

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 Service Contract Pricing & Payment terms

Fixed an issue, where the machine fact box in the contact card was showing results although the contact in questions was not related to any customer.

3.2 Operator complaint lines will create two times for posted service invoice

Fixed a bug where the posted service invoice would print operator complaint lines twice.

3.3 Issue with "Bin Code" in service line by posting a warehouse receipt with relation to service line (Zendesk #14987)

There was an issue with posted warehouse receipt lines with relation to service lines. The "bin code" from warehouse receipt was not set correctly in service line, so that there was an incorrect sync between the item being in stock and the bin code to take the item from.

3.4 On printout for warehouse receipt picklist for parts, the configuration headline should not be shown

Fixed a printout issue for the unposted warehouse receipt document. It was printing configuration headlines although no machine or configuration was selected in the warehouse receipt.

3.5 Issue with sorting of functions to execute the "GetSalesOrder" report to use "Create Req. WS" in Service (Zendesk #14859)

The two functions for initializing and clearing the dimension source were wrongly sorted. Fixing this leads to a correct dimension set ID for req. WS lines related to service lines.

3.6 Issue with creating "Transfer Header" and usage of location dimension from TRASER Setup which is not initialized correctly (Zendesk #14859)

Beginning with NAV 2018 Microsoft removed the field "No." from almost every document. This led to a change of validation routine, so that the first field entered in a document is executed (validation-trigger)

before "Insert-Trigger". A change was needed to have all functions being executed in correct order for dimension set.

3.7 Issue with availability page in JD Kernel with multiple sales/service lines

If you entered two item lines with a lack of availability, there were two notifications. Clicking the first notification the buffer for second notification was deleted. This was fixed.

3.8 Issue with code length of posting groups

Fixed some more code passages where there was still code10 being used for posting groups.

3.9 Prevent to change purchase prices/cost when using a fix price machine in an opportunity

Related to the developments of the ticket "723 – Improvements to Machine Price Management" from sprint JD1905 we fixed, that the user can edit the purchase price of a machine in an opportunity, if the machine used in the opportunity had a fix price.

3.10 JD-2065 Improve Technician Tablet view

Worked on some small issues in the time tracking interface of the tablet view for technicians.

3.11 Issue with import routine for Standard Jobs

Changed the import routine for standard jobs, so it is usable for any language.

3.12 Handling of field "Item Disc. Group" on item card is not correct

In "Item Card" there is several times "Item Disc. Group" used in different scenarios.

Still there is a "Grid Layout" for Brand Item Disc. information, but due to redundancy the field "Item Disc. Group" was removed from that grid.

That lead to a not correct layout of item card.

3.13 EQM (rental module) removed type "Cost" from service lines

The caption for option "Cost" in field "Type" from the service lines was removed by the third-party company EQM. TRASER changed it back to NAV standard, then it is possible to use "Costs" as a type again.

3.14 Issue with "Standard Jobs" related to "Recycling Fees" & automatically assigned service lines from standard jobs

While using standard job codes in service module, the system is accidentally overwriting the lines by parsing them into service lines.

3.15 Issue with empty field for VAT Prod Posting Group in fee table

Fixed an issue for the new feature of additional fees related to items. If the VAT product posting group was left empty, this would lead to issues later, because the code was used as if it was defined as ". This is fixed.

3.16 Template Equipment Line are not deleted when Equipment Templ. Header is deleted

Fixed an issue, where deleting an equipment template would only lead to the deletion of the equipment template header and the equipment template lines would remain in the database.

3.17 Issue with doubled description in Rental Invoice & Rental Credit Memo if using reported hours lines

Fixed an issue, where the printout of rental invoices and rental credit memos would print the machine description twice.

3.18 Service Order Type not filtered on Service

In service documents the order type field was not filtered on service order types. This is fixed.

