ECR #	Type	Module/Program	Requested Change:	Change Summary:
26126	Enhancement	Accounting Connector Sales Order POS Transactions	If the Cash/Check Ref is > 5 characters, the Open Credit invoice number generator can get stuck in loop trying to generate a unique invoice number. Update logic to generate numbers a different way, and change to more random format after 5 duplicates are generated.	Update logic to handle long cash/check ref numbers when generating open credit invoice numbers.
26075	Enhancement	Accounts Payable Create Positive Pay File	Create a positive pay screen that will generate a file similar to the one attached.	Create new Positive Pay program from existing sage positive pay program.
26109	Enhancement	Accounts Receivable Generate Finance Charge	Gen FC process sets billmast.hold = 'y' on generated invoices. They will not post with hold = 'y'. Update logic to set hold = 'n' when making invoices.	Update logic to set billmast.hold = 'n' when making FC invoices. Update Batch Generation logic to set gldist.svrord to blank when processing FC invoices (was getting set to null)
26110	Enhancement	Accounts Receivable Generate Finance Charges	Add the ability to set a custom prefix for finance charge invoices from GENFC. Prefix needs to allow for at least two characters. This could be an entry in the GENFC screen, but it would need to save the last entry and default every time. A new rule could be created to hold the finance charge invoice prefix. A new line could be added to the CID Maint counters for FC Invoices.	Add new FCNEWCOUNTER setup option, if set then new FCINV counter will be used instead of base invoice counter. FCINV counter will be setup on first load of GENFC screen.
26133	Enhancement	Accounts Receivable Apply Cash Receipts	Create a setup option that allows a user to print a cash receipt document from Apply Cash Receipts screen upon save. The form would be a customer-facing document and would need to show all details of the receipt, without the accounting distribution details.	Create new setup option to allow printing of new Cash Summary report after cash receipt. (CASHSUMMARY). Report can be printed at any time if you know the cash key (cashrec.cashkey2)
26134	Enhancement	Accounts Receivable Payment Methods	Expand POS screen and Apply Cash Receipts screen payment method options to include selections for 'Credit Card' and 'Other'.	Expand options to include credit cards and Other (new codes are cc and ot).
26135	Enhancement	Accounts Receivable Cash Receipts Report	Add new Group By option to the Cash Receipts report for 'Payment Method' that will group transactions by	Add new TType grouping option, and two new reports for it.

ECR #	Type	Module/Program	Requested Change:	Change Summary:
			the POS or Apply Cash Receipts payment method selected. Details should be sub-sorted by the Cash/Check/Ref# value from the cash receipt transaction.	
26099	Enhancement	Address Book Resource Import	Create a new importer file and screen to allow importing Resource information. Ignore the standin field, validate the vendor ID, validate on resource name.	Create screen to import resources from xls file. Matching contact must exist in system.
26100	Enhancement	Address Book Contact Details	Add 2 new date fields under the Anniversary date field on the contact details tab.	Add new odate and odate2 fields to Details tab.
26121	Enhancement	Approval Management Pend Approval All	Add logic to allow adding as icon using Star Icon in toolbar.	Add needed code to make star button add to desktop as icon.
26107	Enhancement	Bank Reconciliation Canceling Entry For POS Voids	Create a cancelling entry in bank rec whenever a POS invoice is voided.	Add logic to generate reverse of original cash receipt when voiding a open credit generated from the POS screen. New Cash Receipt uses date from generated reversal invoice.
26130	Enhancement	Bill of Lading Bill of Lading Summary	Add Shipping Event (shipevent table) fields to cursor of report (bollog).	Add SE# (sekeyno), SENAME, estdate, shipdate, osdate, cutdate and ashipdate to cursor.
26132	Enhancement	Commission Tracking Commission Calculator	Add Ending Commit date to Due tab grid.	Add ending commit date to grid (commcommit2.edate).
26125	Enhancement	General Ledger P&L Month/Period	When the year is changed on the P&L (GLINCSTATE) report filter, month jumps back down to January. System should try to use the month currently selected rather than resetting to January.	Update logic to refresh period on change of year. Screen defaults to current period.

