

TRASER Software GmbH

TRASER Release Note

TRASER Dealer Management System

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26.4.2019

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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 Bugfix: Automatic creation of machines leads to problems with more than one prod posting group

Had to fix the field length for some newly introduced fields from last release.

3.2 Bugfix for creation of rental hour lines in rental invoices

Corrected an error in the EQM module that occurred during merging versions. Was causing double creation of invoice lines.

3.3 Issue with ELO Interface in code unit ELO Report Mgt.

Corrected an issue with the ELO interface until we get the official bugfix from ELO.

3.4 Issue with User Password and license

Fixed license issues with the user passwords and table 1261.

3.5 No Menu String appears if you choose a machine via lookup in equipment card

Fixed a bug where the system would not provide the according options to choose from when selecting a machine in the equipment card of an opportunity via the lookup in the equipment header.

3.6 Permission missing in “Modify Shortcut Dimensions 3-8” report Zendesk #14452

Due to a missing permission to modify the value entries table, the report to “Modify Shortcut Dimensions 3-8” could not be used in a customer’s license. This was fixed.

3.7 Bugfix regarding Printout of Prepayment invoices

Implemented a bugfix, to ensure that the printout of the prepayment invoices correctly shows prepayment amounts, which was not happening before.

4 New Developments

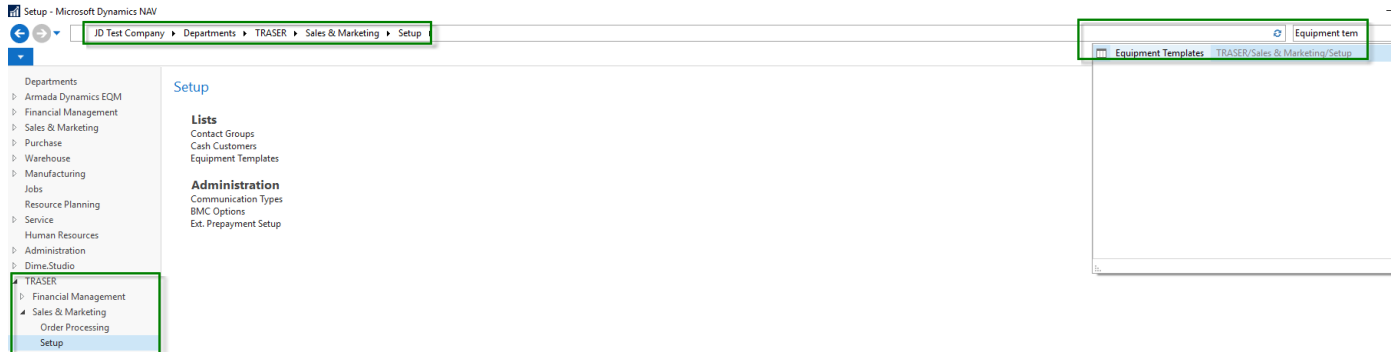
4.1 816 Warranty Start Date should not be set when shipping a transfer order

Changed how the system is automatically setting the warranty start date for machines. It is now only being set automatically when a machine is shipped to a customer. Shipping of transfer orders does not have any effect anymore on the Warranty Start Date.

4.2 491 'Template Builder' functionality

With this enhancement we moved the functionality of creating equipment template from the opportunity to its own entity. So now the sales manager or the sales admin does not need to be in an active opportunity to create/edit/delete equipment templates for their respective sales teams.

The new list of equipment templates can be found either via search or going via “Departments” into the “TRASER Sales & Marketing Setup”.



From here the user can open the list of equipment templates. If the user is set up as a sales manager or sales admin (TRASER User Setup), he will have the possibility to create new equipment templates, edit or delete existing ones. There is also a functionality where he can simply copy one “Equipment Template” record, so he can edit it without overwriting the original.

Equipment Templates - Microsoft Dynamics NAV

JD Test Company > Departments > TRASER > Sales & Marketing > Setup > Equipment Templates

HOME

New Edit View Edit List Copy Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Departments

- Armada Dynamics EQM
- Financial Management
- Sales & Marketing
- Purchase
- Warehouse
- Manufacturing
- Jobs
- Resource Planning
- Service
- Human Resources
- Administration
- Dime.Studio
- TRASER
- Financial Management
- Sales & Marketing

Equipment Templates

No.	Description	Description 2	Brand Code	Family	Series	Model
MT000000001	7270R Basic Config		JD	50	7R SERIES	7270R
MT000000010	5058E Test JD-1785		JD	50	5E SERIES	5058E
MT000000026	7250R Template SFI 17.05.19		JD	50	7R SERIES	7250R
MT000000038	Test for JD7270		JD	50	7E SERIES	7430E
MT000000058	JD 7250R mit Reifen		JD	50	7R SERIES	7250R
MT000000067	Test for JD7270		JD	50	7E SERIES	7430E

The equipment template itself has to levels: A header and corresponding lines. The header will contain typical information as a description of the template and the product hierarchy for this equipment. The lines act corresponding to the configuration lines we know from the opportunity >> equipment card.

Everything entered here on the lines will later be transferred into the configuration lines of an equipment in an opportunity. See the following example where a configuration loaded from GPC was saved as an equipment template.

Edit - Equipment Template - MT000000001

JD Test Company - E_110_JDE_W1 - vsrnav2018...

HOME

View Edit New Edit List Copy Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find Go to Previous Next

Manage Show Attached Page

MT000000001 Header

Allgemein

No.: MT000000001 Family: 50 Tractors

Description: 7270R Basic Config Series: 7R SERIES 7r Series

Description 2: Model: 7270R 7270R

Brand: JD JOHN DEERE Last Date Modified:

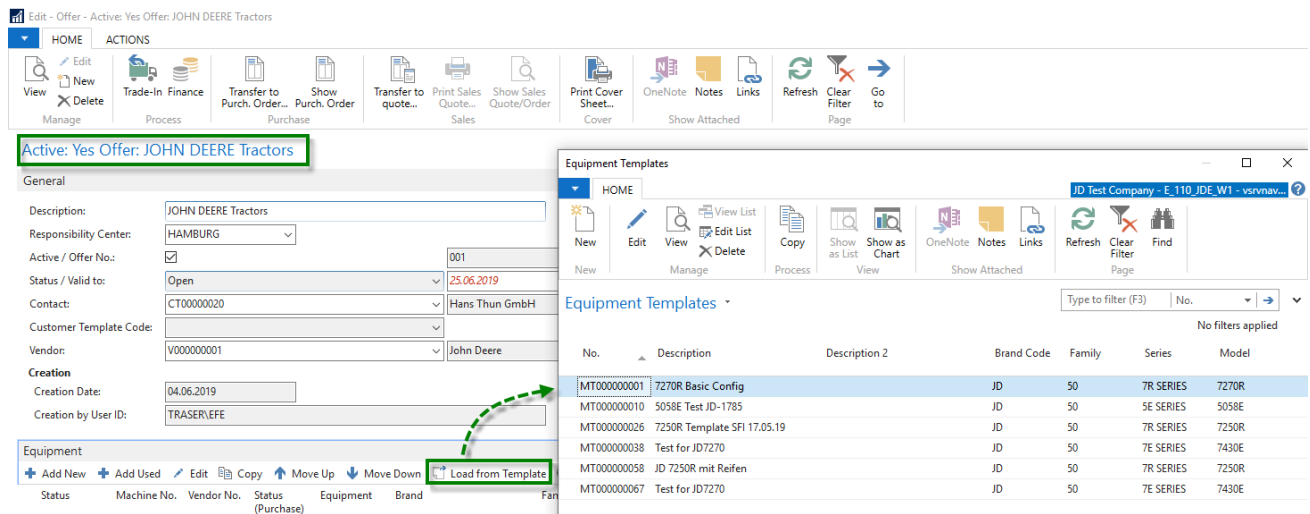
Last Modified by User ID:

Template Lines Lines

No.	Description	Description 2	Quantity	Price List Price	Dealer Net Price	Show on Checklist
06C0RW	7270R (MY17.5)		1,00	178.624,00	150.369,45	☒
8740	Hochleistungs-Lichtmaschine 12...		1,00	378,00		☐
8788	Batterie-Trennschalter		1,00	113,00		☒
8288	Fussgaspedal		1,00			☐
8022	Extra lange Kotflügel hinten - Bre...		1,00	116,00		☒
8969	Zugpunkt vorn		1,00	220,00		☐
8060	Aktivierung für Traktor-Geräte-A...	A)	1,00			☐
0138	Deutschland		1,00			☐
0414	Deutsch		1,00			☐
0557	Keine Ausgabe		1,00			☐

OK

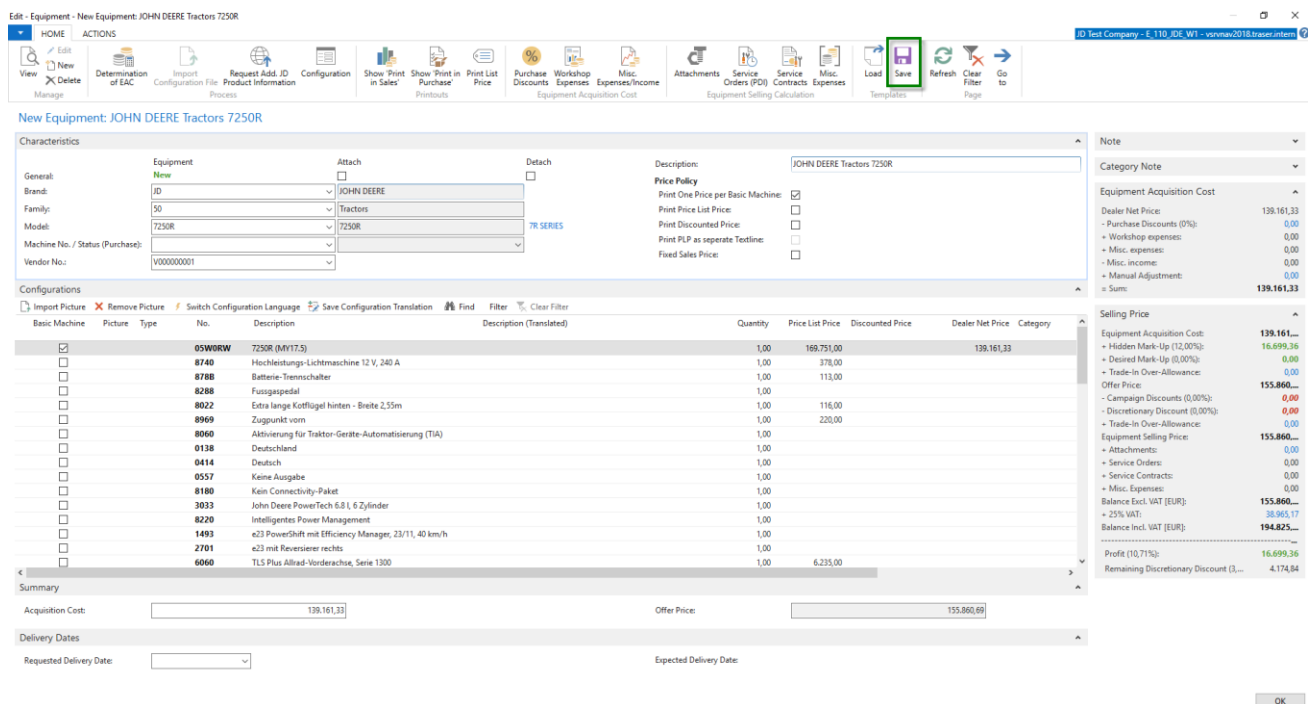
In the opportunity process everything is done as before. In an offer it is possible to use the function "Load from Template" to import the information of an equipment template.



