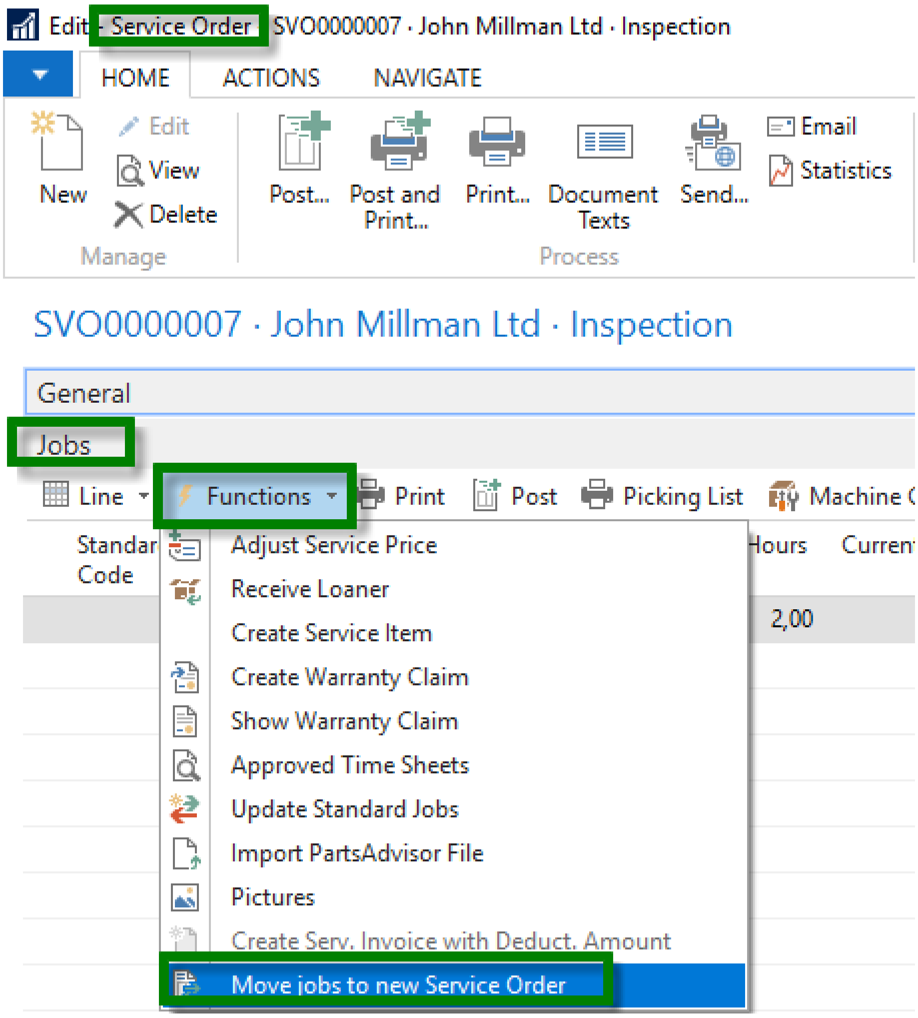


4.3 783 Move group of jobs from one SvO to a newly created SvO

If a user created a service order with multiple jobs, they may need to split the service order into two when some of the jobs require to be given a different service order type (i.e. warranty vs non warranty).

A new function "Move jobs to new Service Order" will allow a user to split an existing service order, effectively moving several jobs to a newly created service order with a different service order type.

From the service order page, the user will have an option to split the service order, the system will allow to select the job or jobs to be moved and define the new service order type to be used in the newly created service order. The user can just move jobs to a new service order which are not invoiced, otherwise an error message will come up.

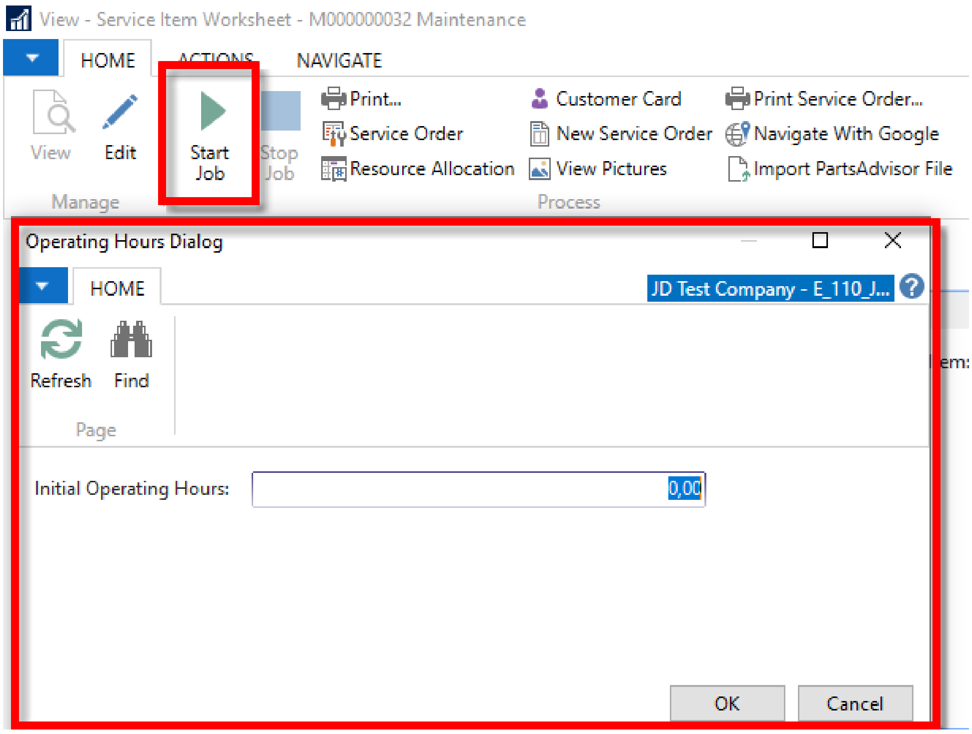


The jobs will be moved with all their content in the same state they were in the source order (lines, resources, time allocation, WIP bin and status etc.).

The operation can't be undone once the jobs are taken to a new service order. There is no functionality implemented to bring them back together.