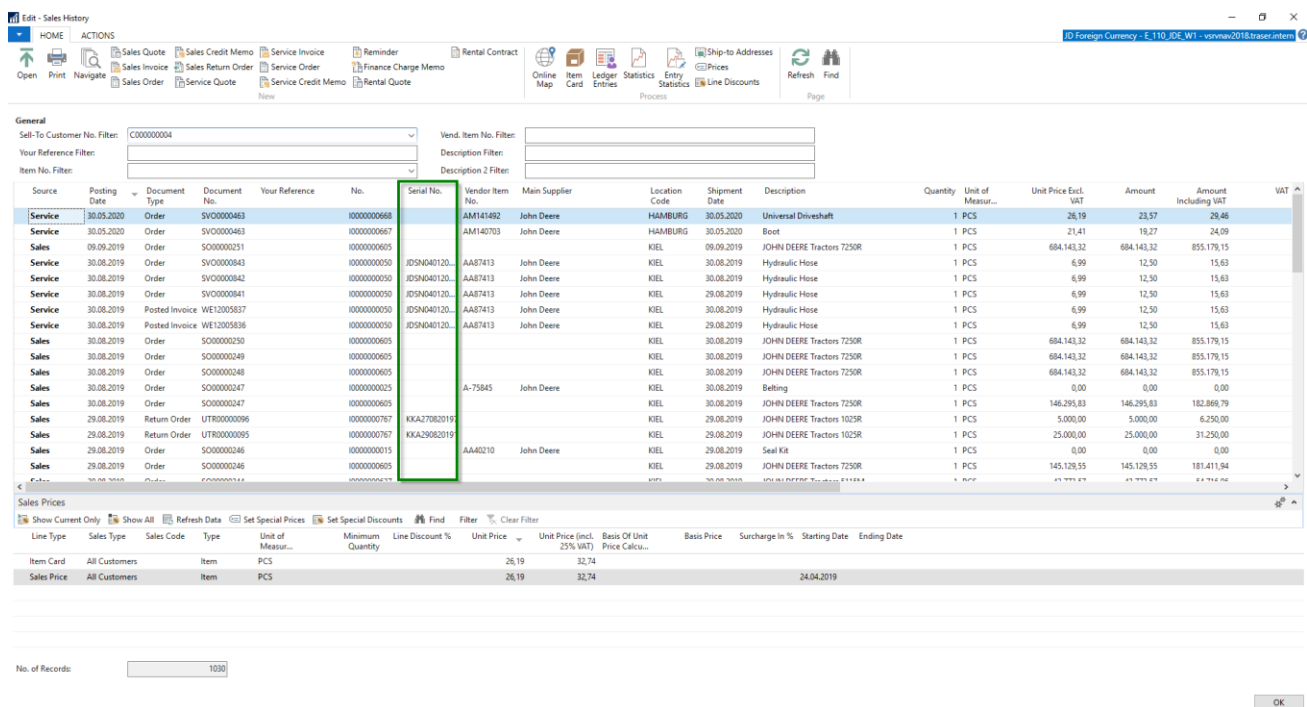
3.19 Run Modal Error when load Online Configuration from John Deere in a Purchase Order

Fixed an issue, where loading a John Deere Online Configuration in a purchase order would result in a "Run Modal Error"

4 New Developments

4.1 648 Visibility of SN next to the machine in customer svc-sale history

The customer sales history was extended with the new column "Serial No." for machines. This can now be used for filtering and so on.



Source	Posting Date	Document Type	Document No.	Your Reference	No.	Serial No.	Vendor Item No.	Main Supplier	Location Code	Shipment Date	Description	Quantity	Unit of Measure	Unit Price Excl. VAT	Amount	Amount Including VAT	VAT
Service	30.05.2020	Order	SVO0000463		10000000668		AM141492	John Deere	HAMBURG	30.05.2020	Universal Driveshaft	1	PCS	26,19	23,57	29,46	
Service	30.05.2020	Order	SVO0000463		10000000667		AM140703	John Deere	HAMBURG	30.05.2020	Boat	1	PCS	21,41	19,27	24,09	
Sales	09.09.2019	Order	SO00000251		10000000605				KIEL	09.09.2019	JOHN DEERE Tractors 7250R	1	PCS	684,143,32	684,143,32	855,178,15	
Service	30.08.2019	Order	SVO00000843		10000000050	J05N040120...	AA87413	John Deere	KIEL	30.08.2019	Hydraulic Hose	1	PCS	6,99	12,50	15,63	
Service	30.08.2019	Order	SVO00000842		10000000050	J05N040120...	AA87413	John Deere	KIEL	30.08.2019	Hydraulic Hose	1	PCS	6,99	12,50	15,63	
Service	30.08.2019	Order	SVO00000841		10000000050	J05N040120...	AA87413	John Deere	KIEL	29.08.2019	Hydraulic Hose	1	PCS	6,99	12,50	15,63	
Service	30.08.2019	Posted Invoice	WE12005837		10000000050	J05N040120...	AA87413	John Deere	KIEL	30.08.2019	Hydraulic Hose	1	PCS	6,99	12,50	15,63	
Service	30.08.2019	Posted Invoice	WE12005836		10000000050	J05N040120...	AA87413	John Deere	KIEL	29.08.2019	Hydraulic Hose	1	PCS	6,99	12,50	15,63	
Sales	30.08.2019	Order	SO00000250		10000000605				KIEL	30.08.2019	JOHN DEERE Tractors 7250R	1	PCS	684,143,32	684,143,32	855,178,15	
Sales	30.08.2019	Order	SO00000249		10000000605				KIEL	30.08.2019	JOHN DEERE Tractors 7250R	1	PCS	684,143,32	684,143,32	855,178,15	
Sales	30.08.2019	Order	SO00000248		10000000605				KIEL	30.08.2019	JOHN DEERE Tractors 7250R	1	PCS	684,143,32	684,143,32	855,178,15	
Sales	30.08.2019	Order	SO00000247		10000000025		A-75845	John Deere	KIEL	30.08.2019	Belting	1	PCS	0,00	0,00	0,00	
Sales	30.08.2019	Order	SO00000247		10000000605				KIEL	30.08.2019	JOHN DEERE Tractors 7250R	1	PCS	146,295,83	146,295,83	182,868,79	
Sales	29.08.2019	Return Order	UTR00000996		10000000767	KKAA27082019			KIEL	29.08.2019	JOHN DEERE Tractors 1025R	1	PCS	5,000,00	5,000,00	6,250,00	
Sales	29.08.2019	Return Order	UTR00000995		10000000767	KKAA29082019			KIEL	29.08.2019	JOHN DEERE Tractors 1025R	1	PCS	25,000,00	25,000,00	31,250,00	
Sales	29.08.2019	Order	SO00000246		10000000015		AA40210	John Deere	KIEL	29.08.2019	Seal Kit	1	PCS	0,00	0,00	0,00	
Sales	29.08.2019	Order	SO00000246		10000000605				KIEL	29.08.2019	JOHN DEERE Tractors 7250R	1	PCS	145,129,55	145,129,55	181,411,94	