Equipment Templates

No.	Description	Description 2	Brand Code	Family	Series	Model
MT000000001	7270R Basic Config		JD	50	7R SERIES	7270R
MT000000010	5058E Test JD-1785		JD	50	5E SERIES	5058E
MT000000026	7250R Template SFI 17.05.19		JD	50	7R SERIES	7250R
MT000000038	Test for JD7270		JD	50	7E SERIES	7430E
MT000000058	JD 7250R mit Reifen		JD	50	7R SERIES	7250R
MT000000067	Test for JD7270		JD	50	7E SERIES	7430E

It is also still possible to save an equipment (out of an opportunity) as an equipment template. Example would be for example a configuration loaded from GPC.



New Equipment: JOHN DEERE Tractors 7250R

Configurations

Basic Machine	Picture	Type	No.	Description	Quantity	Price List Price	Discounted Price	Dealer Net Price	Category
☒			05W0RW	7250R (M177.5)	1,00	169.751,00		139.161,33	
☐			8740	Hochleistungs-Lichtmaschine 12 V, 340 A	1,00	378,00			
☐			8788	Batterie-Trennschalter	1,00	113,00			
☐			8288	Fussgaspedal	1,00				
☐			8022	Extra lange Kotflügel hinten - Breite 2,55m	1,00	116,00			
☐			8969	Zugpunkt vorn	1,00	220,00			
☐			8060	Aktivierung für Traktor-Geräte-Automatisierung (TIA)	1,00				
☐			0138	Deutschland	1,00				
☐			0115	Deutsch	1,00				
☐			0557	Keine Ausgabe	1,00				
☐			8180	Kein Connectivity-Paket	1,00				
☐			3033	John Deere PowerTech 5.8 L 6 Zylinder	1,00				
☐			8220	Intelligentes Power Management	1,00				
☐			1493	e23 Powershift mit Efficiency Manager, 23/11, 40 km/h	1,00				
☐			2701	e23 mit Reversierlenker rechts	1,00				
☐			6060	TLS Plus Allrad-Vorderachse, Serie 1300	1,00	6.235,00			

Summary

Acquisition Cost: 139.161,33 | Offer Price: 155.860,69

Delivery Dates

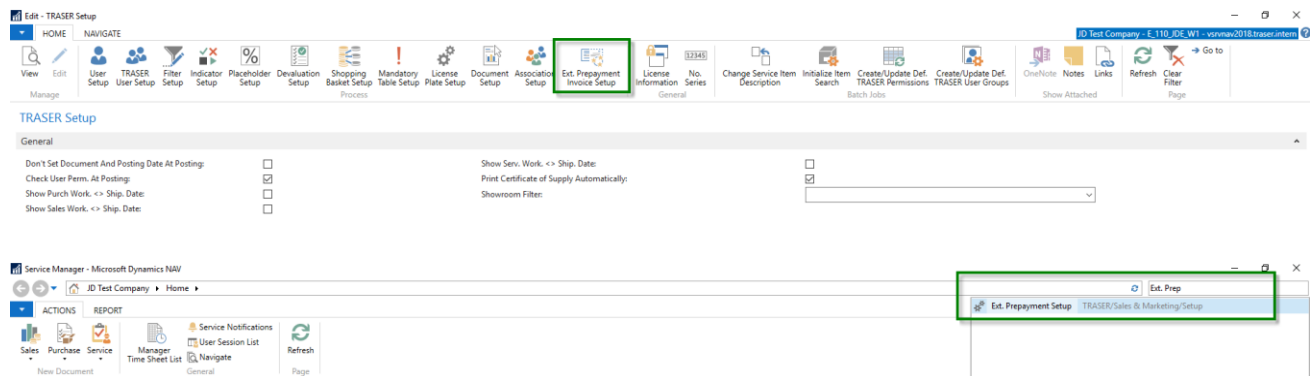
Requested Delivery Date: | Expected Delivery Date:

4.3 827 More detail needed on Prepayment Invoice

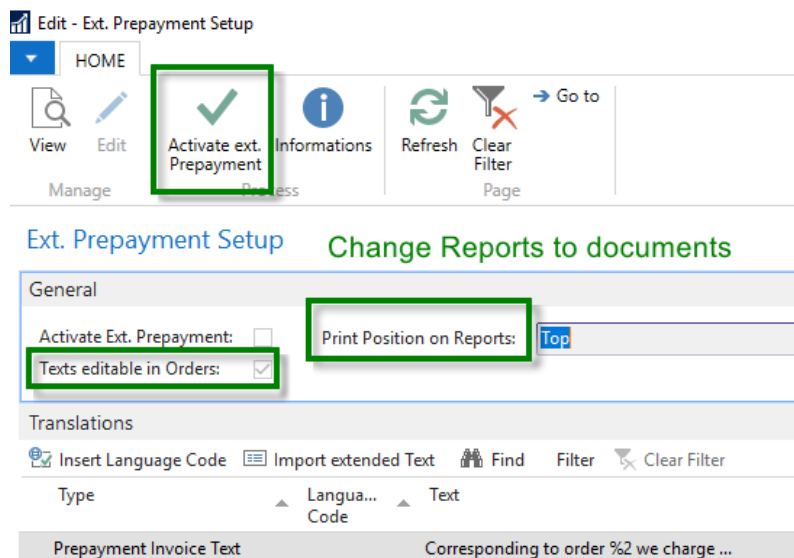
For the financing of machines, it might be necessary to provide detailed information regarding the machine to be invoiced in combination with an invoice for a prepayment from the customer. To allow dealers to automatically have this information available during the printout of prepayment invoices, the "Extended Prepayment" feature was developed. The Ext. Prepayment functionality is intended for the use

in the sales department. The functionality allows to create individual texts for the prepayment invoice. Additionally, the information from the sales order will be transferred into the invoice as well. This allows customers or banks, to have detailed information on the prepayment and what it is related to.

The "Extended Prepayment" needs to be set up once. It is not activated by default. The "Ext. Prepayment Setup" can be found in the "TRASER Setup" or by using the search window.



To activate the "Ext. Prepayment" please use the action "Activate Ext. Prepayment".



In the register "General" it is possible to define, if texts in the Prepayment Invoice, Final Invoice or Prepayment Credit Memo can be edited in the document itself. The texts will be printed in the corresponding lines of the documents. The "Print Position" defines if the texts will be printed in the first line or in the last line of the document.

The prepayment texts are defined in the register "Translations". The texts are only used for sales. The type defines if the text is used for a prepayment, a final invoice or for a credit memo. It is possible to define texts for multiple languages. If no language code is selected, the system will use the language of the company. For each language code it is possible to define one text per prepayment invoice, final invoice and credit memo each.

Edit - Ext. Prepayment Setup

HOME

View Edit Deactivate ext. Prepayment Informations Refresh Clear Filter Go to

Manage Process Page

Ext. Prepayment Setup

General

Activate Ext. Prepayment: ☒ Print Position on Reports: Top

Texts editable in Orders: ☒

Translations

Insert Language Code Import extended Text Find Filter Clear Filter

Type	Language Code	Text
Prepayment Invoice Text	ENU	Corresponding to order %2 we charge you the prepayment amount as part of the total ...
Final Invoice Text	ENU	Order %2 was done during the agreed time. The rest amount for this order is invoiced wi...
Credit Memo Text	ENU	This credit memo will credit the amount of a previos prepayment for order %2.

It is also possible to import "extended texts" from the system. For the manual creation of texts, we implemented placeholders, that will bring the information from the sales order into the text.

Edit - Ext. Prepayment Setup

HOME

View Edit Deactivate ext. Prepayment Informations Refresh Clear Filter Go to

Manage Process Page

Ext. Prepayment Setup

General

Activate Ext. Prepayment: ☒ Print Position on Reports: Top

Texts editable in Orders: ☒

Translations

Insert Language Code Import extended Text Find Filter Clear Filter

Type	Language Code	Text
Prepayment Invoice Text	ENU	Corresponding to order %2 we charge you the prepayment amount as part o...
Final Invoice Text	ENU	Order %2 was done during the agreed time. The rest amount for this order is ...
Credit Memo Text	ENU	

Microsoft Dynamics NAV

This text is empty at the moment. You can specify default texts for the prepayment in Ext. Prepayment Setup.

