

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 Issue related to Model Code length in function GetMarkUpSetUp Code

Had to change code in the function GetMarkUpSetUp in codeunit "Trade Document Mgt.". The variable ModelCode was only Code10 and was changed to Code20 to prevent errors.

3.2 Configurations will not be transfer to machine components after purchasing machine

When only using a purchase order with a previously created machine record, the system was not always correctly transferring configuration lines into the components table for the machine. This was fixed.

3.3 Document Text Type Payment Terms is missing on sales confirmation and rental contract

Fixed an issue, where document texts of type "Payment Terms" (position of the document texts) were not correctly printed in the following reports: Sales Order Confirmation, Rental Contract, Sales Quote, Service Quote and Service Order.

3.4 Automatic recycling fee added to special items in sales invoices

When changing the Order Type in the Item / Machine Fee table the system was not updating the relevant entries in the Fee Assignments table. This was fixed.

3.5 Issue with validation of description in recreate functionalities

Fixed an issue where the recreation of lines (due to other functionalities) would lead to problems with the selection of unwanted item substitution. This was caused by the revalidation of description fields in the lines.

3.6 Issue with changing posting groups in transfer line for machine records

Transfer orders were not considering the posting groups that can be entered in the "Families" table. Behavior was changed to the same functionality as for all other documents.

Edit - Families

HOME ACTIONS NAVIGATE

New View Edit Delete Models Tools Prices Line Discounts CRM Statistics Create Object Group Object Group Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Families ▾

Code	Description	Default Discou...	Sales: Create Machine	Purchase: Create Machine	Purchase: Create Machine	Object Group Exists	General Product Posting Group (New)	Inventory Posting Group (New)	General Product Posting Group ...	Inventory Posting Group (Used)
101	Telehandlers		☐	☐	Receive	No				
201	Chainsaw		☐	☐	Receive	No				
30	Self-Propelled Sprayers		☐	☐	Receive	No				
31	Trailed Sprayers		☐	☐	Receive	No				
32	Seeders		☐	☒	Release	Yes				
33	Seeding Attachments		☐	☐	Receive	No				
34	Planters		☐	☐	Receive	Yes				
35	Combines Headers		☐	☒	Release	No				
36	Combines		☐	☒	Release	Yes	HARVESTER	HARVESTER	USED	USED
37	Combines Miscellaneous		☐	☐	Receive	No				
38	Specialty Sprayers		☐	☐	Receive	No				
40	Pallet Forks		☐	☐		No				
41	Large Square Balers		☐	☐	Receive	No				
42	Round Balers		☐	☐	Receive	No				
43	Small Square Balers		☐	☐	Receive	No				
44	Self-Propelled		☐	☐	Receive	No				

3.7 Changing of VAT Business Posting Group in a Service Order does not change lines JD-2252

When changing the VAT Business Posting Group in the header of a service order, the system was not updating the lines with the new selected VAT Business Posting Group. Additionally, we also enhanced the service orders with the possibility to change General Business Postings Groups on header level. The according fields can be found in the fast tab for invoicing.

New - Service Order - SVO0001081 - Hans Thun GmbH - Demo VAT

HOME ACTIONS NAVIGATE

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

SVO0001081 - Hans Thun GmbH - Demo VAT

General

No.: SVO0001081
Description: Demo VAT
Customer: Hans Thun GmbH
Customer Details
Contact Name:
Machine Details
No.: M000000028
Description: JOHN DEERE Tractors 7270R
Serial No.:
Operating Hours: 116,00
General Inspection: 05.09.2019
General Inspection 2: 15.10.2019
Service Order Type: SERVICE
Cash Customer:
Tender Contract:
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:
Powergard Max. Hours:
Expected Finishing Date:
Fix Price / Discount Method: 0,00 Parts & Labor

Jobs

Job Lines

Invoicing

Bill-to: Default (Customer)
Location Code: KIEL
Salesperson Code:
Max. Labor Unit Price:
Posting Date: 21.11.2019
Document Date: 21.11.2019
Profit Center Code:
Product Group Code:
Payment Terms Code: 14D(7D)
Currency Code:
Prices Including VAT:
Gen. Bus. Posting Group: NATIONAL
VAT Bus. Posting Group: NATIONAL
Customer Type: Credit Customer
Partial Invoice:
Internal Invoicing:
Print Options
Print Parts: Detailed
Print Labor: Detailed

3.8 Error message appears after loading file in service order

Adding file attachment function was enhanced with a check for the salesperson code in the service header. Before the change the system was only checking for a salesperson code in the TRASER User Setup and on the Contact record of the customer used in the service order.

