

NEXGEN Product Release Notes

2021 Q4 GENERAL RELEASE, DECEMBER 2021

VERSION: 2021.4.0.0

Includes changes since NexGen version 2021.2.3.1

RELEASE DEPENDENCIES

- Requires Atom API Version 2021.4.0.0
- Latest Atom Releases: Atom for Android 2021.4.0.0 & Atom for iOS 2021.4.0.0

NEW FEATURES & ENHANCEMENTS

Fleet Cost & Care is pleased to announce the following features and enhancements introduced in the 2021 Q4 release:

Invoicing Enhanced Workflows & Screen Modernization – Following the release of the new WPF Job Screen, we are excited to announce the release of the new user interface for the invoicing screen.

Billing Codes Screen Modernization – The first maintenance screen to be converted to the new WPF user interface, Billing Code Maintenance will allow you to more easily manage & maintain your billing codes – a critical part of the NexGen product configuration.

Modular E-Tickets – After years in planning and programming, the Modular E-Ticket re-designed product is finally here. This will allow you to customize the look and feel of your e-tickets. See the NexGen WPF Dispatch User Guide V3.0 for full details on this new feature.

Enhanced Map Control – You have asked for enhanced map information display of jobs and units, and with the 2021 Q4 release, it's here. The new approach leverages existing platforms to optimize performance when viewing your resources on a map. See the NexGen WPF Dispatch User Guide V3.0 for full details on this new feature.

In addition to these major enhancements, you will also find these new features/enhancements in this release:

- **Invoice Export Status Default on Recurring Invoices** - Recurring invoices now use default invoice export status from System Defaults on creation. (Case # 19095)
- **Union Benefits Report Option Added** - Added "All Employees" option to Union Benefits Report. (Case # 19256)
- **Additional Plain text Equivalent fields for RTF fields on Quotes/Jobs** - Added plain text fields on quotes for "Equipment Required" and "Comments" fields and on Jobs for "Comments" field. (Case # 19384)

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- **Samsara ELD** - Samsara ELD interface developed and available. Contact sales or support for additional information. (Case # 19628)
- **Termination Code** - The Termination Code has been added back to the Jobs WPF screen and has gained some capabilities compared to its old self. See System Administrator's Notes section for more details. (Case # 20314)
- **Voucher Lookup** - Added "Yard" filter to the Voucher View By lookup options. (Case # 20658)
- **Job Screen Canceling an E-Ticket** - If the WPF Job screen is enabled in System Defaults, administrator will see the Maintain > Documents option of 'E-Ticket Copies' and must define this for the save location and the system will automatically be converted to enhanced e-ticket cancelation. (Case # 20864)
- **Enhanced Map Controls in Display Schedules** - In Unit/Employee Schedule (Unit and Employee Display), When user clicks on the Map icon, they will now have the same experience as the Unit Schedule. The map will open in user's default browser with the preferences defined in User Settings in the browser. Replaced 'Show Jobs' label with 'Show Units' and all functionality from Unit Schedule will exist in Unit/Employee Schedule. References to 'Actual Location' are also replaced by 'Last Known Location'. (Case # 20938)
- **Billing Code History Report** - This report will now allow the user to select inactive billing codes and not get an error "Please select active billing code." This report will now support historical data with inactive billing codes. Inactive billing code values are displayed in 'Grey' color on the dropdown to indicate to the user about the inactive codes. If the billing code(s) is inactive, add "inactive" next to the billing code on the header section. (Case # 21125)
- **Add hover text to PO Number field** - In the Job - WPF screen, if the PO number exceeds the width of the field, hovering your mouse on the PO Number field will display the full PO number in a text box. Moving your mouse off this field will clear the display. (Case # 21228)
- **Add transaction-specific rate to Union Reports** - Additional columns were added to the database to account for union rates that applied at the time of the transaction – these allow a user to update union rates without compromising historical information. The union reports were also updated to reflect this change along with a new column to show Max Type. (Case # 21403)
- **WPF Job Screen- Union Drop Down** - Union dropdown was not supporting the multi-column structure that was used in the legacy schedule job screen. Changed the WPF Union field dropdown on the Parameters Tab to a two-column dropdown (Union Code, Description) sorted alphabetically by Union Code. (Case # 21440)