You can use the following placeholders inside your text:

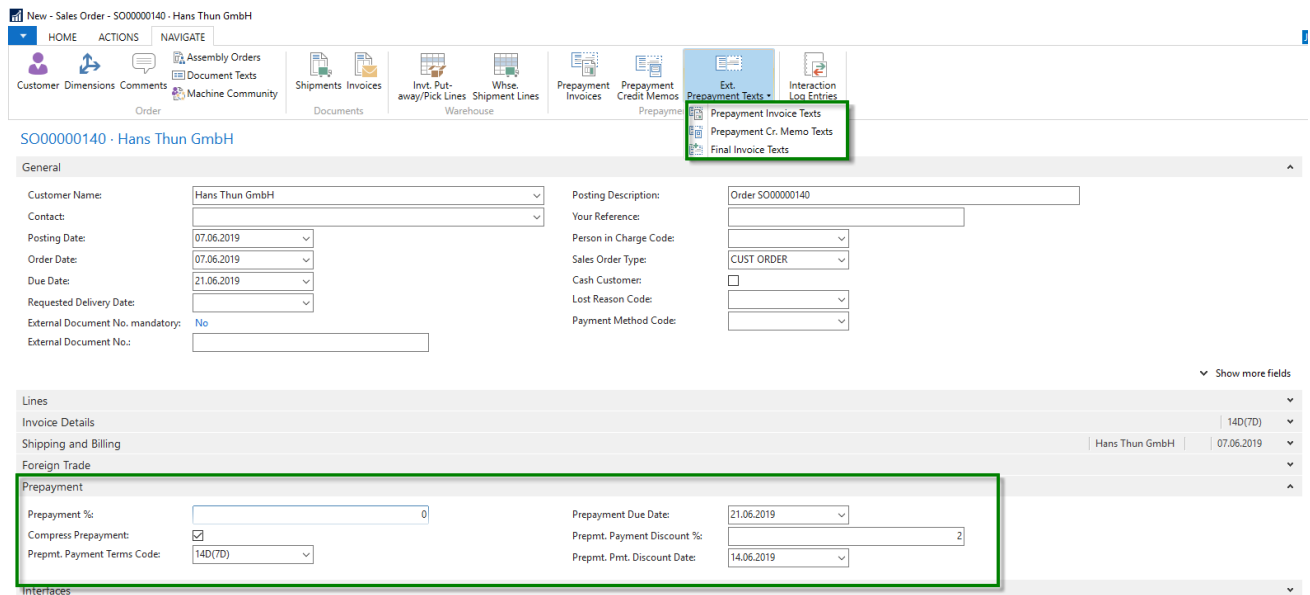
1. Quote No.
2. Order No.
3. Document Date
4. Amount incl. VAT
5. Due Date
6. Your Reference
7. Bill-to Name
8. Bill-to Name 2
9. Sell-to Customer Name
10. Sell-to Customer Name 2

The placeholders need to be declared with a Percent character (%) and the number in front.

OK

To use prepayments in general the fields "Sales Prepayments Account" and "Purchase Prepayments Account" need to be set up in the General Posting Setup (Reminder: the accounts need to be set up with Gen. Prod. Posting Group and VAT Prod. Posting Group for prepayments to work).

During the sales process you can find the “Ext. Prepayment” functionality in the sales order itself. In the register “Prepayment” of the sales order the user can enter the necessary information for prepayments.



General

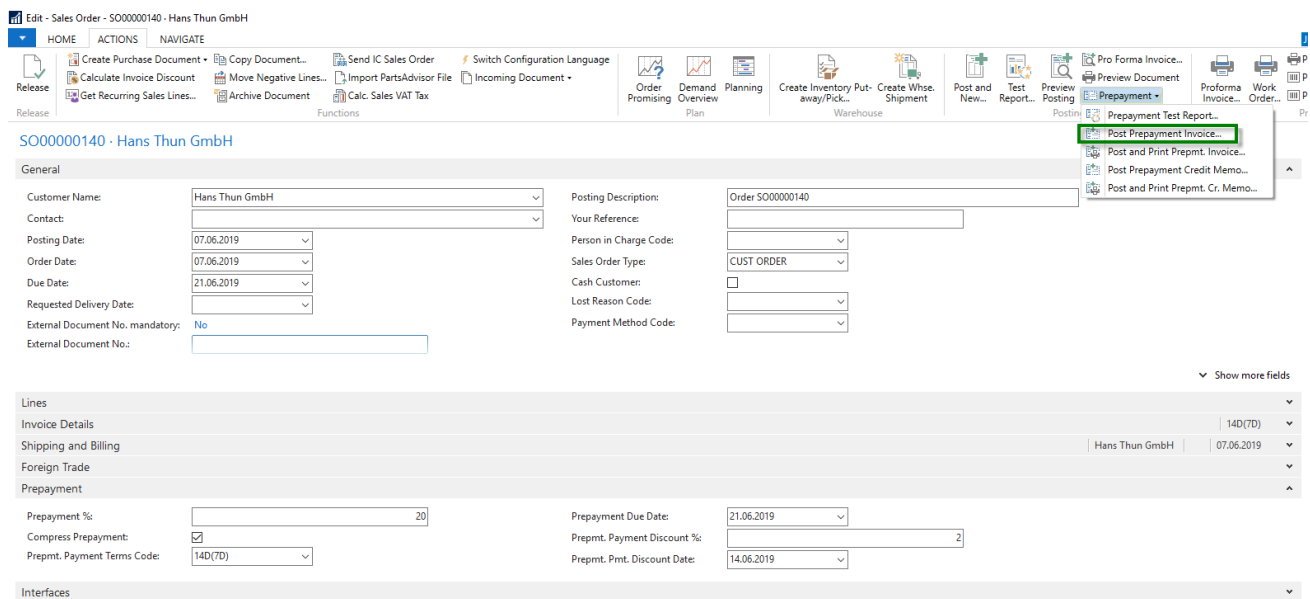
Customer Name: Hans Thun GmbH
 Contact:
 Posting Date: 07.06.2019
 Order Date: 07.06.2019
 Due Date: 21.06.2019
 Requested Delivery Date:
 External Document No. mandatory: No
 External Document No.:
 Posting Description: Order SO00000140
 Your Reference:
 Person in Charge Code:
 Sales Order Type: CUST ORDER
 Cash Customer: ☐
 Lost Reason Code:
 Payment Method Code:
 Show more fields

Lines

Invoice Details: 14D(7D)
 Shipping and Billing: Hans Thun GmbH | 07.06.2019
 Foreign Trade:
 Prepayment:
 Prepayment %: 0
 Compress Prepayment: ☒
 Prepayment Terms Code: 14D(7D)
 Prepayment Due Date: 21.06.2019
 Prepayment Discount %: 2
 Prepayment Discount Date: 14.06.2019
 Interfaces

After entering the information regarding the prepayment, it is possible to show the prepayment texts in the ribbon via “Ext. Prepayment Texts” in the Navigate part of the ribbon. Here it is possible to manually enter additional text lines (if corresponding checkbox in setup was checked).

To create the prepayment-invoice the user needs to go to the action section of the ribbon and there to the prepayment. “Post Prepayment Invoice” will post the prepayment invoice.



Edit - Sales Order - SO00000140 - Hans Thun GmbH

General

Customer Name: Hans Thun GmbH
 Contact:
 Posting Date: 07.06.2019
 Order Date: 07.06.2019
 Due Date: 21.06.2019
 Requested Delivery Date:
 External Document No. mandatory: No
 External Document No.:
 Posting Description: Order SO00000140
 Your Reference:
 Person in Charge Code:
 Sales Order Type: CUST ORDER
 Cash Customer: ☐
 Lost Reason Code:
 Payment Method Code:
 Show more fields

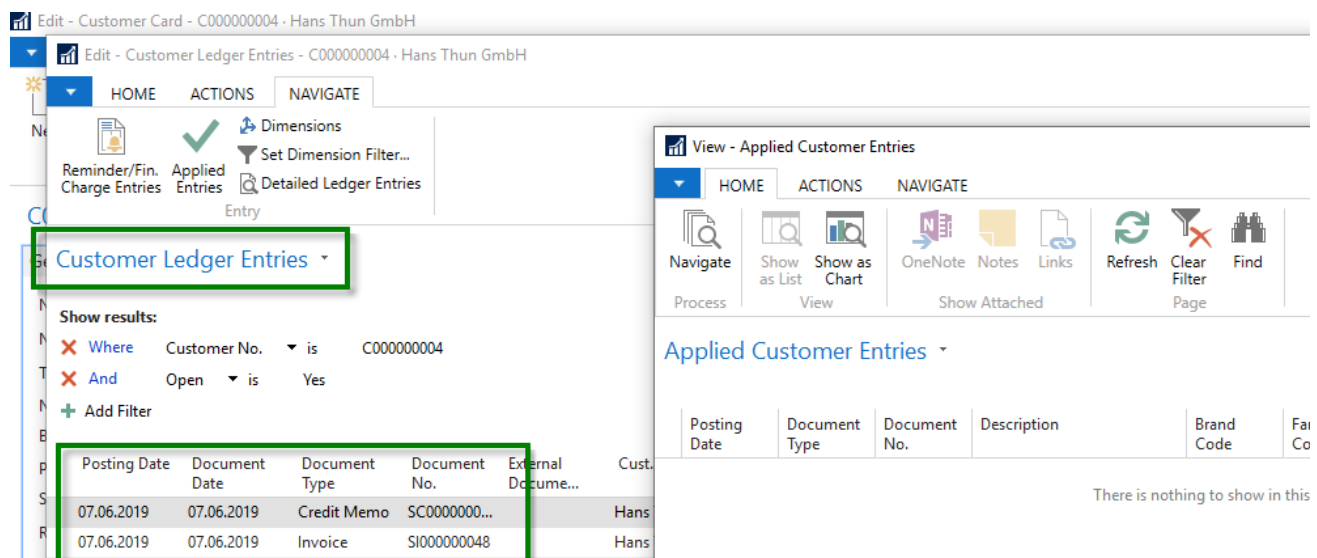
Lines

Invoice Details: 14D(7D)
 Shipping and Billing: Hans Thun GmbH | 07.06.2019
 Foreign Trade:
 Prepayment:
 Prepayment %: 20
 Compress Prepayment: ☒
 Prepayment Terms Code: 14D(7D)
 Prepayment Due Date: 21.06.2019
 Prepayment Discount %: 2
 Prepayment Discount Date: 14.06.2019
 Interfaces

The posted prepayment invoices can be found in the navigate section of the ribbon. The status of the sales order will change to “Prepayment pending”.

If a prepayment needs to be reversed this can be done via the function “Post Prepayment Credit Memo”.

Important: With the reversing of a prepayment invoice the customer ledger entries will not be applied automatically. This must be done manually.