3.9 Posted Credit Memos - No Footer and Header logo printed

Fixed an issue for Posted Service and Sales Credit Memos, where the reports were printing without Header and Footer Logos from the TRASER Document Setup.

3.10 Issue regarding text length of monthly text created in DPM export

Fixed an issue for DPM exports, where the text length of the "Monthly Text" created was too long.

3.11 Prevent to use Item Search functionality with less than five characters

Changed the behavior of the item search functionality. When a user is entering less than five characters a message comes up that needs to be confirmed by the user.

3.12 Issue with space characters in report for importing parts receipts

Enhanced the function for import of John Deere Parts Receipts with a code passage deleting unneeded space characters. These unneeded space characters in document numbers and so on, were leading to errors during the import routine.

3.13 Issue with JD Price Import and field "Without Surcharge"; it shouldn't be set to FALSE automatically during import routine

Changed how the import of JD Price Files works for items regarding the field "Without Surcharge". Before the change the system would set the field "Without Surcharge" to false for all items except so called "Exclusive Items". After the change the system will set the field "Without Surcharge" to true for all "Exclusive Items" and does not change anything for every other item.

3.14 Dimension is missing when using item substitution

Fixed an issue, where the substitution functionality caused the system to lose dimension values for the item in a sales or service line. If the user opens the item substitution page but chose the original part, the system lost the dimension values for the item.

3.15 Offer price in Opportunity is the local currency even the currency code is different (Zendesk #15890)

Fixed an issue where the system would use the currency of the original purchase of a machine although the created sales opportunity was defined with a different currency. This would lead to having the purchase currency for the cost side of the calculation and having the sales currency from the opportunity header for the revenue side of the calculation. This is fixed. Purchase cost will now also be in the currency defined in the opportunity header.

3.16 Issue with field length of "ELO Barcode" from Text30 to Text50

Changed the field length of field "ELO Barcode" in table 124 "Purch. Cr. Memo Hdr." From Text30 to Text50.

3.17 File Box is not filtered by Document No in Service Order List

Removed File Box from Service Order List, since File Box can not be filtered on Service Header level.

3.18 Bug in Service Order Post Batch functionality

Fixed an issue with the "Post Batch" functionality for Service Orders. The request page where starting date, posting date are supposed to be entered was not opening and instead the system would take empty values for these, obviously leading to errors during the posting of Service Orders.

3.19 Wrong Dimension Set ID in Service Order after creating it out of Service Contract

Fixed an issue, where creating a Service Order out of a Service Contract would not correctly create Dimensions for the Service Order. The Service Order would simply have same Dimensions as Service Contract, which lead to errors later.

3.20 Issue with Sales Item Disc. Group; it's not updated by validating "Item Disc. Group"

Fixed an issue where "Sales Item Disc. Group" in table 27 was not correctly updated when validating "Item Disc. Group".

3.21 Issue with "No. Series" field length in opportunity related to incentives

Changed code in several functions regarding the usage of incentives in an opportunity. A lot of the variables here for no. series were still Code10 and needed to be changed to Code20 for the system to be able to use no. series with more digits than 10.

3.22 Issue with req. WS lines being transferred into transfer orders automatically

Fixed an issue where having multiple items in a requisition worksheet that were supposed to be transferred into a transfer order would lead to issues with dimension priorities. System was taking the first line to create the dimension set id for the transfer header. Afterwards the dimensions of the lines were not revalidated by priorities. This is fixed.

3.23 Issue with req. worksheet lines and updating vendor or location information

Fixed an issue, where the system was emptying the location code when changing the vendor in a requisition worksheet.

3.24 Purchase order error (Zendesk #15807)

Fixed an issue where the system was not transferring the currency code from the purchase order header into the created purchase opportunity. This would lead to an error when importing configuration templates that were assigned a currency code.

3.25 Issues with dimension priorities and dimension usage in service module (Zendesk #14637)

Fixed an issue with dimension priorities, where the system was not considering dimension priorities when changing a dimension value in the document header, that lead to the trigger of updating the dimensions for the lines of the documents.

3.26 Bugfixes Service Item Model - Key fields not blank

Added blank property to the primary key fields "Code", "Service Item Group Code" and "Manufacturer Code" of table "Service Item Model". Also corrected a filtering for Service Item Model and changed the OnValidate-trigger of the field Service Item Model Code.

