# Adjutant 20/20 Release Notes

## Version 2412.E

## Accounts Payable

**ECR 44620**      **1099 Forms**

The 1099 NEC and 1096 system default forms have been updated for minor alignment updates and reporting year print format on the 2024 reporting forms.

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| **Rule Maintenance** ** | TYPE1099 |

## Accounts Receivable

**ECR 44362**      **Customer Statements**

New form expressions for the warehouse address details linked to the shipping warehouse from the AR Invoice have been added to the Customer Statement form. The new warehouse-specific address fields available are waddress1, waddress2 and wcitystate.

**ECR 44569**      **Paytrace Integration**

The Paytrace (IMS) credit card vendor integration logic has been updated to process the full AVS and CV response data back to the displayed response when processing credit card transactions with Paytrace. A new version of the AdjCC program must be installed to take advantage of this new functionality. Contact your ABIS support team to update the AdjCC program.

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| **Programs Affected** ** | ADJCC |

## Approval Management

**ECR 44282**     **Multi CID Approvals**

*New logic has been added to the Approval Management module to handle approvals across multiple CID environments where an approver has separate User in Adjutant records across multiple CIDs. The new logic allows the same user to see and take action on approval records created from multiple CIDs when they have separate UserID records in each CID.*

*The User in Adjutant 'Approval Info' tab has a new Linked Contacts table where a user can establish the contact/user records that are set up on other CIDs and link them to their primary CID user. This will allow other approval records to show in the primary CID as long as they match the setup in the 'Approval Info' tab.*

*The Pending Approval screen will show all pending approvals for the logged in user from all linked CIDs. The Pending Approval screen also has a new CID column to show and sort the pending approvals.*

## Blocks

**ECR 44199**     **Project Task List block**

*A new 'Task Phase' filter option has been added to the Task List block for use with the Project Phase tab on the Project screen. The new filter has a 'Selected Phase' option that will report the tasks linked to the Project Phase selected on the Phase tab when using the Task List block in the User Functions area. In order to take advantage of the new selected phase task filter, any existing Task List blocks in the Project User Functions area will need to be recreated in order to show the new filter. A special database update may be required for some systems, which will require assistance from the ABIS support team.*

## CRM/Sales Force

**ECR 44410**     **Comparative Sales (Invoiced)**

*A new 'Org Acct Manager' Sort option has been developed for the Comparative Sales Invoiced Report. The new 'Org Acct Manager' option will select and group invoiced totals according to the Account Manager specified on the Organization Sold To screen - rather than the Account Manger specified on the sales order/invoice record. The 'Sales Team' option will continue to select and group report details according to the Account Manager on the invoice record.*

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## Document Imaging

**ECR 44100**     **Document Vault Security**

*A new specialized Document Vault Security Update screen (DVaultSec_s) has been developed to control access to specific Document Vaults based on an Organization or based on a specific record. The new Document Vault Security Update screen has been developed to control access to Organization and Accounts Payable (AP) Document Vaults. The new screen may be expanded to control other specific Document Vaults in the future.*

*The controls for this screen work on special logic to allow specific users into specified Document Vaults based on an Organization or even a specific AP Invoice record. If one or more users are specified in the new screen for access to specific vaults, then only the users specified in the screen will have access. All other users will be automatically denied access to the specified Document Vaults. Users that are denied access based on settings in this screen will see a red error that access is denied based on Doc Vault Security when attempting to access any of the specifically denied vaults.*

*The Document Vault Security Update screen is a new screen and will need to be added to the Menu Prompts before it can be accessed and set up.*

http://www.abiscorp.com/faq/index.php?title=Document_Vault_Security_Update

## Expense Reporting

**ECR 44412**     **Expense Report Block**

*A new 'Reimbursable Total' column has been developed and added as an available column for the standard Expense Report block.*

## Import/Export Manager

**ECR 44383**     **Quick Assembly Import**

*The Quick Assembly import function has been added as an available import option in the Adjutant 20/20 Platform.*

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## Item Control (Inventory)

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| **ECR 44396** | **Prompt 44 (Print P Label)** |

*An Adjutant 20/20 VTERM version of Prompt 44 (Print P Label) has been developed for use with the new Virtual Terminal screen.*

