

ECR #	Type	Module/Program	Requested Change:	Change Summary:
25259	Enhancement	Accounting Connector InvDiff File	Add a setup option that will stop the InvDiff files from being generated.	Add logic to check for SKIPINVDIFF CID option, if set, then don't run InvDiff Check
25335	Enhancement	Accounts Receivable Add SOUSE to Billtran Table	Push the SOUSE field to the billtran table to be used for reporting. It will need to be available in the cursor of the AR invoice, AR aging, Gross Margin report.	Add SOUSE to billtran. Copy from sotran when creating invoices. Add to cursor of print invoice and gross margin report.
25358	Enhancement	Accounts Receivable Deposit Slip	Add an expression to the cursor for the AR Deposit Slip that will return company name for each receipt. Expression should work like lc_cust and work with the [1] through [24] parameters.	Add lc_company[xx] to available fields. Field has company name
25364	Enhancement	Accounts Receivable AR Deposit Slip	Add lc_checkno[xx] to allowed fields to hold the check number	Add lc_checkno[xx] field with check numbers from cash receipts.
25342	Enhancement	Address Book Soldto AM	Change the Account Manager on SoldTo to update all associated children records.	Add setup option SOLDTOUPDATEAM, if set then AM on linked SO and Invoices are updated when the Soldto AM is changed. Only items with linked shipto AM set to blank are updated (ShipTo AM takes priority if set)
25346	Enhancement	Address Book Shortcut Field	Extend the shortcut field to a max character length 30. Add the shortcut field to the NEWLOOKUP grid for org search and allow sort on this column.	Expand max field length to 30 for shortcut. Add to FindOrg grid with sort (NEWLOOKUP)
25348	Enhancement	Address Book Org Air Hammer	Invoice numbers for credits are not drillable in the org air hammer.	Update credit memo logic from CashRec screen to push full CM Invoice number into cashrec table. Change org air hammer cash receipts tab to lookup original invoice number if possible when showing applied credits.
25380	Enhancement	Address Book Phone Number Search	Allow searching by phone number on the Org screen. Preferably, it would first search the main phone for the organizations, and then it would search the contacts phone numbers and pull up the organization the contact is tied to.	Add phone search to Org screen. Find Orgs with matching phone numbers, and Orgs linked to contacts with matching phone numbers.

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25180	Enhancement	Configurator Update SOSEPSOC Screen	Apply updates to the SOSEPSOC screen that will save the configuration questions.	Change SO screen to use older socinput screen. Make changes to pull data from SOCINPUT back into SO screen.
25203	Enhancement	Contract Management Contract screen	Add audit for blocks. Add new open addCap values (billed items that add to cap numbers, but not paid)	Add new unbilled cap hours and dollars field, pull from linked invoice lines that are on unpaid invoices.
25225		Custom Reports Sales Order Cursor	Add Project Manager to Sales Order cursor.	Add projman to a_pomast cursor (a_pomast.projman). Value is fullname of Project Manager from linked project.
25425	Enhancement	Document Imaging Notes Doc Vault	Doc vault for notes not showing all linked documents that are linked from notesreader through datastore (saved in maillink)	Correct issues with note attachments not appearing in docvault (not getting saved correctly in some cases)
25279	Enhancement	General Ledger GL Tools	Change Roll BegBalance to use single SQL query to update each year. Change Update YTD to use single query. Change Add/Check GLBAL to use single query.	Change GLTOOLS to use new faster logic to roll BB from year to year. Add logic to use single queries to update YTD and check/Add Gbalance records.
25280	Enhancement	General Ledger GL Close	Change Close GL Year to use single query to update closeent numbers.	Use new faster logic to make CloseEnt updates, and roll BB numbers to next year.
25291		Item Control (Inventory) Cycle Count Second Sort	Add logic that will sort by serial number second if you sort by item.	Change item sort to be by item + serial in pending and active tabs

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25341	Enhancement	Item Control (Inventory) AR Invoice Master	Similar to the #Lot tab of the itemmaster, allow a double click on the lot number on the AR Invoice master to launch the lot's certificate of analysis.	Add logic to allow double click on lot number on Invoice line item tab to open COA screen if item has COA attribute
25390	Enhancement	Item Control (Inventory) Cycle Count Last Count Date	Change the last count date to be per lot instead of per item. Currently if one lot of an item is counted, all lots of that item show a last count of the day the first lot was counted.	Add new LastCCount2 field to itemtrack. Update when package is counted. Add to Pending Grid.
25415		Item Control (Inventory) Add Alloc/Wip Button to @ Tab	On the @ tab for the itemmaster screen, add an alloc/WIP button similar to the # Lot tab.	Add Alloc/WIP button to @ tab. Change allochist screen to handle non lot items
25288		Logistics (Shipping Events) Multi-Department Select	Add an option to select multiple departments in the print pre-load form screen.	Add new Checkbox list to allow multiselect of departments
25426	Enhancement	Logistics (Shipping Events) Unload Cart	Existing logic resets the target unload bin to the probin when processing the unload. Change to only reset the blank bins to probin. If bin is entered, use the entered bin.	Change logic to only update blank bins in unload cursor with probin when processing unload. If bin is filled out in grid, use this bin if valid.
25427	Enhancement	Logistics (Shipping Events) SELoad - Transfer Lines	Splitting transfer lines to load from different bins results in a out of stock message for stock items during carton check when carton is shipped.	Update SEADD2 to make correct setrans lines when partial loading transfers. Created lines were missing ownerid and heldfor, so they would be flagged as out of stock when loaded later.
25237	Enhancement	Order Entry Add 1% Markup to Orders	Create a process to go along with the Hayes Generate Sales Orders, that will add a 1% markup in qty to the quantities of all items. This would be controlled by an item attribute, as only non-production items get the mark up. Markups will need to round up to the nearest whole number, and orders under 100 qty will just get a quantity of +1.	Add new logic to scale up order qty for items with OVERSELL-99 attribute, where 99 is the percent to scale up. Qty is rounded up to next whole number. It is done on a order by order basis during the Hayes generation, qty is applied to the first matching item on each order.