3.27 Issue with receipt no. check in purchase invoice/cr. memo

Fixed an issue that comes up when TRASER Setup is setup to not allow posting of purchase documents without a relation to warehouse receipts. The functionality was checking for all lines with the type "Item". We fixed that Items from the type "Service" are not checked and can be posted without a relation to a warehouse receipt line although the restrictive setup was chosen.

3.28 Equipment cost without config lines (Zendesk #16007)

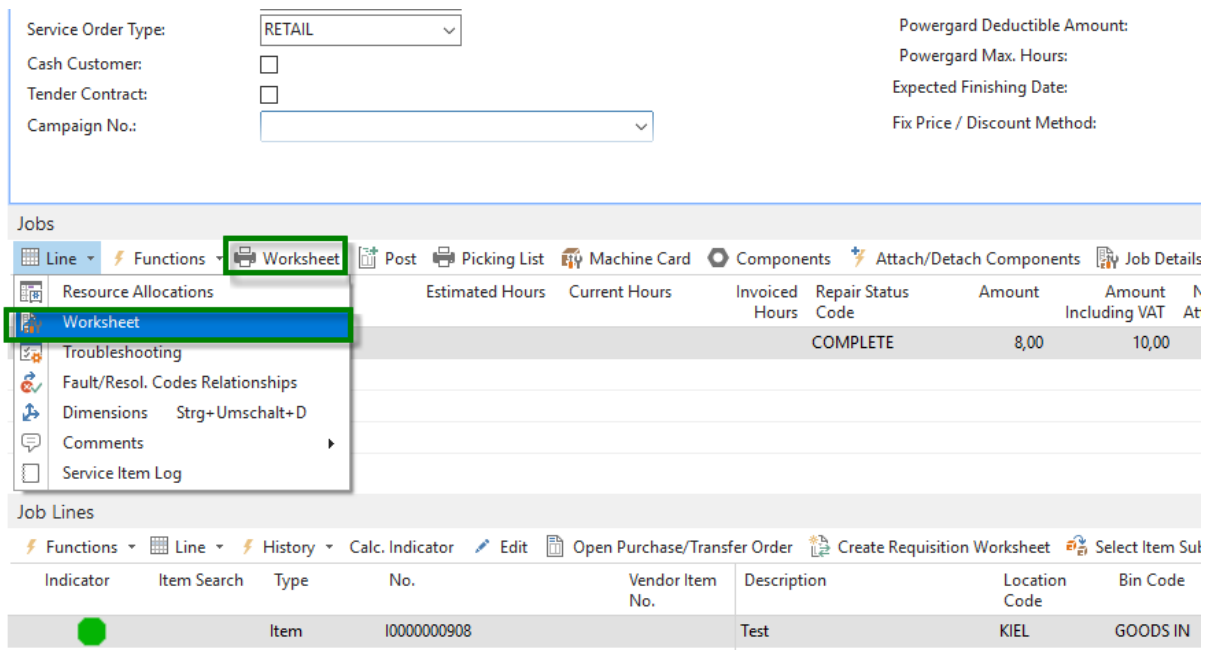
Fixed an issue for the calculation of DNP for countries where the GPC does not send the DNP via interface. The system is now considering correctly the prices of all configuration lines before subtracting the percentage amount defined in the John Deere Setup in the GPC register.

4 New Developments

5 Improvements

5.1 Caption change for functions regarding Page “Service Item Worksheet”

Changed some captions for functions and actions regarding the page “Service Item Worksheet” to make the caption consistent in the software. Is now called “Worksheet” everywhere.



Service Order Type: RETAIL
 Cash Customer: ☐
 Tender Contract: ☐
 Campaign No.:

Powergard Deductible Amount:
 Powergard Max. Hours:
 Expected Finishing Date:
 Fix Price / Discount Method:

Jobs

Line Functions Worksheet Post Picking List Machine Card Components Attach/Detach Components Job Details

Resource Allocations Estimated Hours Current Hours Invoiced Hours Repair Status Amount Amount

Worksheet Troubleshooting Fault/Resol. Codes Relationships Dimensions Strg+Umschalt+D Comments Service Item Log

