

## Version 1604.1445

ECR #	Type	Module/Program	Requested Change:	Change Summary:
25648	Enhancement	Accounting Connector Disable PWO Auto Assign	Add a setup option that when enabled will disable (or remove) the PWO Auto-Assign button on the Assign Non S/L Inv tab.	Add setup option PWONOAUTONON to disable the Auto Assign buttons on the Non S/L tab and the All Non S/L tab.
25857	Enhancement	Accounting Connector GL Account Filter - SOE Report	Add a gl account number field to GLSTATEEARN (GL Statement Of Earnings Report) allowing user to then key in either an account, a leading digit, or just one segment to filter the report. For example: if warehouse is [segment two] ___-xxx-___, then user could put in ___-100-___ in the account filter for this report. The report would only return data from accounts with the second segment value of '100'.	Add GL Account filter to Statement of earnings report. Filter is in lc_filter (to add to report to show the current filter).
25850	Enhancement	Accounts Payable Print AP Checks	Create a setup option for Print AP Checks that produces the checks in Vendor alphabetical order based on the vendor name, rather than the vendor number order.	Add new setup option (APCHKVENDOR), if set then print checks in company order instead of vendno order.
25665	Enhancement	Address Book Org Required Fields	Through setup options, make the following organization fields required: ent.address1 ent.city ent.state ent.zipcode ent.phone ~ with this field, also require the data entered to at least be 10 characters/digits long	Add new setup option (ENTREQ1). If set, then require address1, city, state, zipcode and 10 digit phone number.
25819	Enhancement	Address Book Contact Screen	The logic that loads your contact record when launching the contact screen should only work in your cid. It should not load anything when in other CIDs.	Change logic to not load current user's contact record if not in current users' CID.
25818	Enhancement	Asset Tracking Asset Screen	Add lock location checkbox. If not locked, then update lat/long on change of current location to match new	Add new Lock Lat/Long checkbox. If checked, then do not update Lat/Long from org when changing the

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			lat/lon from org. If locked, then do not update lat/long on change of current location org.	current location.
25825		Asset Tracking Serial 1 Copy	Add an item attribute that will copy the serial 1 to the new serial 2 field when an item is being received. That item should be able to be entered on the material tab of time entry. Users should also be able to use that serial number on the Update function on the asset tab of time entry to update an existing asset's serial 2. The asset being updated should then show the proper serial 2 on the asset and conninfo screens.	If item has new COPYSERIAL2 item attribute, then copy serial to serial2 field during receipt
25814	Enhancement	Commission Tracking CommCalc	Add NOLOCK hints to all SO/INVOICE queries to speed loading and reduce blocking.	Add NOLOCK hint to SO/Invoice queries to improve performance, and reduce blocking.
25835	Enhancement	Commission Tracking Commissions	PAYMENT type commissions ignore Item CommGroups. Change logic to load both commgroup and non commgroup plans and documents.	Update commission logic to use Item CommGroups when processing Payment type plans.
25848	Enhancement	Commission Tracking Commissions	Non laddered tiers do not work as expected. All commissions should be calculated using the matched tier based on the sum of the documents in the selected period.	Change Use Tier, but not laddered logic to figure total sum of gross or margin, then use total to find tier to use for all invoices linked to plan.
25658	Enhancement	Custom Reports OPENSO Report Cursor	Add sold to org information to the cursor for the report generated from the Sales Order Report screen (OPENSO), so that customer address and email address are able to be shown on the form.	Add address1,address2,city,state,zip,phone,fax and email to cursor. Data is from soldto or billto depending on Billto Checkbox.
25630	Enhancement	EDI EDI PO Screen	Update logic to run generate SO logic until good SO is found. Current logic stops after one try.	Change logic to keep trying to generate next SO number until it generates a valid one.