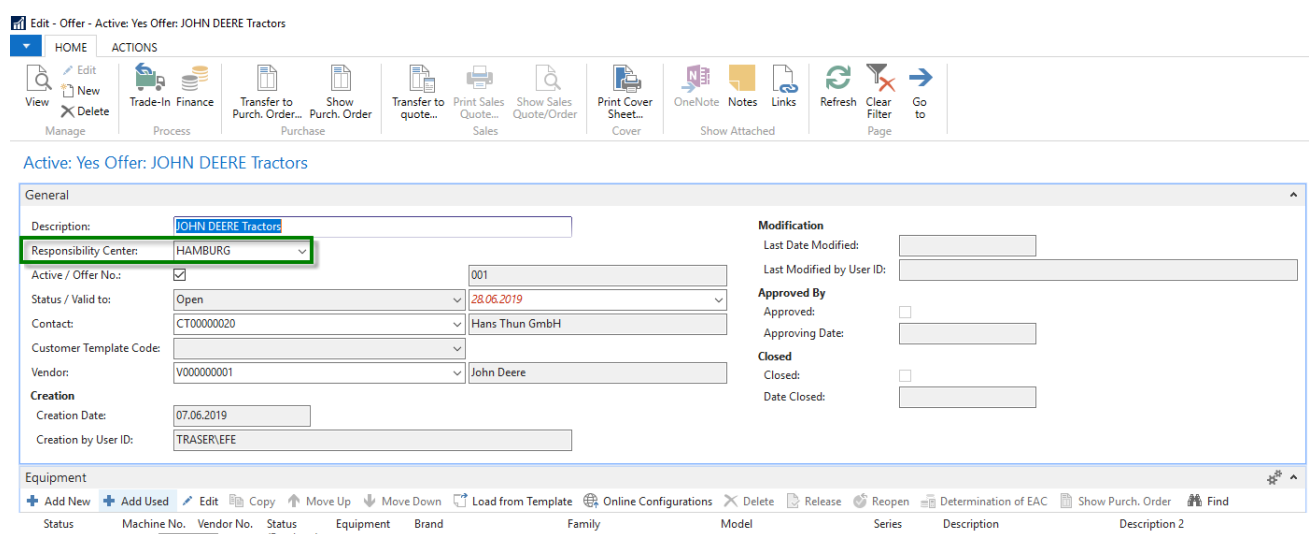
Customer Ledger Entries

Posting Date	Document Date	Document Type	Document No.	External Document No.	Cust.
07.06.2019	07.06.2019	Credit Memo	SC00000000...		Hans
07.06.2019	07.06.2019	Invoice	SI000000048		Hans

The final invoice is created by posting the sales order. The prepayment is evident on the printout of the final invoice (incl. VAT).

4.4 826 Default Responsibility Centre on Opportunities

The Responsibility Center was added to the opportunity. It can be found in the header of a calculation offer of an opportunity. It is pre-populated with the value defined in the TRASER User Setup.



Active: Yes Offer: JOHN DEERE Tractors

Responsibility Center: HAMBURG

General

Description: JOHN DEERE Tractors

Responsibility Center: HAMBURG

Active / Offer No.: 001

Status / Valid to: Open 28.06.2019

Contact: CT00000020 Hans Thun GmbH

Customer Template Code:

Vendor: V000000001 John Deere

Creation

Creation Date: 07.06.2019

Creation by User ID: TRASER\EFE

Modification

Last Date Modified:

Last Modified by User ID:

Approved By

Approved:

Approving Date:

Closed

Closed:

Date Closed:

Equipment

+ Add New + Add Used Edit Copy Move Up Move Down Load from Template Online Configurations X Delete Release Reopen Determination of EAC Show Purch. Order Find

Status	Machine No.	Vendor No.	Status (Purchase)	Equipment	Brand	Family	Model	Series	Description	Description 2
--------	-------------	------------	-------------------	-----------	-------	--------	-------	--------	-------------	---------------

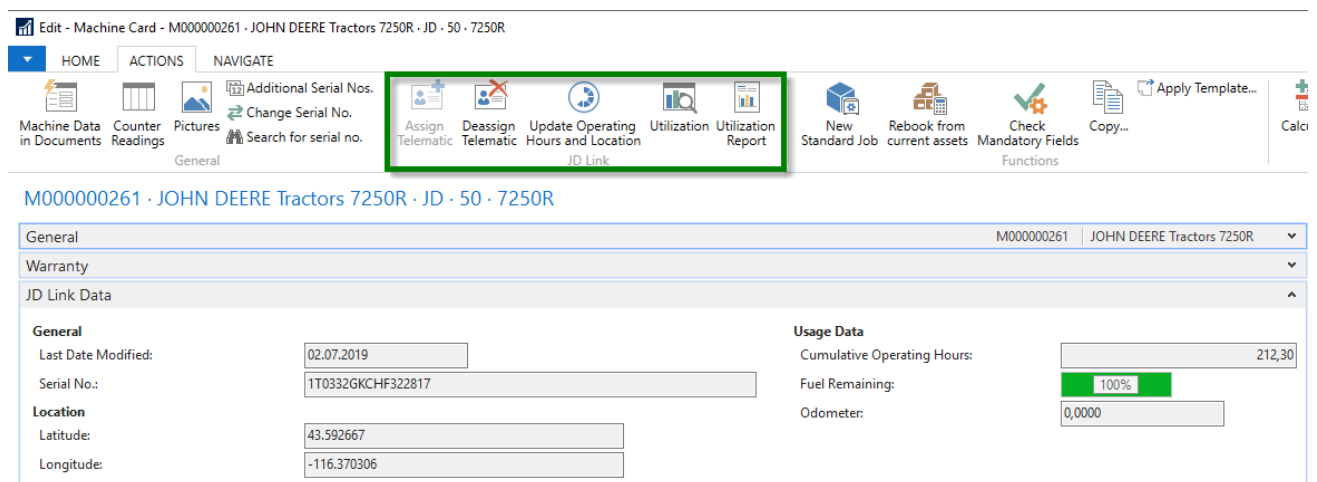
The responsibility center from the calculation offer will then be the default value for all related documents originating from this offer. If a user changes the responsibility center in the sales quote, sales

order or purchase order, the system will ask if the responsibility center should be updated on the opportunity and all related documents as well.

4.5 109 JDLINK Information Business Usage JD-1251

A new function in NAV will update machine information such as location and operating hours when JDLINK is installed on a machine. Behind a job queue the system will check and update in a specific interval, all machines which are related in a service or rental contract. All these machines will be updated with the newest information from the JDLINK interface (once a day). Another job queue will also run in the background in a specific interval (once a week), which will update all the other machines with telematic data. Additionally, it is possible to update the location and the operating hours manually by pushing the button "Update Operating Hours and Location".

This enhancement will facilitate for daily operation of a several departments such as providing at any time exact location of a machine, the exact operating hours of machines and plan upcoming services and maintenance plan in the day to day business.



Edit - Machine Card - M000000261 · JOHN DEERE Tractors 7250R · JD · 50 · 7250R

HOME ACTIONS NAVIGATE

Machine Data in Documents Counter Readings Pictures Additional Serial Nos. Change Serial No. Search for serial no. General

Assign Telematic Deassign Telematic Update Operating Hours and Location Utilization Utilization Report JD Link

New Standard Job Rebook from current assets Check Mandatory Fields Copy... Apply Template... Calc

M000000261 · JOHN DEERE Tractors 7250R · JD · 50 · 7250R

General M000000261 JOHN DEERE Tractors 7250R

Warranty

JD Link Data

General

Last Date Modified: 02.07.2019

Serial No.: 1T0332GKCHF322817

Location

Latitude: 43.592667

Longitude: -116.370306

Usage Data

Cumulative Operating Hours: 212,30

Fuel Remaining: 100%

Odometer: 0,0000

If a service order is created based on a machine which has JDLINK, the system will use the same function to check the operating hours and location of that machine. If this machine got updated information within the last 24 hours, the check will be skipped, otherwise the actual operating hours and location will be received when creating a job in the service order.

4.6 581 Service Contract Pricing & Payment terms

This enhancement will provide the service department at dealerships, with a variety of new functionalities regarding the pricing and the payment terms of service contracts. The aim was to reflect the John Deere environment for service contracts and the corresponding business cases.

There are three different possible cases of how a service contract will be invoiced or paid by the customer:

- The contract amount will be fully paid in advance as a pre-payment or it is paid with periodic invoices. The amount of the full contract will be calculated on basis of the contract lines
- Pay as you go: The service contract it self will not be invoiced to the customer. Service orders created out of the service contract will be invoiced to the customer. Possibility of fixed prices, specific discounts for labor and/or items can be defined for the contract.
- Combination of the two above: It is possible to define in the service contract lines, which lines are free of charge (paid in advance), which lines will be fix prices or with the defined discount conditions. The service contract will be invoiced as a pre-payment in advance or periodically. Additionally, certain service orders created from the service contract will be invoiced to the customer directly.

To implement the functionalities to represent the above business scenarios, several changes were developed.

New - Service Contract - SVC00000119 - Demo of Service Contract Pring 1

HOME ACTIONS NAVIGATE REPORT

View Edit New Document Texts Print... Create Service Invoice Create Service Order Lock Contract Sign Contract Add Service Plan Statistics Contract Gain/Loss Entries Contract Invoicing Expired Contract Lines Contract Details Report OneNote Notes Links Refresh Clear Filter Go to Previous Next

SVC00000119 - Demo of Service Contract Pring 1

X This customer has an overdue balance. Show details

Address 2: Post Code: 24793 City: Oldenhütten Contact Name: Phone No.: Email: henrik.parusel@traser-software.de Machine No.: Starting Date: 18.06.2019 Expiration Date: Status: Responsibility Center: HAMBURG Service Location: Change Status: Open Default Service on Demand: ☐

Lines

Line	Job Card	Service Plan	Find	Filter	Clear Filter	Rated Hours	No. of Times	Used	Service on Demand	Service Period	Starting Date	Next Planned Service Date	Operating Hours	Next Planned Service (Operating Hours)	Response Time (Hours)	Line Cost	Line Value	Line Discount %	Line Amount	Last Service Date
								☐			18.06.2019	18.06.2019		0,00						

The line amount will be summed up to give the total contract value, that is invoiced to the customers. To be able to achieve the first business case of having a prepaid or periodically paid contract, where all service orders are free of charge the new field "Service Orders Free of Charge" was implemented on line level. Additionally, it is possible to define on Header level, that all service contract lines will have the "Service Orders Free of Charge" flag by default. If a service contract line is flagged as "Service Orders Free of Charge" all service orders created will be 100% discounted.

New - Service Contract - SVC00000119 - Demo of Service Contract Pring 1

HOME ACTIONS NAVIGATE REPORT

View New Edit Print... Lock Contract Add Service Plan Contract Gain/Loss Entries Contract Invoicing Expired Contract Lines OneNote Notes Links Refresh Clear Filter Go to Previous Next

SVC00000119 - Demo of Service Contract Pring 1

This customer has an overdue balance. Show details

Address 2: Post Code: 24793 City: Oldenhütten Contact Name: Phone No.: Email: henrik.parusel@traser-software.de Machine No.: Starting Date: 18.06.2019 Expiration Date: Status: Responsibility Center: HAMBURG Service Location: Change Status: Open Default Service on Demand:

Lines

Line	Date	Next Planned Service Date	Operating Hours	Next Planned Service (Operating Hours)	Response Time (Hours)	Line Cost	Line Value	Line Discount %	Line Amount	Last Service Date	Contract Expiration...	Object Counter	Service Orders Free of Charge	Fixed Job Price
19	18.06.2019			0,00									☐	

Shipping

Service

Service Zone Code: Response Time (Hours): Service Period: Service Order Type: First Service Date: 18.06.2019 Default Service Orders Free of Charge: ☐

The service admin will now also have the possibility to define "Complete Service Period" for the invoicing period. Prepayment works as before.

