FLEET COST & CARE

NEXGEN Product Release Notes

2025 GENERAL RELEASE 2 - JANUARY, 2026
VERSION: 2025.2.0.0

Includes changes since NexGen version 2025.1.0.0

NEW FEATURES & ENHANCEMENTS

Fleet Cost & Care is pleased to announce the following featured enhancements introduced with the 2025 General Release 2:

- **Round file size up to the nearest whole number (1 or >1)** - Corrected the file link file to round up to 1 KB when the file size is less than 1 KB. (Case #22637)
- **Fillable PDF's and Walk Through Forms** - Added a new document option "Fillable PDF Forms" with the type "LEM Ticket" & "Operator Ticket" in the Maintain-Documents screen. (Case #36749)
- **Add Column for Certified Pay/Prevailing Wage to Jobs by Report** - Added a "Certified Pay" column in the Reports - Jobs - Jobs By report. (Case #38047)
- **Retain invoice lines with quantity of 0 on the invoice detail tab** - Added a feature to display the job estimates with zero quantity on an existing invoice in the Invoice WPF screen. (Case #38482)
- **Include prospects in the dropdown on Quote lookup view by Customers** - Included prospect records in the customer dropdown for a quote lookup with view by as "Customers" and added an "Include Inactive Customers" checkbox. (Case #38590)
- **NexGen Quote Rate Variance triggering with 0.00% variance** - Added an SSD flag 'Show All Variances' to mark all the estimates as needs approval and the negative variance records to be shown in red. (Case #38598)
- **Sage Intacct - Multiple Email Issue** - **ACCOUNTING - SAGE INTACCT** – Added support for Customer main email field sync to Sage Intacct. (Case #38619)
- **New Terms & Conditions Not Displaying Correctly on Quotes** - Added an additional sixth field to capture the description of the footer that is not sufficient to fit in the 5 existing fields to capture the total length of the text. (Case #38643)
- **Modify List of Certifications** - Changed the filter options for the Customer/Location Certifications report. (Case #38838)
- **Email Message - Need to Open Outlook Error** – Changed the error message displayed when emailing from NexGen fails to manually open Outlook instructing the user to manually confirm licensing by logging in with their Microsoft cloud credentials. (Case #38971)
- **Provide links on the Unit/Resource checklist history tab to E-tickets** - Added a hyperlink to the "Ticket" in the Unit - Checklist History tab to open the job tickets report. (Case #39056)

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- **"Get Payments" optimization - ACCOUNTING - SAGE INTACCT** : Changed the Get Customer Payments to use the last sync date to get the latest data instead of deleting the entire checks in NexGen and reimporting all the checks from Sage. (Case #39199)
- **Increase 'CheckNumb' character length limit - ACCOUNTING - SAGE INTACCT** - Increased the Customer Collection 'CheckNumb' field character length limit in the database from 30 to 100 characters to match the Sage Intacct field limit. (Case #39374)
- **Turn off "Did It Print Correctly" Pop-Up Messages** - Removed the message "Did it Print Correctly" that would appear in all Invoice printing screens. (Case #39409)
- **Disable Detail Tab When Invoice is Approved** - Added a "Disable Detail tab when Invoice is Approved" setting in the SSD-Invoice tab, and based on the flag, disabled the invoice details while the invoice has been approved. (Case #39434)
- **Profile Screen Setting- Reports Invoices Plain Paper** - Added profile screen settings and restrictions for Invoice Plain Paper and Print Not Printed screens. (Case #39441)
- **L4PPP Screen Performance Optimization - Job & WO # dropdowns to textbox** - Changed the Job & WO dropdowns to textboxes on Labor for Payroll Pre-Processor and Labor screens. (Case #39544)
- **Work Order/Service Invoices with a Prospect** - Added validation and navigated the customer screen when trying to convert a WO Quote to a work order with a prospective customer. Corrected Australian date format issue in Jobs Unbilled report. (Case #39577)
- **Component Module Enhancement: Create Reference to Associated Components from Unit Screen** - Added components tab in the Units screen to display the list of Components the unit is associated with. (Case #39876)
- **Add Custom PO Status Report as a system Report** - Added a new PO Received Status Report with additional columns Received Amount, Open PO Total. (Case #39887)
- **Keyboard Functionality on Telerik Reports** - Added keyboard shortcuts to Telerik Reports. (Case #39949)
- **QuickBooks - Update Import of Customers/Vendors/Employees to check for duplicate names** - Changed the Imports screen to add additional validation to check for duplicate names across Customers/Vendors/Employees when accounting is QuickBooks. (Case #39950)
- **Invoice Header Information on Printed E-Tickets** - Added a feature to repeat the header similar to the first page in all additional pages when printing e-tickets. (Case #39955)
- **Add Unit Search Functionality on WO** - Added Unit lookup in the Work Order screen for unit field. (Case #40008)
- **Fillable PDF's and Walk Through Forms** - Added the ability to allow the Fillable Forms to be emailed with the e-tickets attached to the Invoices. (Case #40017)
- **Add Equipment Usage Revenue Report to all customers** - Enabled Equipment Usage Revenue Report to all customers. (Case #40194)

