

Version 1612.1506

ECR #	Type	Module/Program	Requested Change:	Change Summary:
26974	Enhancement	Accounting Connector Task Require Time Entry	Create a new option on the standard task screen called "Require Time Entry". If this is checked, the task should not be able to be completed unless it has a time entry saved. This option should not be able to be selected if the Milestone option is selected, and vice versa. This should be a universal option no matter how or from where the task is completed.	Add checkbox to standard task, add check for both milestone and Req time. Add check to complete logic, stop if set and no time entered. (rtstask,reqtime)
27121	Enhancement	Accounting Connector Grid Sort	On the Bill of Material Master, allow sort on all columns.	Add sorts to all columns on input grid.
27122	Enhancement	Accounting Connector PWO Grid Sort	For the PWO Master, on the Assign Material tabs (for both lot and non-lot) allow a sort on all grids.	Add sorts on all columns on Assign Non Serial/Lot and Assign Serial/Lot.
27133	Enhancement	Address Book Org Air Hammer	On the sales order tab of the Org airhammer, create a set up option to add the Sales Order Notes (just the order notes, not the shipping/production/invoicing notes). Expand the column to allow the full text to be displayed.	Add shortnote (first 254 chars of note), and long note (hover or double click to see all) to summary SO grid.
27162	Enhancement	Address Book Backflow Connection Flag	Add a "Backflow Connection" flag on the connection info screen.	Add new backflow checkbox to connection screen (Conninfo.backflow). Add to Adj2 screen also.
27213	Enhancement	Address Book Legal Name Change	Add "Legal Name" to BillTo and RemitTo screens/tables. Change printinv and pdfmaker to use in place of a_billto.company when present in billto. Change printcheck2 to use in place of C1.company and lc_vendor when present in remitto. Add new billto field to cursor of printrfq, printso, and pdfmaker.	Add LegalName to billto and remitto table and screens. Update Inv Print logic to insert legal name into billto company field if filled out. Update check printing logic to use legalname as company name if filled out in the remitto. Create new a_billtoa cursor in printSO and PrintRFQ processes with full billto info (a_billtoa.legalname)

Adjutant Desktop Release Notes
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ECR #	Type	Module/Program	Requested Change:	Change Summary:
				Make same changes in PDF maker.
27146	Enhancement	Bill of Material Print PWO	Bomlist variable has the SOC item instead of the BOM item if BOM is linked to SOC via rcode, and SOC has linked item on question. Add new PWONORCODESWAP CID setup option to suppress this when building BOMLIST variable.	Add new PWONORCODESWAP setup option, if set then do not swap in linked SOC item when BOM Rcode = SOC Rcode when building bomlist expression.
27189	Enhancement	ECR ECR Screen	Add new Exclude from Release notes checkbox. Update PRINTECR screen to add option to respect flag.	Add field to database, add to ecr screen in desktop and adj2. Update PrintECRReport in desktop to use filter if option is checked on results tab (only changes the print logic, all records still shown and updated).
27173	Enhancement	Import/Export Manager Item Export	Add Item Description as a data column in the ITEMEXPORT.XLS file created by the Item Export (for Update Cost) program.	Add description to exported data.
27227	Enhancement	Inventory Labels Carton Status Screen	Add buttons to print Carton and Bundle Barcode Label. Add fields to allow selection of barcode printer to use.	Add buttons to print Carton and Bundle barcode tags. Add logic to allow selecting barcode printer to print to.
27119	Enhancement	Item Control (Inventory) Inv. On Hand Control Account Filter	Add a control account filter from the OHF tab to the inventory on hand report. Add control account to the cursor of the report.	Add Inv Account filter to report. Add stkinv account to cursor (ctrlacct).
27143	Enhancement	Item Control (Inventory) User CW Attribute	Create a new item attribute called UserCW that when assigned to an item allows purchasing in the purchase unit and receiving in the purchase and stocking units. Make adjustments to the COILLIKE	Create new USERCW attribute that will allow the user to enter the stocking qty during PO receipt. The stocking qty is not hard linked to the receiving qty. Change works on New PO Receipt screen.