New - Service Contract - SVC00000119 - Demo of Service Contract Pring 1

HOME ACTIONS NAVIGATE REPORT

View New Edit Print... Lock Contract Add Service Plan Contract Gain/Loss Entries Contract Invoicing Expired Contract Lines OneNote Notes Links Refresh Clear Filter Go to Previous Next

SVC00000119 - Demo of Service Contract Pring 1

This customer has an overdue balance. Show details

Lines

Line	Plan Code	Standard Job Code	Description	Estimated Hours	No. of Times	Used	Service on Demand	Service Period	Starting Date	Next Planned Service Date	Operating Hours	Next Planned Service (Operating Hours)
							☐		18.06.2019	18.06.2019		0,00

Shipping

Service

Service Zone Code: Response Time (Hours): Service Period: Service Order Type: First Service Date: 18.06.2019 Default Service Orders Free of Charge: ☐

Details

Invoicing

Invoice Details

Calculate with Annual Contract Amount: Amount: Allow Unbalanced Amounts: Calc'd Annual Amount: 0,00 Invoice Period: Month Next Invoice Date: Amount per Period: Next Invoice Period: Price Update: None Complete Service Period: Last Invoice Date: Prepaid: Automatic Credit Memo: Combine Invoices: Invoice after Service: No. of Unposted Invoices: 0 No. of Unposted Credit Memos: 0 No. of Posted Invoices: 0 No. of Posted Credit Memos: 0

Customer Statistics

Customer No.: C000000004 Name: Hans Thun GmbH Balance (LCY): 3.303.062,66 Sales: Outstanding Orders (LCY): 9.569.902,66 Shipped Not Invt. (LCY): 361.875,00 Outstanding Invoices (LCY): 81.950,00 Service: Outstanding Serv. Orders (LCY): 148.185,64 Serv Shipped Not Invoiced(LCY): 16.554,95 Outstanding Serv.Invoices(LCY): 35.596,33 Total (LCY): 12.862.215,61 Credit Limit (LCY): 0,00 Overdue Amounts (LCY) as of 18.06.19: 1.456.611,53 Total Sales (LCY): 2.643.058,83 Invoiced Prepayment Amount (LCY): 89.246,63

Customer Details

Actions: Send SMS Customer No.: C000000004 Name: Hans Thun GmbH Address: Lindenstrasse 1 Address 2: Post Code / City: 24793 Oldenhütten Phone No.: Email: henrik.parusel@traser-software.de Fax No.: Credit Information: Credit Limit (LCY): 0,00 Available Credit (LCY): 0,00 Payment Terms Code: 14D(TD) Contact: Signature: Apply Signature

To create a "Pay as you go" contract, the service admin should choose the option "None" as the invoice period. The service admin can then define line values, discount values per service contract line or define a fix price amount for the service contract line.

New - Service Contract - SVC00000119 - Demo of Service Contract Pring 1

HOME ACTIONS NAVIGATE REPORT

View New Edit Print... Lock Contract Add Service Plan Contract Gain/Loss Entries Contract Invoicing Expired Contract Lines OneNote Notes Links Refresh Clear Filter Go to Previous Next

SVC00000119 - Demo of Service Contract Pring 1

This customer has an overdue balance. Show details

General

Contract No.: SVC00000119 Machine Description: Trade No.: 0

Description: Demo of Service Contract Pring 1 Serial No.: 0

Customer No.: C000000004 Contract Group Code: Salesperson Code: 18.06.2019

Contact No.: CT00000020 Document Date: 18.06.2019

Name: Hans Thun GmbH Expiration Date: Status: HAMBURG

Address: Lindenstrasse 1 Responsibility Center: Service Location: Open

Address 2: Post Code: 24793 City: Oldenhütten Change Status: Default Service on Demand: 0

Contact Name: Phone No.: Email: henrik.parusel@traser-software.de Machine No.:

Lines

Line	Job Card	Service Plan	Find	Filter	Clear Filter	Line Value	Line Discount %	Line Amount	Last Service Date	Contract Expiration...	Object Counter	Service Orders Free of Charge	Fixed Job Price	Fixed Job Price Total	Credit Memo Date
1	Hours	Next Planned Service (Operating Hours)	Response Time (Hours)	Line Cost		0,00									

For these kind of service contracts, there will not be an invoice for the contract itself, but instead an invoice per service order with the additional defined pricing options.

The last business case now would be a combination of the above. For this, all the above functionalities apply. It is possible to define a service contract, that is invoiced for the complete service period for a certain amount that includes some service orders free of charge and others with special conditions (e.g. fixed price or certain discounts for the service). The total contract value (price invoiced to the customer) is calculated as the sum of all "Line Amounts".

Additionally, we had to fix or change some standard functionalities that are described in this release or will be described in later releases. Additional enhancements are planned to take care of the printed invoices and the UI and UX of the service contract functionality.

4.7 814 Improvements for Fixed Price Service

To help with fixed price scenarios for service orders, some minor changes were developed. The job view of a service order was enhanced with two new columns:

- Total Amount (Parts)
- Total Amount (Labor)

New - Service Order - SVO0000578 - Hans Thun GmbH - Demo for Fixed Price Service Improvements

HOME ACTIONS NAVIGATE

Customer: Hans Thun GmbH Responsibility Center: HAMBURG
 Customer Details: Contact Name: Release Status: Open
 Service Order Type: SERVICE Service Location:
 Machine No.: M000009133 Print Template Code:
 Machine Description: JOHN DEERE Tractors 7270R
 Serial No.: 31312ASDA1312
 Cash Customer:
 Campaign No.:
 Status: Pending
 Your Reference:
 Warranty: Warranty Ending Date: 09.04.2020
 Est. Warranty Powertrain Ending Date:
 Est. Warranty Comprehensive Ending Date:
 Powergard Deductible Amount:
 Powergard Max. Hours:
 Expected Finishing Date:
 Fix Price / Discount Method: 0,00 (Parts & Labor)

Jobs

Line	Description	Estimated Hours	Current Hours	Amount	Repair Status	Amount Including VAT	No. of File Attachments	Total Amount (Parts)	Total Amount (Labour)
1	Demo for Fixed Price Service Imp...	6,00		2.341,56	UNSCHEIDULE	2.826,99	0	2.071,56	270,00

Job Lines

Indicator	Item Search	Type	No.	Description	Location Code	Bin Code	Variant Code	Quantity	Unit of Measure	Work Type Code	Order Type	Unit Price Excl. VAT	Line Discount %
	Item		10000000005	A-915L84	HAMBURG	WAREHOUSE		2	PCS			777,48	0
	Item		10000000006	A-AE39630	HAMBURG	WAREHOUSE		10	PCS			51,66	0
	Resource	EFE		Erik Feddersen	HAMBURG			3	HOUR	STD LABOR		45,00	0
	Resource	SFI		Sascha Fischer	HAMBURG			3	HOUR	STD LABOR		45,00	0

These fields will calculate the respective total amounts of the job line. We also changed all service reports (Service - Quote TSR, Service - Order TSR, Service - Invoice TSR, Service - Credit Memo TSR) accordingly to give a better print out, when a fixed price service was done.

4.8 781 Recording and administration of engine hours for a rental machine JD-1919

In the rental module the possibility to validate and enter counter readings has been enhanced. Now you have several options to enter the counter. It can be a net value (original) or a total value of counter reading; the system will calculate the correct net or total counter the other way around.

4.9 733 Date Filter for Legacy R12 in the TS/non-TS Program Req. Worksheet JD-1921

On a "TS" and non "TS" requisition worksheet there are 3 new columns shown which include the sales history of the related part. These columns contain the combined quantity of all sales within the last 12, 24 or 36 months from the current and the legacy system.

Edit - Req. Worksheet - SFI_REQ - SFI Requisition Worksheet

HOME ACTIONS NAVIGATE REPORT

Delete Inventory Order Calculate Plan... Collect Requisition Lines Get Drop Shipments... Get Special Orders... Reorder Point and Max. Inv. by Sales Qty. Release all Lines for Collective Purchase Order Reserve Carry Out Action Message... Order Tracking Item Tracking Lines Inventory Availability Inventory - Availability Plan Inventory Purchase Orders Refresh Find

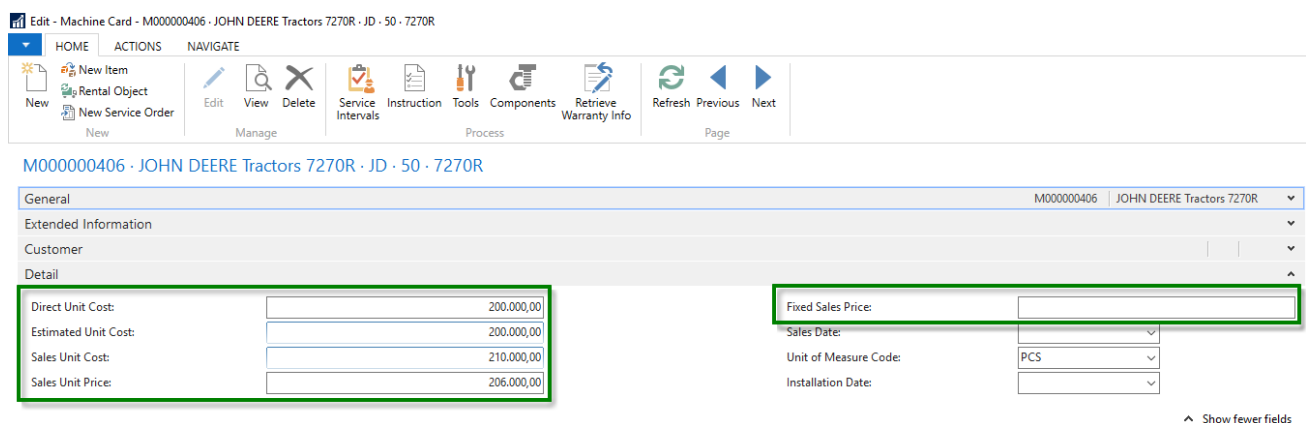
Name: SFI_REQ

ue	Due Date	Vendor No.	Vendor Item No.	Order Code	Purchase Order Type	Customer Name	Replenishm... System	Rolling Twelve (last year)	Rolling Twelve (2 years)	Rolling Twelve (3 years)	Lost Sales Orders	Lost Service Orders	Available Inventory
	15.05.2019	V000000001	T19044				Purchase	220,00	230,00	233,00	35	0	14.464,00

In this example the total sale of a T19044 oil filter within the last 12 months is 220 pieces. This number is based on the sales from the legacy system (data comes from data migration) and the sales from NAV.

4.10 723 Improvements to machine price management JD-1927

The aim of this enhancement is to provide dealers with better visibility of pricing structures for their machines. For this purpose the machine card was amended with some new fields and the calculation of some already existing fields was changed.



