

ECR #	Type	Module/Program	Requested Change:	Change Summary:
23962	Enhancement	Roll Former Integration AMS Bundle Change	<p>Create setup option to change AMS Bundle data export to match this.</p> <p>Custaddr1 = Sold To Address1 Custaddr2 = Sold To Address2 Custcity = Sold To City Custstate = Sold To State Custzipcode = Sold To Zipcode User1 = SO Customer PO User2 = SO Number User3 = ShipTo phone number User4 = SO Order # (somast.orderno) User5 = blank</p>	Change AMSBUNDLESET2 logic to use soldto info for customer fields, and always put orderno into user4. Use shipto phone for user3
23954	Enhancement	Accounts Payable AP Invoice Master	Add PO Line Number to the PO Receipts tab of the AP Invoice Master.	Add PO Line # to PO Lines tab of AP Invoice Master Screen.
23964	Enhancement	Accounts Receivable AR Apply Credit	<p>If applying a credit that has a control account <> the target's control account, the GL entry is backward.</p> <p>Example: \$4000 Deposit with Control Account = 2500 \$4000 Invoice with Control account = 1200</p> <p>Applying the deposit to the invoice should Debit 2500 for \$4000, Credit 1200 for \$4000. Current logic appears to do the opposite.</p>	Change logic to make correct debit/credit entries when credit/deposit AR account <> to the target invocie's AR account.
23894	Enhancement	Accounts Receivable AR Statement	Change/Verify Deposit logic to not make two records in AR Statement with payments.	Add new CID option (ARSTATESKIPDEP) , that will exclude deposit payment records from report.

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23178	Enhancement	Production Auto Assemble	<p>-New attribute on an item, PWOAUTOASSIGN. -If attribute assigned, then auto-assign non serial/lot items from BOM during assembly. -Add logic to PWO screen and Prompt 45.</p> <p>-Change will allow user to assemble items that use the same non s/l inputs every time without having to go through the process of actually assigning them.</p> <p>-Match auto-assign logic currently used (stop the assembly if something is out of stock)</p>	<p>If item has PWOAUTOASSIGN attribute, attempt to auto assign all outstanding material when Assemble Line item or Assemble All Line Items buttons are checked. If serial/lots not assigned, or non serial/lot material not on hand (stock only), cancel out of assembly of that line. If all can be assigned, assign and complete. Add same logic to prompt 45. Enter # at Scan P# prompt, item will assemble if stock allows.</p>
23950	Enhancement	Logistics (Shipping Events) Cartclean	<p>Add columns to cartclean: SO Number, SO Status (open/closed/voided), Project Type, Project Status Add sort order on columns Add SO# filter w/search Add print/export function</p>	<p>Add new columns (so#, SOStatus, ProjStatus, ProjType Add output button with new report Add SO# Filter</p>
24026	Enhancement	Email Integration Email Pending approvals	<p>PO and SO adduser looked up by SO#. If duplicate SO# or PO# exist in other CIDs, email can be sent to wrong user. Change to lookup by keyno</p>	<p>Change PendAppr logic to lookup adduser email using SO and PO keyno instead of number.</p>
23840	Enhancement	Email Integration Email Template - Change Order #	<p>- Add "Change Order #" data field to email template. This new field is a count of change order type sales orders (sotype num2 =1) on the project. This count corresponds to the selected/relevant change order (not the total number on the project). This field needs to work for tasks where the keynoh is in the descrip AND also needs to work in Message Control on the changeorder screen.</p> <p>- Add the same data field as an expression in the changeorder report.</p>	<p>Add new lc_cocount variable to Change order report. Add new ~*COCOUNT*~ field to template. Change change order screen to use sotype.num2 = 1 to build list of change order type sales orders instead of looking at text1 for 'Change order'</p>
23852	Enhancement	Email Integration Email Template - PRINTCO	<p>Add msn data fields to PRINTCO email template.</p>	<p>Add msn fields to PrintCO template processing</p>

