

## NEXGEN Product Release Notes

### 2023 GENERAL RELEASE 2 - JANUARY, 2024

#### VERSION: 2023.2.0.0

Includes changes since NexGen version 2023.1.0.1

**PRODUCT FEATURE RETIREMENT NOTICE:** FCC will end support for the **Atom Android APK file updates** in June 2024. This has been available on the Google Play Store since June 2021. With the availability of Atom Android on the Google Play store, we will stop including the Atom .APK file in release updates. System Administrators should make plans to update your Atom user devices via the Google Play Store prior to June 2024. Please contact FCC support if you have any questions. Also see the Google Play Store Admin User Guide link in the Documentation & Training section at the bottom of this document.

### NEW FEATURES & ENHANCEMENTS

Fleet Cost & Care is pleased to announce the following featured enhancements introduced with the 2023 General Release 2:

**Avalara Integration** – With this long-awaited enhancement, NexGen is now integrated with the Avalara tax engine to auto calculate taxes upon creation of invoices and credit memos. All Avalara taxes will be summarized at the line level with the specific details stored in the Avalara system. Additionally, address validations will occur automatically when customer job sites are created in NexGen or with a single click when created from Atom. The Avalara integration feature requires the user to have a valid Avalara account. Please contact Sales or your CSM to learn more and or subscribe to this integration.

**Sage Intacct Integration** – This update brings exciting news for the customers who are currently using Sage 300 and upgrading to Sage Intacct or considering migrating to the Sage Intacct from their current accounting package. NexGen now supports integration with cloud-based Sage Intacct Accounting system. You can now experience a seamless and more efficient data flow between the two systems, ensuring your financial data is always up-to-date and accurate. This integration supports all key modules – Customers, Vendors, AR, AP, Taxes and AR Aging Reporting. We also export Units, Salesperson and Jobs as additional dimensions for better reporting out of the Sage Intacct. Please contact Sales or your CSM to learn more and or subscribe to this integration.

**Responsibility Matrix** – To enable you to clarify expectations with your customers related to job responsibilities, FCC is pleased to announce a new “Responsibility Matrix” feature introduced in this release as an optional feature. This feature will appear on your Job Quotes to capture the Job/Project responsibilities of Equipment Rental/Crane Companies (“Company”) vs your customer’s (Customer) responsibilities. This responsibility matrix will then be printed on your Quote documents. Responsibility Matrix helps to identify and clarify the roles and responsibilities between the company and customer on various important items/tasks. The items/tasks are configurable and get copied over to the quotes by default and can be included or removed at the quote level.

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**ITI Integration Enhancement** – For the customers who are using the FCC - ITI Integration can further benefit from the link to the ITI Learning Portal for easy access to the on-field employees and Branding options. ITI Learning Portal setup for the customers by the ITI are now available to be configured in NexGen with the Learning Portal Menu Name, Branded Icon and URL for the ATOM users to login and access ITI Learning Portal for training and certifications.

The following additional features and enhancements are introduced in the 2023 General Release 2:

- **Add apprentice scope to Employee Import screen** - Added Apprentice % field to the Import Employees feature. (Case #29444)
- **Invoice Register Report - Export to Excel/CSV** - Added Department name, Created By, Modified By, Created Date, Modified Date columns to the Export to Excel function of the Invoice Register Report. (Case #29650)
- **Update pay logic** - Updated pay logic for Over Scale and Craft Modifier will not be included when calculating Pay Rate when employee union rate is zero. (Case #29768)
- **Union selection** - Changed the Union dropdown in all the labor screens to list only the unions assigned in the employee unions. (Case #29822)
- **Billing Contact field in Customer** - Added the ability to assign billing contacts to a customer before the customer record is saved. (Case #29829)
- **Adding "Next Bill" Field for 3-Rate Billing Codes to WPF Job** - Added "Next Bill" Field for 3-Rate Billing Codes to WPF Job>Estimates. (Case #29917)
- **Profile Screen Settings - Samsara Telematics** - Added profile-based access to the 'Signed' field in Activities tab of the Work Orders screen. (Case #30086)
- **Exception handling to Export Telematics Routine for Samsara** - Added exception handling to Export Telematics Routine. (Case #30099)
- **Samsara export defects routine** - Changed the export feature to include the username of the mechanic who resolved the defect. (Case #30100)
- **Units - Import Primary and Secondary Unit Types** - Added a new option "Unit - Secondary Unit Types" to the import screen to add secondary unit types to a Unit. (Case #30273)
- **Samsara API for Trailers** - Changed the Samsara Telematics import to import Trailer odometer information as well as other schedule types. (Case #30685)
- **Legacy Job screen** - Added the ability to change the Job Code on the Legacy Job screen even after an E-Ticket has been issued. (Case #30828)
- **WPF Job screen** - Added the ability to change the Job Code on the WPF Job Screen even after an E-Ticket has been issued. (Case #30829)