4.4 785 Improvements to track operating hours for warranty claims

Warranty administration policy requires the warranty claims to indicate the operating hours of the machine for the time the job was started, while the technicians can capture and update the hours of the machine in subsequent visits. Technicians should be prompted to indicate machine operating hours when they start working on a job. This information is stored on the job header and not modified in the subsequent process.



Note: If machine operating hours have been updated in the previous 24 hours, these hours will be stored on the machine card and will be taken for the new job header as well. Within the 24 hours, the user will not get this update page again!

If the job is a warranty case, the operating hours registered on the job header are taken to populate the operating hours of the created warranty claim.

The feature of tracking hours is a setup and can be disabled or enabled. Behind the “Order Types”, there is a new field “Operating Hours mandatory”. If this field is checked, the system will use the pop-up page to set the operating hours of a machine when a job starts during the time tracking.

Order Types

Code	Description	Service Order Type	Warranty	Operating Hours mandatory
AGREE	Service Agreement	☑	☐	☐
ALLOWAN...	Special Allowance	☑	☑	☑
COMPON...	Component Order	☑	☐	☐
INTERNAL	Internal Service	☑	☐	☐
POWERGA...	Powergard warranty	☑	☑	☑
RETAIL	Regular Service	☑	☐	☐
SERVICE	Service Warranty	☑	☑	☑
UE RECOND	Reconditioning	☑	☐	☐
UE WAR	Used Equipment Warranty	☑	☐	☐
WAR HOR...	Warranty Horsch	☑	☑	☑
WAR JCB	Warranty JCB	☑	☑	☑
WAR JD AG	Warranty JD Agriculture	☑	☑	☑
WAR JD TU	Warranty JD Turf	☑	☑	☑
WAR OTHER	Warranty Other	☑	☑	☑

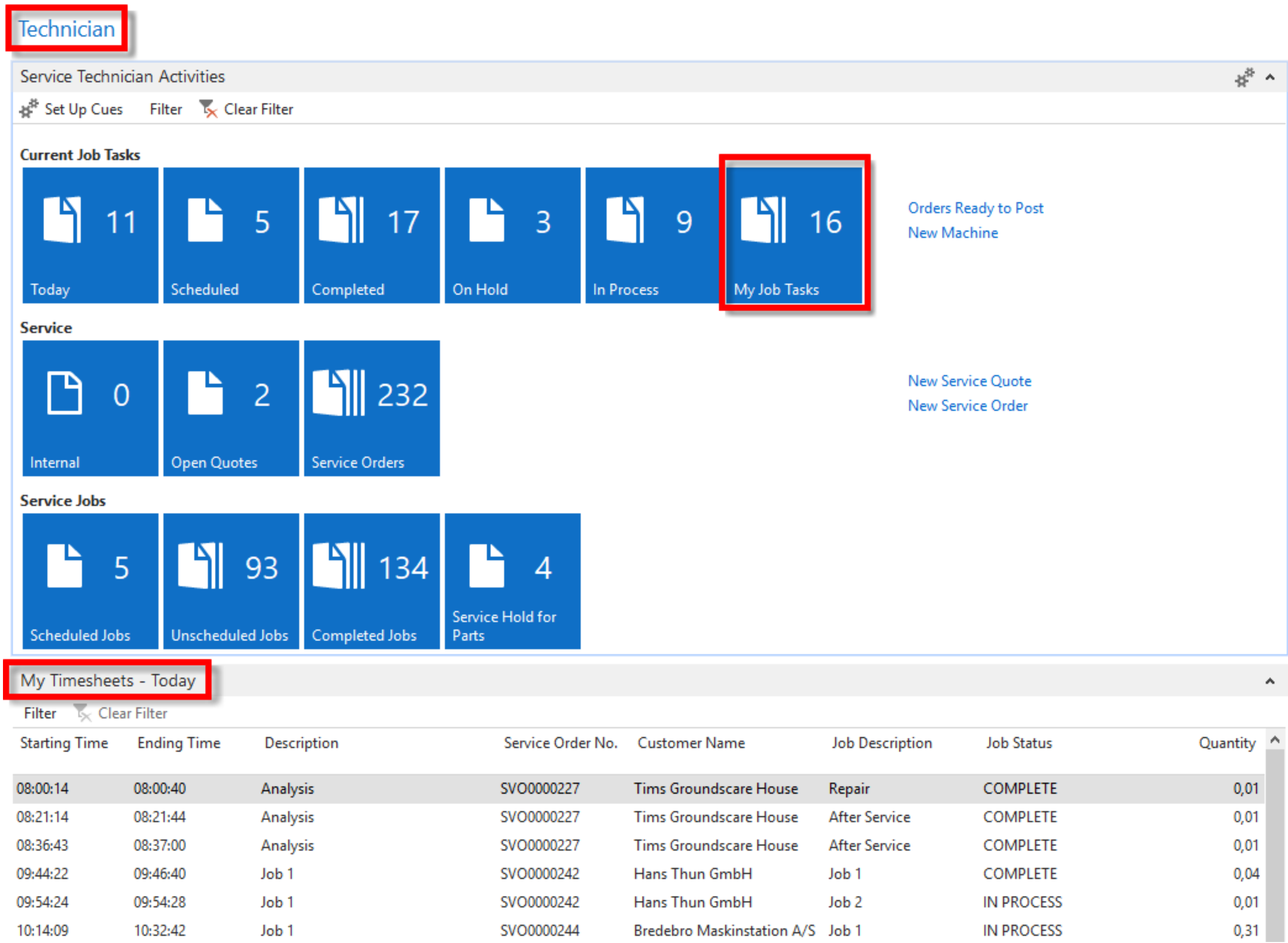
Always when the field is filled by a user/technician, the system will fill the table “Counter Readings” behind the machine record to track these values. The operating hours on the machine card will be updated as well.

4.5 771 Clear out expired TS programs from list

When a new John Deere TS-program is imported into NAV in preparation to work on a requisition worksheet, a list of all ever-imported TS-programs is shown. Expired TS-programs are shown in red but remain visible in the list. With this feature expired TS-programs have been removed from the list and are not displayed anymore. Only current TS-programs will be shown on the list.

