

Version 1701.1620

ECR #	Type	Module/Program	Requested Change:	Change Summary:
26231	Enhancement	Accounts Payable Check In Hand	<p>Create a "check in hand" flag on the AR Invoice master that when checked, will link back to the AP invoice that is attached to it. Create logic in the Approve AP Invoice screen that will change the color of the lines that are flagged as "check in hand". This will alert the user that the corresponding AR invoice payment is in the office. Alternatively, have the flag check when the AR balance reaches 0 to make sure the AP invoice is affected even if the user forgets to manually check the flag.</p> <p>Include a filter radio button on the Approve to Pay screen that will filter only invoices that are "check in hand". The "check in hand" color should override all other color options.</p>	<p>Add new check in hand checkbox and field. Add new color to AP Approve check grid to show items linked to invoices with 0 balance or check in hand box checked in light purple. Add checkbox filter to Approve AP Invoice screen. Make purple the highest priority color. Enable on Approve AP invoice screen with CHKINHAND setup option.</p>
26261	Enhancement	Accounts Payable AP Invoice	<p>Change variance login in PO Receipt to handle cases where PO is received at 0 dollars, and AP invoice has value (100% variance).</p>	<p>Update PO Receipt logic on AP screen to handle cases where PO line received at 0 dollars.</p>
27537	Enhancement	Accounts Payable Approved to Pay Report	<p>Create a new expression for the AP Approved to Pay Report (APAPRPAYREP) that would count the number of checks needed for the number of approved vendors. The expression could count the number of unique vendors selected in the report and be able to generate a count of 1 for each vendor. The expression should be able to be totalled at the end of the report.</p>	<p>Add new checkcount value to cursor. Can be summed into different groups to get the total check count.</p>

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27594	Enhancement	Accounts Payable AP Invoice Report (Detail)	Add expressions for project number, project name, and phase name to the AP Invoice Report - Detail format (OPENAP - openapdet.frx). We currently have expressions for msnid and phaseid.	Add Phase, msnum and msname to detail cursor.
26346	Enhancement	Address Book Connection Importer	Adding to the logic for the connection importer from ECR 26177, add columns to the import that will fill out the following information on the connection organization that gets created:  City State Zip Address 2 Address 3 Email Mcity Mstate Mzip Maddress Maddress 2	Add logic to import new fields to template/code.
27554	Enhancement	Address Book Bill To AR Data	Add a field to the AR information on the Bill to jump screen that has a running 12 month total invoiced. It would be like the YTD invoice field, but instead of resetting at the end of the year, it is a rolling 12 months.	Add New Last 12 Months Total invoiced (without tax).
27070	Enhancement	Asset Tracking "New" Asset Option	Add a new checkbox above the Asset ID field on the asset tab of time entry. This box should only be able to be checked if the asset Status selected is Read or Remove. If a user checks this box, allow them to enter in an Asset ID and make them type the Based On item (possibly	New checkbox added to asset screen just before TagID field. Enabled during Read and remove, if checked, then tagID does not have to exist, and will be added with soldto/shipto as owner/location. Description field used as source of based on item. If blank or does not exist, MISC will

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			<p>repurpose description for this if the box is checked?). When they save that line, a new Asset record should be created and conninfo.mnum for the shipto of the service order should be updated with the Asset TagID. If the Asset ID they typed in already exists in Adjutant, don't allow save of line and tell the user that the asset already exists. The Current Location of the asset should also be filled out based on the ShipTo of the task. The same should happen with a remove, except conninfo.mnum doesnt need to be updated, only create an asset record. This will be used to help service techs when they go to enter a Read in Adjutant, but that address doesnt have any asset information and the asset doesnt exist.</p>	<p>be used. New TagID cannot exist in system.</p>
27342	Enhancement	<p>Asset Tracking Removing Assets</p>	<p>If you use the Remove function on the asset tab of time entry, clear out the mnum from conninfo.</p>	<p>Add logic to blank out meter and meter2 if removed meter matches current meter in conninfo.</p>
26959	Enhancement	<p>Bill of Material BOM Export Column Limitation</p>	<p>On the BOM export, create a button that will allow you to select the columns to export (similar to a raw xls export from message control) to allow the BOM export of more than 22 BOM input items.</p>	<p>Change BOMexport to allow selection of fields to export. Change BOM import to allow more items to be imported (limit is now 80).</p>
26151	Enhancement	<p>Commission Tracking Comm Structure Screen</p>	<p>Upper section uses full name, lower grid uses first + last, so people with middle name/initial will not appear in upper section (since names don't match) Change both sections to use full name.</p>	<p>Update logic to use same name in upper section and lower section to allow names to always appear in select box when updating existing records.</p>