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- **Adjust Time Round To setting on Union Codes to allow for actual time calculations.** - When Time Round is set to blank in the payroll defaults tab of the Union Code, the processing will be done on the actual times. (Case #31580)

### **SOFTWARE ISSUES ADDRESSED IN THIS RELEASE**

- **Sage 300 Payroll Interface SSN Formatting** - Corrected SSN formatting issue for US employees in the employee sync. (Case #22619)
- **Vouchers from Receivers** - Corrected an issue of the "Remaining to Distribute" amount not showing the correct value when deleting the Freight or Sales Tax lines. (Case #22899)
- **Job Revenue Variance Forecast Report - Missing data report used for Month End Close** - Corrected an issue in report where the report was not pulling all departments data. (Case #23214)
- **Track Qty On+Off** - Corrected an Issue in the parts screen by displaying a validation message when turning off "Track Quantity" when the "In Stock" quantities are not zero and not being displayed on the screen. (Case #25792)
- **Job - WPF Comments Section - RTF formatting is not enabled consistently** - Corrected an issue where the RTF controls are not showing up on the comment's fields on the Job WPF screen when a Quote is converted to a Job. (Case #27039)
- **Job Screen Not Prompting for Unit Certification** - Corrected the unit certification prompting issues in Job WPF screen. (Case #27231)
- **Billing Cost Import** - Corrected issues in the Import Billing Costs feature. (Case #27621)
- **Deficiency Reported Date** - Corrected the Deficiency Reported Date on the Checklist Deficiency Status Report. (Case #27924)
- **E-ticket Report Corrected overlapping text** - Corrected an issue of checklist comments overlap on the Telerik E-ticket report within Jobs WPF E-ticket Manager or Reports > Jobs > Job E-tickets. (Case #28506)
- **Screen size on Legacy Job** - Corrected an issue on the Legacy Job screen where the estimates grid resizes when saving a Job. (Case #28930)
- **Customer inquiry screen** - Corrected aging calculation issues on Customer Inquiry screen with Sage 300 Accounting system. (Case #29009)
- **Screen partly hidden - Job WPF** - Corrected the issue of the Invoice History pane window sizing on Job WPF screen where the pop-up window for invoice history was not sizing properly in some circumstances. (Case #29010)
- **Schedule refresh causes cursor to change focus to Report Type dropdown** - Corrected an issue where focus line changes after performing a refresh, the cursor focus will remain where it was prior to the refresh. (Case #29017)