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- **Update AR Bulk upload - Add Salesperson ID to AR Line Items - ACCOUNTING - SAGE INTACCT** - Added Salesperson code to AR Line Items in AR Bulk upload. (Case #40364)
- **Select Logo on E-Tickets Based on Yard Selection** - Added brand tab to the yards screen to assign a logo to a yard to display the assigned logo on the e-tickets and if no logo is assigned for a yard, then the company logo will be displayed. (Case #37966)
- **Mark signature optional on Operator, Trucking and Load Tickets** - Changed the Operator, Trucking and Load Tickets to make signature entry as an optional field. (Case #39886)
- **Interface - Gusto Payroll Output File Creation - PAYROLL - GUSTO** - Added a new external payroll 'GUSTO' to export payroll data in a format that GUSTO payroll can import. (Case #40217)

SOFTWARE ISSUES ADDRESSED IN THIS RELEASE

- **Editing Received PO Lines** - Added a message on the PO screen when editing a detail line that has been received but is still editable. (Case #22701)
- **Cost on PO** - Corrected an issue in the PO screen to include $ sign for the currency fields. (Case #33671)
- **P&L Per Diem Calculation Issues** - Corrected an issue in the Job P&L by Invoice Date report to include the labor amounts for the Misc pay rate records also. (Case #39354)
- **Voucher Import not processing as expected** - Corrected the rounding issue on the Import Vouchers screen. (Case #34920)
- **E-Tickets Not Approved or Invoiced** - Performance Issue and Improvement suggestions from customer - Added a performance enhancement to the E-Tickets Not Approved or Invoiced screen. (Case #35418)
- **E-ticket Displaying Wrong Employee Name** - Corrected an issue in the Job e-tickets report where correct employee is not being displayed in a very rare case. (Case #38118)
- **Update display order "Team Information" section per unit on LEM tickets/e-tickets in a chronological order** - Changed the display order on the Team Information section to display employees as per the chronological start time order. (Case #38287)
- **PO approval** - Corrected an issue in the Vouchers from Receivers screen when there are multiple receivers created for a PO and after the first voucher is created, the rest of the vouchers are tagged as needing approval. (Case #38322)
- **Unit schedule display bar graphs not aligning properly when informational columns are shrunken down** - Corrected the issue of the bar graphs not aligning correctly when displayed with zoom out. (Case #38333)

