

ECR #	Type	Module/Program	Requested Change:	Change Summary:
25063	Enhancement	Accounts Payable AP Checking Account Screen	If ADJGL is enabled, require AP checking account to be validated against GL account.	If AdjGL enabled, add check for valid GL account. Do not allow save if not found.
25072	Enhancement	Accounts Payable AP Doc Vault Message Control	Add header to doc vault screen of AP invoice in order to allow for message control (if emailing, email invoice as attachment)	Add printer button. Report is just simple form with a few fields. Send to message control in such a way as the linked documents can be attached using the Attached link button.
25082	Enhancement	AR Invoice Importer	Logic validates Orgs using active = 'y', but then matches without the filter, so inactive orgs can be assigned to imported invoice.	Update logic to check for active = 'y' when matching Custnos during import phase.
24993	Enhancement	Configurator Add Config Question Insert	Add a screen to mass insert a SOC question by group of items. Mimic the setup for the SOCQAC screen to add answers to a SOC question.	Create new screen to allow insert of new question into SOC for items without disrupting existing questions/answers. Question is added if RCODE not found in existing questions. Always added if Rcode is blank. For List type questions, the answers will have to be added using the answer add tool. Add logic to export skipped items to skipped_soc.xls in adjutant folder.
25037	Enhancement	Project Management Add Field to Phase Rule	Update project phase rule to allow default phases by project type. If project type is not found in rule use blank phase rows to create default phases.	Add new text2 value to PROJPHASE rule as Project type. Try to filter to matching project type, if no matches found, fall back to blank text2 records.

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25097	Enhancement	Import/Export Manager Add Prepaid Freight to AR Invoice Import	Add Prepaid Freight field to AR Invoice Import	Add ppfmt to AR invoice import.
25014	Enhancement	Accounts Receivable Apply AR Credit	Applying AR credit and taking discount does not update the balance correctly on the invoices that have discounts taken (the discount remains in the open balance)	Change logic to update AR balance with sum of cash amount and discount amount when applying credits and taking discounts.
25016	Enhancement	Time Billing Apr/Edit Billing	Change APREDIT to use task billid to control invoice generation	Change APREDIT to use rrtask.billid to group data for invoicing instead of sotran.custid. (should be grouped by billto instead of soldto)
25015	Enhancement	Bill of Lading BOL Summary Screen	Add report set logic to Bill of Lading Summary Screen.	Add report set logic to BOL summary report.
25012	Enhancement	Bank Reconciliation Bank Rec	Add new logic to write records to new bankrecaudit table as lines are cleared/uncleared.	Add logic to write fake audit log records to new BankRecAudit table as lines are cleared/uncleared.
25074	Enhancement	Accounting Connector Cash Receipt Screen	In the apply cash receipt screen, add new CASHRECTYPE rule. The rule will be tied to new cash receipt type dropdown on the apply cash receipts screen.	Add new rule (CASHRECTYPE), text1 = name c(20), text2 = code c(3), log1 = type. Add field to cash receipt screen, and save to new cashre.crtype field (Code)
25011	Enhancement	Bill of Lading Contact on BOL	Change BOL to remove first match logic when pulling in default contact. If no default found, then leave blank when creating new BOL.	Remove logic that falls back to first contact (by last name), if consig does not have a default contact.
25062	Enhancement	Logistics (Shipping Events) Create a "return to stock" screen	Create a new screen that takes a Sales order as input and displays lines that have been shipped and not yet invoiced. Create a process to select lines and return to inventory. Will need to add back to stock, and reset the sales order lines to be reshipped. If possible, add a link to the screen from the sales order.	Create new screen that allows "unshipping" of shipped orders. Shipped lines must still be in unbatched state (No invoice created yet). Screen will allow selection of lines to unship. SO line is reset as unshipped, and material is returned to stock.