4.6 Improve Role Center for Technicians (JDNF-165 & JDNF-170)

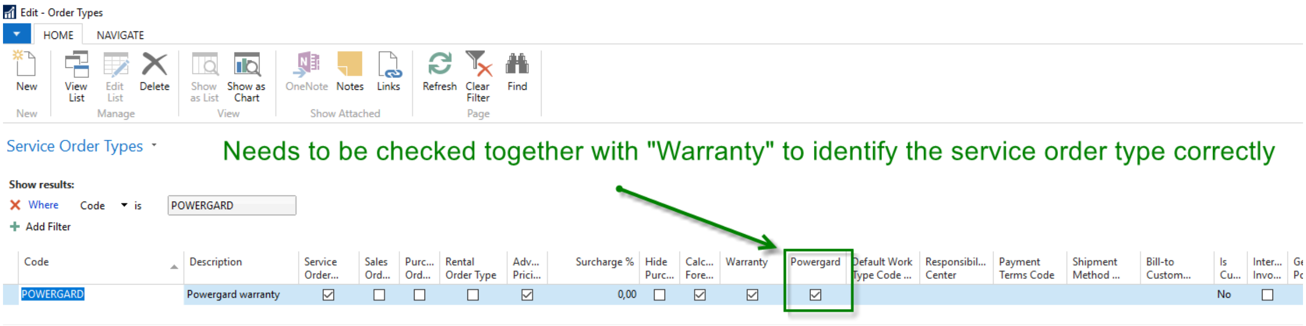
A new cue “My Job Tasks” was added to the role center of the technician which shows all related jobs, which do not have the repair status “Reviewed” or “Complete”. This is for a better overview for the technician of all assigned jobs sorted by allocation date and starting time.



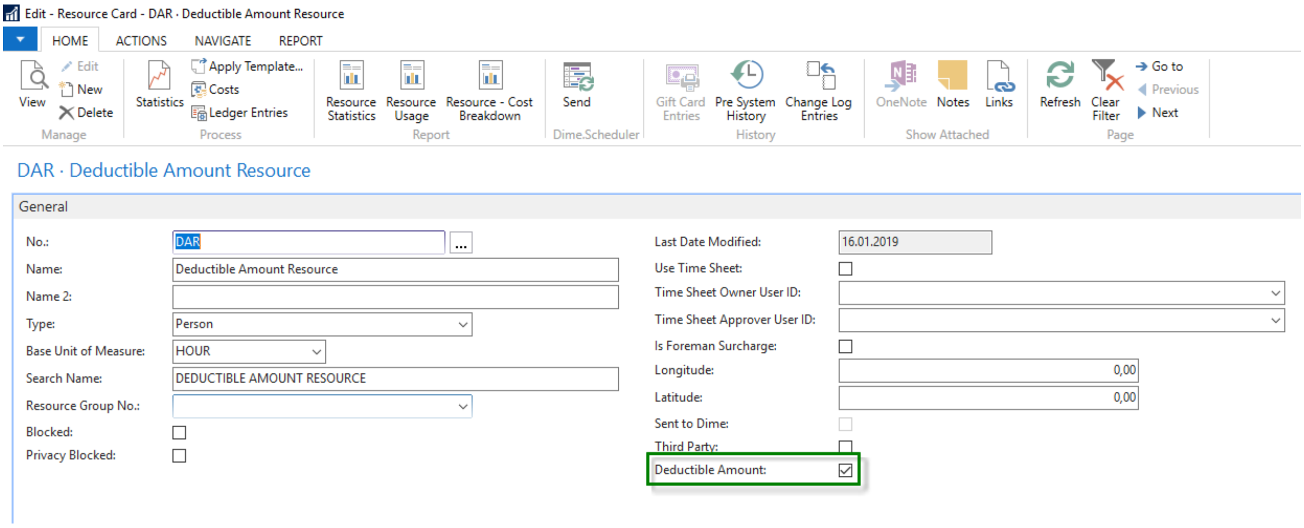
4.7 481 PowerGard Process Improvement

This enhancement aims to provide the user with an easier way to identify warranty cases, where a deductible amount might need to be invoiced to a customer. The system will now check when creating a warranty claim if the service order type is flagged as “PowerGard” and if a deductible amount is available for the machine that is serviced. If so, the user is prompted to decide if the system needs to create a separate service invoice to the customer with the amount of the deductible.

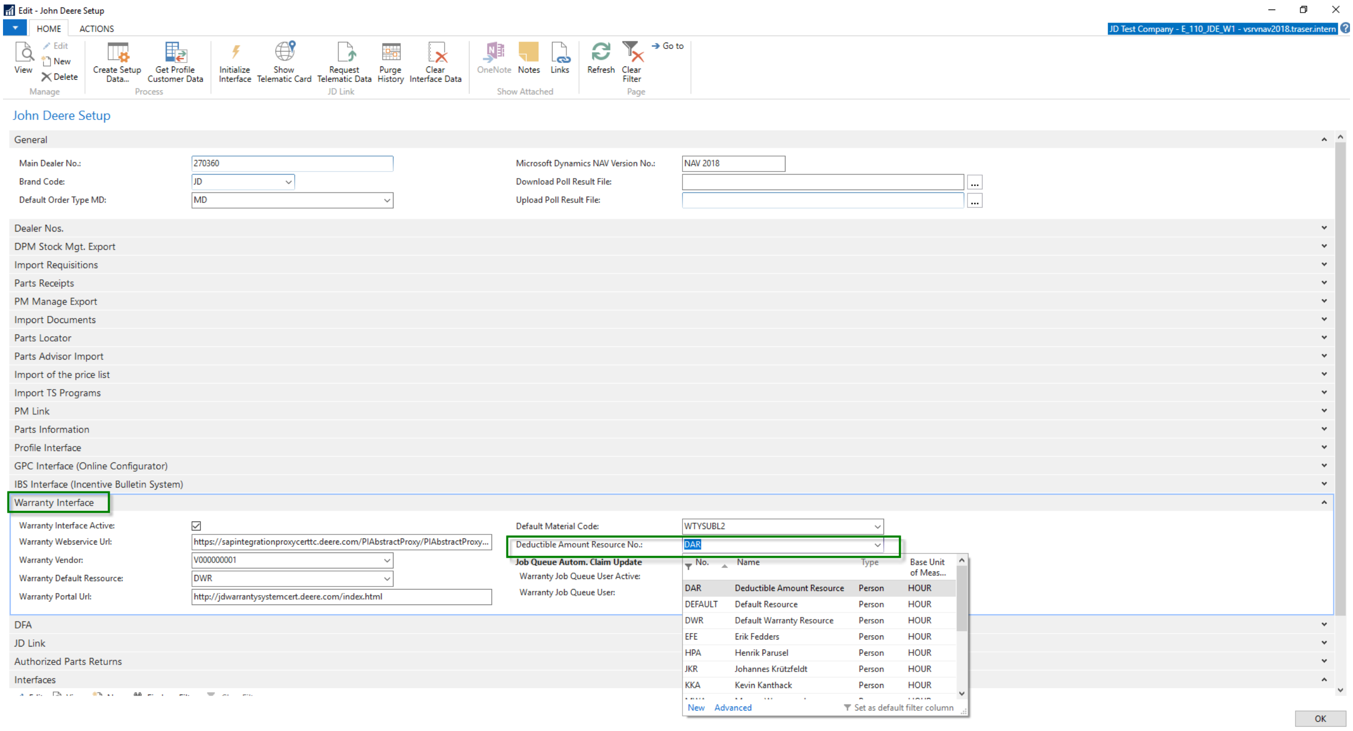
For this to work as intended the dealer needs to do some changes to the setup. The first step is to set up a service order type that is used for the warranty cases, where a deductible might be used. There is a new flag in the order types table called “PowerGard” that will identify this kind of service order type.