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- **Prepopulate the Unit Number: Voucher import with a work order number but no unit** - Corrected the voucher import file, if the voucher line is for a work order, it will auto-populate the work order unit code in that records unit code column. (Case #38388)
- **Job Line Item Summary Report- Hours worked column** - Corrected an issue in the Job Line Item Summary Report where the rounding has been removed on the Hours Worked column. (Case #38411)
- **Error When Generating LEM** - Corrected the error while generating the LEM from the Unit/Employee schedule- Employee Schedule display option. (Case #38574)
- **Derived numbers - Showing negative hours derived on the report** - Corrected an issue in the Job E-Ticket report where the hours derived are showing negative value when the end date is less than the start date. (Case #38586)
- **Checklist History Error** - Corrected an error while clicking on the Checklist History tab on the Maintain-Units. (Case #38666)
- **NexGen Exception - Job Quotes/Sub-items** - Corrected an exception in the Quote screen that occurred when there is no customer assigned on the main tab and checking or unchecking the subitem checkbox in the estimates tab. (Case #38716)
- **RPT Save As Export Options Exception** - Corrected an issue in the export options report where an error occurred when clicked on Save As from reports for the users who had unacceptable special character in the user signature field. (Case #38727)
- **Sage Intacct - AR Invoice Export - ACCOUNTING - SAGE INTACCT :** Corrected an error in the Invoice export which occurred because of the unit code having a special character (&) in it. (Case #38764)
- **Job Line Item Summary Report Not Allocating Revenue Correctly for AIA Billing** - Corrected an issue in the Job Line Item Summary Report where the revenue amount of the AIA invoices are not displayed. (Case #38816)
- **Not Approved or Invoiced Screen** - Corrected an issue on the Invoice Not Approved or Invoiced Screen where All Yards and All Departments selections in the respective Yard and Department dropdowns is not retrieving the data. (Case #38840)
- **Legacy Job Screen keyboard shortcuts** - Corrected an issue on the Legacy Job screen where the shortcut key press for the add employee and add component are not working. (Case #38856)
- **Unit Checklist not available on Atom devices** - Corrected an issue in the legacy job screen where the unit/job checklists are not being added to the tickets when generating an Operator ticket. (Case #38901)
- **Provide Insert resource capabilities into legacy Job resources when components are enabled** - Added Insert line options for Employees and Components in the legacy Job screen. (Case #38921)

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- **Legacy Job Screen Components showing after turning off on SSD** - Corrected an issue in Job WPF screen where the components feature will be turned on both from the features tab and the old SSD flag 'Use Components'. (Case #38931)
- **PO Vendor Change Does Not Validate Remit To** - Corrected the remit to drop down in the voucher when updating the vendor in the purchase order. (Case #38977)
- **Missing Units in Team Information Section on LEM** - Corrected an issue in the Job Ticket Team Information section where the information for a record without an employee assigned but is part of the ticket is not shown on the card. (Case #38992)
- **Marked with Require Comments Not Copying Over Correctly When Copying Checklists from One Unit to Another** - Corrected an issue in the Copy Unit Checklist where the tasks marked with Require Comments are not copying over. (Case #39012)
- **Export to Excel Error** - Corrected an exception when exporting a Job estimate to Excel. (Case #39043)
- **Message when saving a job - Cannot insert the value Null into column description table job line items** - Corrected the error while updating the estimate with job line items in the job estimates. (Case #39094)
- **Maintain Units Checklist History Performance** - Corrected a performance issue in the checklist tab of the units' screen. (Case #39101)
- **ExecuteReader error when trying to Save As to Excel file for Reports/Vouchers/Sales Use Tax-over Maximum using a monthly date range for All Yards** - Corrected the error while exporting the "Use Tax Report - with Over Maximum Amounts" report to Excel using Save As. (Case #39127)
- **Unable to Add Customer Job Site – Due to message "You cannot add job sites for this group"** - Corrected an issue that is occurring when adding job sites for an inactive customer by clicking on Add button from Quote screen. (Case #39132)
- **Error message when editing a Customer** - Corrected an issue in the customer screen where an error occurred which saving a customer record with a special character '&' in the website field. (Case #39171)
- **Payroll Export - PAYROLL - KEYPAY** : changed the logic to handle the duplicate lunch breaks when we have two jobs, one finishing at 11:30am and another starting at 11:30am on the same day. (Case #39248)
- **Some Comments from Labor Entries Adding Multiple Rows on Payroll Export File** - Corrected the comments are displaying multiple rows on the labor payroll exported file. (Case #39275)
- **Issues with "Team Information" section not displayed in a chronological order** - Corrected the chronological order of the units and employees to be displayed based off the time start on the job e-ticket report. (Case #39279)