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25027	Enhancement	Order Entry District Meter Limitations	Limit which meters can be used in which district, require a district upon PO Receipt (on the PO Screen). This should get copied over to TYPE field. Make change that disallows you to add a meter to a SO for a districts where districts do not match in the type field.	Add filter to restrict allowed meters based on asset type. Match district to assettype rule using text1 (assettype.text1 = district custno) Only allow matching types, or blanks to be entered into meter field on labor tab or asset tab of time sheet. Change PO screen to allow selection of asset type to flag generated assets with. Type can be updated on asset screen if needed.
25066	Enhancement	EDI EDI	ASN 856 needs to be updated to include this info now.	Tracking number sent in REF-CN segment in Shipment loop. Has carton tracking number if any, None if blank.
25039	Enhancement	Production FN Field Ordered Quantity	Create FN40 Qty - This will need to be mapped to the quantity of a line on the sales order. The tag is to print the quantity from the sales order line not what is actually S2P. If Qty Ordered changes, it doesn't print original, it prints the new ordered qty. Needs to be mapped to the new FN field.	Add FN40 to g_invm1t and g_invm1tns labels. Will have rounded qtyord from sales order if PWO line is linked to SO line.
25043	Enhancement	Report Sets Inventory on Hand Report	Add the Item's itemact receipt records (pr) to the inventory on hand report to track actual receipt dates.	Add new setup option (ONHANDRECDATE), if set then fill out RECDATE in cursor with oldest accounting date from itemact PR record (for lot and serial items) This is the original receipt date.
25013	Enhancement	Item Control (Inventory) Lot Allocation Screen	Add field under lot number (on right side) to show current on hand qty of lot. alloc1ot.scx	Add QTY and CWQTY, change layout to group into qty/unit and cw qty, cw unit blocks.
24758	Enhancement	MBS Integration MBS Weight Import	Create a setup option to treat the MBS weight value as an extended total line weight, rather than an individual unit weight. If set, the option would divide the weight value in the MBS BOM_SHP.INI for each line item by the quantity when creating the Excel file.	Add new MBSTOTWT option, if set (and MBSWT is set), then the weight in the file is treated like a total wt, and is divided by qty to get the unit wt.
25103	Enhancement	Order Entry Misc Code	Create a new expression for the Misc Code from the Sold To record, which is available in the Sales Order and Invoice cursor.	Add misccode to a_soldtoa cursor for PrintInv, PrintSO and PDF Maker

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25019		Asset Tracking New Serial # Field to Asset Screen	Add a second serial number field to the Asset screen.	Add second serial number to Asset screen (serial2)
25021	Enhancement	Asset Tracking New Serial # Field to Conn Info	Add a second serial number field to the Connection Info screen.	Add new field to conninfo screen. (Second Meter Number) conninfo.mnum2
25020	Enhancement	Asset Tracking New Serial # Field to POREC	Add a second serial number field to the PO Receipt screen.	Add new serial2 fields to po receipt screen. Copy serial2 over to asset when asset is generated from receipt. Add logic to PORECNEW to handle serial2.
25023	Enhancement	Time and Materials New Serial # Field to TimeSheet	Add a second serial number field to the Time Sheet.	Add logic to pull serial2 from rtasset table, and use as mnum2 as needed (when updating meter info in conninfo) Enable with SERIAL2 setup option.
25049	Enhancement	System-Wide / UI Notes Screen	Update new closedate and closedateGMT fields when note is closed. Also update from other processes that create notes.	Update rtnotes.closedate and closedategmt when note is closed (status set to CL)
25056	Enhancement	Message Control OPENPWO	Add the following fields to the OPENPWO Detail report cursor: Custbinch to show line item cut length wom.keyno to scan as PWO line for prompt 45 material, color, gauge from profile attribute for WO line (or/and BOM item) Plus the required amount from the PWO val(getsoc("B",linenum))*qty. Sort by Date instead of work order number. (did not sort even with radio button selected). Then in detail bar, sort all like items together within same work order.	Add custbinch, material, ncolor, gauge and length to cursor. Add new sort option (Sch date + item)
25102	Enhancement	Order Entry Open SO Summary Report	Create new fields for Sales Order Report to give the overall SO Subtotal amount and the overall SO total tax amount. These expressions should return the	Add tosub and tottax to summary cursor (tosub + tottax = totord)

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			total for the SO, not just the value for open lines when open SO records are selected. These fields should be available to be totaled correctly in the summary section - similar to the new 'totord' field created on ECR 25098.	
25036	Enhancement	Purchase Orders PO Receipt	Change PO Receipt to update soallocate table for lot items that have allocate at order set. Control with setup option.	Add new setup option (POSOALLOCATE), if set then allocate linked lines in SOALLOCATE table
25064	Enhancement	Production PWO Disassemble Logic	Process does not actually query the amount on hand, so it will allow disassemble in some cases when it should not, and will block disassemble in some cases where it should allow it.	Logic not checking onhand qty correctly, so disassembly was allowed/disallowed incorrectly at times. (if qty made was <= qty ord, disassembly was always allowed, if qty made > qty ord, then disassembly was always disallowed)
25045	Enhancement	Approval Management Pending Approval Screen	AP Invoices viewed from Pend Approval screen for CIDs other than the current CID do not load the CID correctly.	Update AP Invoice screen to load correct CID data if called from process in other CID.
25038	Enhancement	Message Control Print and Save Form	Add set up options. From PRINTPWO screen, if print only is selected the print will run twice once for the printer and a second time to save a PDF record of the PWO to the correlated project document vault. If no project is found save to SO doc vault.	Add new PWOSAVEPDF setup option, if set and print only is used, save PDF version of PWO into Project doc vault if linked to project. If there is no project, save to SO docvault.
25104	Enhancement	Production Prompt 45	Add a set up option that will automatically use the comma functionality in prompt 45.	Add new setup option PWO45COMMA, when set the system will move the auto assemble one logic after the PWO Line scan.
25083	Enhancement	Warehouse Management System Prompt 46	Calculated amount to use is rounded to 2 places, change to round to 4 places.	Change Estimated qty in Prompt 46 to have 4 decimal places.

