

NEXGEN Product Release Notes

Version: 3.5.580 (July 2020)

Includes all changes since NexGen version 3.5.567

RELEASE DEPENDENCIES

- Requires Atom API Version 2.4.68, Atom for Android 2.4.68 & Atom for iOS 2.2.62
- Optional update to FleetCostPDF Driver V4

NEW FEATURES & ENHANCEMENTS

- **Sales Assistant** – Transform your business with the new Sales Assistant module. For those of you who need a sales automation tool, Sales Assistant will be the transformative change to your business needs to take you to the next level. Sales Assistant will enable your sales team and management to schedule, track and report your sales activities to manage your sales activities more effectively and not miss those important deadlines. For more information see the Documentation & Training section below.
- **Enhanced E-Ticket Cancellation** - Added new functionality to be able to cancel an e-ticket up to the point of the first customer signature and retain full e-ticket accountability and history. This feature can be turned on in system defaults on the new Features tab if you desire to use this functionality. For more information see the Documentation & Training section below.
- **Job, Unit and Employee Schedules** – If Enhanced E-ticket Cancellation is turned on, the display schedules will not show a pink line if the e-ticket was cancelled.
- **Job Screen** - Added a **Show Certifications** button on the job screen to be able to view the certifications for the units/people assigned to the job and be able to email the certifications directly from the screen. The **Show Certifications** button is available while viewing all tabs.
- **All Schedule Display Screens (Job, Unit, Employee)** - Changed the yard column header text to show if it is Job Yard, Unit Yard or Employee Yard.
- **Union Report** - Changed the union drop down to multi-select on the Union Report.
- **Job Storage Report** - Added monthly amount and storage comments to the Job Storage Report
- **Enter Quote Screen** - When converting a quote to a job, if the quote includes a Billing Code that is marked as inactive a message will appear asking if you want to proceed. If “Yes” is selected, then processing will continue and convert the quote to a job. If “No” is selected, the system will highlight the inactive Billing Code and the quote will not be converted to a job until an Active Billing Code is selected.
- **Order Entry Revenue Detail Report** - Added a new Order Entry Revenue Detail Report. It can be found on the menu at: *Reports > Expenses/Revenue/Profit > OE Revenue Detail Report.*

NEXGEN Product Release Notes

- **Quote File Links** – When generating a Quote PDF document, a progress bar will be displayed showing the progress of the document generation (was formerly just a message).
- **Voucher from Receiver Screen** - On the **Voucher from Receiver** screen, added State and Zip to the Vendor Info section to match the vendor information on the PO Screen.
- **New EOM Terms** - On Maintain Terms Screen added a new check box called **EOM**. When checked, this will use the **Calculate Due Date in # of Days** column. For example: Terms are 30EOM, invoice date is 3/5/20, the due date would be 4/30/20 -30 days from the end of March.
- **Certification Reports** - Added Company, Yard and Department filters to all Certification reports.
- **Invoice Print Not Printed Report** - Added PO and Terms columns to the report.
- **Emailed Invoices Report** - Added a date range filter to the invoice emailed invoices report

SOFTWARE ISSUES ADDRESSED IN THIS RELEASE

- **Employee and Availability Schedule** - Corrected an issue where an Employee is scheduled on a job that spans over a weekend and the **Work Weekends** checkbox is un-checked. The Employee was not showing as available on the Availability Report or on the Employee Schedule, but now shows as available. (Case #16700)
- **Labor for Payroll Pre-Processor and Labor Screens** - Changed the sort order to show earliest to latest start times if there are multiple entries for a day. (Case #16720)
- **Enter Invoice Screen** - Corrected an issue when creating a Credit Invoice where the default Export Status from system defaults was not filling in correctly. It now populates with the correct default export status. (Case #16601)
- **Inventory Transfer Screen** - The Company, Yard and Department drop-downs were not reflecting the security setting in User Options. This has been corrected to comply with security settings in User Options. (Case #17035)
- **Unit/Employee Schedule** - Corrected an Issue on the Unit/Employee Schedule where the bar text was always defaulting to PO Number, even though a different option was selection and user saved layout. This has been resolved and now retains bar text selection when saving layout. (Case #17144)
- **PO Detail Report for Internal** – Removed In-House Comments from appearing on the PO Detail Internal Report to follow system convention of not printing any in-house comments. (Case #17244)
- **Job E-Ticket Status Report** – Corrected printing issue on the Job E-Ticket status report. The report was cutting off the right side of the report if the default printer did not support 11"x17" paper size. (Case #16419)
- **Union and Workers Comp Reports** - The Union, Workers Comp Summary and Detail Reports allowed viewing of pay rates if pay rate access is disabled for a

