

Version 1509.1361

ECR #	Type	Module/Program	Requested Change:	Change Summary:
24636	Enhancement	System Manager Add Security to View Notes	Add a security token option that would prevent an account manager from viewing the notes of an account unless they are the manager on the account. This need to be user specific (a security token rather than a global set up). Users must still be able to see the notes for the main CID organization.	Enable with setup option HIDEORG. If set, then user needs NOTES,ORG or NOTES-S2 (Old/New) to see any org that they are not the AccMgr for. (except for the master org)
24574	Enhancement	Production Available to Produce	Available inventory verification on the Select Qty to Produce screen and SSA screen needs to consider total allocation of material (cumulative) and not just current stock on hand. Use projected quantity instead of available quantity when determining what to produce. Current open production work orders for the item should be considered as well.	Add new S2PPROJ setup option, if enabled then the S2P screen will use projected onhand to determine if the item needs to be produced. Also change SSA screen to use projected to color code lines.
24616	Enhancement	Expense Reporting EXP Task	Change Expense Task creation to use actual expense line item dates from the expense record, rather than create date.	Change to use Expense Report Line date as transaction date for billing.
24609	Enhancement	Auto Alert Email Templates	Add the last meter read value as a valid field name for use in Email Templates	Add new strings to email templates to show meter read number and meter read type (*METERREAD*, *METERTYPE*) Items will need to be added to Email Template Extra Rule
24617	Enhancement	Invoicing/Shipping Manual Ship	Change logic in setup option MSCHECKPACKED to add an additional check of whether the sales order has been returned and allow manual ship if SO has been returned. (Update to ECR 24464)	Add logic to check for returned item. If found, allow shipping from manual screen.
24614	Enhancement	Purchase Orders PO Receipt	Add the Last Receipt Cost and Last Receipt date from the OHF tab to the PO Receipt (POREC) screen as a display-only value. Add setup option to enable this display.	Add last rec cost and last rec date fields to PO Receipt screen. Show with PORECSHOWLAST setup option.
24604	Enhancement	Production PWO Auto Close	Close linked PWO with no allocations if SO is closed.	Add new setup option PWOCLOSEUNUSED, if set then close PWOs without any material assigned when closing linked Sales Order

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24601	Enhancement	Production Production Stop (no inputs)	Add setup option to not allow assembly of item without at least 1 input assignment. Check for all assembly processes (desktop and wireless)	Add new setup option PWOREQINPUT, if set and PWO does not have any assigned input, do not allow assembly of line. Add logic to CERTPWO to stop assembly if no inputs assigned (used by terminals)
24624	Enhancement	Quoting RFQ Price/Uprice	Margin Calculator screen updates uprice, but does not update price. Converted quotes have incorrect price values.	Change logic to update price at same time uprice is updated.
24622	Enhancement	Quoting RFQ Screen	Hide Price and Hide Line not saved on new lines (saved on edit of existing lines).	Change logic to save hide line and hide price when adding new line.
24603	Enhancement	Order Entry SO Margin Report	Extend lstcost2 logic to production side to update lstcost2 with pricing unit cost (FT for panels), then use this cost on SO Margin reports. It would replace base cost, since there is no base cost per ft available	Add logic to shipping processes to update lastcost2 in itemdet with Selling unit cost for non stock items where item is configurable. Add new setup option (soresetsocost). If set then use basecost if >0, or lstcost2 from itemdet as source of cost data for configurable items with controlling qtys. Basecost should be set in selling units in this case.
24623	Enhancement	Logistics (Shipping Events) Shipping Bins from an Order	Add a stop when entering a bin while shipping manually from a sales order that does not have any inventory on hand.	Add setup option MSCHECKBINQTY. If set then verify bin has qty to ship in it. If not, then stop shipping process. Only applies to stock items.
24600	Enhancement	Logistics (Shipping Events) Shipping Stop/Alert	Add setup option to check for linked PO received, or linked PWO complete. If not, do not allow shipping. Generate an alert if more is produced by AMS than on the original order.	With MSCHKPWO and MSCHKPO setup options enabled, and LINKPOSTOP and LINKPWOSTOP user options enabled, items linked to OPEN POs and PWOs should not be able to be shipped. Created new AMS-OVER event when AMS Product file has more of item produced than ordered. Order details in rtask.note
24608	Enhancement	Report Sets Sling Report	Add the asset quantity (the quantity shown on the task tab of the project screen) to the Sling Inspection report cursor.	Add assetqty to cursors for all reports on sling report.

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24573	Enhancement	Production Sub-Assembly Creation	Add a setup option that when enabled will look at available inventory to see if sub-assemblies need to be produced. If enough inventory is available, do not send to production. If there is not enough inventory, create sub-PWO for quantity needed to fulfill the job.	Change sub logic to check for subs on hand before making PWOs for new ones. Enable with SUBSTKCHK setup option. Add logic to buildsubm and buildsubs. Enable with SUBSTKCHK setup option
24526	Enhancement	Production Tag FN Field	Add unit weight as FN 22. Additionally, map the Sold To name (not customer #) from the sales order to FN30. Add logic to calculate future weight based on assigned inputs if item has not been assembled yet.	Add unitw to fn22, and soldto.company to fn30. Add logic to calculate future weight based on assigned inputs if item has not been assembled yet.
24607	Enhancement	Time and Materials Time and Materials Entry	Create a setup option to require a solution code when completing Labor entry in Time and Materials.	Add Req Sol Code checkbox to Standard task. If checked and task uses this standard task, the solution code is required for time entry. Also add setup option (REQSOLCODE), if setup option is set, then all time entries need solution codes.
24620	Enhancement	Accounting Connector Voucher/Doc Vault Viewer	Change pdf voucher program to write copy of voucher to ctemp vs tmpoutput (make same change on doc vault viewer)	Add new setup option (DVTSLOCAL), if set then copy docvault files to c:\temp folder before loading in viewer.

Total Number of Changes: 18