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25686	Enhancement	Invoicing/Shipping Project Shipping	If one project ships some lines from a sales order, ship frt from the same order, and setup options are enabled to make invoice on shipment; the resulting invoice has duplicate lines.	Correct issue when shipping using project screen when line items and frt shipped from same SO, and MakeInvoice at shipment is enabled.
25859	Enhancement	Item Control (Inventory) Cert of Analysis Copy CAS NO	Add the CAS No to the copy funtion of the COA Defaults screen.	Add casno to copy on COA defaults tab.
25637	Enhancement	Logistics (Shipping Events) SE Load Schedule Report	In SE Load Schedule, drilldown to SE does not work in drilldown mode. Scompany is always blank. Fill with shipto company if only one shipto, else put multiple.	Fill out scompany with shipto company name if only one shipto linked. Use Multiple if many linked. Correct issue with drilldown not showing if single quotes in any linked data.
25643	Enhancement	Logistics (Shipping Events) SE Load Schedule SaveRS	Add report set logic to SE Loading Schedule (SELOADSCH) report.	Add report set logic to SELOADSCH report.
25666	Enhancement	Order Entry Force Warehouse Taxes	Add a checkbox labeled "Customer Pick Up" to the SO master screen that is available only when a setup option is enabled that will apply the tax table associated with the order warehouse instead of the tax table associated with the ship to on the order. This will allow the proper address and tax table information to be collected for walk in customers and will also guarantee the correct tax table is applied.	Add new SOSHOWCPU setup option to show/hide new CPU checkbox. If CPU checkbox is checked, then use whse taxable as taxable unless shipto or soldto is exempt.
25667	Enhancement	Order Entry Payment Required To Ship	With a new customer attribute, do not allow manual or SE ship if the ordered amount is not equal to the paid amount.	If soldto org has new PREPAY attribute, then order must be prepaid using POS or CC button before it can be shipped from the manual ship or SEADD2 screens.
25671	Enhancement	Order Entry Dept Rule Item Code	Add a field to the department rule where an item is auto-added as a quantity 1 when 1 or more items for the department are ordered. Make the change to	Add text7 to dept rule as Dept Addon Item. If filled out, then add this item to sales order/RFQ if any items from this dept are on order/rfq. If item has SOMULTI

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ECR #	Type	Module/Program	Requested Change:	Change Summary:
			quote and order entry. Allow for the rule item to exist as an SOMULTI item so that more than one item code can ultimately be auto-added for a single department.	attribute, then add BOM items instead. Qty is 1 if not SOMULTI, qty comes from BOM if SOMULTI. Items are priced using system pricing logic.
25684	Enhancement	Order Entry Bins on Return Orders	Bin logic on return orders is the same as on normal sales orders; but if one is returning material to a bin that currently does not have inventory in the bin one wants, it cannot be selected. On return orders: return orders need to display all available bins for the given lot; and if none, the probin; and if no probin, PUTAWAY.	Add logic to insert PUTAWAY and items actual probin as allowed bins when returning items using manual ship screen with negative sales orders.
25806	Enhancement	Order Entry Require Sales Order Type	Add logic to require the user to select a SO type before saving a SO instead of defaulting to the Sales Order type if left blank.	Add header check for blank SO type, stop save if found.
25847	Enhancement	Order Entry Quote to Order	Update approval setup so that when a quote is converted to an order, the approval for S2P is required the same as if an order was generated from the Order Entry screen.	Add logic to generate needed approvals when converting quote to order.
25856	Enhancement	Order Entry CC and POS screen	The Sales order header camount field is only updated with the last payment amount, not the total payments if more than one.	Update POS and CC save logic to update camount with total of payments (old payments + current payment)
25862	Enhancement	Order Entry SO Screen - Copy Logic	Add usertrace to log when SO is copied. Save copied SO number in usertrace data.	Add user trace record when SO is saved from a copy.
25866	Enhancement	Order Entry SO Screen - Next SO logic	Add logic to reset production flags based on next item (or SOMULTI items from next item).	Update SO Next logic to reset production flags based on next item (or BOM Items if SOMULTI is set on next item).