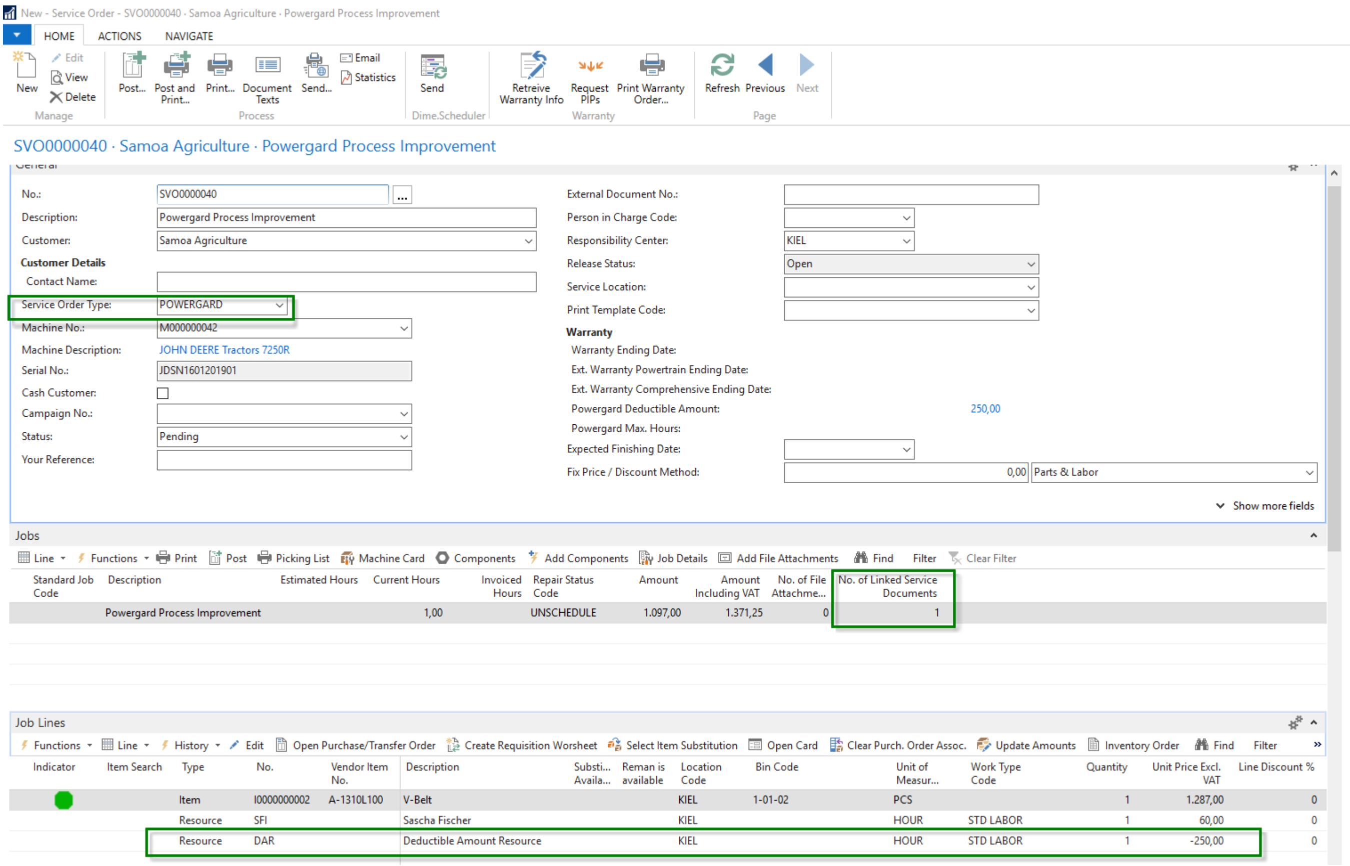
To enable the system to automatically create new service invoices to the customer with the deductible amount a dedicated resource needs to be set up as well as can be seen below:



It needs to be flagged as “Deductible Amount”. Then this dedicated “Deductible Amount Resource” needs to be entered in the John Deere Setup under the fast tab “Warranty Interface”:

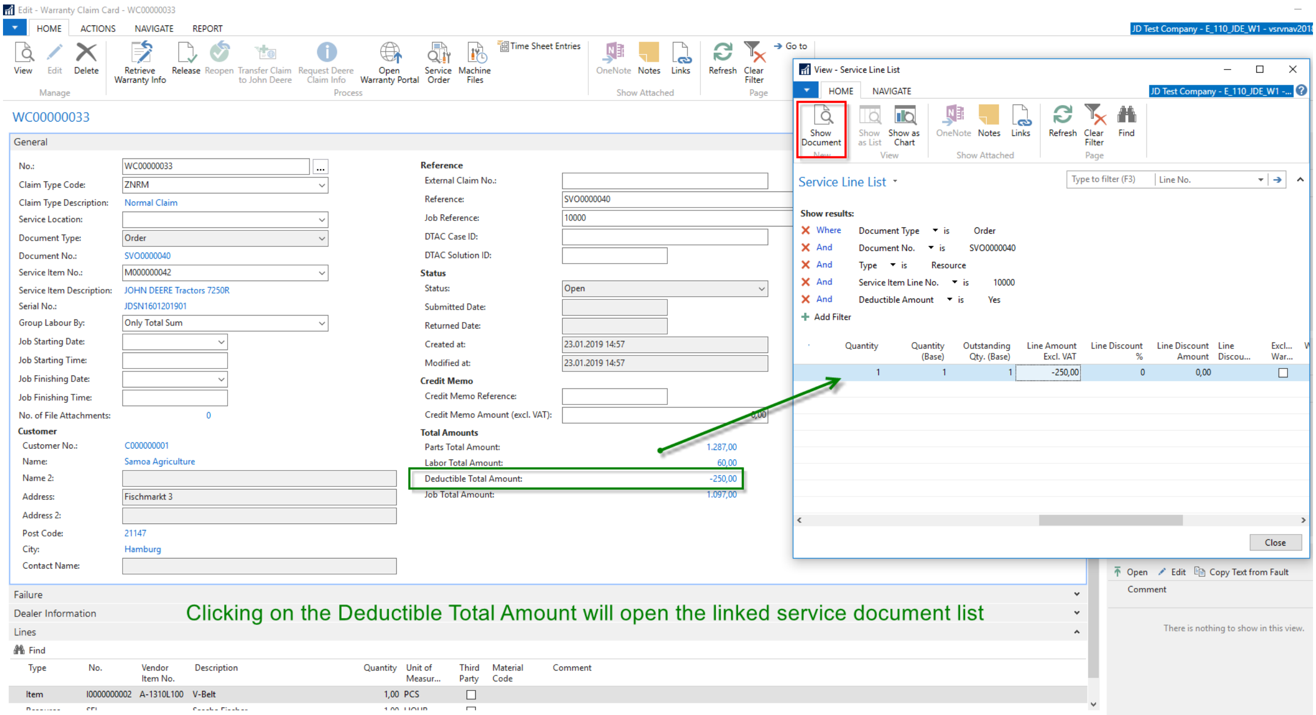


If the user now creates a warranty claim for a machine that has a warranty contract including a deductible the system will ask if a service invoice to the customer needs to be created for this deductible. If a separate service invoice was created the original service order will look like this:

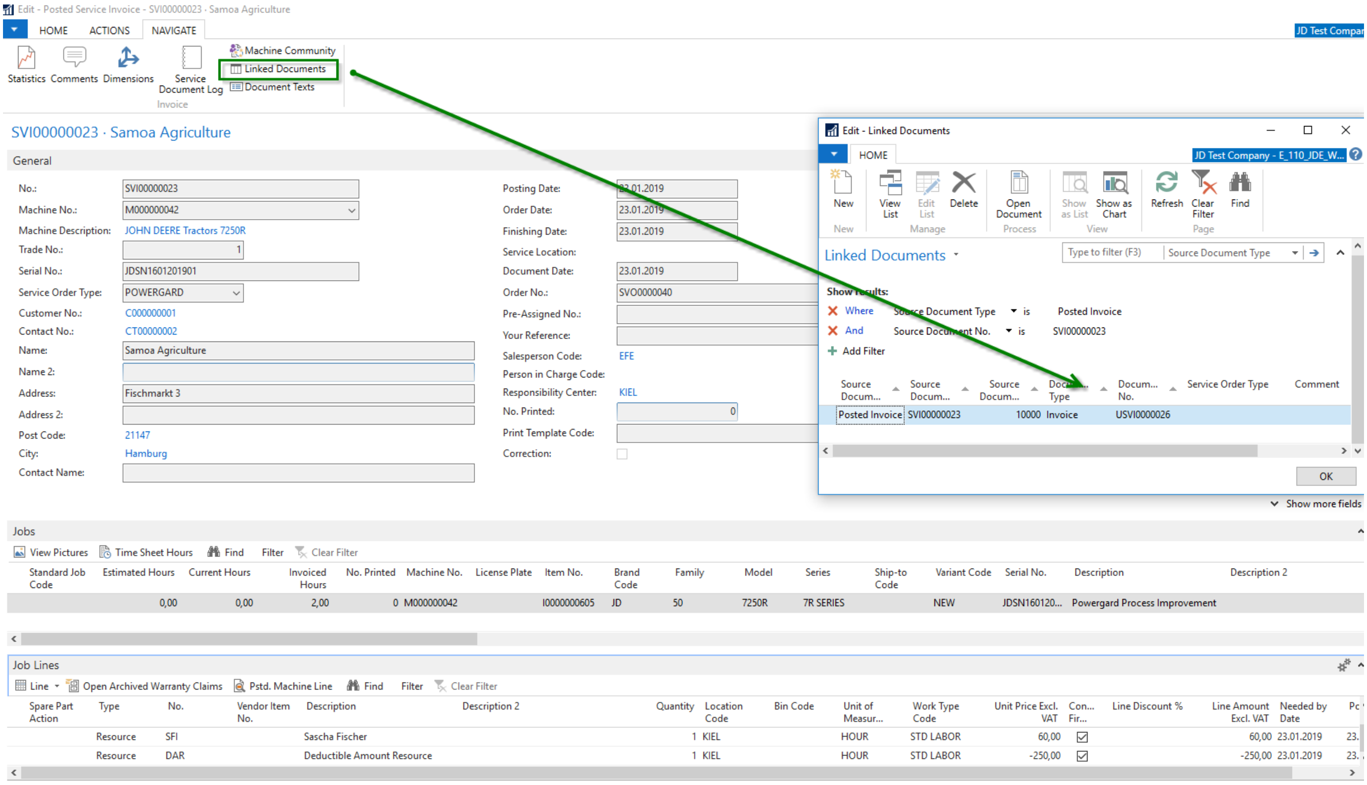


A new job line is created automatically by the system deducting the deductible from the original service order. The newly created service invoice to the customer can be found when clicking on the “No. of Linked Service Documents” in the jobs.

The warranty claim created from the service order job will also contain this information, that a deductible was invoiced to the customer. The claim amount is reduced accordingly. The service invoice containing the deductible amount can be reached from here as well as can be seen below.