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- **Exporting to Excel (Reports > Materials > History Per Day)** - Corrected an error in the Export to Excel feature by adding support to eliminate the unsupported special characters in the Excel export. (Case #29239)
- **Inactive vendor code allowed when copying a PO Requisition** - Corrected an issue by displaying an error message: *"Vendor record selected is inactive, select an active vendor"* when copying a Purchase Order with an inactive vendor. (Case #29244)
- **Revenue Detail Report by Invoice** - Corrected an error when retrieving report data that has a project number with a single quote character. (Case #29252)
- **Employee on Job Schedule** - Corrected an issue where the reference in the Job Resource table was not deleted when deleting a Unit record from the Unit/Emp schedule. (Case #29499)
- **Legacy Job & Unit Schedule** - Corrected an issue of an employee not being displayed as assigned employee on the Unit Schedule in certain conditions. This fix affects the Legacy Job Screen only. (Case #29526)
- **Job Resources & Data Validation** – Clarifying conflict messages on the Job WPF resource screen. (Case #29530)
- **Cancelled Employees** - Corrected an issue where cancelled employees may be included on paper tickets under certain conditions. (Case #29604)
- **Apprentice Wage Calculation** - Corrected an issue in the Labor by Job screen where the apprentice calculation was not completed when adding a new labor record under certain conditions. (Case #29616)
- **Recurring Billing** - Corrected an issue in the Recurring Invoices screen where the retainage percentage entered on a Recurring Billing is not taken into consideration while generating an Invoice. (Case #29626)
- **Job Profit and Loss by Invoice Date report** - Corrected an issue where the Job Profit and Loss by Invoice Date Summary Report did not include the equipment expenses based on the Invoice date but was using the work date instead. (Case #29703)
- **Employee Payroll Processor Detail Report - Truncating Job Number value** - Corrected the Employee Payroll Processor Detail Report to display longer text in the Job Number field. (Case #29757)
- **Craft Modifier Code error** - Corrected an issue in the union screen where an exception occurs when selecting a Craft Modifier containing a single quote. (Case #29821)
- **Employee Schedule generating Operator Ticket** - Corrected the unit selection when generating an operator ticket from the Employee Schedule. (Case #29824)
- **Lookup Workorder on L4PP Screen** - Corrected an issue where wrong validation message was displayed when selecting a Work Order from the lookup. (Case #29854)

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- **Employee Schedule** - Corrected an issue in the Employee schedule where in some exceptional cases an employee record does not show the pink line to indicate there is an E-ticket assigned to that employee. (Case #29867)
- **Exception when creating a ticket from Unit Schedule** - Corrected an issue in the Unit Schedule screen where generating an E-Ticket was causing an error when there is more than one secondary employee for a unit. (Case #29888)
- **Legacy Job screen resizing** - Corrected an issue on the Legacy Job screen where the estimates grid resizes when saving a Job. (Case #29940)
- **OCIP Report** - Corrected an issue in the OCIP report by customer, where the OCIP amounts are not displayed correctly. (Case #29982)
- **Invoices & Sub-Accounts in QB Desktop Version** - Corrected an issue in QuickBooks interface where, in certain conditions, exported Invoices are being added to the sub accounts of the main customer instead of adding it to the main customer. (Case #30010)
- **Invoice Update Performance** - Corrected an issue where an incorrect SQL statement was affecting the performance of the Invoice screen. (Case #30068)
- **Description of work Samsara DVIR** - Corrected an issue where the Description of Work is not being populated correctly when creating a WO from a deficiency which was added from a Samsara DVIR. (Case #30098)
- **WPF Job** - Corrected an error that occurred when changing resource status from "On Job" to "Finished" when hitting enter. (Case #30105)
- **Missing operators/drivers from the daily report** - Corrected an issue where the Operator assigned to a Unit is not being displayed on the Unit Schedule in certain cases. (Case #30179)
- **Invoice Batch Audit Report** - Corrected an error that occurred when exporting the data to Excel using Save As feature. (Case #30181)
- **Menu Security & Copy Jobs** - Corrected an issue by disabling the "Copy Job" and "Ticket Generation" options, when save is disabled for Job screen in the menu security. (Case #30187)
- **L4PP - SQL Client Exception** - Corrected an issue in the payroll processing function where an error is being thrown when processing payroll that has time slots defined at the Employee level and not at the Union Level. (Case #30247)
- **Local Union Craft Modifiers** - Corrected an error in the Union Codes screen where an exception is thrown when adding a Craft Modifier with single quote in it. (Case #30258)
- **Samsara Telematics auto-mapping** - Corrected an issue of Samsara Telematics not importing the hours based on the Asset ID assigned in the Hours Lower or Upper. (Case #30328)