4.2 858 Responsibility Centre/ Location Code of the Machine

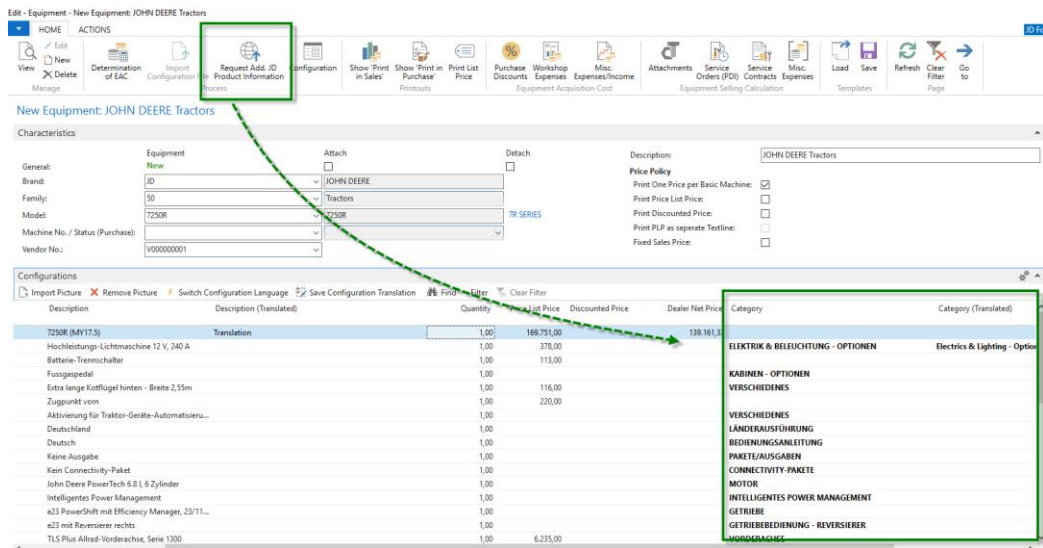
To give users the possibility of filtering in respective lists, the service notification list contains now the responsibility center from the corresponding service contract. Additionally, the service order list was also amended with the responsibility center.

4.3 899 611a - Enhancements to Translation Functionality

This enhancement aims to further develop and amend the functionality of saving translations for configurations imported via GPC or entered manually in an opportunity or coming from a template.

First addition made, is that if a template is used, that includes options with a translation in the BMC option table, this translation is pulled in an offer as well.