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| **ECR 44551** | **Item Master** |

*The Next Item/Previous Item buttons will now be displayed on more Item Master tabbed screens, allowing easy switching between items no matter which tab you are viewing.*

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| **ECR 44518** | **Inventory Labels** |

*This update adds the ability to word-wrap text on an inventory label so text stays together on a label. This prevents awkward cut-offs on long item descriptions. The label logic routines must be manually updated with new commands in order to add the new capability. Contact your Implementation Consultant if you are interested in taking advantage of this new label option.*

**Programs Affected\*\***   **G_LINV\*.PRG**

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| **ECR 44427** | **Prompt 49 (Scrap Item)** |

*An Adjutant 20/20 VTERM version of Prompt 49 (Scrap Item) has been developed for use with the new Virtual Terminal screen.*

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## MBS/Roll Former Integration

### ECR 44379    Connex integration

*The Connex integration logic has been updated to provide more linking information between Connex and Adjutant data tables. This new information is only available in the database and can be used for troubleshooting production details between the two systems. The new logic requires a new version of the READCONNEXAPI program and a database update to enable the new linking data. Contact the ABIS support team for asssitrance with updating the Connex program.*

**Programs Affected\*\***    READCONNEXAPI

## Order Entry

### ECR 43800    Print Production Work Orders

*A new 'Images Only' checkbox is available in the Print Production Work Order screen that will print attached image files in a separate report with only the linked JPG or PDF files. This logic works with the PWOPRINTIMAGE logic that automatically prints files saved to the Sales Order Document Vault that where the file name matches the Department value on the PWO record. This new option allows users to print only the attached files without generating the entire PWO form. Note that if users intend to stop automatically including the printed images with the PWO print, it will require a form template change to remove the automatic image band.*

**Setup Options\*\***    PWOPRINTIMAGE

### ECR 44323    Sales Order Update Tool

*A new setup option, FORMATLENGTH, has been developed for the Sales Order Update Tool that separates the single Length column into separate columns for Feet and Inches. This makes the SO Update Tool more closely match the configuration entry when users have the SEPARATELENGTHFIELDS option enabled for SO Configuration entry.*

**Setup Options\*\***    FORMATLENGTH

### ECR 44238    Item Master

*A new 'Default Blank' logic checkbox is available in the Item Configurations screen for Dropdown/List type configuration questions. The new checkbox will only be available for questions with a type of 'Dropdown'. Selecting the 'Default Blank' option will also automatically check the 'Required' box so that these types of configuration questions will default as unselected, but will require a selection before saving the line item. This new logic provides an alternative to the default logic of the configuration selecting a default option without any user selection. This new logic will require a user selection on every line item entry.*

## Order Entry

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| **ECR 44279** | **Customer Pricing** | |

This update adds a new option to base customer pricing based on the total overall weight of a sales order or quote. The new 'Qty Break on Total LBS' check box in the Customer Pricing screen works with the Starting Qty and Ending Qty entries to enable the user to define pricing tiers based on total pounds ordered for the customer pricing combination. Quotes and Sales Orders will automatically recalculate the pricing for affected line items according to the total pounds sold.

http://www.abiscorp.com/AdjWiki/PRICEGROUP.ashx

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| **ECR 44515** | **SO and Quote forms** | |

The SO Confirmation and Quote forms have been updated to print the associated static length value from the Item Master Length (Ft) field for items that have a defined length in the Item Master.

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| **ECR 43901** | **Discount/Surcharge Calculations** | |

A new CID Setup Option, NEWSUR, converts the Organization Discount/Surcharge logic to a back-end process that calculates the discounts and surcharges at shipping/invoicing with a new back-end routine that will handle the calculations needed for partial shipments and project retainage with a more robust set of logic.

http://www.abiscorp.com/faq/index.php?title=CID_Setup_Options

| **Setup Options\*\*** | **NEWSUR** |
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| **ECR 44235** | **Print Sales Order** | |

A new SO Packing List form expression has been developed to report additional details for allocated lot #s on the SO Packing List. The new expression, 'lotalloc_BQH', will show the following additional data with each allocated lot# when using the new expression:
1. Bin#
2. Quantity allocated (to the sales order);
3. Heat # (from the coil screen).

