

Version 1605.1456

ECR #	Type	Module/Program	Requested Change:	Change Summary:
26002	Enhancement	Accounts Receivable Cash Receipts Total	Add a field that will total the amount of invoices selected as they are checked in the top grid of the cash receipts screen.	Update logic to refresh upper right and lower right balances as invoices are processed in upper grid. Add new running total box. Total is sum of checked balances.
26003	Enhancement	Accounts Receivable Apply Cash Receipts	Make the Invoice select grid columns sortable in Apply Cash Receipts.	Add sorts to columns in upper grid (invno,sono,terms, balance,invdate,invamt,msn).
26076	Enhancement	Accounts Receivable Auto Print And Auto Email	Allow both auto-print and auto-email attributes to be used so that the invoices print during the batching process at night and are emailed out during processing.	If new AUTOPROMANY option is set, then all of the AUTO- tags can be used; so documents can print, email, and fax if all three are enabled on organization.
26101	Enhancement	Address Book Conn Info	In the grid on the Connection Info screen, allow the tasks to be drilled into.	Add task drilldown to task and sonum columns.
26070	Enhancement	Approval Management Approvals Screen	Add the salesperson (somast.sp) to the pending approvals screens (PENDAPPR and PENDAPPRALL) and allow sorting by this column.	Add SP from SO and QUOTE to approval grids (single and all).
26067	Enhancement	ECR ECR Test Processing	Logic to find original ECR assignment resource does not ignore voided tasks.	Update ECR test processing logic to ignore voided tasks when finding first assigned resource.
25944	Enhancement	Email Integration ScreenShot	Update the ScreenShot application to use current Adjutant email logic so it can take advantage of newer email control logic.	Update NEWOCX logic to use STARTTLS and alternate auth methods if set.
26093	Enhancement	Email Integration Email Templates	Add a code for the Meter TagID/Serial# to be used in the Email Template lower list.	Add new strings to email templates to show meter tagid (and serial2) (*METERTAG*,*METERTAG2*). Items will need to be added to Email Template Extra Rule.
26000	Enhancement	Invoicing/Shipping Invoice Register Report	Add a multiselect option for the Sales Order Type. Add an option to exclude any line items from the report that have the NOCOMMISSION attribute.	Add multi button, and popup multi select for SO type, use old dropdown if selected, else use checked ones. Add option to exclude NOCOMMISSION items.

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26059	Enhancement	Invoicing/Shipping Invoice Register	Add an expression to the Invoice Register Report (INVOICESUM) for last payment date.	Add lastpaid to cursor (use ttod(lastpaid) to display in report).
25890	Enhancement	Item Control (Inventory) New Fab Time Field	In the Item Master screen on the C/V Part tab via the vendor selection, add a Fab Time field to store fabrication time. The field should be dynamic by hours (2h), days (3d), and weeks (2w). Note: when the field is populated with hours, any date calculations should round up to one day. A specified fab time of "0" should be used as 0 within date calculations and will be accepted over the department fab time default. The Fab Time field should only be available to edit when the item is flagged to produce. The assumption is the fab time field will be populated with a reference to the production plant as the vendor. Add the field to the C/V part importer.	Add new fabtime field to CV tab of item master. Only enable in vendor mode when item has produce flag set. Format is 9x, where 9 is number, and x is h = hours, d = days, w = weeks.
25891	Enhancement	Item Control (Inventory) Dept Rule - Fab Time	In the Department Rule, add a new text field to store the default department Fab Time. The same dynamic time entry method will apply as with the item master field where time can be entered in hours (2h), days (3d), and weeks (2w). The default department time will be used for date calculations when a produced item for said department has a blank fab time.	Add Text8 as Def Fab time (5 char).
26079	Enhancement	Item Control (Inventory) Default Costing Unit	Add a field to the itemmaster settings tab to specify a default Costing unit to be used for POs.	Add new pcostunit and pcostfact to itemmaster screen for Purchase Cost Unit. Update PO screen to use as default costing unit when adding new PO.
25991	Enhancement	Logistics (Shipping Events) BOL Generation By Carton	Add logic to link multiple sales order to each BOL based on: On a delivery route (setype rule log3 = 'y') it could go strictly by drop number. n anything other than a delroute it could ask. If more than one shipto linked into the same carton then, "This carton has multiple Ship To records. Create one BOL for all orders?" If yes, then create one BOL with all orders. If no, then create one BOL for each corresponding shipto. Default to yes.	Add new BOLBYCARTON2 setup option. If option is enabled, then split non interplant SEs into multiple BOLs by Carton/Dropno if delievery route, or Carton/Shipto if not. If not and SE has multiple shiptos in a carton, ask if one wants to split by shipto. Pass list of linked SO to current carton/drop or carton/shipto to allow correct multiSO add in BOL If BOLBYCARTON2 and BOLFROMSO are enabled, then just load items from current carton into lower grid on BOL.