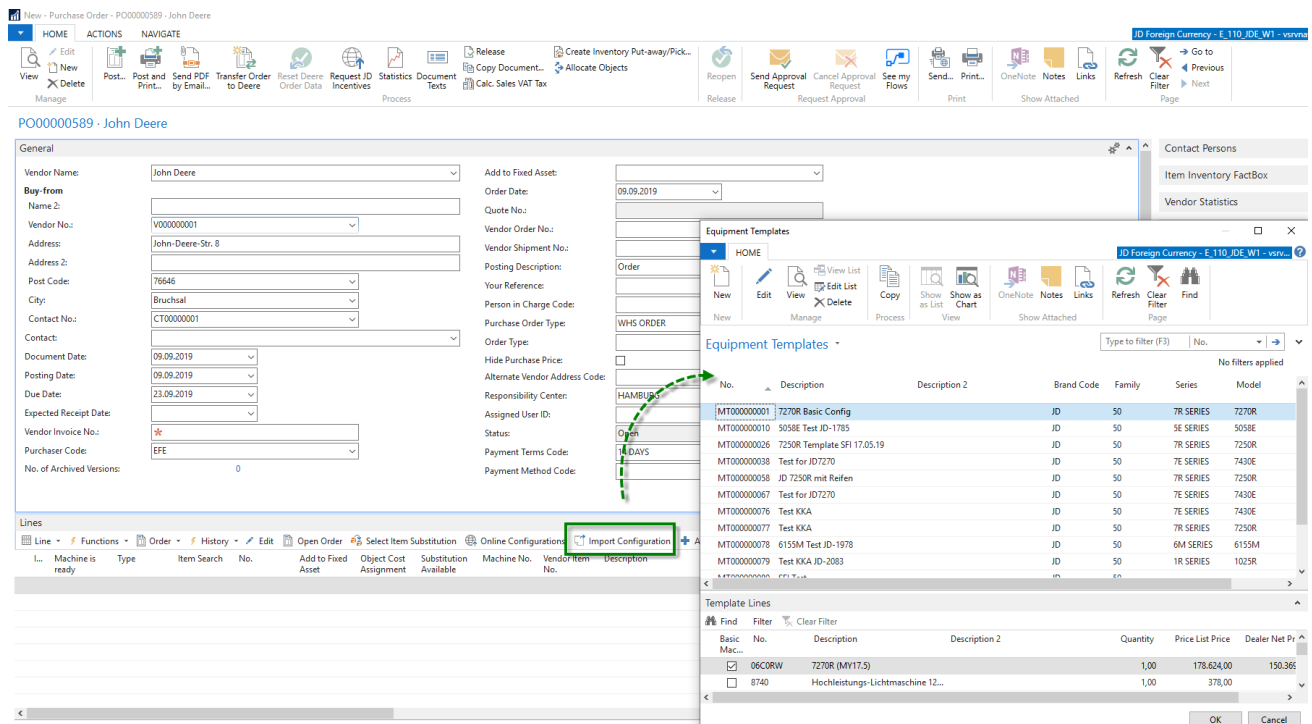
Second addition made with this development is, that it is now not only possible to translate options but also possible to translate option headings:



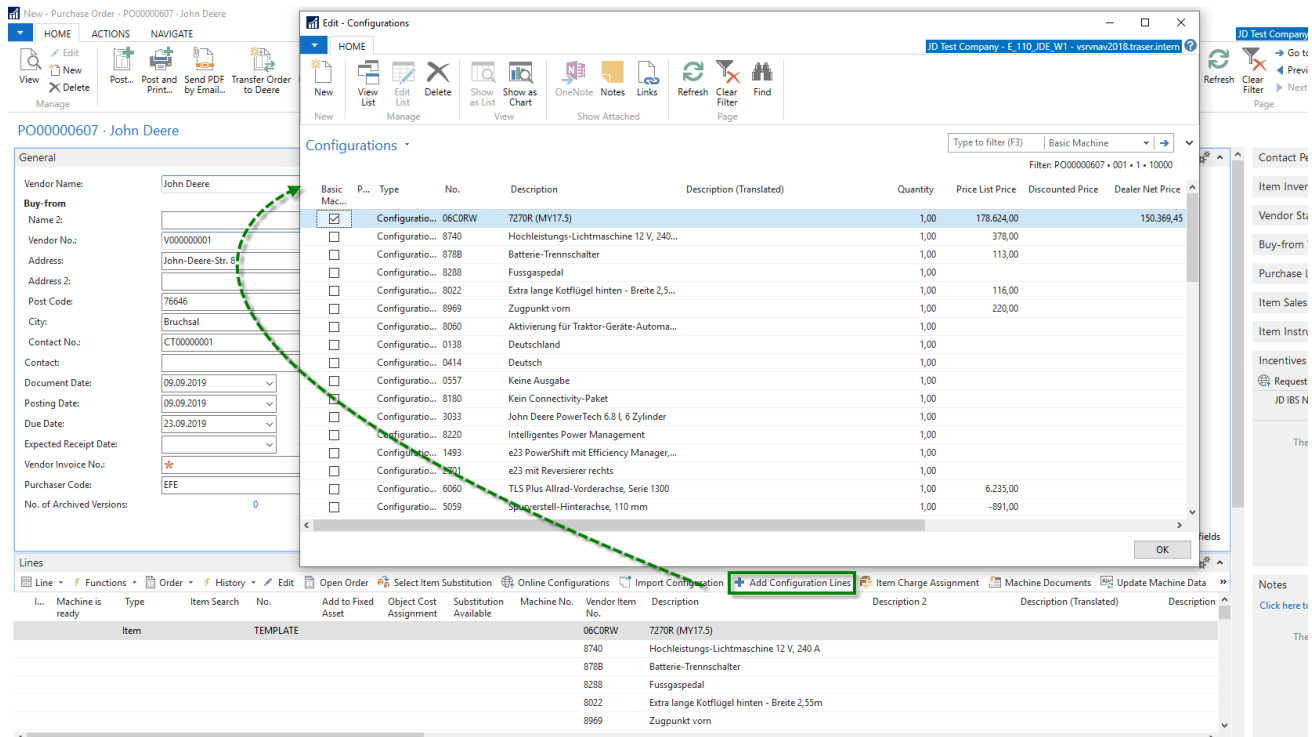
Third addition made in this development is, that the picklist printed from the warehouse receipt of a purchase of a machine will contain the translated lines so that staff will have it in their local language.