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27601	Enhancement	Contract Management Contract Screen	When I go to edit an item in the Product Pricing section, the unit switches as soon as I save the record.	Unit changed back to stkunit of edit of Product line on lost focus of Item Field. Update logic to start cursor in factor field on edit of line.
27524	Enhancement	ECR ECR - New Date Fields	Add new Requested Delivery Date, Estimated Start Date fields to ECR Screen.	Add new Delivery Date and Start Date Fields.
27228	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 to stock, then re-delete once the credited order is shipped.	Add logic to mark Carton Bins when created , then delete the bin when emptied during shipping.
27604	Enhancement	Logistics (Shipping Events) Shipping Event Master	The Shipping Event Type (from SETYPE rule default) and the Shipping Event Status (from SESTATUS default) need to populate on the Shipping Event Master record when the Shipping Event is created from an AutoGen SE. Currently, the SETYPE and SESTATUS will only default if an SE record is added directly in the SE2 screen, or added from the SO Line hyperlink to SE2 (which is just a manual add).	text3 of shipvia rule is used as SE type. Update logic to fill out sestatus with default status from SESTATUS rule.
27118	Enhancement	MBS Integration Rounding Issue	When confronted with situations described below, make sure that the system is rounded up to the nearest 1/16th of an inch.  *** The dectofrac logic makes an assumption that the decimal value was original in ft and in and the inch were in 1/16s	Adjutant Dec to Fraction logic assumes the input decimal ft was originally a valid ft - in number in 16th's of an inch. Number in question does not fit that assumption, so the convert logic cannot convert it correctly. Update MBSEXCEL to use version of dectofrac that handles decimal lengths that were not in 16ths to start with in a more uniform manor.

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			<p>157.9924 does not fall into that assumption, it is 13 ft, 1 in and 15.88/16th.</p> <p>To handle some rounding issues, 1/32th is added into the inch part, and then rounded back out at a later time, this is pushing the 15.88/16s over 16/16th and causing issues with rounding ****</p>	
27532	Enhancement	MBS Integration MBS Import	MBS Import process not filling out inches correctly. Fractional Length is in a format that the inches function does not understand, so the resulting inches are incorrect.	Make new version of dectofrac function to mimic output format of old function. Change mbsexcel to use new function.
26297	Enhancement	Order Entry SO Screen	Shipto is always flagged as missing if SE is a del route.	Update SE check on Droute type SEs to use delroute = 'y' as flag instead of mstop (mstop is always 'n' now).
26677	Enhancement	Order Entry RFQ Config Pricing	Config Item Pricing gets reset in some configurations during edit of config. Conditions needed to duplicate SOC Fixed Price, Cost Based Pricing and hidden cost fields.	Update RFQ and SO logic to handle edit of config items better when socfixedprice is enabled. Do not recalc price on edit, just use locked price from original add.
27131	Enhancement	Order Entry Void Linked PWO on SO Void	When voiding a sales order that has linked PWOs, give the option to void the linked PWOs. If there is any kind of production progress on the PWO, do not allow void of PWO (give the same message as if trying to void a PWO with work done on it).	Update PWO check logic to check linked PWOs for any assignments or assemblies. If none found, alert user and allow void to continue if they are going to void the PWOs.
27132	Enhancement	Order Entry Remarks	Create an org attribute that has the following logic:	Create new Org Attribute (RELEASENO), if set on org, then remarks are required on SO with