When the original service order (the one resulting in a warranty claim) is now invoiced, the posted service invoice will also have the linked documents available. This now enables the user to see the overall profitability of the service.


Edit - Posted Service Invoice - SVI00000023 - Samoa Agriculture
HOME
ACTIONS
NAVIGATE
Statistics
Comments
Dimensions
Service Document Log
Machine Community
Linked Documents
Document Texts
Invoice
SVI00000023 · Samoa Agriculture
General
No.: SVI00000023
Machine No.: M000000042
Machine Description: JOHN DEERE Tractors 7250R
Trade No.: 1
Serial No.: JDSN1601201901
Service Order Type: POWERGARD
Customer No.: C000000001
Contact No.: CT00000002
Name: Samoa Agriculture
Name 2:
Address: Fischmarkt 3
Address 2:
Post Code: 21147
City: Hamburg
Contact Name:
Posting Date: 23.01.2019
Order Date: 23.01.2019
Finishing Date: 23.01.2019
Service Location:
Document Date: 23.01.2019
Order No.: SVO0000040
Pre-Assigned No.:
Your Reference:
Salesperson Code: EFE
Person in Charge Code:
Responsibility Center: KIEL
No. Printed: 0
Print Template Code:
Correction:
Edit - Linked Documents
HOME
JD Test Company - E_110_JDE_W...
New
View List
Edit List
Delete
Open Document
Show as List
Show as Chart
Refresh
Clear Filter
Find
Linked Documents
Type to filter (F3)
Source Document Type
Show results:
Where Source Document Type is Posted Invoice
And Source Document No. is SVI00000023
Add Filter
Source Docum...
Source Docum...
Source Docum...
Docum... Type
Docum... No.
Service Order Type
Comment
Posted Invoice SVI00000023 10000 Invoice USVI0000026
OK
Show more fields
Jobs
View Pictures
Time Sheet Hours
Find
Filter
Clear Filter
Standard Job Code
Estimated Hours
Current Hours
Invoiced Hours
No. Printed
Machine No.
License Plate
Item No.
Brand Code
Family
Model
Series
Ship-to Code
Variant Code
Serial No.
Description
Description 2
0,00 0,00 2,00 0 M000000042 I000000605 JD 50 7250R 7R SERIES NEW JDSN160120... Powergard Process Improvement
Job Lines
Line
Open Archived Warranty Claims
Pstd. Machine Line
Find
Filter
Clear Filter
Spare Part Action
Type
No.
Vendor Item No.
Description
Description 2
Quantity
Location Code
Bin Code
Unit of Measur...
Work Type Code
Unit Price Excl. VAT
Con... Fir...
Line Discount %
Line Amount Excl. VAT
Needed by Date
Resource SFI Sascha Fischer 1 KIEL HOUR STD LABOR 60,00 60,00 23.01.2019
Resource DAR Deductible Amount Resource 1 KIEL HOUR STD LABOR -250,00 -250,00 23.01.2019

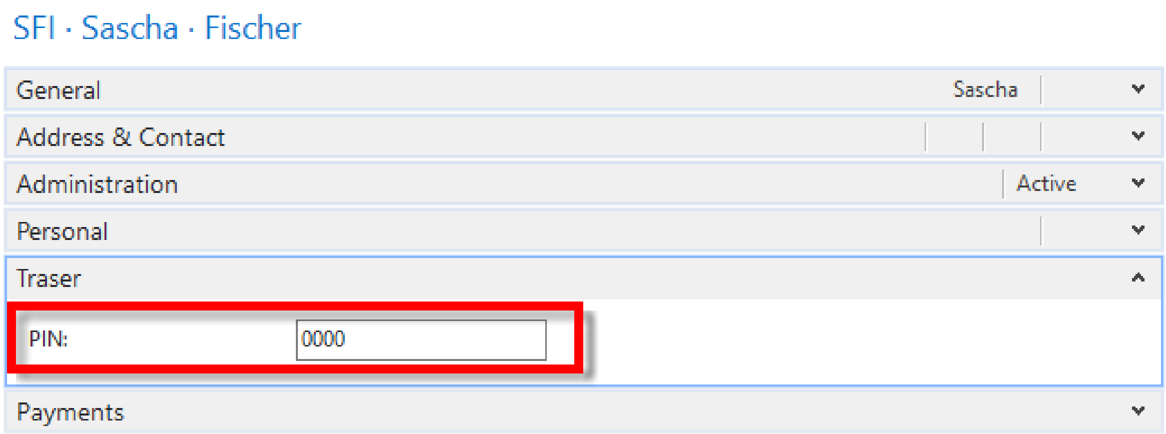
5 Improvements

5.1 External Document No. mandatory logic should not be enforced for Sales Quotes

In the opportunity process especially, but also in other processes, it should always be possible to release a sales quote to the customer, although the checkbox "External Document No. Mandatory" in the customer card might be checked. So, the logic of this field will not be enforced for sales and service quotes.