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25860	Enhancement	Production AMS Record for Mod Transfers	Create an AMS for Mod Processor warehouse transfers of coil.	Add logic to insert AMSCOIL record during mod processing for coils with AMS attribute when coil receipt screen is not displayed (for coils that already exist)
25804	Enhancement	Project Management Project Control Shipping Dates	Add a setup option to blank out the shipping dates on the Master tab of Project Control by default.	Add new MSNNSTARTDATE setup option, if set then start with blank Project start and end dates.
25805	Enhancement	Project Management Project Phase Past Dates	Add logic to prevent a date from being entered in the past in msnphase.pstartdate.	Add new setup option MSNPHASENOPAST. If set, then don't allow edit of phase start date to date in past unless original date is in past (to allow edit of existing phase). Do not allow create of new phase with past date.
25807	Enhancement	Project Management Parent Phase Date Restrictions	Currently, the msnphase.penddate, msnphase.pshipdate, and msnphase.ppwodate from the earliest child phase get passed up to the parent phase and disallow manual entry. Add to the logic to make the msnphase.pstartdate get passed up and disallow manual entry of that field when it is at a parent level. Only the youngest phase will be able to have its msnphase.pstartdate changed with proper security. Phases that are both parent and child will have the parent restrictions.	Add logic to lock start date of phase if the phase has a child. Only enable when MSNNEWDATELOGIC is enabled.
25803	Enhancement	Purchase Orders PO Rec Cost Warning	Create an attribute that can be assigned to suppress the warning popup when the PO Rec cost entered is >10% different than the PO Cost or Last Rec Cost.	Check for new item attribute NOPOCOSTCHK, if found, then skip 10% cost change during PO receipt.
25846	Enhancement	Quoting Warehouse Taxes	Re-create the warehouse "Customer Pick Up" checkbox change in the Quote Entry screen.	Add CPU Flag logic to RFQ screen. Change ConvertRFQ process to respect flag, and transfer to SO.
25681	Enhancement	Report Sets Customer Sales Analysis Report	Add a multi-warehouse selection to the Customer Sales Analysis report.	Add new Whse checkbox list to customer sales analysis report.

ECR #	Type	Module/Program	Requested Change:	Change Summary:
25672		Tapping Tap Setup Warning Notes	On Tap Setup screen, add a setup option to check for and show the warning note for any address that is clicked on.	Add setup option TAPSHOWWARN. If set and address has a warning note, show note in popup box.
25635	Enhancement	Task Management Task Grid Column	Add solution code to the task grid (sortable column). Needs to be in the cursor for export as well.	Add Solution Code column to grid (solcode). Add sort to column.
25625	Enhancement	Warehouse Management System Item Swap During Loading	<p>Through an item attribute, create a jumpscreen that allows for a list of items that may be substituted with the item master item during wireless loading. Assume that the substituted item will use the same unit of measure as the original item called out on the sales order. To be replaced during loading with a substitute, the item must have the new attribute and listed substitutes. The item must also have the 74DOUBLESCAN attribute which will allow for the substitute to be scanned during the double check process. Partial and complete replacements are allowed so an additional line must be added to the sales order and the quantities updated on both lines. The new substituted item price will copy from the original line item's price.</p> <p>Changes to prompts 74 and 79 will work as follows:</p> <ol style="list-style-type: none"> <li>1) Scan the L number on the loading paperwork.</li> <li>2) Scanner then requires the second scan at which time the user scans a different item or ikey.</li> <li>3) If the item/ikey is a listed substitute, the quantity remaining to load for the line will be displayed.</li> <li>4) User enters the quantity to load of the substituted item*.</li> <li>5) Changes will then be made to the SO in question.</li> </ol> <p>* If the user does not key in the total quantity remaining to load, the scanner will prompt for what to do with remaining quantity.</p>	Create desktop screen to hold list of allowed item swaps per item (altitem7x). Assign to item attribute, and assign attribute to items that have alternate items and use screen to assign alternate items. Add logic to prompt 74 to allow alternate item to be entered during double scan prompt. Add 74Doublescan logic to prompt 79, then add altitem logic to doublescan prompt in vterm519.

**Total Number of Changes: 35**