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			If the customer with that attribute is placed on a sales order, highlight the "Remarks" field yellow. If possible, remove the color once the Remarks field is filled out. Prevent being able to ship order unless that field is filled out.	matching soldto before allowing shipment in Manual Ship, Project Ship or SE Loading screen.
27536	Enhancement	Order Entry Zero Price by SO Type	Create a new logic option on the SO Type (overflow) rule that when applied to the SO Type will zero out all line item prices as added to the sales order.	Add logic to price lines at zero based on SO type. Create new SOTYPE2 rule to allow for more options based on SO type. Example of new SOTYPE2 rule in ECR docvault.
27556	Enhancement	Order Entry Sales Order Grid	Create a new column in the SO Grid (SOGRID) that shows Production Complete status of Yes or No. If all PWO records associated with that SO detail are marked complete, display a Yes. If all PWO records are not complete, display a No. Make the column click-sortable so you can group all complete orders together.	Add new PWOCOMP column to grid. Set to Y if PWO's exist, and all are complete, otherwise set to N.
27592	Enhancement	Order Entry Packing List	Create expressions for the Sales Order form and Packing List forms to show when a form has been printed.	Add new printeds (sales order) and printedp (packing list) fields. Update to 'y' when printed.
27620	Enhancement	Production PWO Sub Logic	Subs of Subs not checked for qty, change logic to check if CHKSUBSTK is enabled.	Expand SubStkCheck logic to check subs of subs when generating sub work orders. If item is stock then adjust qty to make based on current stock levels.
26805	Enhancement	Project Management Project Screen	Edit of Phase fails to update if edited twice and there are no linked tasks.	Correct issue with editing of phase tab twice without refresh.

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27282	Enhancement	Project Management Project Control Job Cost	Add Item description next to the Item number in the bottom grid view of the Job Cost tab.	Add sotran.description to lower grid on Job Cost tab of Project screen. Add sort to grid on description.
26216	Enhancement	Purchase Orders PO Receipt Screen (NEW)	Add the ability to update the cost of linked items on a Sales Order from the PORECNEW screen.	Add logic to update SO cost when PO Cost changes (Same logic as current PO Screen).
27517	Enhancement	Purchase Orders PO Receipt (NEW)	Add check for receipt of 0 qty, and stop receipt if found.	Add checks for zero qty received, and stop receipt if found.
27525	Enhancement	Purchase Orders PO Receipt of Lot #'s	Add item attribute (ie; EDITLOT) that, when added to a lot controled item master record, will replace the item master description (on the lot) and the PO line description during receipt when record is saved to coilreceipt table. Also then allow description field to be editable on the Coil Receipt Information jump screen (DISPLAYCOIL).	New Item Attribute (CTCOPYDESC) will copy the description from the PO line to the coil tag during receipt, and will allow edit of the description on the display coil tag screen at a later date.
27285	Enhancement	Quoting Price Quote	Update Price Quote (GETPRICE) program to include an Item Description search. The description search should have the same functionality as the SO line description search (including comma multi-search). Update Price Quote (GETPRICE) to handle configurable item pricing and generate a price showing the configured item price.	Add logic to allow Price Quote Screen to get pricing for configurable items. Add description field with searches from SO screen.
27239	Enhancement	Reporting Bring UDF Answers from Task	Create a variable to bring in UDF answers from tasks linked to a project into the print SO cursor for sales orders linked to the same project.	Add logic to pull answers to UDF questions from linked tasks (via project), and UDF answers for linked project. Display using getsockey2(RCODE,0) (getsockey2

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				("COLOR",0) for example to print answer to COLOR udf question.
27321	Enhancement	Reporting Job Summary Report	For the job summary report created in ECR 27054, create a radio button option to sort the sales orders by SO Type instead of SO Number so that the Building Orders (type B) will always show up first. Create another radio button for the current way it is sorting (by SO number). The default should be the new radio button for SO Type.	Add new sort radio button to allow sort by sono/linenum or so type code/sono/linenum. Default to SOType sort.
27533	Enhancement	Reporting On Hand Report	Error: Variable 'CTRLACCT' is not found' error when running an open inventory on hand report.	Correct issue with onhand report.
27534	Enhancement	Reporting Unbilled PO Receipt Report	Owner not saved to report set on unbilled PO receipt report.	Update Save/Load RS logic to capture owner info.
27535	Enhancement	Reporting Job Summary Report	When launching the Job Summary (MJOBSUMMARY) as a project report from the project screen, the first field is being auto-populated by the MSN keyno, not the project number, and it is throwing an error.	Update logic to handle MSNNUM setup option when loading from passed ProjID.
27538	Enhancement	Reporting Job Summary Add Proj Mgr	Add the project's project manager to the cursor of the Job Summary report (MJOBSUMMARY).	Add Proj Manager Name to cursor (c_master.pname).
27539	Enhancement	Reporting Add Line Item Note to Job Summary	Add the line item note from the sales order to the cursor of the Job Summary report (MJOBSUMMARY).	Add line item notes to cursor (notes).