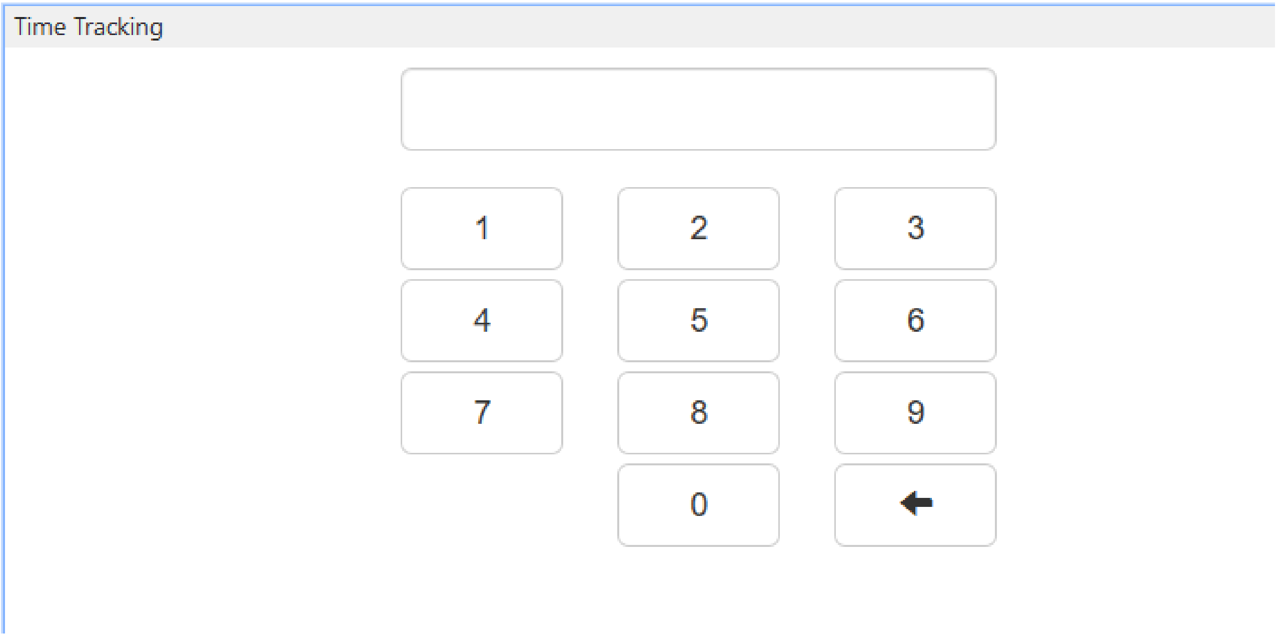
5.2 Improve Time Tracking Interface

In case that a dealership wants to use a central terminal in the workshop for time tracking, it is possible to use a specific page “Time Tracking” in NAV to use just one NAV screen for multiple technicians. Behind the table “Employee” it is possible to setup a “Pin” code to identify each technician for the time tracking module.



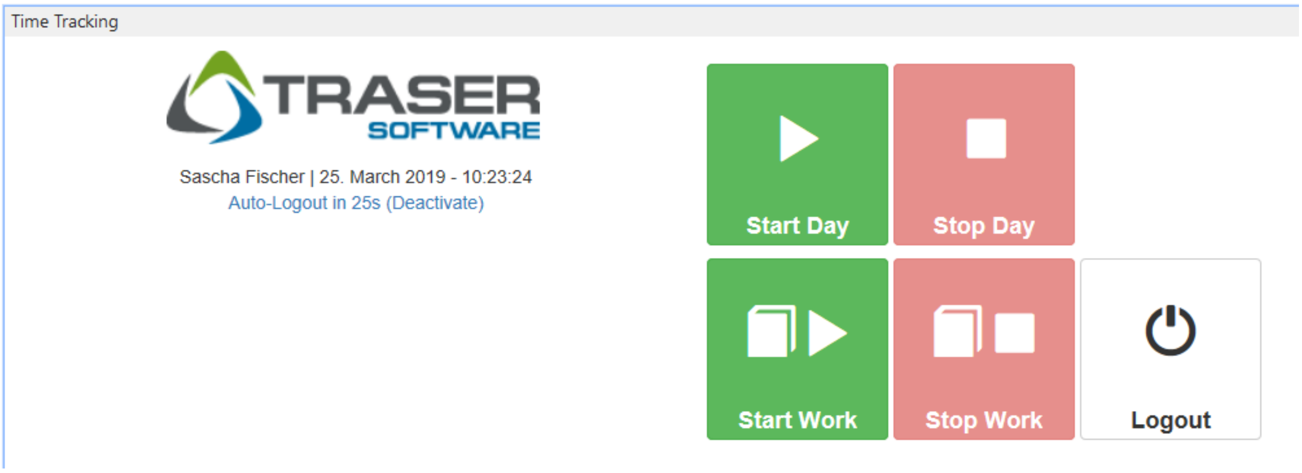
The following page allows the technician to login the time tracking module. If the login with the “Pin” code was successful, NAV recognizes the technician and will show information accordingly. Before the technician can start to track time on a job, it is mandatory to click on the button “Start Day”. The technician is now able to use the time tracking module in NAV.

Time Tracking



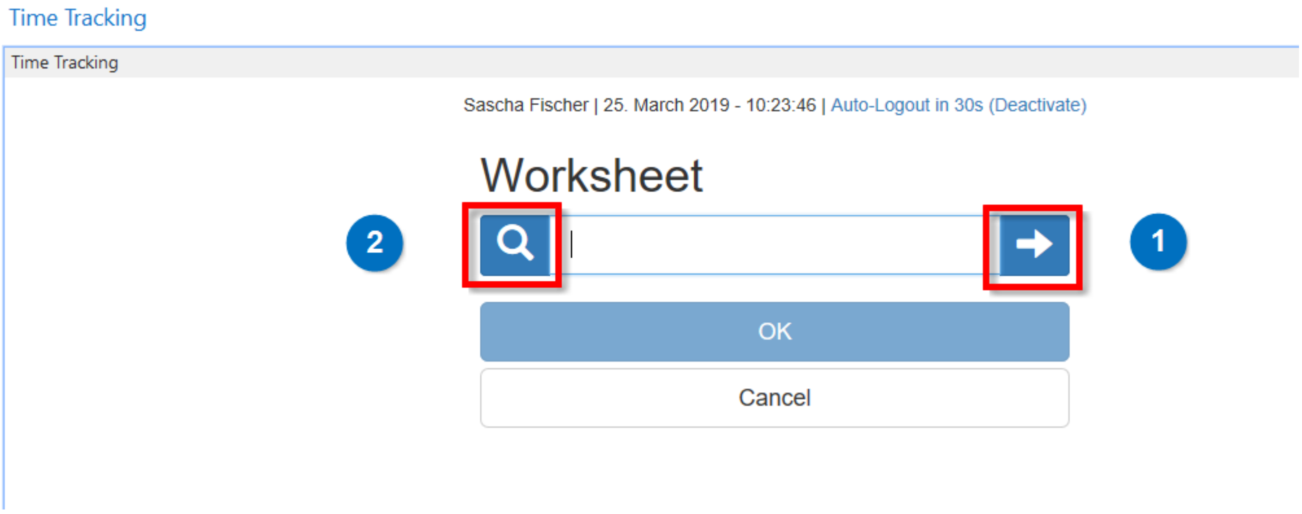
If the technician enters the “Pin” code the following page comes up:

Time Tracking

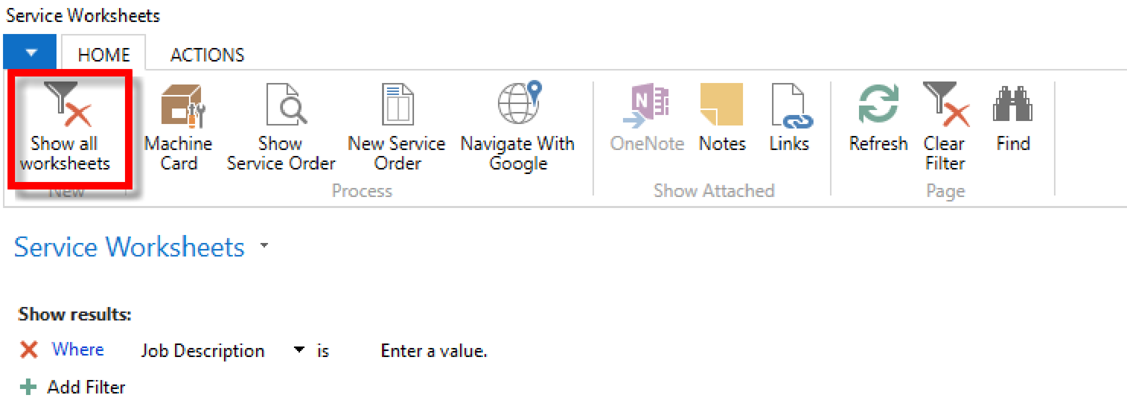


When the technician starts the day, the “Start Work” button is available to start a job. The technician can use two options to work on a job.

1. Scan barcode which is printed on each specific worksheet
2. Use “Search” button to get a list of all assigned worksheets.



If the technician uses the "Search" button, a list of all assigned jobs will show in a new window. If the technician needs to help on a not assigned job, it is possible to use the button "Show all worksheets" to get a list of all worksheets.



Job Description	Docum... No.	Allocation Date	Starting Time	Finishing Time	Repair Status Code	Estimated Hours
JOHN DEERE Tractors 7250R	SVO0000213	19.03.2019			IN PROCESS	5,00
JOHN DEERE Tractors 7250R	SVO0000215	19.03.2019			COMPLETE	3,00
Repair & maybe warranty	SVO0000221	20.03.2019			COMPLETE	7,00
Maintenance	SVO0000224	20.03.2019			COMPLETE	5,00
Inspection 250h	SVO0000225	19.03.2019			COMPLETE	3,00
Analysis	SVO0000227	21.03.2019			COMPLETE	1,00
Repair	SVO0000227	21.03.2019			COMPLETE	3,00
After Service	SVO0000227	22.03.2019			COMPLETE	1,00
New Job	SVO0000227	21.03.2019			COMPLETE	3,00

The technician can choose a job and can start to track the time on it.

5.3 Improve setting Description in Counter Reading Table

Operating hours of a machine can be updated by the technician from the service order worksheet or manually on the machine card. The table “Counter Readings” will track all changes related to the operating hours. The system will set the description automatically for each entry. In the case where the operating hours are updated from the service order, the description will contain the service order no. and the job description to give a better relation to the updated hours.

Counter Readings

Counter Type Code	Description	Date	Value
OH	Machine Entered manually	22.03.2019	100,00
OH	Order SVO0000260 - JOB 1	25.03.2019	125,00
OH	Machine Entered manually	25.03.2019	130,00
OH	Order SVO0000260 - JOB 1	25.03.2019	131,00
OH	Order SVO0000260 - JOB 2	25.03.2019	140,00

6 Tasks

6.1 TRASER

Import new control add-in for Time Tracking “Traser.TimeTrackingControl” (copy dll on server directory and import zip file in database on “Control Add-ins”)

6.2 Partner/Customer

Regarding 4.2:

Create new entry in “John Deere Setup” on register “Interfaces”.

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
Import TS Programs
PM Link
Parts Information
Profile Interface
GPC Interface (Online Configurator)
IBS Interface (Incentive Bulletin System)
Warranty Interface
DFA
JD Link
Authorized Parts Returns
Interfaces

Edit View New Find Filter Clear Filter

Code	Description	Filename	File Directory	Archive Directory
CREDITMEMO	Credit Memos		X:\Whole Good Cr. Memos\	X:\Whole Good Cr. Memos\Archive\
DPM_SM	DPM Stock Management	DLR2JD_DPMEXT_%1_%2%3.DPM.EAME	Y:\DTF\UPLOAD\	
PARTS_LOCATOR	Parts Locator	DLR2JD_%1_%2.DAT	Y:\DTF\UPLOAD\	
PARTSADVISOR	Import Parts Advisor	%1.txt		
PARTSINV	Parts Invoices		X:\Spare Part Invoices\	X:\Spare Part Invoices\Archive\
PARTSRECEIPT	Parts Receipt		Y:\DTF\DOWNLOAD\	Y:\DTF\DOWNLOAD\Archive\Part Receipts\
PMMANAGE	Parts Management Data	DLR2JD_%1%2%3_%4.DAT	Y:\DTF\UPLOAD\	
PRICEFILE_DELTA	Import delta price	*.DAT	C:\Temp\Interface test\	C:\Temp\Interface test\Archive\
PRICEFILE_FULL	Import full price	*.DAT	C:\Temp\Interface test\	C:\Temp\Interface test\Archive\
REQUISITIONS	Electr. Requisitions	*.EAME	Y:\DTF\DOWNLOAD\	Y:\DTF\DOWNLOAD\Archive\Requisitions\
SUBSTITUTIONS	Import substitutions	*.DAT	C:\Temp\Interface test\	C:\Temp\Interface test\Archive\
WARRCRMEMO	Warranty Credit Memo		X:\Warranty Cr. Memos\	X:\Warranty Cr. Memos\Archive\
WHOLEGOODS	Whole Goods Invoices		X:\Whole Good Invoices\	X:\Whole Good Invoices\Archive\

Crete 3 new job queues:

1. Based on codeunit 5446273 - JD JQueue Import Price List - to import price files into buffer table
2. Based on codeunit 5446274 - JD JQueue Apply Price List - to import price files from buffer into nonstock item table
3. Based on codeunit 5446275 - JD JQueue Import Substitutions - to import substitution files

➔ These jobs should run every day at night. Usually the dealership receives delta price and delta substitution files once a month and full price and substitution files once a year. Delta files will be imported in a couple of minutes, initial files might take up to a few hours.