ECR #	Type	Module/Program	Requested Change:	Change Summary:
25990	Enhancement	Import/Export Manager Water District Connection Import	Building on the current import of WATERMATCH, create import that will use the attached file to update fields in ent and conninfo.	Create new version of watermatch process. Use new file format. SubDiv and Builder are validated using custnos.
23112	Enhancement	MBS Integration MBS Grid - Add SOC columns	Add same grid functionality that is in SO Update Tool: - Unit Weight (also updates rcode = 'w') - SOC Questions/Answers Pass info to Quote/SO when generated.	Add SOC columns from rule to grid, load data from xls to columns when auto matched or changed. If columns filled out, use data to make SOC data for SO/RFQ.
23028	Enhancement	Order Entry MBS Grid	Add logic to make items price based on customer and SOC setup options.	Add popup to ask to price. If yes, then price based on current pricing rules.
23031	Enhancement	Order Entry Margin Calculator	- Add Setup Option to show "Cost" as Standard Cost. Change Margin % and Margin $ to reflect std cost. - Change Discount% column to "Disc% from List". - Add Net Price column (getprice) and "Disc% from Net". - Add $/lb column (4 decimal) and make editable to change sell price. - Swap place of buttons (Commit should be bottom right, Cancel should be bottom left). - Remove Net Prices tab.	Create setup option EXTMARGIN, if set then launch new shared margin screen (between SO and RFQ) Ask if pricing per lbs. Based on answer show correct columns. Pass new pricing info back into SO/RFQ. Setup option SOMCSTDCOST controls which cost is used (set for standard cost).
26104	Enhancement	Order Entry Default Paid Amount on POS to 0	Create a set up option that will have the default amount paid on the POS screen to 0. Create a warning if user forgets to change the amount and tries to submit a $0 POS payment.	Add new POSZERO setup option, if set then default cash payment amount to zero in Process Cash Screen
26122	Enhancement	Order Entry Sales Order Item Swap	Correct issue with price of configurable items if SOSWAPPRICE is enabled. New price is correct price / controlling qty in some cases.	Correct issue with reprice of SOC items during item swap processing.

ECR #	Type	Module/Program	Requested Change:	Change Summary:
26127	Enhancement	Order Entry SO POS Credit Void Logic	Update logic so that voided POS Credit does not post to GL (the linked Cash Rec handles the posting).	Alter POS credit void logic to make invoice in processed state to prevent posting from invoice. Posting is done from cash rec (matches original POS logic).
26129	Enhancement	Order Entry Print SO	Printing multiple packing list copies with PickPackList Qty option enabled and not grouping by sales order will only print 1 copy.	Update PickListPack screen to use different counter variable to avoid resetting the SO printer counter in the middle of the loop.
26146	Enhancement	Order Entry SO Screen	Change Lock Price logic to allow full processing of added item before the lock takes effect.	Update pricing logic to fully process before respecting locked checkbox on new item add.
26115	Enhancement	Procurement QuickBuy - Make PWO	Making PWO from QuickBuy screen where there is more than 1 item per PWO (multiple items in same dept), the line number is 1 for all items. Update logic to make line numbers unique per line item.	Update MAKEPWO logic to generate unique line numbers when adding line to existing PWO when grouping by dept from QB.
26116	Enhancement	Procurement Quick Buy	Change main query to run in read uncommitted mode to limit locks requested and blocking issues.	Update QuickBuy to run the main query in uncommitted mode to prevent the issue of shared locks when reading table information.
26145	Enhancement	Procurement New PO Receipt Screen	During return of non serial/lot item, the PO qty is checked in stock instead of the qty being returned, so the return will fail if the order qty is > qty on hand. Change to use the actual return qty.	Update logic to handle checking of stock for non serial lot returns correctly.
26131	Enhancement	Purchase Orders PO Screen	If new PO is created when existing PO is loaded and has a received amount, the new PO will have the same received amount saved into the header.	Update logic to set recamt to zero when saving a new PO when a received PO was loaded before starting the new PO.
26128	Enhancement	Quoting Order # Search	Similar to the sales order screen, open up the Order # field to be searchable.	Add option to search using order number on RFQ screen.

ECR #	Type	Module/Program	Requested Change:	Change Summary:
26136	Enhancement	Report Sets Sales Margin Report	Cost on report is incorrect for configurable items when running in Billed Cost Mode(for the sales margin screen).	Update logic for billed cost mode to use correct cost for configurable items.
26102	Enhancement	System-Wide / UI Desktop Bread Crumbs	Add user option to move breadcrumbs to top of screen instead of bottom.	Add new BREADCRUMBS-TOP user option to move the breadcrumbs to the top of the adjutant window instead of the bottom.
23625	Enhancement	Task Management Def Contract Per Std Task	Add contract type rule (CONTTYPE). Add contract type to CONT1. Add contract type field in STANDTASK which will allow task to default to specific contract type if it exists for that customer (if not, use default). Add logic to all task creation screens which allow matchup to the contract type.	Add new Contract type field to Contract and Standard task screen, comes from new CONTRACTTYPE Rule. Add new eqhours field to blocks tab, save to contmast as eqhours. Add logic to task screen and support screen to change contract based on selected standard task if standard task ctype matches contract ctype.
26106	Enhancement	Task Management Task Grid Report Cursor	Add the shipto and the conn info information for the Shipto org on a task to the Task Grid Report Cursor (report name : rtgrid).	Add Crossstreet, keymap and subdivision to grid.
26095	Enhancement	Time and Materials Master Meter Read	Add the ability to store a note with each reading recorded. The note could be tied to the reading date and would be valid for all meters on that day. Any recorded note could be accessible in the list of recorded readings either by displaying line with the note below the reading, or with a jump-to button with the note behind it. The Water Buy report would also need to be able to report the note entry.	Add new readnote field to Adj2 Meter read screen. Update Desktop report to have readnote in main cursor.

Total Number of Changes: 33