Job Lines

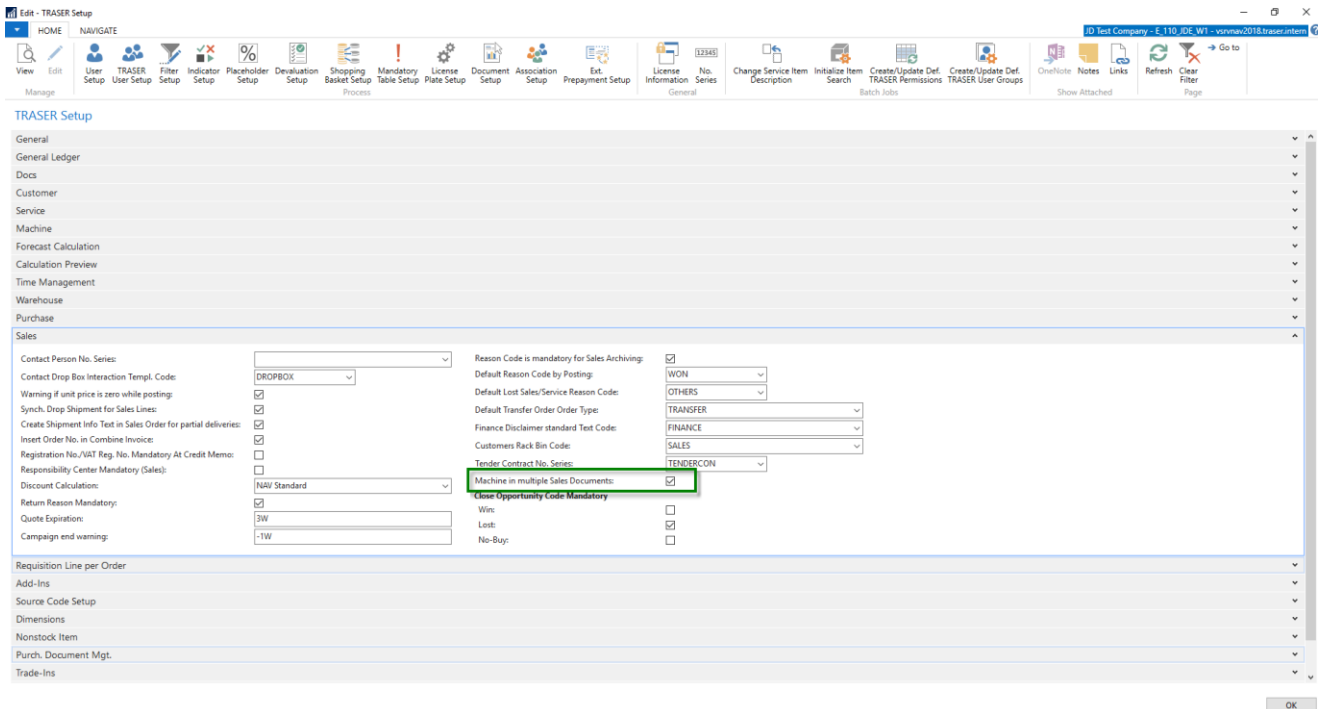
Functions Line History Calc. Indicator Edit Open Purchase/Transfer Order Create Requisition Worksheet Select Item Sul

Indicator	Item Search	Type	No.	Vendor Item No.	Description	Location Code	Bin Code
		Item	I0000000908		Test	KIEL	GOODS IN

5.2 Machine sales order limitation (Zendesk #15868)

Implemented a new checkbox in the TRASER Setup in the sales area that will give administrators the possibility to set up the system behaviour in two different ways:

- When checked the system will allow the usage of a machine in a sales order although it is already included in another sales order
- If not checked the system will check if the machine chosen in a sales order is already used in another sales order and give an error message accordingly



TRASER Setup

General
General Ledger
Docs
Customer
Service
Machine
Forecast Calculation
Calculation Preview
Time Management
Warehouse
Purchase
Sales