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			attribute to work in conjunction with the UserCW attribute.	
27199	Enhancement	Item Control (Inventory) PO Find Return	Update the USERCW attribute so that items and the received quantities work with the Find Return button in the new PO Receipt screen.	Add new logic to handle returns of UserCW items in new PO receipt screen.
27224	Enhancement	Item Control (Inventory) MOVEPACK Logic	Update MOVEPACK logic to handle cases where the selling unit is not equal to the stock unit. The qty moved into the carton bin should be in stock units. So if the Sell Unit is Bag250, and the stock unit is each, if 3 bags are packed, then 750 screws should be moved into the carton bin.	Update movepack logic to move stock qty to new bin instead of sell qty in cases where the sell unit <> stk unit. Terminal change in v547.
27041	Enhancement	Logistics (Shipping Events) SE Viewer change	Add columns for somast.orderno and somast.custpo to the SE Viewer - Orders w/o SE tab grid view.	Add OrderNo and CustPO to SO without SE tab. Add sorts for both columns. Add label names to new columns (lorderno, lcustpo).
27158	Enhancement	Logistics (Shipping Events) Security for SE Add	Add security token that is managed by a setup option which will allow the client to enable the ability to manually load items in the SE Load screen by user. Currently the view security token allows the manual load in SE Load screen.	Add new SEADDSEC setup option, if set then check SEADD,ADD before allowing add to carton.
27159	Enhancement	Logistics (Shipping Events) Security Token for Unload Screen	Add security token to deny access to the unload screen (UNLOADCART).	Add new security token for deny entry to UnloadCart Screen (UNLOADCART,S1).
27219	Enhancement	Logistics (Shipping Events) Shipped Cartons	Make a change that will delete c-bin locations once the carton is marked shipped. Create a process that will add the c-bin back if the order is credited and the items are returned	Add logic to mark Carton Bins when created , then delete the bin when emptied during shipping.

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			to stock, then re-delete once the credited order is shipped.	
27151	Enhancement	MBMA Reporting MBMA Quarterly Reporting	The 'state' expression in the summary version of the MBMAREPORTING report needs to pull data from the ZIPMBMA table instead of the COUNTYMBMA table.	Change logic to pull state names from zipmbma instead of countymbma.
27048	Enhancement	Order Entry Update SO PO Grid	Update the PO Grid change from ECR 26738 to add a button for "Add to Existing".	Add new "Add To Existing" button, if clicked, show open POs for each checked line based on current vendor, allow selection of open order. Generate POs to selected orders on complete of processing.
27129	Enhancement	Order Entry Item Swap Price Update	Add a check box on the item swap module that will allow the user to update pricing or not on an item by item basis. Currently, there are set up options that will blanketly update the price or not each time. This will give the user the option per each item. Default the option to be checked.	Add new setup option SOSWAPRP, if enabled then show a second checkbox on the line item view screen for each line, only rerpice lines where the checkbox is checked.
27130	Enhancement	Order Entry Price Update	Allow the user to update pricing for several items at once on the Line Item View tab. Whether just making the price grid editable or allowing the user to check several items and adding a new button at the bottom to set the price.	Add logic to allow bulk update of price from Line Item View table. Enable with SOBULKPRICE setup option. Switch to Line Item View tab, click on edit order , update prices in New Price Column, click on Save.
27144	Enhancement	Order Entry Warn On 0 Price	Add a warning on the manual ship that will alert user if there is a \$0 price line.	Add new MSCHECKPRICE0 CID option, if set check selected lines for zero price, stop shipping if any found.
27140	Enhancement	Production PWO Sort	Add SOC Report Code O to the cursor so it can be used as a sort option in the PWO Forms rule.	Add anso to cursor, to allow custom sorts on the answer to the Rcode = O question.