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23820	Enhancement	Order Entry Fuel Surcharge Changes	<ol style="list-style-type: none"> 1. Change to be based on percentage of order that is shipping (dollar ship the line), so if order is shipped in 3 batches, surcharges will be on each batch, based on amount shipped each time. 2. Add logic to manual ship screen to work the same way. 3. Allow override on manual ship screen to adjust for errors or other issues. 4. Change to check soldto also for attributes. 	Look at SoldTo also, pull Surcharges from there also. Add logic to manual ship to calculate amount to ship based on total percent of order being shipped. Add button to force manual recalc. Add button to lock amounts from recalc to allow manual change Change SE shipping to use same logic (calc based on percent of order shipping)
23890	Enhancement	Purchase Orders GL Dist - BOLNO and SONO	For PO Receipt transactions, if remarks on PO start with SE#, then query both for PO number to get BOLNO and SONO.	Add logic to handle cases where PO Remarks have SE# instead of BOL#
23976	Enhancement	Order Entry Generate PO from seadd2	Use the ShipTo from the linked SO on the SE as the Ship To on the Purchase Order (fill out pomast.shiptoid, pomast.shipto, pomast.saddress1, pomast.saddress2, pomast.saddress3, and pomast.saddress4 according to ShipTo info on linked SO). If more than one SO, then use ShipTo from first linked SO.	Change FPO logic from SE screen to use shipto of selected SO as shipto address on PO (or first SO if none selected)
23887	Enhancement	Report Sets Gross Margin Report	<p>Add the following to the cursor for the 3 Gross Margin reports: GMARGININV, GMARGINCINV and GMARGINSO.</p> <p>Sold To company name and custno Sales Order number SO line number</p>	Add Soldno and soldcompany to cursors.
23944	Enhancement	Purchase Orders Linked SE Field	Add logic to populate the shipping event number onto a freight PO (in "Linked SE field") when generated from a BOL. (Addition to ECR 23742)	Add logic to genfpo to insert SE# into PO header when creating PO.
23942	Enhancement	Order Entry Lock line after value shipment	Lock line from being edited after a dollar amount shipment - this includes partial shipments.	Add new setup option to prevent edit of dollar shipped line (SOLOCKDOLSHIP). If set, line cannot be edited if dollar shipped. Change logic to prevent delete of

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				dollar shipped line in all cases.
23812	Enhancement	Quoting Lock/Unlock Button	Create a new lock/unlock button to the RFQ screen. If locked, the order cannot be edited (to edit, user with the special security token would unlock the order, and then lock it again)	Add new lock button. Add setup option RFQALLOWLOCK to show button. Anyone with Edit can Lock, takes special Unlock security to unlock (RFQ,UNLOCK RFQ-S9) Once locked it cannot be edited Lock Margin Cal button of RFQ is locked.
23877	Enhancement	Order Entry Make No Processing Default	Add a set up option to make the "No Processing" radio button default to checked. Should be per sales order type.	Set SOTYPE.num9 as Default to No Processing flag. If set and sotype is picked, check the Skip Processing checkbox on the SO Header Screen.
23943	Enhancement	Quoting New security token	Copy logic from ECR 23845 for SO to RFQ screen. Create new security token for quote entry that will prevent user from editing the price. This should include restricting access to the Margin button, discount field, sell price, GM%, etc.	Add new security token (RFQ, LOCK PRICE (old), RFQ - S10 (new)) If set, lock price field, margin field and Margin Calc button.
23969	Enhancement	Item Control (Inventory) OHF Update process	Change OHF update process to use NOLOCK hint on all joins and subqueries	Change update OHF logic to use NOLOCK hints in all queries and sub queries.
23893	Enhancement	Purchase Orders PO Defaults	Apply the Default RemitTo from the SoldFrom jumpscreen to PO generated to this vendor through SO entry PO button. Add new field to SoldFrom jumpscreen for Default PO Type that will default on POs created for this SoldFrom (logic should be similar to the Default SO Type on the SoldTo jumpscreen).	Verify the PO Gen logic uses the default remitto if setup. Add new DefPO Type to SoldFrom Screen. Change PO Gen logic from SO screen to use that POType as default PO type during processing loop
23517	Enhancement	Purchase Orders PO PrintOut	Add setup option which will call specific pieces of information to print with PO: PDS Plate (from the CofA screen) Package Label and OSHA Statement (label and OSHA statement come from item master/hazmat screen) Main PO Confirmation Attached Documents	Changed PrintPO logic to pull all info from hazmat, specs in specs field. Block changes in other ECR

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			FORM MUST INCLUDE ALL BLOCKS OF TEXT with print when options	
23946	Enhancement	Production Partial Assembly of Items	Partial assembly does not update the OCost in the assembled item if other material is used, final item is marked as multiowner and setup option is enabled.	Change partial assemble logic to correctly use other cost when included with input items.
23878	Enhancement	Logistics (Shipping Events) Pre Load Report	Add the lot quantity amounts to the pre - load report.	If SOPRINTLOT is set, add qty to lot list (999)
23875	Enhancement	Procurement QB TS quantity	The TS quantity needs to display on lines when they are linked to a sales order. Right now it shows 0	Fill out TONHAND, TALLOC, TONORD, TAVAIL, TPROJECTED when in transfer mode for items added to QB from SO PO Generation
23914	Enhancement	Procurement Quick Buy Make	Add option in Quick Buy screen to merge selected items onto one PWO by department. Use the item department as the PWO for stock department. Currently the defaulted department is the first in the alphabet instead of the item's assigned department.	Add new setup option (QBGRPPWO), if set then group PWOs by dept when generating (will only ask for 1 due date, all will have that due date)
23813	Enhancement	Approval Management RFQ approvals	Quote gets sent into the Approval screen upon Save. Set up a timer/loop that will check the approval table every 30 minutes, and this will generate events that can be sent to the APPROVERS with a list of the approvals they have due and their docno. Create timestamp of approval and APPROVED y/n flag to the RFQ cursor.	Create new process to look for RFQs in pending approval status, and email the approver with a list of pending RFQs. Runs 6am to 6pm, M/F, checking every 30 minutes. Enable with RFQAPPR setup option. Runs as part of FoxProcess Add new fields to RFQMAST to hold approval status. Change Pending Appr screen to update apprstatus and apprdate when approved.
23742	Enhancement	Logistics (Shipping Events) SE Master	Add Purchase Orders tab to SE Master. Same tab (layout, columns, functionality, etc) as PO tab on Project Control. Tab will include "freight/carrier PO's" linked to the "linked se" field in POMAST and all the PO's that are linked to a BOL that is linked to an order on the SE".	Add Purchase Orders tab to SE Master. Same tab (layout, columns, functionality, etc) as PO tab on Project Control. Change logic to just get linked Freight POs