4.4 943 Need to be able to import Templates into PO

With this enhancement it is possible to import equipment templates into purchase orders.



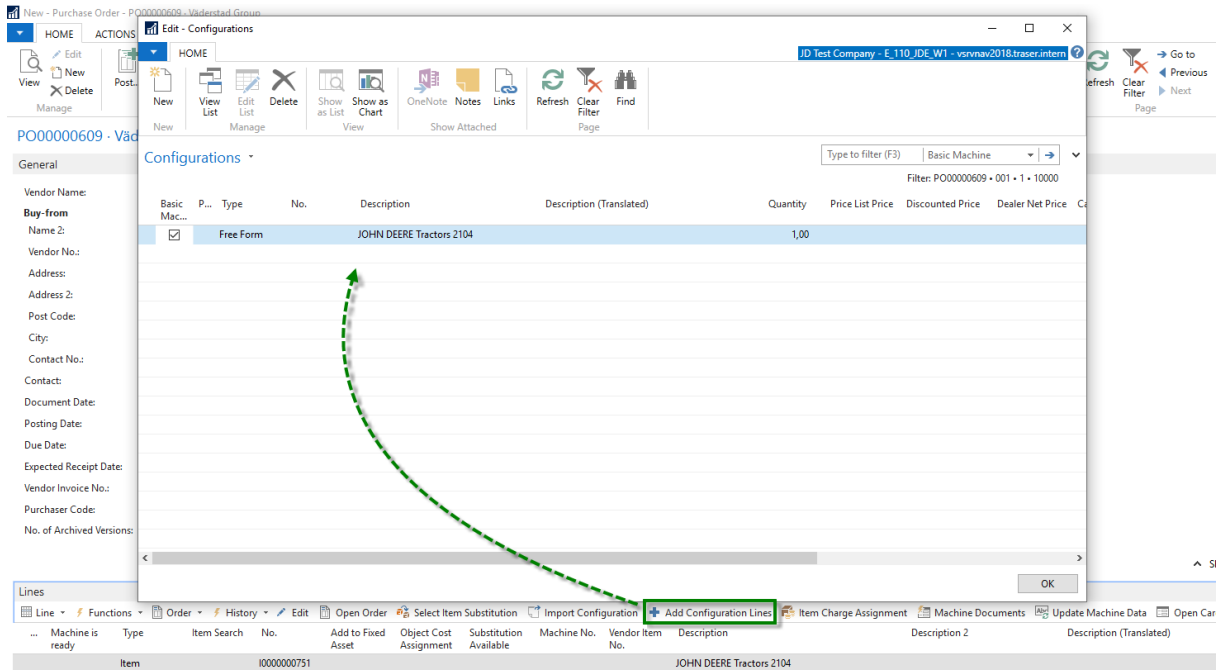
Using the line function "Import Configuration" will open the list of saved equipment templates stored in the system. Importing a template into a purchase order will create a purchase opportunity in the background. To add or change any of the configuration lines the user needs to use "Add Configuration Lines".



The changes made will be saved in the purchase order and in the purchase opportunity in the background. When releasing the purchase order, a machine record is created, and the configuration lines will be stored in the machine components.

4.5 900 728a - Enhancement for storing non-JD configurations on Machine Card

To enable users to store non-John Deere configurations on the machine card (in the components section), it is now possible to use the functionality "Add Configuration Lines" in a purchase order. If dealing with a non-John Deere machine the user needs to create an item line with the respective item first in the purchase order. After doing so it is possible to "Add Configuration Lines". This will create a purchase opportunity in the background and will open a new page with the configuration register from this background purchase opportunity.



Here the user can now enter the desired configuration lines. As soon as the purchase order is released a machine record is created and the configuration lines will be transferred to the components of the freshly created machine.