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- **Parts Inventory Cost Adjustment** - Corrected an issue of the Parts Inventory Cost Adjustment adding record to a 'Not Assigned' yard and location instead of primary yard and location. (Case #30343)
- **Service Invoice error** - Corrected an error in the service invoice screen when retrieving an invoice that has a space in front of the invoice number - (Ignore leading spaces) (Case #30344)
- **Invoice Batch Audit Report Excel export** - Corrected an error encountered when exporting data to Excel using Save As feature. (Case #30359)
- **E-Tickets Not Invoiced Report** - Corrected an error when loading invoice screen from E-tickets Not Invoiced screen. (Case #30363)
- **Unit Code** - Corrected an issue where the Unit Code entered in the PO Requisition is not carried through to Voucher from Receivers screen in certain conditions. (Case #30408)
- **Payroll processing** - Corrected an issue in payroll processing where the hours are split into two records for an overnight job that does not have time slots assigned in the union. (Case #30421)
- **WO Lookup search input** - Corrected an issue of unit dropdown not working correctly when text is typed in the WO lookup. (Case #30550)
- **Telerik Invoice** - Corrected an issue so the "Include E-Tickets" checkbox would be enabled on the Telerik Plain Paper report. (Case #30595)
- **WPF Job** - Corrected an issue where Job WPF > Estimate tab was allowing entries greater than 1 on the quantity field for summary lines. (Case #30614)
- **Jobs P&L Report** - Corrected the issue by changing the export to Excel for the Jobs P&L by Invoice Date Report to use the correct version of the Stored Procedure. (Case #30661)
- **Invoice Transaction Audit Report** - Corrected an issue of the Invoice Transaction Audit Report displaying zero costs for the inventory and cost of goods sold on the distribution lines. (Case #30683)
- **Invoice WPF performance optimization** - Corrected the performance issue by turning on virtualization for the invoice PO grid. (Case #30710)
- **Voucher from Receiver** - Corrected an issue where a Foreign Key error may occur when changing the unit code for tax or freight lines. (Case #30714)
- **Department Dependency on Quote Profit Forecast Reporting** - Corrected an issue on the Quote Profit Forecast Report, where the report was not pulling the Quotes with blank Department when viewing the report for All Departments. (Case #30735)
- **Payroll processing** - Corrected an issue of payroll not processing for Sunday when there are no union time slots defined. (Case #30744)
- **Quote Profit Forecast - Billing costs** - Corrected an issue of the Billing Costs with 'All Yards' selected are not displayed on Quote Profit Forecast tab. (Case #30817)



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- **Job Schedule Overlimit Performance** - Corrected a performance issue for the Job Schedule query by removing the unused column added for database identity. (Case #30840)
- **Vendor Detail Report** - Corrected the performance issue in the Vendor Detail Report. (Case #30930)
- **User option Company/Yard restriction for Units** - Corrected an issue in the Job screen where yard restrictions are not applied to filter the units. (Case #30937)
- **Minimum Rate logic** - Corrected the minimum rate logic in Labor screens for OT and DT Craft Codes to multiply by 1.5 and 2 times the minimum rate. (Case #30990)
- **Job WPF & Line Items** - Corrected an issue in the Job WPF screen where the default Line Items set in system defaults are not saved to the job, occurring when a job is saved without accessing estimates tab. (Case #31169)
- **Employee Union Benefit Detail Report** - Corrected an issue in Employee Union Benefit Detail Report where incorrect data is displayed when All Employees option was selected. (Case #31210)
- **Unit Schedule monthly view** - Corrected an error when closing the Unit Schedule screen in the Monthly Graph view where a large number of Units are being displayed. (Case #30970 & 31397)
- **Credit Memo due date** - Corrected the issue of due date not calculating for EOM Term when generating a credit memo. (Case #31477)
- **Payroll processing** - Corrected an issue in the payroll processing where, in some conditions, the OT hours processed for the overlapping hours are deducted from the ST hours. (Case #31491)

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## **SYSTEM ADMINISTRATOR NOTES**

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### **System Defaults Changes**

#### **General Tab Changes**

- **Updated Accounting Program dropdown in System Defaults** – Added “Sage Intact” as an option for accounting program.