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- **Changing Dates and Times on the Resource Tab and Main Tab** - Logic was added to the Job WPF screen to emulate the legacy screen by maintaining the offset between dates when changing the start date. For example, if my job is scheduled between 01/10/22 and 01/15/22, if I change the start date to 01/20/22, the end date will automatically update to 01/25/22. See the WPF Dispatching Guide Version 3.0 for additional details. (Case # 21540)
- **Notify the user when enabling Track Qty while parts are in stock**, - Added message when enabling "Track Quantity" and inventory value is greater than 0. "Previous transactions have been placed on this part number. Transactions include Work Orders, Purchase Orders, and Shipments. With those transactions, the current inventory balance is:". Also provide a "Cancel" button that will allow user to cancel update and uncheck Track Quantity checkbox. (Case # 21567)
- **Voucher from Receiver Allows Changing Received Quantity** - Removed the ability for Received Quantity to be changed from the Voucher from Receiver screen. If changes are required to the received quantity, those changes must be made by an appropriate user on the receiver as the authoritative document recording receipt. (Case # 21734)
- **Azuga GPS Interface Enhancement** - Allow support for more than one instance of the Azuga GPS interface. (Case # 21833)
- **Allow Job estimate edits to Date Start/End based on User Options** – In order to allow correction of data entry issues with incorrect date start/end on the job estimates tab, a new user option has been added to allow specified users to change dates after the invoice is generated to adjust the variance. Under Admin > Users or Admin > User Options, a new field labelled "Change Job Estimate Dates" has been added. By default, the value of this field is set to unchecked. When checked for a specific user, then the user will be able to edit the Date Start/End on the Job Estimates tab even after the invoice is created. This user setting will override the profile screen settings. (Case # 22241/22242)
- **Remove Resolved Requirement for In-house comments on invoices** - Removed the requirement for an In-House Comment to be resolved at the point that it is saved to an Invoice. (Case # 22273)
- **Change Load Ticket Report** - Added multi-select to "Loads" dropdown on the Load Ticket report (Reports > Loads > Load Ticket). (Case # 22359)
- **Unit Code on Estimates** - Enabled the functionality where a user can add a unit code that is assigned to the job to an Estimate line on the Legacy Schedule Jobs screen. (Case # 22426/22428)
- **Disassociated Work Order, PO, and Voucher - messaging and logic** – Removed a user's ability to edit a Work Order, Job, Unit Code, or Order Number directly in the Voucher screen. Now, when a user wants to change/correct a value in one of these fields, they will have to modify the information in the Purchase Order. This is to ensure that the

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system has consistent reporting for purchases. Note: a user is still able to add/modify these fields when detail line is added directly to the voucher – only details lines from receivers are affected. (Case # 22130, 22554)

- **Adjust Date Logic of Job-WPF** - Added granular control of the relationship between Job dates and Resource dates. With this change, instead of always following one standard for updating resources when changing job dates, the system will now prompt the user to choose how the dates should be changed (if at all) when resources are present on the Resources tab. See NexGen WPF Dispatch User Guide Version 3.0 for more details. (Case # 22741)
- **Menu Security is not honored in Job E-Tickets report** - Profiles that were restricted from printing, exporting or emailing in Menu Security were not adhered to on the Job E-Tickets report. This has been resolved. (Case # 23174)
- **Added Support for Sage 300 2022 (version 6.9A): NexGen** – Accounting interface is validated with Sage 300 2022. See System Administration section for additional details. (Case # 23414)

Performance Optimization

- **Performance Improvement for Dropdown controls in NexGen** - Optimized dropdown control where the user is restricted with the specific list of company/yard/dept. (Case # 21979)
- **Jobs WPF - System Slowness and Performance Improvement Enhancements** - Made some general performance enhancements with WPF Job screen. (Case # 22476)
- **CPU 100% utilization** - Corrected performance issues with WPF causing 100% utilization of CPU. (Case # 22563)

SOFTWARE ISSUES ADDRESSED IN THIS RELEASE

- **Description Report Excel/CSV Export Error** - When a Unit Description report with a large number of units was exported to an Excel spreadsheet, a memory exception error was thrown. This issue has been resolved. (Case # 14847)
- **PO Numbers not correct when created from Enter > Reqs/POs from Parts Reorder Points** - When PO numbering is configured to include department code, system was not generating complete PO numbers when creating PO's from Enter Req/PO from Reorder Points screen. System will now prompt user to select a department. The dropdown for departments will be from user's "My Departments" list (or "All Departments" if that is set for user). (Case # 19194)
- **Enable Start/Stop Time Editing** - Enabled editing of start & stop times in the Labor for Payroll Pre-processing screen. (Case # 19556)