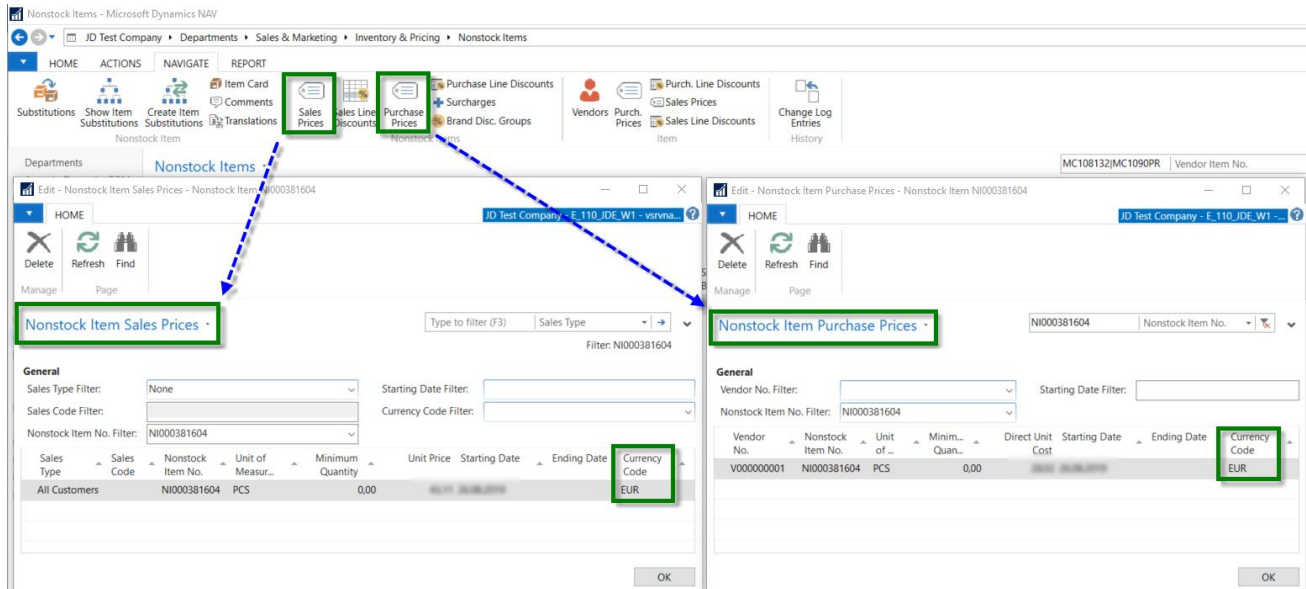
4.6 934 Multi Currency Functionalities

In terms of using NAV with a foreign currency, all the John Deere related interfaces must be handled correctly. Means if the local currency is different to the customer John Deere sends in different cases via the interfaces, the system must work with a currency code.

The following John Deere interfaces are involved:

1. John Deere price file import:

John Deere will send the price file in different currencies depending on the country. If NAV is using a different currency code than the price file, the system will create a new entry in the nonstock item price tables (purchase & sales) during the price update routine (once a year (initial) or once a month (delta)).



The screenshot displays two side-by-side windows in Microsoft Dynamics NAV. The left window is titled 'Edit - Nonstock Item Sales Prices - Nonstock Item NI000381604'. The right window is titled 'Edit - Nonstock Item Purchase Prices - Nonstock Item NI000381604'. Both windows show a table of prices for a specific nonstock item. In the left window, the 'Currency Code' field is highlighted with a green box and contains the value 'EUR'. In the right window, the 'Currency Code' field is also highlighted with a green box and contains the value 'EUR'. Blue dashed arrows point from the 'Sales Prices' and 'Purchase Prices' buttons in the top ribbon to the respective tables.

Note: In this case NAV will **not** create a price on the nonstock item card, just in the related price tables, because the fields on the card are always in local currency. If an item will be created out of the nonstock item, the system will also create just a record in the related item price tables (purchase & sales). The prices on the item card will be empty for the same reason we have on the nonstock item card.

5 Improvements

5.1 Improve R12 Sales History Filter which is based on location code

The filtering for the "Rolling Twelve" columns does not filter any more on location in the standard requisition worksheets and the TS requisition worksheets.

5.2 Only check for "Vendor Shipment No." mandatory, if there is a source document related to purchase

If the field "Vendor Shipment No. mandatory" is checked in the TRASER Setup the system will only check for "Vendor Shipment No." on line level if a purchase order is associated. If the associated document is a sales return order, the check is not applied.