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25306	Enhancement	Order Entry Order Entry	<p>Additional pricing and cost restriction for Order Entry screen:</p> <p>-Hide BaseCostL column from the display Line Item Entry and Line Item View grids when SHOW COST security item is unchecked.</p> <p>-Create a security option to hide the GM% display (this should also remove the GM% column from the Line Item View grid).</p> <p>-Create a security token for the Gross Margin Calculator so access can be denied.</p> <p>-Create a security option to hide the List Price and Discount% Off List values (this would also remove the List column from the Line Item View grid, and obscure D% From List in the Line Item View screen and the grid area).</p>	<p>Add new security tokens. HIDE MARGIN and HIDE LIST. Hide the fields and grid columns based on the new tokens. Add the basecost fields to the SHOWCOST logic.</p>
25336	Enhancement	Order Entry Add Mill Assessment Field	<p>Add logic that would use a determined item (or items) entered on a sales order, and roll the cost of said item proportionally by weight/qty into the other line items so that the cost is distributed into the transaction categories for the other items. The cost will be stored in a new field for reporting, similar to the ppft field. This will need to be added to the Gross Margin Report.</p>	<p>Add new MILLASSESS setup option. Add logic to process items with MILLASSESS attribute like FRT items when COSGSPLIT is enabled. Cost is reallocated to other items based on qty</p>
25340	Enhancement	Order Entry Force Multiples of Pack Qty	<p>Add logic to force line entries to be in multiples of the item's pack qty. Round to the nearest multiple and notify user.</p>	<p>Add CheckPackQty setup option, and check entered qty vs system packqty (from itemmaster)</p>
25343	Enhancement	Order Entry LotA Pop-up	<p>Add the quantity of lot assigned to the LotA pop up window on the Sales order line item entry screen.</p>	<p>Add Qty to lot assigned grid that pops up from button.</p>
25416	Enhancement	Order Entry Reset Def Whse	<p>When adding a new order after previously saving an order, the warehouse will stay the same as the previously selected warehouse. Create a set up option that will reset the warehouse to the default warehouse.</p>	<p>Add new setup option (SORESETWHSE), if set then reset whse to default on add of Sales order.</p>

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25313	Enhancement	Production PWO Subassembly Delete	PWO - Delete of sub should not reset sotran.pwokey	Delete of sub work order should not reset linked SOTran PWOKEY values to zero.
25326	Enhancement	Production PWO Assembly	Create setup option that when enabled does not allow a PWO line to be completed and assembled unless the system-calculated footage from the BOM setup is assigned.	Add new setup option PWOREQALL to only allow assembly if all inputs are assigned
25392		Production PWO Suffixes	Add logic to allow suffixes to be created after PWO names based on the department of the PWO.	Add new text6 value to dept rule as Suffix (char 20). If filled out, will be used as suffix when making PWOs.
25420	Enhancement	Production Production Scheduler	Add a report with message control to the production schedule screen. Allow for export raw xls with column selections.	Add output button and report to SchedMasG2 screen.
25129	Enhancement	Project Management Create SO from Project	Add a new jump screen that will show up when the user selects the SO button from the project. The new screen will list each of the phases on the project for the user to choose.	Create new Pick a Phase screen to show a phase tree. Pass selected phase to SO screen. Enable with MSNPICKPHASE.
25389		Project Management Task Tab Sort	Add logic to change the default sort of tasks in the task tab on the Project screen to be sorted by description.	Add new descrip column. Add sort to column. Add setup option MSNTASKTASKSORT to default the sort on the task grid to task.
25391		Project Management Child Phases	Add a new setup option (MSNNOCHILD) that will turn off the "Child of Selected Phase" popup that appears when you are creating a phase. This will take away the ability to have child phases.	Add new setup option (MSNNOCHILD). If set then don't ask "Child of selected phase?" when making new phases. The new phase is never a child of the selected phase.
25393		Project Management Shipping Event Remarks	Add the Shipping Event Remarks field to the grid on the shipping events tab of the Project screen.	Add shipping event remarks to SE tab of project master
25303	Enhancement	Purchase Orders Copied POs	When copying a PO, add a check on the lines for inactive accounts. Add a warning message of the	Add check when copying PO for invalid or inactive GL accounts. Alert user if found. Blank out invalid