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- **Outlook interface error when using Job screen** - An unhandled exception error when attempting to use Outlook to email from Job Screen has been resolved. If NexGen is unable to launch Outlook because it is busy with another application, user will receive the following notification: "Outlook is busy with another application and cannot complete your request. If this message persists, close out of any other applications that connect to Outlook and try again." (Case # 19978)
- **XRS ELD fix** - Added the ability to declare more than one account and allow filtering by department when using XRS ELD. (Case # 20077)
- **Cancelled Units & Employees on Unit/People Tab Triggering Schedule Overlap Warning Message** - Removed cancelled Units/Employees from check for scheduling conflicts. (Case # 20640)
- **Visual Bug in Labor for Payroll Pre-Processor** - When entering labor entries on the Labor for Payroll Pre-processor screen, the 4th line would have a blank space over that entry. Clicking on the entry grid would clear it. This initial display bug has been resolved. (Case # 20704)
- **Error When Generating LEM Tickets** - Corrected an error on the Legacy Schedule Job screen. When generating a LEM ticket, if there were conflicts identified, the primary employee was being changed on the LEM ticket to the last employee found to have a conflict. This issue did not exist in the WPF Schedule Job screen. (Case # 21675)
- **Modifications to OE Revenue Detail Report** - Do not display non-stock part shipper information in OE Revenue Detail Report. (Case # 21849)
- **Show Jobs error within "Unit/Emp Schedule"** - Corrected error that occurred in certain conditions when selecting the "Show Jobs" option on the Unit/Employee Display Schedule. (Case # 21885)
- **Error when shipping an Order** - In certain conditions when shipping a non-stock part, an error occurred "Column 'EstRate' does not belong to the table." This error has been corrected. (Case # 21930)
- **Database table index added** - Added index to the database table FMS_DEVICES. (Case # 22093)
- **Payroll Defaults OT Not Processing Correctly** - Stored Procedure fix to correct payroll calculation in some specific conditions. (Case # 22109)
- **Work Orders from Coming Due PM's Screen - Error message** - Corrected error occurring in Coming Due PM screen (would display error: "Cannot find table 0"). (Case # 22180)
- **Error on Jobs Tickets by Unit Report** - With certain data conditions an error would be reported in the Job Tickets by One Unit report. This has been corrected. (Case # 22202)

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- **WOs from Due PMs not assigning unit dept** - In System Defaults (Unit/WO tab), if "Yard/Dept Default on WO" is set to Units, was not properly setting Dept to Unit Dept from the Unit when creating WOs from Due PM screen. This has been corrected. (Case # 22223)
- **Job Storage Report Missing Records** - Corrected date comparison issue that was excluding some records from the Job Storage report. (Case # 22262)
- **User Account Renames** - Corrected an issue when renaming user accounts. (Case # 22264)
- **Arrived Yard Hyperlink incorrect on E-Ticket Status Report** - The hyperlink for the Arrived Yard GPS location on the E-Ticket Status Report was using the location for the Arrived Job location. Corrected report to now use the proper location for Arrived Yard link. (Case # 22392)
- **Multiple crashes** - Corrected issue where repeatedly opening WPF Job Screen caused error. (Case # 22410)
- **Generate LEM modal window hidden in the background** - In certain conditions, the LEM generation window could be hidden behind the main window and not accessible. This appeared to cause the system to freeze. The issue has been fixed. (Case # 22439)
- **No Primary Key error** - In certain conditions when opening a job created with the legacy schedule jobs screen in the new WPF job screen, users would receive an error indicating "No primary key". This issue has been resolved. (Case # 22441)
- **Schedule Jobs WPF - Date format for latest invoice** - Corrected international date formatting for "Latest Invoice Date" field. (Case # 22443)
- **Samsara interfaces not honoring unique attributes** - Setup for Samsara included both a GPS and ELD interface and each have a unique attribute, the system only references the first instance of the attribute in Telematics Providers. Corrected Telematics setup so that each instance of an interface declared in Telematics Provider is unique and is now be referenced accordingly. (Case # 22492)
- **System crash occurs when attempting to open Menu Security** - Corrected error that would occur in certain conditions when opening Menu Security screen. (Case # 22509)
- **Include on Job from Quotes isn't working with Jobs WPF File Links** - Corrected issue where documents attached to quote and marked as Include on Job were not being attached to the job when the quote was converted to a job. (Case # 22521)
- **Job, Date & Ticket issues** - Corrected issues with date logic when multiple tickets issued on a job. Also corrected timeout error on Unit Status Report when all yards selected for large organizations. (Case # 22550)