ECR #	Type	Module/Program	Requested Change:	Change Summary:
26733	Enhancement	Project Management Project Job Card	<p>Create a new custom report run by Project number with the following details: Project Contract Total Project Subtotal Project Tax Total Project cost totals goruped by month Project cost total to date Amount invoiced Amount paid</p> <p>.</p> <p>Program should produce two report formats of the Job Card Report: Format A is the original format when the report is requested by project#. Format B is the format when requested with a date. Format B is a one line per project, with the following columns: Project Number Project Name Project Contract Total Project Subtotal Project Tax Total Project cost totals goruped by month Project cost total to date Amount invoiced Amount paid Total Cost for selected month*</p> <p>*This would show the dollar amount of the costs associated with the project for the single month selected in the report request screen.</p> <p>.</p> <p>The report request screen should allow an entry of a valid project number OR a specific month and year (not an open date range). Selecting the output button without either a project or a month/year should give an error that either a project or a date must be specified.</p>	<p>Create report per spec. Change report logic to allow entry of date range, and then pull all active projects in that range into report. Ether range or single project must be entered. Change report to use single period instead of range. Only show projects with cost in period in period mode. Use new summary format when in period mode.</p>
26885	Enhancement	Project Management Project Review Report	<p>Create a new standard Project Review report.</p>	<p>Create report per spec. Use new PROJREVUDQ rule as source of</p>

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			<p>The new report will pull together key fields from the Project Control screen, as well as custom Project UDF fields, and Project Notes to create a high level project review tool for scheduling or sales meetings.</p>	<p>UDQ answers to show. Text1 = Rcode, Text2 = Report header, num1 = UDF slot (1 to 10). Exclude EO type notes per request.</p>
27011	Enhancement	<p>Project Management Cash Balance in COD Field</p>	<p>We recently made a change to add the cash balance from all the sales orders attached to a project (ECR 26772) that takes the total order amounts minus the total POS deposits received, and displays it as a cash balance on the Sales Order tab of the project. Add a set up option that will automatically feed that number into the COD amount on the project header screen.</p> <p>So when a sales order price is changed or updated, that cash balance will change and the COD will be updated automatically. The same will be true if they make another POS receipt on an order attached to the project.</p>	<p>Add new POSMSNCOD setup option to control if logic runs. If set, then the project COD amount is set to the sum of the project linked SO order amounts less the POS payments to linked orders.</p>
27123	Enhancement	<p>Project Management Project Screen</p>	<p>Please add Company Name and Job Title to this search window. Change to pop-up window if it makes more sense.</p>	<p>Change dropdown box to have 4 columns; name, email, company and jobtitle.</p>
27155	Enhancement	<p>Project Management Project Screen</p>	<p>Expand Multiphase logic to Create Task and Start Route buttons on task tab.</p>	<p>Expand MultiPhase logic to include Create task and Start Route buttons on Tasks tab.</p>
27148	Enhancement	<p>Purchase Orders Prevent \$0 Receipt</p>	<p>Create a setup option to prevent a user from receiving material at \$0.</p>	<p>Add new PONOZEROCOST setup option. If set, then do not allow receipt of zero cost lines.</p>

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27229	Enhancement	Purchase Orders PO Receipt Report	Add receipt date to detail cursor	Add recdate to detail cursor.
26952	Enhancement	Report Sets Paylocity Unbilled Hours	Add a line to include all unbilled hours in actual time entered. The current billtran line and the newly added field should not overlap in hours. The new line should include overtime and regular hours. Also, change the way that the report checks for overtime to use the rate type = O.	Add new rha1-12 fields. Load unbilled acutal hours into field by date group.
27054	Enhancement	Report Sets Project Account Report	Create a Project Report that will combine line items from all the sales orders (except BOM orders), along with quantity, price and ext price. Also include ability to bring in configuration questions from the building line item. If possible, be able to find and include answers to specific task UDF questions to bring in the building color. Form should use the attribute logic to put freight and packaging and fuel items totalled at the bottom of the form. The report will also need to combine all POS invoices to populate the "less deposits" field.	Create new report per spec. Use new getsockey() function to get SOC/UDF answers. See standard report for examples. 0 = Project/Task UDF answers, In_buildkey = Building SOC answers, keynod = line soc answers. Uses new JOBSUMMARY rule. Text1 = BOM SO type, text2 = Building Item Code
27139	Enhancement	Report Sets Sales Order Summary	On the sales order report, the customer search is inherently a contain search, which is causing issues when trying to isolate a particular customer. For instance when your customer is CL001, it pulls in results for ACL001. Update the sales order report customer search to have an "exact" checkbox to make sure the search can use the exact entry.	Add exact checkbox to Open SO report, if set, then Custno filter is exact match.