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25943	Enhancement	Order Entry SONext Function	Add to the SONEXTTYPE rule a place for a warehouse; so when the SONEXT function is used, a different warehouse can default in.	Add num1 to SONEXT rule. Set to whse loctid if SO type varies by whse. If matching one is found during processing, then use match, else look for sonext rule value with 0 as num1.
25975	Enhancement	Order Entry POS Grid	Make a grid on the POS pop up screen that shows any existing credit invoices for that order. Allow the invoice to be drillable to get to the credit invoice itself. Grid should display information similar to info displayed on the invoice tab of the sales order. Also, make sure the balance displayed is the Cash received balance (the same displayed on the SO Header from recent change), not necessarily the shipped balance.	Add new grid to lower part of POS screen to show all linked open credits. Add drilldown to inv# column to load invoice master screen for selected invoice.
25988	Enhancement	Order Entry S2P-AMS	When a AMS controlled SO line is set to zero, send a Change(0) and Delete command to AMS for that line (send the C0 first).	Send C0 and D lines to AMS when a submitted PWO line is reset to qty = 0 on the sales order.
26020	Enhancement	Order Entry SO Total Linear Ft	Create a new field that would go along with the Total Linear Feet on the Sales Order screen that would only take into account Total panel footage, based on department.	Add new PALnFt field next to existing LnFt field. Only include items in PA dept.
26021	Enhancement	Order Entry No Process Invoice Date	Change the invoice date to be the day that "no process" is unselected; or the invoice date should ignore any ship dates while no process is checked, and use the final shipment once "no process" is unchecked.	Add new setup option INVTODAY, that forces invoice to be today when batch processing invoices.
26029	Enhancement	Order Entry Negative POS Entry	Add a setup option that when enabled will allow an order cash balance due to go negative with a POS payment. This will allow downpayments to be entered against an order even if all items and prices are not yet keyed in.	Add new setup option POSALLOWOVER. If set, then allow POS transaction for more; then open SO amount.
26030	Enhancement	Order Entry POS Voided Invoices	Update CCAMOUNT when a POS credit invoice is voided.	Add logic to update the linked ccamount when a CC/POS invoice is voided.