Adjutant Desktop Release Notes
Version 1504.1323

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			PO's generated from SEADD are linked by pomast.sekeyno PO's generated from BOL are linked by bol.sekeyno **Do not include PO's linked to SO's on the shipping event***	
23876	Enhancement	Logistics (Shipping Events) SEADD screen	If multiple customer/sales orders are loaded into single SE, and SOSHIPINVOICE is enabled, and SO type are autoship, the resulting invoice is not broken out by custno/SO.	Create new version of makeinvoice2 program that splits up a multiorder shipment into one invoice per order.
23982	Enhancement	Approval Management SO Approvals	Approvals not setup every time in SO Screen (some work, some don't)	Change SO approval logic to work more consistently. Change to only call from Final Total update during save process.
23980	Enhancement	Order Entry SO/RFQ Pricing logic	Change pricing logic to use same unit for all calls to GetPrice to find customer or contract based price. Use Pricing Unit by default when looking up price in pricing or contract matrix. Add setup option SELLUNITPRICING to change to use selling unit as lookup unit.	Add new setup option (SELLUNITPRICING), if set, then use the selling unit as the input to the price lookup from the pricing tables and the contract price tables. If not set, then use the selling price unit.
23821	Enhancement	Logistics (Shipping Events) Sales Order Packing List SE	Add logic to ECR 23810 (button that calls print so screen for linked sales orders) to make the message control loop go in drop order.	Change Print SO to print Sales Orders in drop order if called from SE Load Screen
23892	Enhancement	Task Management Service Order Analysis Report	Change the service order analysis report to have the Basic Service Charge (MISCNT) break out on its own total, and not subtotal with the other materials.	Add new setup option (SPLITBASICSRV), if set, break all MISCNT items into new group (Basic Service, code = B)

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			Since it is broken out by product group it will need a special material product group.	Make new subtotal values (extcostB and extrpriceB)
23881	Enhancement	MBS Integration Supply ID filter	Add the ability to filter the MBS BOM_SHIP.INI file by Supply ID in the MBS to Excel process so that it only creates the desired import items in the Excel file. Create a rule that holds a list of SupplyID values to exclude when creating the MBS Excel file.	Create new rule (MBSSUPPLYID) text1 = ID to exclude. Process imported ini file to remove all rows with matching supplyIDs
23981	Enhancement	Task Management Task Entry	If standard task has multiple resource assignments, add all the assignments to the task.	Change logic to handle standard tasks with multiple resource assignments. Make all assignments as needed.
23940	Enhancement	Task Management Task Status Report	Add Report Set logic to Task Status Report (SVRREPORT)	Add Report set logic to Svr status report.
23879	Enhancement	Warehouse Management System Termcontrol S	Look into error issues with TermControlS	Change error handler to log less data. Correct order of parameters to error handler. Move new handler to vterm and termcontrol also.
23935	Enhancement	Logistics (Shipping Events) Update to Clist	Add a field to clist variable for preload report that will display NP for a line that is not fully assembled.	Add (NP) to the end of the SO line in clist if item still has pending production. Enable with SECHECKPWO
23886	Enhancement	Custom Reports Updates to Vintage	Update / remap the data fields for the Vintage csv file to correct the following missing data from the invoice form (reference attached screenshots for examples): 1. Populate City, State and Zip in the header (between the street address and phone number) 2. Replace Salesperson with the Account Manager 3. Remit to: add the missing city, state and zip 4. Populate data for calculated discount and the if paid by date per the invoice terms 5. Add total FT by line item (qty*length) and a	Update / remap the data fields for the Vintage csv file to correct the following missing data from the invoice form (reference attached screenshots for examples): 1. Populate Sellersburg City, State and Zip in the header (between the street address and phone number) 2. Replace Salesperson with the Account Manager 3. Remit to: add the missing city, state and zip 4. Populate data for calculated discount and the if paid by date per the invoice terms

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			grand total FT per item*	
23949	Enhancement	Invoicing/Shipping Voiding an invoice	Change return Cost Tier logic to rebuild ocost/oid from costusage records when generating cost tiers for items returned from credited invoices.	Change retFLS logic to put ocost and oid back into tiers from data in costusage records.

Total Number of Changes: 39