5.3 467/1 - Enhancing PM Manage export

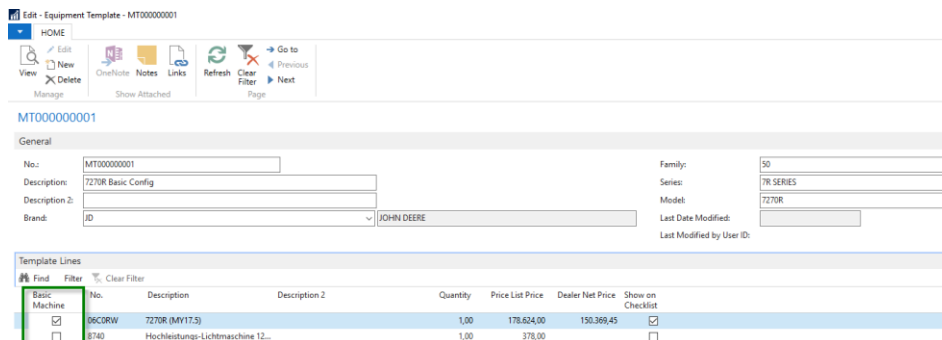
Changed calculations of the PM manage export, so it would be in line with most recent definitions for different KPIs.

5.4 Caption Change in FA wizard functionality

Changed a caption in the Fixed Asset Wizard from "Service Item No." to "Machine No.".

5.5 Make it possible to add a "base machine" line into the equipment template functionality

With this improvement it is now possible to also define a base machine in the equipment templates. So, you can define a total price for the complete machine instead of defining prices just for the lines.



No.	Description	Description 2	Quantity	Price List Price	Dealer Net Price	Show on Checklist
06CORW	7270R (MY17.5)		1,00	178.624,00	150.369,45	☒
8740	Hochleistungs-Lichtmaschine 12...		1,00	370,00		☐

5.6 Improve service document printout related to machine information

If we have several job lines in a service order the printout will not contain basic information on the machine (e.g. construction year, serial no. etc.) multiple times for each job line but instead only on the first job line in the printout.

5.7 Deactivate "Determination of EAC" function for all users which are not allowed to use it (trade-in process with approval workflow)

Changed the functionality of the "Determination of EAC" action in the trade-in card. It is now only useable for users with correct permissions (Sales Admins and Sales Managers).

Edit - Trade-In - Trade-In JOHN DEERE Loaders H360

JD Test Company - E_110_JDE_W1 - vsrvnav20

HOME ACTIONS

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

Manage Process Show Attached

Trade-In JOHN DEERE Loaders H360

General			
Type / No.:	Machine	M000000370	USED
Brand:	JD	JOHN DEERE	
Family:	51	Loaders	
Model:	H360	H360	H300 SERIES
Description:	JOHN DEERE Loaders H360		
Document No.:			
Sales Order Type:			
VAT Prod. Posting Group:	VAT HIGH		
Unit Price:	15.000,00		
Purchase Price:	14.000,00		
Over-Allowance:	1.000,00		

Over-Allowance Calculation

☑ Increase Offer Price ☐ Decrease Mark-Up ↺ Reset Values ↻ Confirm 👤 Find

Entry No.	Description	Offer Price	Max. Discretionar...	On Price	On Mark-Up
1	JOHN DEERE Tractors 7250R	84.000,00	5,00		

File Box

Dateien

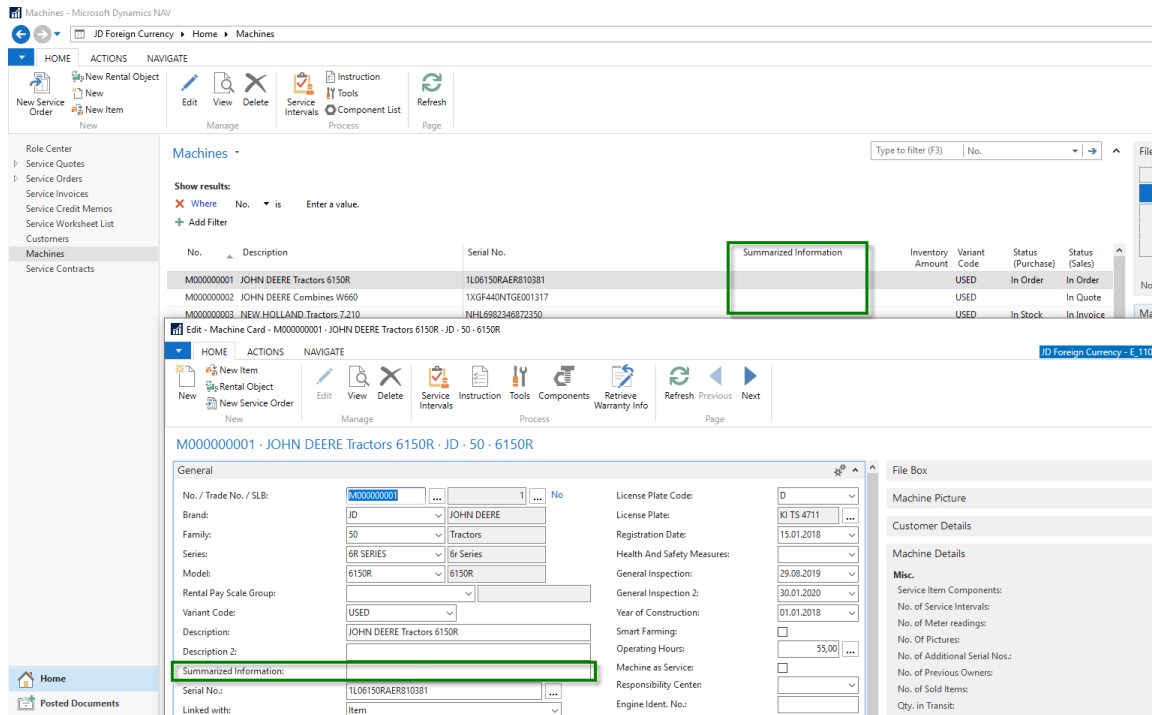
No....