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26061	Enhancement	Order Entry Warning In Quote/Order Entry	Add a logic field to the Department rule that when selected on a department will compare the item's department profile (if filled out) to any other item profiles as they are keyed in on a quote and on a sales order. If an item is entered on a quote or sales order with a profile that does not match this logic-enabled department profile on the initial line save, then display a popup reading "WARNING Profile Mismatch".	Add new setup option CHECKPROFILE. If set, then the profile from first item on the order where log6 in the dept rule is set is used as the master profile for the order, and a warning is shown each time an item is saved that has a profile that does not match the master. The change is made to both the RFQ and SO screens.
26062	Enhancement	Order Entry WARNING Item Attribute	Add an item attribute, WARNING, that has a jump screen behind it for free text (50 char). When this attribute is added to an item and text is entered on the jump screen, display this text as a pop-up on the initial item save when the item is added to a quote or a sales order.	Change Warning note screen to support linked to item master. Change SO and RFQ screen to show note in popup on first save. Note is not modal, but is onto the SO/RFQ Screen.
26077	Enhancement	Order Entry Packing List	Allow users to cancel/escape the PICKLISTPACKscreen, (when they meant to print the sales order for example) without having to hit OK and produce the Message Control screen.	Add new Cancel button to PickPackPrint screen. If clicked on, then don't print packing slip for that order.
26084	Enhancement	Order Entry POS Check/Cash Radio Default	Create a setup option that will default the "check" radio button on the POS screen.	Create new setup option (PSODEFCHECK). If set then default the Cash/Check radio button to Check.
26086	Enhancement	Order Entry Sales Order	Add an expression to the Sales Order Confirmation to print the SoldTo Tax Exempt#.	Add soldto taxnumber to a_soldtoa cursor (a_soldtoa.taxnumber). Make same change to PDF Maker.
25895	Enhancement	Production Sub Assembly Due Dates	A sub assembly item's due date would be calculated as the due date of the parent produced item minus the parent item's Fab Time. If the parent is a Processed item, the parent's lead time would also be subtracted. Produced items entered direct on a sales order will continue to be based off of the item's phase's Production Due date. Force the PWO Scheduled Date to reflect the PWO Due Date minus item fab time. In the event that a PWO has multiple items, use the biggest fab time for the calculation. I.e. A PWO with an item having 2d	Add logic to split subs by phase if S2PBYPHASE or S2PBYPHASE2 enabled. Change to set duedate to start date of parent PWO. If S2PBYPHASE2 enabled, reset start date to duedate - longest fab date of any item on Sub PWO.

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			and and item having 4d will subtract 4 days from the due date to create the scheduled date. If no items on the PWO have a defined fab time or a department default, set the scheduled date to the Production Due date of the phase minus ProductionDays.	
26016	Enhancement	Project Management Allow Phases To Be Put On Hold	Create a new check box where you can place individual phases on hold. This would place all tasks associated with that particular phase on hold.	Add new Phase Hold checkbox. Places phases on hold/unhold based on checkbox setting.
26017	Enhancement	Purchase Orders Make the PO Data Report a Report Set	Make the Purchase Order Data (MOPENPO) report a data set.	Add report set logic to openpo report.
26071		Purchase Orders Qualified Vendors	Add a setup option that will warn and disallow a vendor from being put on a Purchase Order unless they have the Qualified Vendor org attribute.	Add new POQUALVEND setup option. If set then allow selection of unqualified vendor, then show message box and blank out vendor fields. On GenPO screen, show message and do not allow adding to QB, PO or NEW PO with unqualified vendor.
26072	Enhancement	Quoting COD Amount In Quote	Extend setup option the SOFORCECOD in Order Entry to be used as a setup option in Quote Entry as well.	Add logic to support SOFORCECOD setup option (if cod terms used, then the COD amount is reset to the order amount).
25915	Enhancement	Report Sets Paylocity Integration	On the DATETIMESUMM report, add an import for Paylocity data that will pull into a table from the attached excel report. The datetimesumm report will produce a report that compares hours billed per resource (currently doing that now) against hours paid to resource (data from paylocity). Resource ID will need to be what links to the resource (as names might not necessarily match perfectly). The dates from paylocity will also need to be stored and match the dates on the filters of the report. New filters on the DATETIMESUMM screen will be an option to group by Supervisor and Resouce (supervisor pulled from resource screen). Also, radio options for Salary, hourly or Both (this is determined by a resource attributes - hourly/salary).	Add new table to hold imported paydata (PAYDATA) add logic to populate new irh and ioh fields with matching imported data (same resno and date range inside date group). Add new Super/Resource grouping option and report.