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- **Able to delete employee on unit/people tab who has been issued an operator ticket** - Modified deletion logic to perform the same validation against deleting an employee who has been assigned an Operator Ticket as we do for LEM tickets, and as we do for both types of tickets from WPF. (Case # 22559)
- **Quote save issues** - In certain conditions, users were experiencing slowness in saving quotes. Addressed performance issues that were causing this. (Case # 22710)
- **Dates and time issues while copying jobs** - Corrected date displays when copying jobs. Also updated date logic when copying jobs to properly use revised date time logic. (Case # 22993)
- **Cancel Job with Active Tickets** - Prevent cancelling job if any e-ticket exists in a state other than cancelled. (Case # 23102)
- **WO Quote Parts not Calculating Correctly** - Corrected issue where part retail price was not calculating in certain conditions when Mark Up = %Off List. (Case # 23280)
- **Parts Quantity Mismatch** - Corrected an issue that resulted in a mismatch between Summary and Details for parts when enable "Track Quantity" for a part. (Case # 14415, 16321)
- **User Maintenance and Deadlocks** - When adding a number of new users concurrently, deadlock errors were being encountered by some. Corrected the record locking process to avoid this deadlock. (Case # 17366, 19499, 21370)
- **Frequent deadlocks experienced while accessing various database tables** - Resolved issue causing deadlock situations. (Case # 18401, 21557)
- **Migrate GPS to Telematics feature** - Migrated the following GPS providers to use the Telematics feature in NexGen (See Maintain > Telematics Provider screen): Temeda, Telogis & GeoTab. (Case # 21168, 21229, 21230)

SYSTEM ADMINISTRATOR NOTES

See the **Admin User Guide – WPF** for full details on what you, as a System Administrator, need to know about the WPF Release (see Document & Training section below).

System Default Changes

- **Main Tab Changes**
 - **Added Support for Sage 300 2022 (version 6.9A):** NexGen – Accounting interface is validated with Sage 300 2022 and accounting version 6.9A is added under Set System Defaults --> Accounting Version. (Case # 23414)
 - **Removed Application Logging controls:** Controls were moved from the Main tab to a new tab called System Maint. See below for more details.

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- **Job Tab Changes**
 - **New field – Hook Ready per Unit.** Checkbox, checked or un-checked. Default value is Unchecked. The Hook Ready option is used to identify a specific time the unit needs to be set up. Once enabled, it will add a new column to the Job WPF Resources tab where a user may enter time. This flag also adds the option to E-Ticket Settings to display the value in a banner on the e-ticket in a position of your choosing. Note: you may change the name of the label on e-tickets to better suit your organization's needs.
- **Features Tab Changes**
 - **New selection option – Invoicing WPF.** The Invoicing WPF feature enables the new WPF-based rental invoice screen and a new Billing Codes screen. When enabled, this will replace the legacy Invoice screen. The WPF version does not support parts jobs, so the legacy invoice screen has been relabeled as 'Parts Job Invoices'.
 - **New selection option – Modular E-Tickets.** The Modular E-Tickets feature enables a new screen in NexGen called Maintain > E-Ticket Settings and will affect ALL subsequently generated e-tickets once enabled. The feature comes with a default template and can be changed by you to better fit your needs. This feature will also add a new tab in Maintain > Company called Brand which allows you to add your company-specific logo and a theme to the e-tickets.
- **New Tab added this release – System Maint.**
 - **Truncate System Logs – Truncate Now button.** This will allow the system administrator to manually truncate System Logs. This should not be used without understanding what the impacts are and how it may affect your system. Contact Support for additional details or questions.
 - **Keep Records For – Dropdown to select 30/60/90 days for retention of System Logs.** This option does not imply automatic truncation – it serves as a reminder to administrators when accessing the Set System Default screen. If more time has passed than is defined in this field, a prompt will appear, reminding any 'administrator' user how long it has been since the last manual truncation.
 - **Enable Application Log – Checkbox, checked or unchecked.** Default value is unchecked. This choice will enable/disable NexGen application logging. Note: this is the same functionality as existed on the Main tab, it was moved to better align functions on tabs.
 - **Keep Logs Only For – Dropdown to select 30/60/90 day retention period for NexGen Application Logs.** This is an automated process (unlike truncation) that will automatically clear the application logs of any records preceding the threshold defined.
- **New Tab added this release – External APIs (added for future functionality)**

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- This section was added for future functionality. Do not use at this time.
This section was added only to explain the appearance of the new tab.