NEXGEN Product Release Notes

user. This has been corrected and users are unable to view pay rates if their security is set to disallow viewing pay rates. (Case #15940)

- **Job Pre-Lien Report** - Removed any records from printing on the report where the pre-lien amount on the job additional info tab is zero. (Case #17492)
- **PO Req Screen** - When creating a PO from the PO Req screen and the user may get a database deadlock error under certain conditions. This has been corrected. (Case #14578)
- **Maintain Parts Screen** - If you enter in the main Part Number into the **Previous Part No** or **Obsoleted By** fields, a message will appear when attempting to save that previous or obsoleted part cannot be the same as the main part number and will not allow you to save. (Case #14618)
- **Unit/Employee Schedule** – Under certain conditions, when scrolling on the Unit/Employee Display Schedule and there is an employee marked as “Down” an error would occur. This has been resolved. (Case #16957)
- **Maintain Employee Screen** - Getting an “Invalid Object Name” error message when changing an Employee ID. This issue has been resolved to allow changing of employee ID without error. (Case #16886)
- **Jobs Unbilled Report by Unit/People** - Corrected an issue where the jobs unbilled report was showing an incorrect total amount. This was happened when sub-items on the jobs estimate tab were included in the total but should have been excluded. (Case #15932)
- **Print Not Printed** – Corrected an issue in the Print-not-printed function when invoices with a large number of e-tickets was not generating properly. (Case 17471)

SYSTEM ADMINISTRATOR NOTES

- **System Default Changes** – There is a new tab in **Set System Defaults** called “Features”. This was added to enable you to turn on/off **Sales Assistant** and **Enhanced E-ticket Cancellation** features described above. By default, these new features are *disabled*.
- **Set System Defaults Screen** - Added a message to the top of the **Set System Defaults** screen recommending best practices to perform if changes are made.

For consistent performance and user experience, best practice is to:

1. Inform users of pending change to their workflow,
2. Make system configuration changes outside normal business hours, and then
3. Notify users to log out / log back in for changes to take effect.

- **Password Encryption** - Encrypted all user passwords (including FCC support accounts) for customers not using active directory for user authentication.
- **Atom Devices** - Added **Last Logged User** column to the Atom device screen (Utilities > Atom Devices, Devices Tab).
- **Recurring Billings Screen** - Removed the field **Stop Date** from the Recurring Billings screen as the field/function is no longer used.
- **Menu Security Setting Changes** - Added the following items that are enabled by default. Check your Menu Security settings for all profiles to ensure the access to these new items are enabled/disabled as appropriate for your organization.

NEXGEN Product Release Notes

- New Report: **Reports > Expenses/Revenue/Profit > OE Revenue Detail Report**
- New Maintain Menu: **Maintain > Sales Assistant** (only if active)
 - Sub items: **Maintain > Sales Assistant > Task Setup & Maintain > Sales Assistant > Task Lookup**

DOCUMENTATION & TRAINING

- **Sales Assistant Setup and User Guide:**
 - [Sales Assistant Setup](#)
- **E-Ticket Cancellation Information (contained in Dispatch User Guide):**
 - [NexGen Dispatch User Guide V3.0](#) (See FAQ section)

PREVIOUS RELEASE DOCUMENTS:

General Release [3.5.567](#)