#### **Invoice Tab Changes**

- **New Field - Enable saving a copy of the invoice PDF when printing or emailing** - Added an enhancement to save the PDF copy of the Invoices and its attachments when printed/emailed. Added flag to System Defaults under the Invoices Tab - "Enable saving a copy of the invoice PDF when printing or emailing". Default=unchecked.

#### **Quote Tab Changes**

- **New Field - Responsibility Matrix** - Added an optional feature "Responsibility Matrix" in the Quote tab of System Defaults. Default=unchecked. - To fully utilize this feature, existing Quote templates will require modifications. Please contact your CSM or FCC Support.
- **New Field - Include Responsibility Matrix** - Added 'Include Responsibility Matrix' checkbox in Set System Defaults screen to turn on or off the adding of responsibility matrix grid. Default=unchecked.

#### **E-Documents Tab Changes**

- **New Field - Modular E-Tickets Labor & Unit Details Double Expand** - Added a new option in the System Defaults E-Documents tab "Expand Labor Accordions by Default". Default=unchecked.

#### **External API Tab Changes**

- **New Field - ITI - Integration** - Added a field "ITI Learning Hub" to System Defaults External API tab to set the URL for opening the ITI Learning Hub in the browser.

### **Menu Security Changes**

- **Menu Items Change - Maintain → Geographies → States and Counties** - Added new menu item Geographies to list States and Counties screens.



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- **Menu Items Change – Maintain → Quotes** – Added Configuration Screen for Responsibility Matrix.

### Utilities → Atom Devices

- **ATOM Android flag for APK vs. Play Store version** - Added a new field in Atom Devices screen to display the Atom Build Type being used to identify Play Store / APK / App Store for a user.

### Menu Security Settings Changes (Admin → Menu Security) & Profile Screen Settings Changes (Admin → Profile Screen Settings) – Added the following items that are **enabled by default**.

Check your Menu Security & Profile Screen settings for all profiles to ensure the access to these latest items are enabled/disabled as appropriate for your organization.

- **Add Security settings for Maintain → Geographies** – Added menu security and profile screen settings to Geographies module.

**Add Security settings for Maintain → Quotes** – Added menu security and profile screen settings to Responsibility Matrix configuration module.

### Miscellaneous Changes

- **Legacy Jobs screen > Unit/People tab** - "Emp Row ID" column added to Operator and Oiler dropdown to support correct selection when there are multiple entries per employee. Allowing users to easily identify the instance of an employee being assigned to a unit, ensuring the resource dates align.

## DOCUMENTATION & TRAINING

The following documents are the current versions and may be of help for System Administrator reference:

- [Avalara Setup & User Guide](#) (New feature available in this release)
- [Responsibility Matrix Setup & User Guide V 1.0](#) (New feature available in this release)
- [Quote Profit Forecast User Guide V 1.0](#)
- [NexGen\\_WPF\\_Dispatch\\_User\\_Guide\\_5.0](#)
- [Modular\\_E-Ticket\\_User\\_Guide\\_3.0](#)
- [ITI Integration User Guide V 2.0](#) (New feature available in this release)
- [NexGen\\_WPF\\_Invoicing\\_Guide\\_v4.0](#)
- [NexGen\\_WPF\\_Admin\\_User\\_Guide\\_2.0](#)
- [Google Play Store Admin User Guide](#)

## NEXGEN Product Release Notes

### **PREVIOUS RELEASE DOCUMENTS:**

Release [2023.1.0.1](#) (Q2 2023) (Q2 2023)

Release [2022.4.3.0](#) (Q4 2022)

Release [2022.2.0.0](#) (Q2 2022)