

ECR #	Type	Module/Program	Requested Change:	Change Summary:
26722	Enhancement	Accounts Payable Change Pay Priority	Allow user to change an existing pay priority, including to C for credit card payment which will generate the needed extra set of invoices.	Change logic to allow change to C (credit card) PP on edit of existing unpaid AP invoice. Current invoice is marked as paid, and new is created tied to CC vendor.
26769	Enhancement	Accounts Payable New Positive Pay	Create new positive pay file according to the template attached.	Add new rule to link Check Accts to PP Formats (PPFORMAT, text2 = bank account number, text2 = Format code, OLDPP and NEWPP are the two current formats). Add new logic to support NEWPP format (xls file).
26766	Enhancement	Accounts Receivable Manual Invoice Account Offset	Add logic to input an offset account to the A/R account when making a manual invoice. This should override any transactional categories set up for a customer or item.	Add cost offset account to manual invoice header. Change posting logic to use this account instead of transaction cat. COGS account if filled out.
26838	Enhancement	Accounts Receivable Manual Invoice	Add a setup option that would make the manual print invoice process use the Bill To contact and auto-process information. So if I have an invoice for a Sold To Customer that has a different Bill To organization we are paying, and both orgs have a different A/R contact, the manual print invoice logic should use the Bill To A/R contact. Currently the auto-process and the manual print AR process work off different attributes. The manual process works off the Sold To contact information while the auto process works off the Bill To.	Add new INVBILLAUTO to use the billto ID for generating the email template, and source of info for message control.
26860	Enhancement	Accounts Receivable Add Auto-Process Code	Add org's auto-process code (auto-email, auto-print, auto-fax, etc) to the cursor of the Print Invoice screen.	Add auto attributes to new lc_bauto and lc_sauto fields (billto and soldto).
26911	Enhancement	Accounts Receivable Credit Memo Date	When voiding an AR invoice, in the "Enter Credit Memo Date" field, add a button to select "OK" to confirm the date entered and to continue on. Continue starting the cursor in the date field and not on the OK button.	Add OK button to date screen.

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26923	Enhancement	Accounts Receivable Cash Receipt Screen	Generate open credits with EXEMPT-XX tax tables (items are not taxable, but voids of them generated unknown taxable records on tax reports).	Add logic to insert EXEMPT-Xx where xx is state code for generated billtran records.
26780	Enhancement	Address Book Resource Screen	Make DefSkill a field on the screen. Remove checkbox logic in attributes.	Add DefSkill as Dropdown on screen. Remove Default boxes from attribute list.
26951	Enhancement	Bill of Lading Update to BOL Setup	Add a setup option to pull in miscellaneous line items from the SO onto the BOL. This setup option should work in conjunction with BOLSTKFROMSO.	Add new setup option BOLSTKMFROMSO, if set then stock and misc items will be added from SO (disable BOLSTKFROMSO if set).
26771	Enhancement	Diamond Tools New SQL Table	Add a new SQL table that would include fields such as "Date, Ikey, Lot, Origin WarehouseID, New WarehouseID" that the customer could pass data into.	Create new table. Will be installed as part of data update during next update or data update.
26816	Enhancement	ECR Complete By on ECR	Remove logic that blanks out Complete By on Major issue.	Remove logic that blanks out complete by name when major issue is generated. Still incomplete, but leave complete user in table.
26872	Enhancement	ECR ECR Report	Add AddUser filter to the ECR Report.	Add AddUser as filter.
26594	Enhancement	Logistics (Shipping Events) Auto Close SE	Add a setup option that when enabled, where a single order is tied to a shipping event and the same order is shipped and marked closed on another shipping event, the open shipping event is auto-closed.	Add new setup option SECLOSELINKED, if set then close other SEs that are single linked to same SO as the SE that is being closed.
26970	Enhancement	Logistics (Shipping Events) Unload Carton	Unload carton process makes negative itemtrack records in error if MOVEPACK is enabled, and items being unloaded are nonstock.	Update packmove logic to not attempt to transfer non stock items out of carton bags.