5.8 Possible Improvements to Automatic recycling fees being added to special items

We added menu suite entries for the recycling fee functionality to enable easier setting up of fees. The vendor item no. is now also available in the fee assignment table. Also, we changed how the filtering of the g/l account field and the order type field will affect the usage of fee in the documents. For example if order type is not filled for a fee, the fee is now valid for all order types.

5.9 New field on machine card/list for summarized information about machine configuration

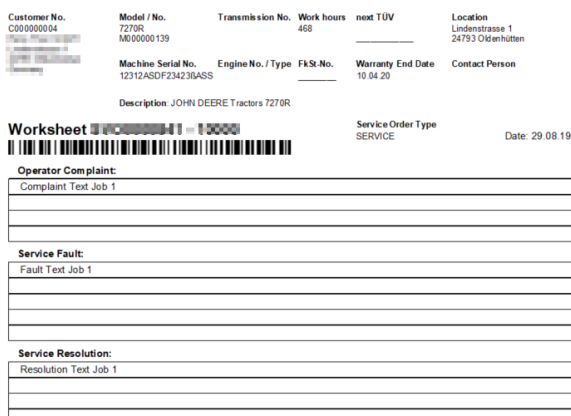
Added a new text field to the machine card and machine list. This field is intended to be filled manually by the user to give a short summary of the configuration of a machine.



The screenshot shows the 'Machines' list in the TRASER Software interface. The list includes columns for No., Description, Serial No., and a new 'Summarized Information' field. Below the list, the 'Machine Card' for 'JOHN DEERE Tractors 6150R' is displayed. The 'Summarized Information' field is highlighted with a green box in both the list and the card view.

5.10 Add "Complaint Text" fact box on service order worksheet

With this enhancement the text from the "Complaint" fact box will be printed in the service order worksheet.



The screenshot shows the 'Worksheet' form for a service order. The 'Operator Complaint' section is highlighted, showing the 'Complaint Text Job 1' field. The form includes various fields for customer information, machine details, and service order information.

5.11 Add and improve information on picking list from service order

Enhanced the printed picking list from the service order with the date the parts are needed. Also fixed an issue, where serial no. and operating hours was not filled.

5.12 Add Operating Hours & General Inspection on Service Order Header

Added Operating Hours and General Inspection information to the service order header and rearranged and regrouped several fields in the service order header.

New - Service Order - SVO0000844 · Hans Thun GmbH · Demo Service Order Header

HOME ACTIONS NAVIGATE

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

SVO0000844 · Hans Thun GmbH · Demo Service Order Header

General

No.: SVO0000844 ...

Description: Demo Service Order Header

Customer: Hans Thun GmbH

Customer Details

Contact Name:

Machine Details

No.: M000000523

Description: JOHN DEERE Tractors 7250R

Serial No.:

Operating Hours: 0,00 ...

General Inspection:

General Inspection 2:

Service Order Type: SERVICE

Cash Customer: ☐

Campaign No.:

Status: Pending

Your Reference:

External Document No.:

Person in Charge Code:

Responsibility Center: HAMBUR

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:

5.13 Change Customer (Sell-to. or Bill-to.) on service order worksheet

Changed the customer that is printed in service order worksheet from sell-to-customer to the bill-to-customer.

6 Tasks

6.1 TRASER

6.2 Partner/Customer

Run codeunit 50021 to delete complaint text duplicates & update Operating Hours on service orders.