Modular E-Tickets – See Modular E-Ticket User Guide for setup and configuration of new modular e-ticket enhancements.

New User Settings Screen – A new screen has been created under the Utilities menu called “User Settings”. The only option on this screen at this time is the selection for default mapping program – Google Maps or Bing Maps. Users must set this to take advantage of the new Enhanced Map Controls. Administrators should ensure that all users who will need this have access to this screen via Menu Security. This option is only available when Job WPF is enabled.

User Option Change to allow editing of Job Estimate Dates – A new user option has been added to allow specified users to change job estimates dates after the invoice is generated. Under **Admin > Users** or **Admin > User Options**, a new field labelled "Change Job Estimate Dates" has been added. By default, the value of this field is set to unchecked. When checked for a specific user, then the user will be able to edit the Date Start/End on the Job Estimates tab even after the invoice is created. This user setting will override the profile screen settings. (Case # 22241/22242)

Menu Security Setting Changes (Admin > Menu Security) - 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.

- **Utilities > User Settings** This will allow/deny access to enable users to set their default mapping program (Google/Bing). There are no other ways for Administrators to set this at this time.
- **Maintain > E-Ticket Settings** This will allow/deny access to manage the e-ticket layout when Modular E-Tickets is enabled. This will only appear if Modular E-Tickets is enabled in the Admin > Set System Defaults, Features tab.
- **Maintain > Codes > Billing Codes – WPF** This will allow/deny access to the modernized Billing Codes screen. This will only appear if Invoicing WPF is enabled in the Admin > Set System Defaults > Features tab.
- **Reports > Jobs > Job E-Tickets** This will allow/deny access to the Telerik-based e-ticket report. This is only for modular e-tickets and will only be an option if Modular E-Tickets is enabled in the Admin > Set System Defaults, Features tab.
- **Enter > Invoices – WPF** This will allow/deny access to the new rental Invoice screen. This will only appear if Invoicing WPF is enabled in the Admin > Set System Defaults > Features tab.

Profile Screen Setting Changes (Admin > Profile Screen Settings) - Added the following items that are **enabled by default**. Check your Profile Screen Settings for all profiles to ensure the access to these new items are enabled/disabled as appropriate for your organization.

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- **Maintain > Units > Buy/Sell Info tab:** Added Purchase Date field which was previously missing.
- **Maintain > E-Tickets > E-Ticket Settings:** Added new section to include all related controls for the Create and Assign tabs.
- **Maintain > Company > Company > Brand:** Added new section to control options related to branding for modular e-tickets.
- **Maintain > Codes > Billing Codes – WPF:** Added new section (replaces Billing Codes) that displays only if WPF Invoicing is enabled; this section provides all the same control as the legacy option.
- **Enter > Invoices – WPF > Rental:** Added new section (replaces Invoices) that displays only if WPF Invoicing is enabled; this section provides all the same control as the legacy option. Note: the legacy screen will still be present, but limited to Parts Jobs only – if not using Parts Jobs, feel free to disable this screen in Menu Security.
- **Utilities > User Settings:** Added new section to include all related controls for the new User Settings screen. Currently, this is limited to just Map Provider.

Job Unit Termination Code – To enable the Termination Code field in Schedule Jobs Screen, you must set 'Termination Code' = Yes in System Defaults on the Job Tab.



System administrators may disable show and edit for this column in Profile Screen Settings. If View is disabled, the user will not be able to generate a termination code. If View is enabled, but Edit is disabled, the user can generate a termination code using the icon or the context menu but may not edit it once created.

DOCUMENTATION & TRAINING

- **WPF Admin, Schedule Job Screen and Dispatch User Guide:**
 - [NexGen_WPF_Invoicing_Guide_1.0](#) (New)
 - [Modular_E-Ticket_User_Guide_1.0](#) (New)

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- [NexGen_WPF_Dispatch_User_Guide_3.0](#) (Updated for this release)
- [NexGen_WPF_Admin_User_Guide_2.0](#) (Updated for this release)
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PREVIOUS RELEASE DOCUMENTS:

Quarterly Release [2021.2.3.1](#) (Q2 2021)

Quarterly Release [2020.4.7.1](#) (Q4 2020)

Quarterly Release [3.5.580](#) (Q2 2020)