

Version 1604.1449

ECR #	Type	Module/Program	Requested Change:	Change Summary:
25918	Enhancement	Accounting Connector Sales Order Report Cursor	Add department to the cursor for the Sales Order Report forms (all versions). This should be the department of the line on the sales order. We should be able to create a band on the report that will group by department. The end goal is to customize the report to show weight by Sales Order by Department.	Add new Dept/Item Sort option. Add dept and dcode to cursor and fill out. Add new detail report with dept and item groups.
25920	Enhancement	Accounting Connector GL Dist Report	Ending period combo boxes do not work well if starting period is set to blank.	Correct issue with ending period loading logic if starting period was set to blank.
25878	Enhancement	Accounts Receivable Cash Receipts report	Add ship to Company name to the cash receipts report cursor and allow grouping by this field.	Add option to group by shipto. Change logic to attach one shipto company name to each cashrec attached to an invoice. Create new summary and detail reports for shipto grouping option.
25898	New Feature	Address Book Org Merge Importer	Allow the Organization Merge screen to accept an import file. The import file should be able to handle multiple organizations being merged to a single organization at once.	Add logic to allow import of org list to merge. A is main org, B is delete org. File assumed to have header row.
25887	Enhancement	Auto Alert Schedule Drag Alerts	When dragging a task on schedule, new assignment fails to trigger email alerts.	Add logic to barmove in schedule to generate new A2 events to allow email processing.
25869	Enhancement	Bill of Lading BOL Contact	Make the Contact from the Sales Order screen the default contact on the Bill of Lading.	Add new BOLCONTSO setup option; if set and SO has a contact that has a phone number, then that contact will be used.
25868	Enhancement	General Ledger New GL Dist Report Fields	Add the following fields to the GL distribution report cursor: Refno from the AP Invoice, Item Description from Billtran, AP Check Reference Number.	Add new docno2 field to apdist and gldist. Update check logic to put ap invoice reference number into docno2. Update invoice posting logic to put item description into gldist.description.
25916	Enhancement	Import/Export Manager Cash Receipt Import Template	To import cash receipts with cash receipt types, include a field for CASHRECTYPE to be mapped to fields in template.	Add CRTYPE to import. Match on code.

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25893	Enhancement	Item Control (Inventory) Processed Item Attribute	Create a new item attribute for "Processed" that will indicate the production process for the item incorporates a purchased 3rd party service.	Add new PROCESSED Item Attribute.
25930	Enhancement	Item Control (Inventory) HazMat Field Labels	Allow for the edit of labels on the Hazmat defaults jump screen.	Update lables on both tabs of HazMat Screen.
25865	Enhancement	Order Entry Change Order Report - FL Taxes	Change Change Order report to recalc tax on all linked sales order assuming all lines are linked to same building when FL tax is used (to allow tax to be capped based on FL sales tax rules).	Change sales tax logic to allow capped logic to be used when the current so does not meet the cap. Change Change order report to set the cap flag if the original order is >5000 dollars. This makes the other change orders calculate as if they met the cap value, so the county tax is used. Test with example report from original task, and tax is within 1 cent of xls file.
25876	Enhancement	Order Entry LF and Weight	Add total LF and total weight to bottom of quote and SO screens on the Line Item Entry tab.	Add new Total Wt and Total LF fields to bottom of line item entry tab. Add to RFQ Screen also.
25877	Enhancement	Order Entry Order/RFQ Search	Add ship to Company name, RFQ Date/Order Date and O or C based on status to the search drop down in RFQ/SO entry. If more than one ship to is associated with the transaction, pick the first one.	Add status, date and shipto address to drop down box when ? or partial match is entered into SO/RFQ search box
25881	Enhancement	Order Entry Available Qty Field	Make Available qty label and field bold and red on RFQ and SO lines.	Add new AVAILRED setup option, set Avail qty to bold and red if enabled.
25882	Enhancement	Order Entry Buyout Item Warning	Create a setup option to pop-up a warning in RFQ and order entry when a buyout item (from the attribute) is initially added and pre-saved.	Add new CID Setup option, SOCHECKBUYOUT. If set, then show warning popup of save of buyout item.
25883	Enhancement	Order Entry Paid Balance	Create a setup option to add a display of paid balance in Order Entry screen which would be ordered amount less paid amount.	Add SOSHOWCASHBAL cid option. If set, then show new cash balance field which is order amt - cash/cc paid amount (on first header tab). Field is updated on SO load.