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26956	Enhancement	MBS Integration Color on MBS Import	Update the MBS Import Process so that an imported file with a column (currently D or 4th column in file) containing a color code, and during the import, Adjutant matches that color column to a configuration question with Rcode "O" and uses that color as the answer to the specific question where applicable. Create a new rule to send all unmatched color codes to the config answer "TBD".	Add logic to match color from xls file to O type SOC question (List), if no match found, look for TBD code in color list.
26776	Enhancement	Order Entry SOC Pop Up Box	Create a setup option that allows the unit fields of an SO line to be unlocked even when SOC questions are present. Only lock them when one of the questions has a controlling qty.	If SOC item does not have a controlling qty, then unlock unit fields on line item entry tab during add/edit.
26767	Enhancement	Production Add Custom BOM Note	Add the line notes on the custom BOM screen to populate on the subassembly PWO forms.	Add inoted to main PWO cursor. Pull from linked BOM. Update buildsubmnew logic to fill out bomkeyd5 for all lines.
26768	Enhancement	Production BOMLIST Variable	Update the BOMLIST variable (or create a new one if needed), that will display the BRCode (length) from subassembly items in the BOM. This should include the custom BOM lengths as well. Currently the variable groups by item, not taking length into consideration. Also, rearrange the order of the BOMLIST variable to reflect the order in which the custom BOM is made.	Create new bomlist2 variable, pull in answer to B question from BOM SOC Config. and add to BOM line. Change to pull directly from BOM instead of WOBOM, do not merge like items together.
26772	Enhancement	Project Management Add Cash Balance	The balances on the SO Tab of the project screen need to reflect any POS payments that have been received on the SO to show a true cash balance. So, similar to the Cash Balance field on the individual SO, add a cash balance to the sales order tab that will give an amount of total SO - POS payments received.	Add new POS Balance column to SO Summary tab. Add total at bottom of tab.
26895	Enhancement	Project Management Project Number	Change the Project Summary report to use the msn number from the project instead of the keyno.	Update passed param logic to reset key value to msnum value if msnum is enabled.

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26738	Enhancement	Purchase Orders PO Grid	Add a setup option that will open a new SO Generate PO screen when the PO button is selected from the Sales Order screen. The screen should be similar in look and feel to the Quick Buy grid but will only list the items associated with the SO that the screen was initiated from. The main columns needed are a select checkbox per line, SO quantity, cost, default vendor (with option to change), purchase unit, and costing unit. Group the items by vendor as in the quick buy screen. Options at bottom of screen should be similar to the current Gen PO screen from the SO without the Skip option. If the PO is created from the screen, auto-link the SO as it is done today.	Add new setup option (SOPOQUEST3), if set then show new PO Question grid to allow processing all items at same time. Add SO number column, add sorts to line num, item and vendor. Add color logic from QuickBuy Screen.
26797	Enhancement	Purchase Orders UR Records	Update the PO screen to use UR records instead of PR records when calculating the open balance. The UR records are in the same unit as the PO, so there is no rounding.	Update PO Receipt logic to look at UR records instead of PR records to figure the dollar value received.
26969	Enhancement	Purchase Orders PO Receipt (NEW)	Trackno (P number) not filled out on PO Receipt summary report (porecp).	Update New PO Receipt logic to fill out trackno in PO Receipt Summary Report.
26741	Enhancement	Quoting Price Update Button	Add a "Price Update" button to the quote screen that would adjust the item pricing to the updated pricing for that customer. For instance, if the customer makes a mass pricing update for all items, the Price Update button would change all the pricing to reflect the changes (based on the Customer Pricing Setup). It would be a manual process on the quote. Also add a check on conversion if the quote is past the expiration date, to ask if the SP would like to update prices. If the SP says yes, it would update pricing and convert. If they answer no, convert as is.	Add new Update Price (uP) button (next to Quote expire date on header tab). When clicked, the pricing will be updated based on the current pricing. Add logic to convert button to prompt to update pricing if the quote expire date is in the past.
26753	Enhancement	Report Sets Print SO Cursor	Add the msn.billtype full description to the Print SO Cursor. Currently, only the Billtype Code (text2) is in the cursor. Text1 is needed.	Add CBillType to a_msn cursor (a_msn.cbilltype)