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25075	Enhancement	Procurement Quick Buy Column Additions	Add a column for, and make available for custom filter equations in Quick buy for the following: On hand for all warehouses On order for all warehouses Allocated for all warehouses	Add new columns for allocate (all) and Onorder (all). Add Onhandall, allocateall and onorderall to calculatlor.
25087	Enhancement	Report Sets RS for PWO Schedule Profile	Add a report set option to the PWO Schedule Profile report, screen PWOSS.	Add report set logic to report
24728	Enhancement	Logistics (Shipping Events) Sales Order Lot Allocations	The shipping event load screen needs to take into account the allocations provided on the sales order. This should override any logic that would change the lot on the loader screen. User should be able to load partial lines and combinations of lots into a single carton without lots being overridden.	Change SELOAD allocation logic to handle SOALLOCATE lot assignments better. Remove from temp allocation table when packed into cartons during screen load process.
25034	Enhancement	Order Entry Sales Order Screen	Add a new event when a SO is created, based on SO Type and CustComm. Make it to work from ecommerce as well. SOCUSTCOMM-SOTYPE-COMMCODE Sotype = somast.sotype Commcode = somast.commcode (text1 from CUSTCOMM rule). For example: SOCUSTCOMM-N-FAB	Add logic to create new events (SOCUSTCOMM-SO Type-Comment Code) to SO and Convert RFQ screens. Add logic to process events.
25024	Enhancement	Custom Reports Tap Journal Report	Add the second serial lot number from the PO Rec, Asset, Conn Info, and Time Sheet screens to the Tap Journal report.	mnum2 is in cursor (second serial on connection).
25100	Enhancement	Task Management Task Due Date Backdating	Add a checkbox to the standard task setup screen under the "Due Date Offset" field. This should make the due date offset look at the Project Phase Target Complete Date (msnphase.penddate) that the route with the task was fired from. For example:	Add new Base on Phase Complete checkbox to Standard task below Due Date offset. If set, then base duedate offset from phase complete date. (so -7d will make the due date 7 days before the project complete date) Only supports days and weeks right now.

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			I have a phase called "Phase 2" on a project with 11/30/2015 as the target ship date. If I start a route that has a task on that route with the due date offset checkbox checked and a due date offset of -10d, the task due date should be 11/20/2015.	
25025	Enhancement	Time and Materials Timesheet Meters	Process to allow adding an existing meter to timesheet (add, remove, and read are there, needs an UPDATE option). This should prompt for the antenna number.	Add new update option if SERIAL2 setup option is enabled. First tagID must be installed meter, then new second serial can be attached to that meter. ConnInfo and Asset updated with new Serial2.
25041	Enhancement	General Ledger Trial Balance Cursor	Add a beginning and ending balance for the period to the cursor of the Trial Balance sheet.	Add sbalance to cursor. It has PTDDEBIT, PTDCREDIT and CLOSEENT backed out. Added PTDDEBIT and PTDCREDIT to cursor. DAMOUNT AND CAMOUNT are the ending balances, with the sign removed. BALANCE is the raw number (credits will be negative)
25105	Enhancement	Time Billing Utilization Report	Add a new variable similar to phours (potential hours) that excludes any hours that are input on a task/so tied to project (this is controlled by a rule). End goal will be to show potential hours as normal hours minus any PTO time used (for the given date range). Add a start/termination date to that resource screen. Modify the formula of the potential hours to take into account both DEFAULT HOURS PER DAY and TERMINATION date.	Add new setup option (USUMMEX1), if set and new rule (VACPROJ) is filled out (num1 = projid of vacation project), then timesheet hours linked to vacation project are backed out of possible hours and timesheet hours. Add new setup option (USUMMDEFHR) to calculate possible hours using resource hours per date and resource hire and term dates. Add new hire and term dates to resource screen. Change Default hours per day on resource screen to accept decimals (999.999)

Total Number of Changes: 42