For new machines:

- **Direct Unit Cost:** Actual cost of the machine, without the consideration of incentives. This is the DealerNetPrice (DNP)
- **Estimated Unit Cost:** This will be the Direct Unit Cost, minus the estimated incentives, that were initially selected on the PO
- **Sales Unit Cost (Actual):** (aka. Acquisition Cost). Direct Unit Cost of the machine, with all associated costs and incentives applied (transport, IBS, misc. cost)
- **Sales Unit Price:** Is a calculated value that is the Estimated Unit Cost plus the pricing policy defined. This pricing policy is taken from the mark-up setup. If nothing is defined there the "Default Gross Profit %" is taken from TRASER Setup
- **Fixed Sales Price:** This is manually entered on the machine record. The value will be transferred into any offer, if this machine is selected. Should a user, that is not set up as Sales Manager or Sales Admin, try to add additional discounts etc. in the offer, an approval process is triggered.

For used machines:

- **Direct Unit Cost:** price given to the customer minus the over-allowance in the trade-in (Cost Amount Actual).
- **Estimated Unit Cost:** Direct Unit Cost minus any warranty provision or purchase discount and plus any workshop expenses etc.
- **Sales Unit Cost:** Direct Unit Cost + misc. cost from the Used Equipment Acquisition Calculation, but without any workshop costs

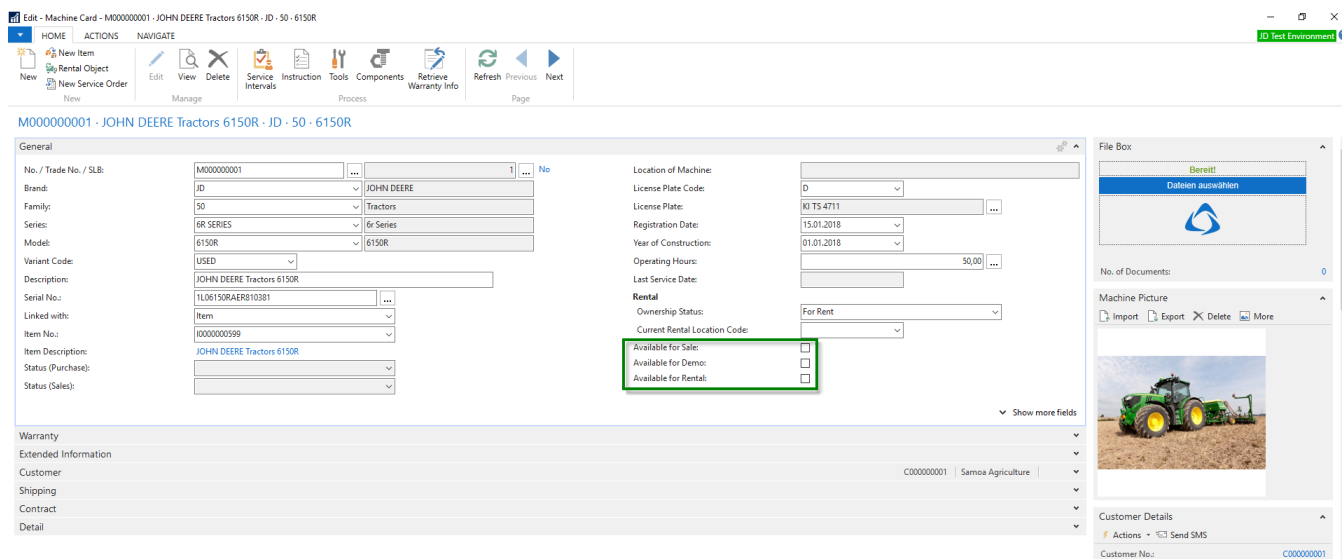
- **Sales Unit Price:** Expected selling price that is set in the determination of the Used Equipment Acquisition Cost.

When the used equipment is sold the Direct Unit Cost will be transferred to the field Dealer Net Price of the base machine line of the configuration in an offer. The offer price here will be the Sales Unit Price from the machine card.

4.11 614 We need to flag machines that are available for sales and machines that are not available for sales

To keep track of what kind of machines are in stock at the dealership, three new checkboxes on the machine card were added:

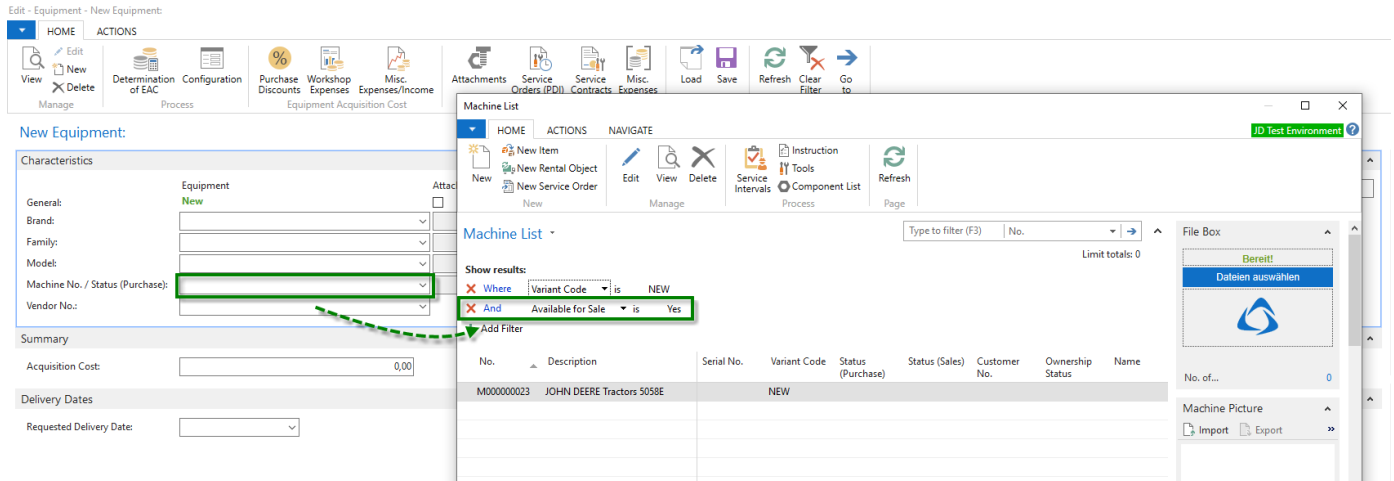
- "Available for Sale"
- "Available for Demo"
- "Available for Rental"



The screenshot displays the 'Edit - Machine Card' interface for a John Deere 6150R tractor. The interface is divided into several sections: General, Location of Machine, Rental, and Warranty. The 'General' section contains fields for No./Trade No./SLB, Brand, Family, Series, Model, Variant Code, Description, Serial No., Linked with, Item No., Item Description, Status (Purchase), and Status (Sales). The 'Location of Machine' section includes fields for License Plate Code, License Plate, Registration Date, Year of Construction, Operating Hours, and Last Service Date. The 'Rental' section includes fields for Ownership Status, Current Rental Location Code, and three checkboxes: 'Available for Sale', 'Available for Demo', and 'Available for Rental'. The 'Warranty' section includes fields for Extended Information, Customer, Shipping, Contract, and Detail. The 'Available for Sale', 'Available for Demo', and 'Available for Rental' checkboxes are highlighted in a green box.

These fields can be used to more clearly define the status of a machine. It is possible to filter on these criteria in the machine list. Regarding the checkbox "Available for Sales" there is additional functionality in the background. It is checked by default if a machine is created on release of a purchase order. It is not checked automatically, if the machine is created as a result of a sales order.

Additionally, we prefiltered all relevant lists, lookups, dropdown fields in the sales process, where the user can select a machine. These will only show machines with the flag "Available for Sales". Example can be seen in the following screenshot.

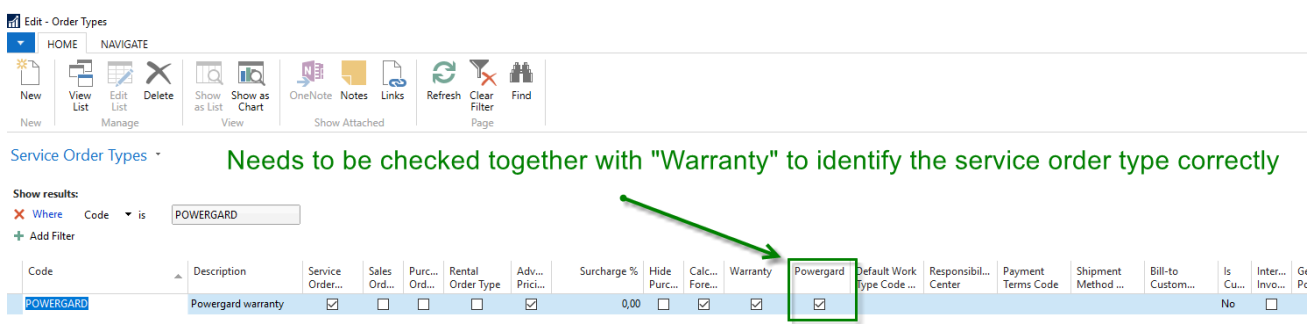


Also, if a machine is shipped to the customer, the system will automatically empty the field "Available for Sales".