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26770	Enhancement	Report Sets Resource Billing Report	On the resource billing report (resbillhrs) add an option to group by supervisor.	Add new group by super button. Add new reports to handle grouping.
26785	Enhancement	Report Sets Slow Stock Report	On the slow stock report, create an option to group items across the entire CID instead of per each warehouse.	Add Merge Whse checkbox option that will remove whse grouping, and use report without group. Add logic to handle the case where there are no tiers at all (instead of not enough tiers). Add checkbox that adds logic to remove item from all whse groupings if the item has at least one transaction after the cutoff date in any whse.
26823	Enhancement	Report Sets Plant Production SO Type	Add Supplement Order type as a selection to the Plant Production Schedule Report (MPPSCH). Make sure to remove it from any exclusions on the report.	Remove exclusion of supp type order (U). Now on multi select list, and not excluded from query.
26743	Enhancement	Roll Former Integration AMS A/C Record Changes	Make a change during the AMS process that looks at the unsent records to see if any A/C records also have D records, where the A/C was created before the D. Then delete the A/C before it gets sent, and send the D's first. This will ensure the D gets to the controller before the A/Cs.	Add new logic to put a setid into amsorder records. SetID is unique to each event that creates amsorder records. Change AdjAms process to put the exported records into setid, bundleid, order, length (desc) order during export to ams. This will put the outputted records in the correct order.
26912	Enhancement	System Manager New Default Account	Add a new default account field to the CID Maintenance screen under Accounts > Accounts Receivable tabs called Open Credit AR. This will be the default account when creating an unapplied balance in the Apply Cash Receipts screen.	Add new open credit account to the accounts receivable tab in the CID accounts screen. Change the Cash Receipt process to default to this account if filled out and making open credit.
26918	Enhancement	System Manager Supervisor Required	Create a setup option to make supervisor a required field on the resource screen.	Add new setup option RESREQSUPER, if set then require supervisor unless resource is a supervisor, or resource is a squad master.
26788	Enhancement	Tapping Builder Deposit Check	Add a new warning that will pop up on the tapping screen if someone is trying to pay a builder deposit that has already been paid. Warning should say	If builder deposit already fully paid, do not allow check of box, and show message indicating that it has been paid.

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			something like "Builder Deposit has already been paid."	
26210	Enhancement	Task Management New Service App. Integration	<p data-bbox="779 318 1289 367">Create a change according to details provided in attached scope document.</p> <p data-bbox="779 399 1346 529">The change will take place over 2 parts. The first part will be a link to an Adjutant 2.0 page that will have an application (which might need to be different based on district). The data filled out by the resident will be pushed to a new table.</p> <p data-bbox="779 561 1373 886">The second part of the change will be on the desktop side. Create a new screen with two tabs. The first tab will take specific information from the data provided in the table. The data will try to match the address already in Adjutant. If it cannot find a match, color code the record red and allow the user to select from possible matches (similar to the vendor import verification process). Also, if possible, have the address information auto-fill on the 2.0 website driven from the address1 field in Adjutant to ensure the data is filled out consistently, and lower the need to match up unmatched records.</p> <p data-bbox="779 919 1373 1162">The user will check a select/approve box for each record they want to approve and send on to the next tab. Once selected, the records will go to a second tab which will work like the work order generator screen, where the user can select the records and generate new service specific work orders for each address. The user will also have the option on the first tab to place a record on hold until they can verify the address (see image on page 5 of the scope).</p> <p data-bbox="779 1243 926 1268">New Changes</p> <ol data-bbox="779 1276 1360 1433" style="list-style-type: none"> 1. When opening the page, put it directly into add mode. 2. Remove any save/future edit/resume functionality. 3. Instead of Save/Cancel when in edit mode, create 1 button: Finish and Print. Currently, if you save it, more buttons appear with all the different options 	<p data-bbox="1394 318 2003 399">Create new waterapp_s.htm page to allow entry of water application via the web. Data will be saved to waterapp table. Page in adj2 application, but login not needed.</p> <p data-bbox="1394 399 2003 505">Create new waterapp screen in desktop that will allow the submitted applications to be used to generate connection work orders. Waterapp screen can also import data from AVR to generate disconnects and door tags.</p>