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26971	Enhancement	Task Management TSFORCE Option On Task Material	TSFORCE should only add nonstock material during complete process if TSFORCE is checked on standard task material, and material is not assigned to task. Verify Checkbox works correctly during add/edit on standard task material tab. Only items with TSFORCE are processed during complete process.	Update TaskComp logic to check for TSFORCE flag when adding material. Update logic in standard task screen to save flag correctly, and show when item is clicked on. Update logic in Adj2 Standard task screen to save correctly. Remove Force column from Task Screen Parts grid (should not be there). Update Lock column to show correctly (not checked if reprice='y'). Update show/save logic to save Lock correctly. TSFORCE items are added during task complete logic by FoxProcess Service.
27163	Enhancement	Task Management Backflow Filter on WO Generator	Add a filter to the work order generator that will select all the connections that are marked as a backflow (using the flag added from ECR 27162).	Add new Backflow filter (B button below None button), if clicked, then only the addresses with backflow are checked.
27177	Enhancement	Task Management Before Save UDF Logic	Verify Save Before UDF logic from standard task works on the Desktop.	Change question logic to allow save of answers correctly before save. Add logic to check for Before Save flag, and check for answers if needed.
27182	Enhancement	Task Management Auto-Schedule Add user	Create a user option that will automatically schedule the task creator on the service order.	Create new user option (TASKADDUSER), if set (and TASKSUPERZONE not set), then add current user to task as resource when creating from task screen. Update logic to ignore standard task assignments if TASKADDUSER enabled and used to assign current user to task.
27055	Enhancement	Time Billing Billing Statement PO List	Create a new PO Listing report tied to the Billing process which would show all received PO lines associated with that billing cycle. The new report should show the	Create report per spec. Shows PO lines linked to billed Service orders by Billing Cycle.

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			<p>following details for each received PO line (example attached): Task/Svc Ord# - Task Complete Date - Task ShipTo Location Name - Task Solution Code - Task Billing Notes. PO# - PO Vendor Number/Name (should be able to format the report to group by vendor) - PO Received Cost. The report should total all of the PO records for that district, in that billing cycle, and be able to produce a total number of POs and a total received cost at the end. The report should be tied to the Bill Cycle Billing Statement (PRINTBS2) screen with a new radio button to 'Print PO Listing'. Ideally, this would be requested immediately after completing a billing cycle for a district (add to the PRINTSTMT loop).</p>	
27069	Enhancement	Warehouse Managment System Scrap in Prompt 45	<p>Update prompt 45 so that once a p-number is scanned, the asterisk (*) may be input on the scanner for quantity which will be read as drop (i.e. 0 qty) assigned to the PWO line.</p>	<p>Add logic to allow scan of lot controlled P number where the qty on hand is zero. If * is entered in the qty to use scan, then 0 will processed thru as a valid scan, making all needed entries. ? entered at qty to use will delete all matching zero lines assigned via the * option.</p>
27225	Enhancement	Warehouse Managment System Terminals - Prompt 74	<p>Add logic to allow single step back at Enter Qty Prompt after Scan C/B/P/L prompt.</p>	<p>Add logic to allow / to move back to scan C/B/P/L prompt from enter qty prompt.</p>

Total Number of Changes: 41