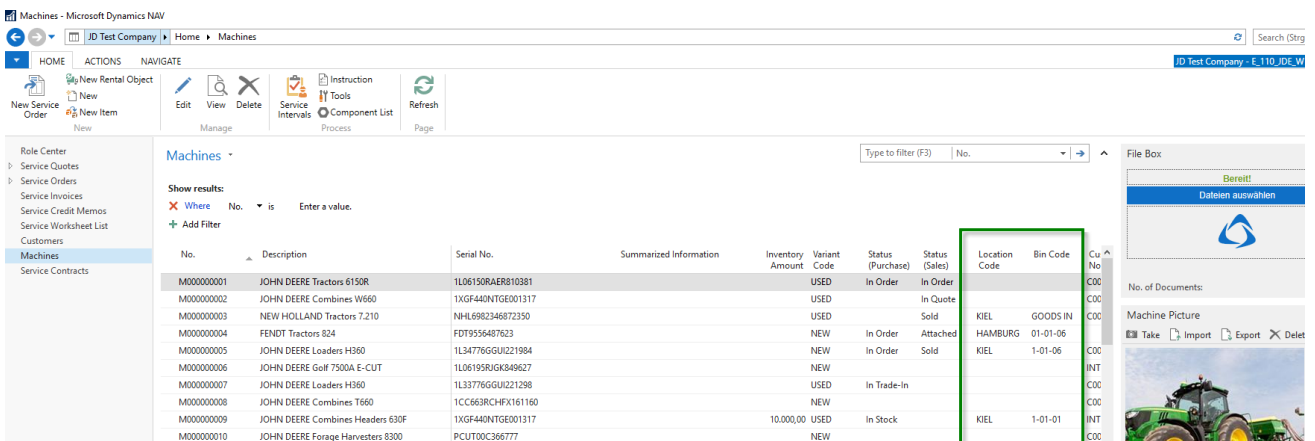
Contact Person No. Series:
 Contact Drop Box Interaction Temp. Code:
 Warning if unit price is zero while posting: ☐
 Synch. Drop Shipment for Sales Lines: ☐
 Create Shipment Info Text in Sales Order for partial deliveries: ☐
 Insert Order No. in Combine Invoice: ☐
 Registration No./VAT Reg. No. Mandatory At Credit Memo: ☐
 Responsibility Center Mandatory (Sales): ☐
 Discount Calculation:
 Return Reason Mandatory: ☐
 Quote Expiration:
 Campaign end warning:

Reason Code is mandatory for Sales Archiving: ☐
 Default Reason Code by Posting:
 Default Lost Sales/Service Reason Code:
 Default Transfer Order Order Type:
 Finance Disclaimer standard Text Code:
 Customers Rack Bin Code:
 Tender Contract No. Series:
 Machine in multiple Sales Documents: ☒
 Close Opportunity Code Mandatory: ☐
 Win: ☐
 Lost: ☐
 No-Buy: ☐

Requisition Line per Order
 Add-Ins
 Source Code Setup
 Dimensions
 Nonstock Item
 Purch. Document Mgt.
 Trade-Ins

5.3 Location Code and Bin Code available in List of Machines

We enhanced page 5981, the list of machines with the two fields "Location Code" and "Bin Code".



Machines

Show results: ☒ Where No. is Enter a value.
 + Add Filter

No.	Description	Serial No.	Summarized Information	Inventory Amount	Variant Code	Status (Purchase)	Status (Sales)	Location Code	Bin Code
M000000001	JOHN DEERE Tractors 6150R	1L06150RAER010381			USED	In Order	In Order		
M000000002	JOHN DEERE Combines W660	1XGF440NTGE001317			USED		In Quote		
M000000003	NEW HOLLAND Tractors 7.210	NHLE6982346872350			USED		Sold	KIEL	GOODS IN
M000000004	FENDT Tractors 824	FDT9556487623			NEW	In Order	Attached	HAMBURG	01-01-06
M000000005	JOHN DEERE Loaders H360	1L34776GGU211984			NEW	In Order	Sold	KIEL	1-01-06
M000000006	JOHN DEERE Golf 7500A E-CUT	1L06195RUGK849627			NEW				
M000000007	JOHN DEERE Loaders H360	1L33776GGU211298			USED	In Trade-In			
M000000008	JOHN DEERE Combines T660	1CC663RCHFX161160			NEW				
M000000009	JOHN DEERE Combines Headers 630F	1XGF440NTGE001317		10.000,00	USED	In Stock		KIEL	1-01-01
M000000010	JOHN DEERE Forage Harvesters 8300	PCUT00C366777			NEW				

5.4 Improve handling of descriptions in Sales/Service Lines for Req. WS proposals (Zendesk #15556)

Improved how Descriptions are filled in Requisition Worksheets. The behaviour for Service Lines is now the same as for Sales Line. The system will take the Description from the corresponding Sales or Service Line.

5.5 General performance improvements

Several changes were made across the database to improve performance of the system in general:

- Changed MaintainSIFTindex to false for primary key in several tables
- Actions in several fact boxes changed. Before was dependent on condition if action was visible. Now always visible but action dependent on condition
- Removed RecordCount for several lists
- Changed customer fact boxes, so that it will now always show Last Orders, Invoices and Shipments (Service, Sales, Rental) but limited to last 20 entries
- Added keys to several tables in database

6 Tasks

6.1 TRASER

6.2 Partner/Customer