4.12 811 Complete PowerGuard readiness

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 "PowerGuard" and if a deductible amount is available for the machine serviced. If so, the user is prompted to decide if he wants 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 "PowerGuard" that will identify the 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 can be seen below:

Edit - Resource Card - DAR - Deductible Amount Resource

HOME ACTIONS NAVIGATE REPORT

View Edit New Delete Statistics Apply Template... Costs Ledger Entries Resource Statistics Resource Usage Resource - Cost Breakdown Send Gift Card Entries Pre System History Change Log Entries OneNote Notes Links Refresh Clear Filter Go to Previous Next

DAR - Deductible Amount Resource

General

No.: Last Date Modified:

Name: Use Time Sheet: ☐

Name 2:

Type: Time Sheet Owner User ID:

Base Unit of Measure: Time Sheet Approver User ID:

Search Name: Is Foreman Surcharge: ☐

Resource Group No.:

Longitude:

Latitude:

Blocked: ☐

Sent to Dime: ☐

Privacy Blocked: ☐

Third Party: ☐

Deductible Amount: ☒

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

Edit - John Deere Setup

HOME ACTIONS

View Edit New Delete Create Setup Data... Get Profile Customer Data 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

Main Dealer No.: Microsoft Dynamics NAV Version No.:

Brand Code: Download Poll Result File:

Default Order Type MD: Upload Poll Result File:

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

Warranty Interface Active: ☒

Warranty Webservice URL:

Warranty Vendor:

Warranty Default Resource:

Warranty Portal URL:

Default Material Code:

Deductible Amount Resource No.:

Job Queue Autom. Claim Update:

Warranty Job Queue User Active:

Warranty Job Queue User:

No.	Name	Type	Base Unit of Meas...
DAR	Deductible Amount Resource	Person	HOUR
DEFAULT	Default Resource	Person	HOUR
DWR	Default Warranty Resource	Person	HOUR
EFE	Erik Fedders	Person	HOUR
HPA	Hennrik Parsattel	Person	HOUR
JKR	Johannes Knitzfeldt	Person	HOUR
KEA	Kevin Kerschack	Person	HOUR

New Advanced Set as default filter column

OK

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

New - Service Order - SVO0000040 - Samoa Agriculture - Powergard Process Improvement

HOME ACTIONS NAVIGATE

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

SVO0000040 - Samoa Agriculture - Powergard Process Improvement

General

No.: SVO0000040
Description: Powergard Process Improvement
Customer: Samoa Agriculture

Customer Details
Contact Name:

Service Order Type: POWERGARD
Machine No.: M000000042
Machine Description: JOHN DEERE Tractors 7250R
Serial No.: JDSN1601201901
Cash Customer:
Campaign No.:
Status: Pending
Your Reference:

External Document No.:
Person in Charge Code:
Responsibility Center: KIEL
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: 250,00
Powergard Max. Hours:
Expected Finishing Date:
Fix Price / Discount Method: 0,00 Parts & Labor

Show more fields

Jobs

Line Functions Print Post Picking List Machine Card Components Add Components Job Details Add File Attachments Find Filter Clear Filter

Standard Job Code	Description	Estimated Hours	Current Hours	Invoiced Hours	Repair Status Code	Amount	Amount Including VAT	No. of File Attachments	No. of Linked Service Documents
Powergard Process Improvement		1,00			UNSCHEDULE	1,097,00	1,371,25	0	1

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... Avail...	Reman is available	Location Code	Bin Code	Unit of Measur...	Work Type Code	Quantity	Unit Price Excl. VAT	Line Discount %
	Item		I000000002	A-1310L100	V-Belt			KIEL	1-01-02	PCS		1	1,287,00	0
	Resource	SFI			Sascha Fischer			KIEL		STD LABOR		1	60,00	0
	Resource	DAR			Deductible Amount Resource			KIEL		STD LABOR		1	-250,00	0

A new job 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 of the "No. of Linked Service Documents" in the jobs. There will always only be one service invoice per service order containing a PowerGard deductible amount, no matter how many warranty claims are associated with the service order.

New - Service Order - SVO0000581 - Hans Thun GmbH - Demo Powergard Deductible

HOME ACTIONS NAVIGATE

Machine Community Approvals Service Quotes Shipments Invoices Warehouse Linked Documents Order Details Foreign Trade Details Service Ledger Entries Archived Quotes History

SVO0000581 - Hans Thun GmbH - Demo Powergard Deductible

Notifications: 2 This customer has an overdue balance. | This customer has an overdue balance.

General

No.: SVO0000581
Description: Demo Powergard Deductible
Customer: Hans Thun GmbH

Customer Details
Contact Name:

Service Order Type: POWERGARD
Machine No.: M000000046
Machine Description: JOHN DEERE Tractors 2104
Serial No.: JDSN105201902
Cash Customer:
Campaign No.:
Status: Pending
Your Reference:

External Document No.:
Person in Charge Code:
Responsibility Center: HAMBURG
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: 300,00
Powergard Max. Hours:
Expected Finishing Date:
Fix Price / Discount Method: 0,00 Parts & Labor

Show more fields

Jobs

Line Functions Print Post Picking List Machine Card Components Add File Attachments Find Filter Clear Filter

Standard Job Code	Description	Estimated Hours	Current Hours	Invoiced Hours	Repair Status Code	Amount	Amount Including VAT	No. of File Attachments	Total Amount (Parts)	Total Amount (Labor)
Demo Powergard Deductible		5,00			UNSCHEDULE	484,80	606,00	0	259,80	225,00
Deductible Amount Resource						-300,00	-375,00	0	0,00	-300,00

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 Import Parts/Advisor File

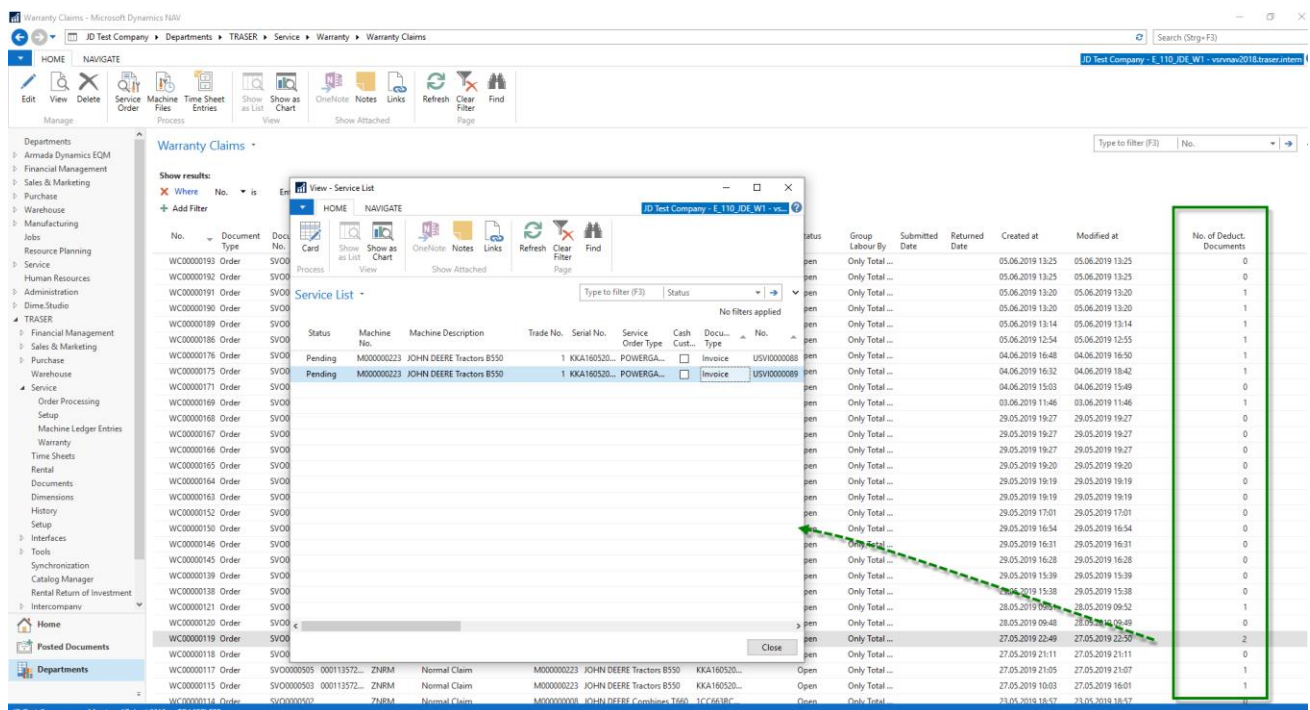
Indicator	Item Search	Type	No.	Vendor Item No.	Description	Location Code	Bin Code	Variant Code	Quantity	Unit of Measur...	Work Type Code	Order Type	Unit Price Excl. VAT	Line Discount %
	Item		I000000008	AA22099	Ball Bearing	HAMBURG	WAREHOUSE		15	PCS			17,32	0
	Resource	EFE			Erik Fedders	HAMBURG			5	HOUR	STD LABOR		45,00	0

The unposted (or respectively the posted one) service invoice can be found via the action "Linked Documents" in the "Navigate" section of the ribbon. The responsible person at the dealer can decide at what time he wants to invoice the deductible to the customer. It is both possible to invoice the amount before the dealer receives the warranty credit memo or after he receives it.

When the warranty credit memos are imported by the system (XML Port "Import JD Warranty Claims (5446211)" used by job queue) the system will now check for several different cases:

- If the warranty credit memo contains information regarding the deductible amount, the system will add or amend the service line for the "Deductible Amount Resource"
- The system will also check if there is a linked service invoice (posted or unposted). If the linked service invoice was not posted yet, it will be corrected to the amount from the warranty credit memo imported.
- If the service invoice was already posted the system will create either a new service invoice or a service credit memo to match the amount from the warranty credit memo.
- Dealers can then decide if they want to invoice or credit the difference to the customer or not.

The list of "Warranty Claims" was amended with the new field "No. of Deduct. Documents". Clicking on the corresponding number, will either open the document directly or a list of documents if multiple related documents are available.

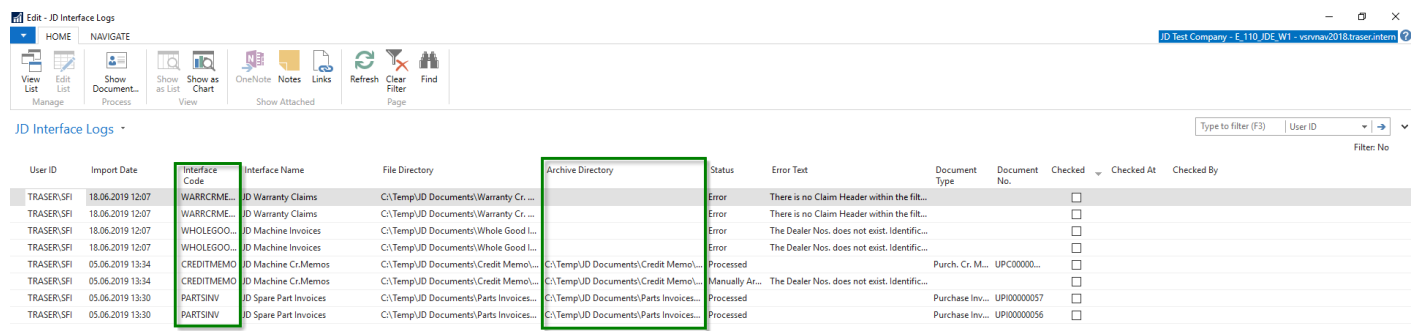


No.	Document No.	Doc. Type	Status	Machine No.	Machine Description	Trade No.	Serial No.	Service Order Type	Cash Cust.	Docu. Type	No.	No. of Deduct. Documents
WC00000193	Order	SVOD	pen									0
WC00000192	Order	SVOD	pen									0
WC00000191	Order	SVOD	pen									1
WC00000190	Order	SVOD	pen									1
WC00000189	Order	SVOD	pen									1
WC00000188	Order	SVOD	pen									1
WC00000176	Order	SVOD	pen									1
WC00000175	Order	SVOD	pen									1
WC00000171	Order	SVOD	pen									0
WC00000169	Order	SVOD	pen									1
WC00000168	Order	SVOD	pen									0
WC00000167	Order	SVOD	pen									0
WC00000166	Order	SVOD	pen									0
WC00000165	Order	SVOD	pen									0
WC00000164	Order	SVOD	pen									0
WC00000163	Order	SVOD	pen									0
WC00000152	Order	SVOD	pen									0
WC00000150	Order	SVOD	pen									0
WC00000148	Order	SVOD	pen									0
WC00000145	Order	SVOD	pen									0
WC00000139	Order	SVOD	pen									0
WC00000138	Order	SVOD	pen									0
WC00000121	Order	SVOD	pen									1
WC00000120	Order	SVOD	pen									0
WC00000119	Order	SVOD	pen									2
WC00000118	Order	SVOD	pen									0
WC00000117	Order	SVOD	pen									1
WC00000115	Order	SVOD	pen									1
WC00000114	Order	SVOD	pen									1