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## Project Management

### ECR 44256     Project Control API

The Project Control API that creates Project Control records in Adjutant will now automatically set the Project Extra 2 value to the Supervisor contact assigned to the linked Salesperson in the API data. The Extra 2 value will be set to the supervisor of the squad master of the squad the salesperson is linked to.

### ECR 44252     Project Control

New logic has been developed for tasks linked to Projects that can update the Project Account Manager, Squad, Extra 1, and Extra 3 using a new Rule Maintenance record. The new Task Project Update Logic (TASKPROJUPDATE) Rule allows users to define standard tasks that can update the linked project based on assignments to the defined tasks. Tasks can be defined in the rule to update the Project Account Manager based on the Squad supervisor and to update the Squad value from the assigned resource. Other tasks can be defined that will update the Project Extra 1 from the Squad Supervisor and the Extra 3 from the Squad Stand In based on assignments to a Squad leader. These updates will only work when the defined task is assigned directly to a Squad leader. This is a new Rule Maintenance record and must be created before this new functionality will be available.

http://www.abiscorp.com/faq/index.php?title=Task_Project_Update_Logic

Rule Maintenance**     TASKPROJUPDATE

## Purchase Orders

### ECR 44482     EDI 861

A new error condition and warning color coding have been added to the EDI 861 grid view to alert users when there is a mismatch between the EDI file warehouse value and the linked PO warehouse value.

## System Manager

### ECR 44471     Organization Notes

*Support has been added for HIDEORG CID Setup Option in Adjutant 20/20 Notes. The HIDEORG option hides Organization Notes for users that are not specified as the Account Manager in the SoldTo record of that organization. The Notes - S2 security token can override the HIDEORG logic for a specific user,*

| Setup Options** | HIDEORG |
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## Task Management

### ECR 44315     Mobile Adjutant

*The Customer and Location (ShipTo) names in the Task List (Priority, Open, and Custom views) in Mobile Adjutant will now display as hyperlinks to the Organization view. This new functionality allows mobile users to jump to the Organization record to check Document Vaults or other details with a single click.*

### ECR 44377     Task Scheduling

*New Rule Maintenance and Security User Option tokens have been developed to customize the behavior of the right-click menu available for tasks and for specific behaviors using the Reschedule feature.*
*1. A new Rule, Task Right Menu Options (RIGHTMENU), allows users to rename or remove specific right menu options from the list of available commands when right-clicking a task in lists and dashboards. The new rule must be created before the functionality will be available.*
*2. Two new User Options have been developed that can be applioed individually to users in the User in Adjutant 'User Options' tab that can hide the due date and/or remove the time entry requirement when using the date selector in the Reschedule modal. The new RESHIDEDUE will hide the Task Due Date. The new RESDATEONLY will remove the time entry requirement for task rescheduling and allow users to select a date only. The system will assume the current time.*

http://www.abiscorp.com/faq/index.php?title=Task_Right_Menu_Options

| Rule Maintenance** | RIGHTMENU |
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### ECR 44230     Mobile Adjutant

*The Task List view in Mobile Adjutant has been enhanced to show a landscape view when rotated. The new landscape view is exclusive to the landscape orientation. The new view will show the Task#, Task Name, Customer, Location, Task Note, Schedule Date, and the Priority value.*

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## ** Additional information for the Setup Options, Rules, and Programs areas

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| **Setup Options** | Setup Options are system-wide controls that must be enabled/disabled in CID Maintenance. Some Setup Options will not display until the related application has been accessed. Contact your consultant for assistance with enablling/disabling Setup Options. |
| **Rule Maintenance** | Rules are added or updated in the Rule Maintenance screen. If you are not familiar with adding or updating Rule Maintenance headers or details, contact your consultant for assistance. |
| **Programs Affected** | Programs are system-level routines that must be updated manually by ABIS personnel. You must contact your consultant to coordinate updating the associated Program before taking advantage of the enhancement.<br><br>Program updates may require system downtime, or may be required to occur outside of business hours. |

**Total Number of Changes: 28**