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- **Checklist History View by Details Report Not Generating Correctly** - Corrected the report not retrieving the data while selecting the Details option in the Checklist History Report. (Case #39287)
- **Allocating Equipment Costs - Utilization Hours Discrepancy** - Corrected an issue when adding a detail line item in invoice with a unit code where the utilization hours were not calculated when the unit code has no allocated cost associated with it. (Case #39304)
- **Bulk LEM Not Working After Canceling Original Tickets Generated Through Bulk LEM** - Corrected the Primary Employee dropdown filling after tickets have been cancelled while Bulk LEM is checked. (Case #39337)
- **Parts Invoice Template** - Corrected the "Order No." that is cutting off when printing the "Invoices from Orders." (Case #39341)
- **Checklists Completed By - Checklists show user having completed for all units** - Corrected the issue where "Completed By" and "Status" are not displayed correctly in the unit checklist history tab. (Case #39386)
- **Report - Copy Certifications** - Corrected the Issue Date and Expired Date on the Employee Certification tab while copying the employee certifications from Utilities (Case #39461)
- **Push Notifications for WO Not Working** - Corrected the push notification feature issue when updating the employee or start date on the WO Employees tab. (Case #39486)
- **Jobs Unbilled Report - inconsistent date formats** - Corrected Australian date format issue in Jobs Unbilled report. (Case #39539)
- **Signature Required Feature** - Added system default flag for high level security and a new field at user option level for user level security for Require Signature on LEM Tickets feature. (Case #39542)
- **Require Signature on LEM - Quote --> Job Conversion** - Corrected an issue in the WPF job screen where the 'Require Signature on LEM' is not applied correctly when a quote is converted to a Job for a user with company defaults set in user options. (Case #39571)
- **Exception when assigning resources to Job WPF** - Corrected an error that occurred when adding a resource type configured for estimates only without a customer on the job's main tab. (Case #39588)
- **NexGen user session terminated** - Corrected an issue with the Auto log off where the users are logged off after the confirmation to continue. (Case #39664)
- **Default GL for Yard** - Corrected an issue in the yard segment of the final GL account where dept segment is used as second segment and yard as third segment. Dept has default GL and yard segment is not replaced with default yard GL. (Case #39731)
- **Changes to Invoice Export to Premier - ACCOUNTING - Jonas Premier** - Changed the mapping of few fields in the Invoice export feature. (Case #39739)