4.13 740 Improve the handling of interface issues in "JD Interface Error Log"

In order to improve the handling of any interface issues, we aimed to improve the information contained in the "JD Interface Log" (Previously "JD Interface Error Log"). The "JD Interface Log" was extended with the following information:

- "Interface Code" was added in addition to the "Interface Name"
- "Archive File Name" will show the directory, where the processed file is stored



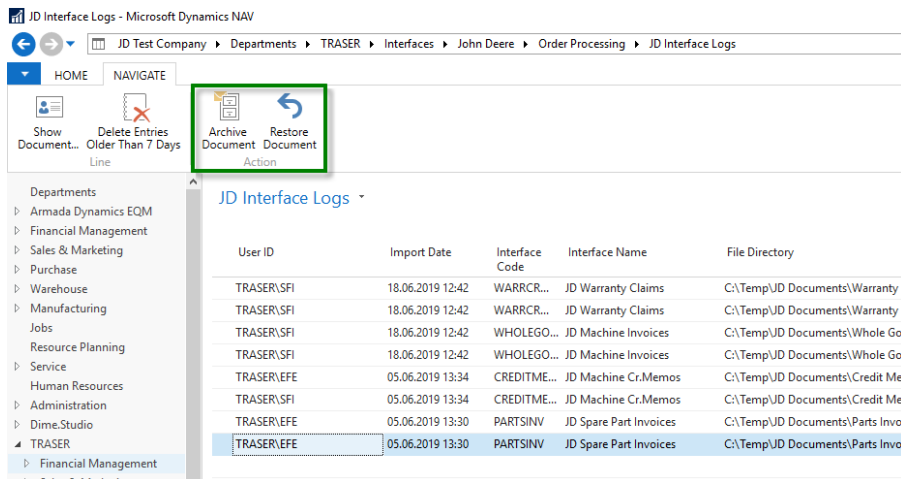
User ID	Import Date	Interface Code	Interface Name	File Directory	Archive Directory	Status	Error Text	Document Type	Document No.	Checked	Checked At	Checked By
TRASER.SFI	18.06.2019 12:07	WARRCRME...	JD Warranty Claims	C:\Temp\JD Documents\Warranty Cr...		Error	There is no Claim Header within the fil...			☐		
TRASER.SFI	18.06.2019 12:07	WARRCRME...	JD Warranty Claims	C:\Temp\JD Documents\Warranty Cr...		Error	There is no Claim Header within the fil...			☐		
TRASER.SFI	18.06.2019 12:07	WHOLEGOO...	JD Machine Invoices	C:\Temp\JD Documents\Whole Good L...		Error	The Dealer Nos. does not exist. Identifi...			☐		
TRASER.SFI	18.06.2019 12:07	WHOLEGOO...	JD Machine Invoices	C:\Temp\JD Documents\Whole Good L...		Error	The Dealer Nos. does not exist. Identifi...			☐		
TRASER.SFI	05.06.2019 13:34	CREDITMEMO	JD Machine Cr.Memos	C:\Temp\JD Documents\Credit Memo...	C:\Temp\JD Documents\Credit Memo...	Processed		Purch. Cr. M...	UPC00000...	☐		
TRASER.SFI	05.06.2019 13:34	CREDITMEMO	JD Machine Cr.Memos	C:\Temp\JD Documents\Credit Memo...	C:\Temp\JD Documents\Credit Memo...	Manually Ar...	The Dealer Nos. does not exist. Identifi...			☐		
TRASER.SFI	05.06.2019 13:30	PARTSINV	JD Spare Part Invoices	C:\Temp\JD Documents\Parts Invoices...	C:\Temp\JD Documents\Parts Invoices...	Processed		Purchase Inv...	UPI000000057	☐		
TRASER.SFI	05.06.2019 13:30	PARTSINV	JD Spare Part Invoices	C:\Temp\JD Documents\Parts Invoices...	C:\Temp\JD Documents\Parts Invoices...	Processed		Purchase Inv...	UPI000000056	☐		

The second change was the way how the log is being updated. Prior to the changes each run of an interface would lead to the creation of a new entry in the "JD Interface Error Log". With this change existing entries will simply be updated. Each run will lead to an update of already existing entries in the "JD Interface Log". To identify the correct entry to update, the system will use a combination of "Interface Code" and "File Name" as an identifier. Additionally, the system will fill the field "Archive File Name", when a file was processed successfully.

Third part of this enhancement are two new actions in the "JD Interface Log".

"Archive Document" will manually shift the file into the archive folder of the corresponding interface. The entry in the "JD Interface Log" will be updated with the corresponding "Archive File Name" and with the new status "Manually Archived".

"Restore Document" will move the file in question back to the original folder, to be processed again by the interface. This action will only work for entries in the "JD Interface Log" with the status "Manually Archived".



4.14 874 Add column "Inventory Class" on Item List

Made the field "Inventory Class" available in the nonstock item list.

4.15 467 Enhancing PM Manage export

With this enhancement, several improvements were done to the export routine of the PM Manage report data.

- Changed how the "Return Values for Shop" are calculated. Will not reflect internal postings anymore after change.
- The calculation of "Average Inventory Values" was changed, in detail, which months are taken. For the PM Manage interface the report should give results for the current month and the previous 11 months.
- With the change above also enhanced the calculation of the "Average Inventory Values" in a way that also time frames, smaller than 12 months will lead to correct calculations (this is needed for the first year directly after introducing the new system due to lack of data)
- Removed function "CalcAvaeragMonthlyInvt2" because it was not used
- Corrected a mistake in the calculation of the function "CalcCurrInvtValue". Was caused by the usage of local variables.
- Redesigned the function "CalcCurrInvtValue" & "CalcCurrInvtValueNoSales" since most of the code is not needed anymore. A decision was made by John Deere to only use "InvCostPostedToGL" in the above functions
- Improved filter values and filtering to make the execution of the report faster

4.16 661 Small fixes identified during Workshop TRASER meeting

Several small changes were made to the software:

- Removed the "Picture" fact box from the vendor card

- "Commission Rate" field is now hidden in customer card
- "Machine No." field in trade-in card was moved to the top to be first information to enter (makes sense from a usability standpoint)
- On the equipment details of an offer the field "Expected Delivery Date" was renamed to "Expected Receipt Date"

5 Improvements

5.1 TRASER Posting Group fields had to be changed from "Code 10" to "Code 20"

Had to change field length of posting groups to Code20 to be aligned with Nav 2018 release.

5.2 Change caption on printout for service reports

Changed captions for service reports for better understanding.

5.3 Field "Serial No." on Fixed Asset Card should be editable

The field "Serial No." on the fixed asset card is now editable.

5.4 E-Post-printing needs to be adjusted also for rental documents

E-Post printing is now also available properly for all rental documents.

5.5 Rename Role Center for JD Kernel

We renamed the role centers in the John Deere Kernel to reflect business areas instead of actual business roles. So, for example the role center with the title "Service Manager" will from now on be called simply "Service". This provides a way bigger reusability at dealerships for different roles in the company.

5.6 Add the availability to connect the counter in rental module to a unique "counter reading" and improve sync process JD-1804

We have now added a feature to set up a counter type per object group in rental module. I.e. operating hours, kilometer etc. By changing that field, it will predefine the values of object types and objects which can also have a unique counter type to ensure the correct counter to determine values for invoicing in rental contracts.

Depending on the counter type the counter will be usable as a kilometer counter or an operating hours counter to invoice the customer depending on these values.

5.7 Improve Shopping Basket Export for multiple suppliers

With this improvement the system can export sales/service or purchase lines to a predefined format (txt, csv) which can be defined per supplier in the "Shopping Basket Setup" page.

With this function, the dealer can export all necessary part lines from a purchase order to save it in a format the supplier needs. After that export and if the supplier supports to import files for ordering parts, the dealer can upload this file in a correct format to create a purchase order directly on the supplier website.

 View - Shopping Basket Setup

HOME

New Edit View Delete Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Shopping Basket Setup ▾

Show results:

+ Add Filter

Manufact... Code	Description	Vendor No.	Active	Show In Sales	Show In Purchase	Show In Service
KRAMP	Kramp	V000000004	☒	☒	☒	☒

KRAMP

General			
Manufacturer Code:	KRAMP	Show In Purchase:	☒
Description:	Kramp	Show In Service:	☒
Vendor No.:	V000000004	Importieren	
Separator:	Semicolon	Skip First Line:	☒
Active:	☒	Export	
Show In Sales:	☒	Include Header:	☐
		Export As:	TXT

Import/Export Sales			
Find	Filter	Clear Filter	
Field	Imp...	Export	
Vendor Item No.	☒	☐	
Quantity	☒	☐	
Description	☒	☐	
Unit of Measure	☒	☐	

Import/Export Purchase			
Find	Filter	Clear Filter	
Field	Imp...	Export	
Vendor Item No.	☒	☒	
Quantity	☒	☒	
Description	☒	☒	
Unit of Measure	☒	☒	

Import/Export Service			
Find	Filter	Clear Filter	
Field	Imp...	Export	
Vendor Item No.	☒	☐	
Quantity	☒	☐	
Description	☒	☐	

6 Tasks

6.1 TRASER

6.2 Partner/Customer

Regarding 4.5:

Create 2 new job queues:

1. Based on report 5446191 - Update JD Link Machines - to request JDLink data from John Deere and update all machine records which are included in a service or rental contract. This job queue can be executed once a day at night.
2. Based on codeunit 5446190 - JD Link Management - this codeunit will receive JDLink data from John Deere and will link and update all machines which has registered telematic hardware on the machine. This job queue can be executed once a week at night, because it takes time to receive all the data.