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25905	Enhancement	Order Entry Sales Order Copy Exclusion	Create a setup option for when copying a sales order, exclude copying the Comment and the Priority.	Add setup option SONOCOPY1, if set then blank out priority and comment on copy.
25678	Enhancement	Procurement New Default Vendor Warehouse	Add a spot on the C/V Part tab for a default warehouse. Create logic in quick buy that will use the default vendor for that specific warehouse. Update any screen using the VPART logic.	Add whse field to c/v part tab. Save for vendors as vpart.vloctid. Change Quickbuy to use correct whse vpart record if found, else use blank whse record. Update PO Gen from SO/RFQ and from Buyout Sheet to show only matching whse records (and blank whse records). Update getcost2 to use matching whse record if found, if not then use blank whse record.
25896	Enhancement	Production Production Scheduler	Update the logic in the production scheduler screens to display items having the Processed attribute as CanNotMake status until the SO-line linked purchase order (for the 3rd party service) is received.	Add logic to check items that have the new PROCESSED Attribute for linked POs. If found and not received, then flag item as Cannot Make.
25897	Enhancement	Production PWO Due Date	Create a setup option that when enabled will not allow anyone to edit the PWO Due Date field. This field instead will be populated from other calculations.	Add new setup option (PWOLOCKDUE). If set, then disable edit of due date when in edit mode (allow edit during add mode).
25808	Enhancement	Project Management Phase Date Exclusions	Instead of looking for the earliest date from a child phase that doesn't have the word "Anchor" in it to populate the parent phase dates, add a rule that will govern which phases to exclude from the date checks.	Create new rule PHASEEXCLUDE1, text1 is text to match into phase name. Use this match to exclude phases from date logic when MSNNEWDATELOGIC is enabled. Expand logic to skip running any date logic when current phase is on exclude list.
25809	Enhancement	Project Management Nesting Phases	Add logic to support nested phases. This would allow nesting top level item phases under the project phase and to then have that earliest shipment date(s) bubble up to the project level. For example: Project Phase -Top Level Item Phase -TL Phase 1 A date change to TL Phase 1 would bubble up to the Top Level Item Phase, then to the Project Phase. The project phase will use the earliest dates of any phase beneath it.	Add logic to move date changes up thru phase tree, changes ripple up thru parents to top phase.

ECR #	Type	Module/Program	Requested Change:	Change Summary:
25697	Enhancement	Report Sets PSFAB Report	On the PSFAB report, change the filters to be by SO Type instead of Project Type. PSFAB excludes certain SO Types in its code. These do not need to be available to select. Specifically only the Building (B), Structural (S), Component (C), Supplement (U), N/C Supplement (N) should be available.	Change Proj Type filter to SO type filter. Adjust queries to use new filter.
25870	Enhancement	Report Sets GL Report Writer	Add setup option to default selected period and year to current period.	Add setup option GLRCURR, if set then default selected period and year to current GL period and year.
25888	Enhancement	Report Sets Structural Costing Job Report	<p>Create a report that can export to the xls attached. There are several groups in the report pulling from different tables/reports.</p> <p>Group 1 - Freight and Buyouts - show PO information with iclass of freight or buyout. Subgrouped by phase, then PONO, and then date.</p> <p>Group 2 - Steel Usage - this will generate from materials tab of time/material entry for the tasks associated with the project. Subgroup by phase, then commcode.</p> <p>Group 3 - Drafting Labor - this information comes from the timesumm report. Subgroup by phase and then resource.</p> <p>Group 4 - Estimated Shop Labor - The "tons" data is taken from the steel usage information, converting the "ttl weight" column. Exclude all comcodes that have tons = 0. The other columns will have to be edited in excel by hand, as customer is not needing the equations to be performed.</p> <p>Group 5 - Summary - this will take the cost total and weight total of the previous groups for a Total Cost and Total Weight. The order total should be taken from the subtotal of the Sales Orders. Calculate a gross margin.</p> <p>Attached is the sample Structural Costing Report, along with sample data pulls from other reports where the data may originate from.</p>	Create report per spec. Generates a xls file in root folder. Uses STURCTCOST rule to get defaults for shop labor summary.

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25909	Enhancement	Report Sets Add the Financial Month, Year	For the canned income statement, GL Distribution report, Balance Sheet, and Trial Balance add a way to display the Month and Year of the financial period. For instance: rather than displaying 2016002, add ability to display February, 2016.	Add lc_year, lc_per and lc_month variables to split the year, posting period number and posting period month into separate values. Add lc_year2, lc_per2 and lc_month2 to GLDIST to hold ending period.
25924	Enhancement	Report Sets GL Report Writer	Add new checkbox options to exclude inactive accounts, and exclude closing entry. Default inactive accounts to yes, and closing entry to no.	Add Exclude Closing Entry and Include Inactive accounts checkboxes to report header tab. Use info when generating reports. Update both generation programs to use settings.
25926	Enhancement	Report Sets Sales Order Report Sort	Replace the new sort by type "Dept + Item" from ECR 25918 on the Sales Order report with a SO/Dept/Line option. The report should look like the following: SO5001 DEPT-Hardware Line 3 – HWITEM#1 Line 5 – HWITEM#2 Total HW DEPT-Trim Line 1 – TRIMITEM1 Line 4 – TRIMITEM2 Total Trim Total SO SO5002 DEPT-ACCESSORIES Line 1 – ACCESSORY1 Total Accessories	Change Dept/Item sort option to SO/Dept/Line Number. Update new report format to match.
25861	Enhancement	Roll Former Integration Coil Inventory Level Adjustment	Add setup option to allow dynamic stock adjustment of coil inventory to satisfy requested demand from AMS production data (this will make an event, so alerts can be set up for this if desired).	Add AMSADDCOIL setup option, if set then coil will be adjusted into the system to meet AMS demand.
25941	Enhancement	Task Management Task Screen	Task,NoBill (S7) enabled/disabling hold checkbox in error.	Update logic to S7/Task, NoBill does not disable/enable Hold Checkbox.

Total Number of Changes: 30