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- **Automatic Data Uploader notification - AP Vouchers Export - ACCOUNTING - Jonas Premier** - Changed the voucher export to limit the Line Description to 100 characters. (Case #39767)
- **Job Profit Loss Report by Invoice Date - Jobs outside of date range** - Corrected an issue where the Invoice detail items with blank start date are being displayed on the report. (Case #39779)
- **Cost on PO Req** - Corrected an issue in the PO Req screen to include $ sign for the currency fields. (Case #39832)
- **Taxable Cannot be Checked for a Tax Exempt Customer** - Corrected an issue on the Service Invoice screen where the tax exempt message is displayed multiple times. (Case #39836)
- **NexGen SQL Database Improvements - sp-BlitzIndex** - Added necessary indexes on table FMS_CUSTOMER_SCREEN_COLUMNS. (Case #39867)
- **Off Rent Ready for Pickup - Not showing** - Corrected an issue where a unit was not showing as needs pick up in unit schedule after the schedule type and unit type combination in the unit's screen has been marked as Inactive after a unit was assigned on a job with this combination. (Case #40041)
- **Occasional Self Approval on PO Reqs** - Corrected an issue in the PO Req screen where Approval checkboxes are checked from previous PO when selected an existing PO Req and clicked on New PO Req. (Case #40106)
- **Issue in Test-Exporting Vouchers** - Corrected an error in the Export Voucher. (Case #40116)
- **Voucher Add Freight Order Entry** - Changed the Vouchers from Receivers screen to carry the previous record's order entry number when adding a Freight Line. (Case #40188)
- **Report To contact name not auto populating in Check Signer's Name field** - Corrected an issue where the auto-populate signers' name is not working correctly because of the flag in system defaults 'DoNotAutoPopulateSignersName' is turned on. (Case #40203)
- **Labor Entries Doubling/Tripling in Export - PAYROLL - KEYPAY** - Corrected an issue in the payroll export where the entries are exporting 2 to 3 times per day. (Case #40234)
- **"Report To" name not auto populated in ATOM app** - Corrected an issue where the auto populate signers' name is not working correctly because of the flag in system defaults 'DoNotAutoPopulateSignersName' is turned on. (Case #40260)
- **Billing Code Types - Inactivating a Billing Code Type hides it in the module** - Corrected an issue in the Billing Code Types screen to show the Inactive records also. (Case #40296)

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SYSTEM ADMINISTRATOR NOTES

System Defaults Changes

General Tab Changes

- **New External Payroll Company: GUSTO –** Added a new external payroll 'GUSTO' to for external payroll export.

Invoice Tab Changes

- **New Field – Disable Detail tab when Invoice is Approved –** Added a "Disable Detail tab when Invoice is Approved" setting, based on the flag, disabled the invoice details while the invoice has been approved. Default=unchecked.

Quote Tab Changes

- **New Field – Show All Variances -** Added an SSD flag 'Show All Variances' to mark all the estimates as needs approval and the negative variance records to be shown in red. Default=unchecked.

Menu Security Changes

- **Menu Items Change –** Reports → Expense/Revenue/Profit → Equipment Usage Report.
- **Menu Items Change -** Reports → Purchase Orders → PO Received Status Report.

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 Reports → Expense/Revenue/Profit → Equipment Usage Report.**
- **Add Security settings for Reports → Invoices → Plain Paper**.
- **Add Security settings for Maintain → Resources → Components**.
- **Add Security settings for Reports → Purchase Orders → PO Received Status Report.**
- **Add Security settings for Maintain → Company → Yard → Brand.**
- **Add Security settings for Maintain → Employees → Union Codes → Pay Rates → Start/End Date**

Miscellaneous Changes:

- **Added Support for Yard Logo Branding** - Added Brand tab to the yards screen to assign a logo to a yard to display the assigned logo on the e-tickets and if no logo is assigned for a yard, then the company logo will be displayed.
- **Added Support for Fillable PDF Forms** - Added a new document option "Fillable PDF Forms" with the type "LEM Ticket" & "Operator Ticket" in the Maintain-Documents screen.

New Reports:

- **Equipment Usage Revenue Report** – Reports → Expense/Revenue/Profit → Equipment Usage Report.
- **PO Received Status Report** – Reports → Purchase Orders → PO Received Status Report.

DOCUMENTATION & TRAINING

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

- Fillable Forms Feature User Guide
- Labor Import User Guide
- MFA & Biometric Authentication User Guide
- Avalara Setup & User Guide v3.0
- Responsibility Matrix Setup & User Guide V 1.0
- 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
- NexGen_WPF_Invoicing Guide_v4.0
- NexGen_WPF_Admin_User_Guide_2.0
- Google Play Store Admin User Guide

PREVIOUS RELEASE DOCUMENTS:

Release 2025.1.0.0 (Q1 2025)

Release 2024.2.0.0 (Q2 2024)

Release 2023.2.0.0 (Q1 2024)