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			inactive account and set it to be blank on the PO Line.	accounts.
25310	Enhancement	Purchase Orders Print PO Cursor	Add the Commodity Code from the itemmaster window to the print PO cursor.	Add itemmaster.comcode to PODETAILS cursor for Print PO screen and PDF Maker.
25337	Enhancement	Purchase Orders Trucker Forms	Add the carrier from the BOL to the cursor to the new Trucker Delivery and Trucker Pickup information forms.	Add new lc_bolcarrier variable to store carrier name from linked BOL.
25243	Enhancement	Report Sets Cut Sheet Sort	Allow cutsheet to be sorted/grouped by item and witem.	Change index to have item+witem after attributes
25338	Enhancement	Report Sets Customer Sales Analysis Report	Add warehouse and Lot Number(s) sold to the cursor.  To the filter screen: Add a range for customer and a multi-select option Add a range for items. Add a range for commodity code Add a lot search Add an Account Manager dropdown	Add new range for custno, range for item. Add new commcode filter, add new serial/lot filter. Add new multi select for billto company. Add new acctmgr filter.
25339	Enhancement	Report Sets PO Cusor	Currently there is a field that will show one linked SO in the Print PO cursor. Create a variable that will list out any and all Sales Orders linked per PO line. Make sure that this will carry over into any additional cursor the Inbound Report/Inbound Receipt uses (the radio buttons available when POCHEM is turned on)	Make new soline2 field with all linked SO lines (SONO-LineNumber)
25408	Enhancement	Report Sets Resource Hours by Zone Report	Create a report similar to the attached excel file that will allow the user to input several date ranges (row 2), to see regular and over time hours per resource, grouped by zone. Report date inputs should save per user so they won't have to be reinput every time report is loaded.	Create report per spec. Create new rule to hold data ranges (DATETIMESUMM) Text1 = start date, text2 = End date, up to 12 pairs. Use -OT on end of item to control Reg/OT logic

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25172	Enhancement	Sales Tax Automation Sales Tax Importer	Update sales tax import process to import all use and sales tax records. Add the letter "U" to the tax table names that represent use tax.	Add logic to import two tax tables for each record (one for use tax , one for sales tax). Usage tax will have -U as ending string of taxable. Enable with TAXBOTH CID option. Change UpdateTaxTable process to use -U version if TAXBOTH enabled, and use tax checked in state rule.
25314	Enhancement	System Manager CCINFO Screen	Delete button does not work.	Correct delete button logic to delete correct record in CCDATA and correct attribute (CCDATA)
25382	Enhancement	System-Wide / UI Phone Number Main Search	Add phone number search to the quick search dropdown that would bring a list of organizations and contacts for any matches to the number.	Add new Phone number serach to toolbar search box. Looks at orgs and contacts, returns org and linked orgs.
25137	Enhancement	Task Management Task Entry	Schedule overlap warning needs to pop up when scheduling for more than a full day of resource's daily schedule load.	Add new logic to handle multi day assignments differently if resource has new CHECKSCH attribute (from ATT_RES rule). If multi day, and use consecutive days not checked, then the days are prechecked to see if it can be scheduled on each future working day, if not, then the user is alerted and they can schedule anyway, or schedule it again.
25293		Task Management Disallow New Work Order	Add a setup option that will disallow hitting the new work order button on a task.	Add logic to only allow New work order button to be enabled during add mode.
25352		Task Management Task Grid Save Opts	Add logic to the Save Opts on task grid that will save the advanced sort options as well.	Add logic to save current custom sort into Save sets, and load back when loaded. Show current sort order at top of Custom Sort Screen.
25373	Enhancement	Task Management Task Grid Notes	Add a column to display the full Detailed Note (description) from the task, understanding that the display will be up to 255 characters. If possible, add drilling capabilities to drill and see the full note. Also, ensure that the note can be exported on the task grid report.	Add two fields to grid , first is 250 chars of note (tasknote), second is full note. Hover over either will show note.

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25377	Enhancement	Time Billing Approve and Edit Billing	Add Resource filter to the selection filters tab. Add pcr.timeest (estimated time) to matching data grid (show total, regardless of splits).	Add resource filter. Add ECR estimated time to grid.
25363	Enhancement	Time and Materials TimeSheet	Inactive items can be added to material tab using the description field.	Add logic to exclude inactive items from query results when using description fields
25384	Enhancement	Time and Materials Contract Master - Over/Under	Add radio buttons to Blocks section of Contract Master to allow toggle of calculation mode from 'Invoiced' basis to 'Paid' basis. Invoiced basis will be the default (current over/under calculation logic). New calculation based on "(cap - unpaid) - billed - pending"	Add Cap / Paid Cap option to recalculate logic. Base starting number of selected value (Full cap or cap less unpaid).

**Total Number of Changes: 52**