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			(print/submit/resume/edit/etc). As an Adjutant user, this makes sense to me, but I think end users will save and not know to look for all the different options. 4. To replace the resume application functionality, send confirmation email to the user to the email address specified with more instructions for them to print, fill out and return to client with the filled out PDF attached. a. Email template for this process 5. Make the email a required field. Add a checkbox if they do not have an email address for user to check. If it's checked, send the confirmation email to a predefined client email address.	
26790	Enhancement	Task Management Default Resource User Option	Update the logic from ECR 26336. Make this logic work based on a user option now instead of a system wide setup option. If the user has the new default resource user option and they create a task, use the same default resource by zone logic from ECR 26336. If the user doesn't have the option, regular logic should apply.	Add new TASKSUPERZONE user option, if set then process super logic.
26817	Enhancement	Task Management Default Res by Zone	Port the logic from ECR 26790 to Adj2.	The TASKSUPERZONE has been removed from the Task_S.js setupList and will be instead populated from the User attribute into the Adjutant2 variable.
26866	Enhancement	Task Management Edit Date on Task Grid	On the task grid, add the edit date as a filter to show tasks edited within the dates.	Add new Edit Date range, use same logic as Add Date range.
26888	Enhancement	Task Management Contact on Route Gen Tasks	On tasks generated by a route, the contact is not being pulled into the task. If I manually start a task from the project it will show up, but any task created from a route for the same customer does not pull it in.	
26913	Enhancement	Task Management Task Screen	In desktop, if I use my previous/next task buttons at the top and I have my questions tab open at the bottom, it will keep my questions of my starting task if I am scrolling through tasks that don't have questions until I get to a task that has different questions, then those will be the ones that stick.	Update logic to refresh questions tab when task has no questions when scrolling through tasks using arrows.

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26922	Enhancement	Task Management Recurring Generation	Some combinations of source and delete options will void all open tasks in date range (Delete Existing and Work Order)	Update logic to not process voids is linked taskid is 0.
26746	Enhancement	Time Billing Itemize Basic Service	Add an option to the Bill Summary report to expand out the basic service (or "other") charges to be itemized. It should be grouped on the bill by the "group" defined in the other charges rule (text2).	Add setup option to allow details of Other Charges to be shown in Bill Summary report (DETBASICSRV). If set, then details from other charge billing are insert into new MOC fields in cursor. See demo report in ECR docvault for example. Add logic to put Group from rule into cursor (mocgroup), sort details section by group.
26909	Enhancement	Time and Materials Time Entry	Add setup option on quicktime to prohibit material from being entered when there are no open sales orders on the project. So, if there are no open orders (exclude tasks/'w' type orders) then don't allow any material to be entered. "No Open Sales Orders for this Project. Material cannot be entered."	Add new TSMATNOOPEN setup option, if set, and task is linked to project, and there are no open Non W type Sales orders, then do not allow material add/edit/delete.
26925	Enhancement	Time and Materials Add Ship To Company	Add the Ship To Company name as a column in the time sheet on the desktop.	Add shipto.company to grid.
26233	Enhancement	Warehouse Management System Prompt 74	During Prompt 74, when loading stock items, check OnHand less what is packed into other cartons and warn the user if there is insufficient quantity to load for the SO in question.	Add logic to Prompt 74 to check for OnHand Less already loaded Less Current Qty To Load >=0 , if not then warn user.
26764	Enhancement	Warehouse Management System Weld Reject Code	Add an additional weld reject code in prompt 75 of "Excessive Reinforcement". To conserve space, abbreviate to "ExcessReinforce".	Add new option #9 to reject codes.

Total Number of Changes: 44