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ECR #	Type	Module/Program	Requested Change:	Change Summary:
26001	Enhancement	Report Sets Bookings Report	<p>Create new rule for SOTYPEGROUP. Rule will be used to group together SO Types in order to show sales bookings for a given period of time. Report needs to exclude:</p> <ol style="list-style-type: none"> 1) items marked with non-commisionable attribute 2) freight type items (item attribute) 3) sales tax <p>Report will build on this query:</p> <pre> select convert(varchar(10), a.sodate, 1) as Date, (select coalesce(sum(g.totamt),0) from billmast g where convert(varchar(10), g.invdate, 1) = convert(varchar(10), a.sodate, 1)) as Invoiced_Sales, (select coalesce(sum(b.ordamt),0) from somast b where convert(varchar(10), b.sodate, 1) = convert(varchar(10), a.sodate, 1)and b.sotype in ('E', '7', '3')) as E#_Bookings, (select coalesce(sum(c.ordamt),0) from somast c where convert(varchar(10), c.sodate, 1) = convert(varchar(10), a.sodate, 1)and c.sotype in ('R', '5', '1')) as R#_Bookings, (select coalesce(sum(d.ordamt),0) from somast d where convert(varchar(10), d.sodate, 1) = convert(varchar(10), a.sodate, 1)and d.sotype in ('8', '4', 'm')) as M#_Bookings, (select coalesce(sum(e.ordamt),0) from somast e where convert(varchar(10), e.sodate, 1) = convert(varchar(10), a.sodate, 1)and e.sotype in ('p')) as P#_Bookings, (select coalesce(sum(f.ordamt),0) from somast f where convert(varchar(10), f.sodate, 1) = convert(varchar(10), a.sodate, 1) and f.sotype in ('7', '3', 'e', 'r', '5', '1', '8', '4', 'm', 'p')) as Total_Bookings from somast a where a.sodate >= ?thisform.v1 and a.sodate <= ?thisform.v2 group by convert(varchar(10), a.sodate, 1) order by convert(varchar(10), a.sodate, 1) </pre>	Create report per spec.
26004	Enhancement	System Manager Adj2 - Info Screen (alt-0)	<p>Check/Correct issues with Info Screen (alt-0, or Info on User dropdown (upper right)). Must be admin level user (Admin, Desktop user option) to change anything, otherwise just read only on info tab. Wiki Page Link should use Current page as target, so org screen should go to http://www.abiscorp.com/adjwiki/Default.aspx?</p>	<p>Info Screen >>> The Setup Options tab was not functioning correctly, so I've discovered the hiccups and removed extraneous code. All functions have been properly explained and commented on the js and service start. The rules and setup list are loading/linking/saving along with page labels.</p>

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			<p>Page=org_S Security Tab appears correct. Options Tab will be removed, it does not appear to do anything Assigned Users is just an info tab that appears correct. Labels is correct. Rules tab is correct. Pulls data from rulelist js var in screen js file, opens rule screen on click. Setup option tab should pull list of options from setupList (like Rules tab). Checkbox reflects enabled status (look at checksetupGlobal function to see how options are stored). Setup option tab should allow set/clear of options from screen (using update button).</p>	
26008	Enhancement	System Manager Rule Import	Add processing message to Rule import from rules screen.	Add wait box to rule import processing to avoid locked look.
26078	Enhancement	System-Wide / UI Notes User Check	For the logic that look attaches a quote or sales order to the notes of a contact, add a check for in use/active.	
26068	Enhancement	Task Management Standard Task screen	Verify the rule based dropdowns are updated on CID change.	Update changeCID logic to use selected CID instead of current global CID.
26094	Enhancement	Task Management Task Status Report	Add expressions for the latest meter read type, tagid, description, reading, and date to the cursor for the Task Status Report (SVRREPORT). This will allow a report of all turn on/turn off requests for a district with the meter read data included.	Add new MRTYPE, MRTAGID, MRDESC, MRREAD, MRDATE fields to cursor. Fill with last meter read event linked to task if TASTMETERREAD setup option is enabled.
26087	Enhancement	Warehouse Managment System Adj - Barcode Test Label	Add button to invlabel screen to print box text label to barcode printer. Label will show 0,0 origin on the printer, and different size boxes.	Add new Box Test button to invlabel screen. Print boxtest.txt template to current barcode printer. Add new set button to update current printer.

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26088	Enhancement	Warehouse Management System Prompt 45/46	Update Prompt45 and Prompt46 so correct ttype is logged into wohist when auto assigning and assembling PWOS.	Update Prompt 45/46 logic to use correct ttype when making WOHIST records. Pass type as needed into autoassem and certpwo.

Total Number of Changes: 40