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27540	Enhancement	Reporting Add Customer Phone to Job Summary	Add the customer phone number to the cursor of the Job Summary report (MJOBSUMMARY).	Add phone numbers to cursors (a_soldto.phone, a_shipto.phone).
27541	Enhancement	Reporting Add Customer Fax to Job Summary	Add the customer fax number to the cursor of the Job Summary Report (MJOBSUMMARY).	Add fax to cursor (a_soldto.fax, a_shipto.fax).
27542	Enhancement	Reporting Hard Code MISC Item Last	Hard code the item "MISC" to be the last item on the Job Summary report (MJOBSUMMARY) each time.	Force MISC item to bottom of line item list.
27543	Enhancement	Reporting Fuel Item on Job Summary	On the Job Summary report (MJOBSUMMARY), similar to freight, make the "FUEL" line item able to go to the totals section of the report. It should be its own variable (it will be added to the Freight amount on the totals).	Make new variable for fuel (LN_FUELTOT), and pull out of detail cursor for items = FUEL.
27512	Enhancement	System Manager Security for Lines In Production	Add a security token that will not allow a user to edit a sales order line that has been submitted to production. This should apply once the line is in production and after the production is complete, until the line is shipped. The only way to allow edits is to delete the item off of the PWO, resetting the sotran.pwokey to zero.	Add new setup option (SOLOCKONS2P), if then do not allow edit of SO line if linked to PWO.
26307	Enhancement	Task Management Meter Read Date	Update rtimeass.mrdate with the transaction date from the meter read transaction. MRDATE expression on the Task Status report should pull this value. Originally linked to ECR 26094, and followup ticket T136384A where MRDATE on Task Status	Add logic to save TDate into rtimeass table when processing meter reads from quick time screen.

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			report needs to show the last meter read transaction date, rather than the ticket completed date.	
27220	Enhancement	Task Management Task Screen ShipTo Lookup	Right click on Ship To lookup for inhouse tasks is incorrect. Should be based on task customer, not task shipto (to match left click logic).	Make right click on shipto show task button (complete), use soldto as linked org for inhouse type tasks (to match the left click logic).
27298	Enhancement	Task Management Require Time Entry	Prevent the user from completing a task if total time = 0.	Update Require Time Entry check to require a non zero time entry.
27304	Enhancement	Task Management Multi-Select for Customers	On the task grid, make the customer field a multi select.	Add logic to allow multi select of customers. Save/Load into save sets and report sets.
27344	Enhancement	Task Management AVR Import Task Generation	<p>Create a new setup option that will make each task generated from the WATERAPP screen progress +1 in the task counter. Currently, if you generate tasks for multiple addresses at once, it changes the counter when there is a district change. If I am generating 4 tasks for MUD1 and 2 tasks for MUD2, the tasks would currently look like:</p> <p>J1234A, J1234B, J1234C, J1234D, and J1235A, J1235B</p> <p>Change the logic so that each task gets its own number, like so:</p> <p>J1234A, J1235A, J1236A, J1237A, and J1238A, J1239A</p>	Add new setup option WASINGLETASK, if set then make new WO for each task generated.
27509	Enhancement	Task Management Task Status Update In Grid	In the "Update" section of the task grid, allow a way to mass update task status. Include a field for remarks.	Add new option to update Task Status/Remarks.

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27638	Enhancement	Task Management Slack Updates on Task Completes	Add logic to allow posting to channels on complete of tasks.	Add logic to event processing to allow completed tasks to post into slack channels. New SLACKTASK rule is used to map standard tasks to channel names.
26757	Enhancement	Time and Materials Tap Set List Limitations	Make a change to the logic from ECR 26657. Currently, the list shows organizations that have the same section on their conninfo as the location organization from the task. Add another filter to only show the records where tap set ='n'.	Change query to only show connections where tabset = 'n'.
27269	Enhancement	Time and Materials Start/Stop Time	Create a set up option that will fill in the start time of the task you are doing time entry on as the stop time of the previous task. This would have to be per day. So for instance, I put in time for 08:30 - 08:45 am for my first task of the day. The next task I go to to fill in time for will auto-populate 08:45 in the start time. The time will remain editable and overwriteable.	Add setup option TSAUTOSTIME, if enabled then find latest end time for selected date for this resource, and use as start time for current time entry.
27506	Enhancement	Time and Materials Weekly Timesheet	Round daily totals to 1 decimal place (totals below grid).	Round daily totals to 1 decimal place.
27516	Enhancement	Time and Materials Subcon Import Validation Check	Adding on the the logic from ECR 26966, add another validation check to make sure the sonum from the importer (Column A) hasn't already been billed. If it has been billed, stop the import and give a validation issue like it does if you try to import with an invalid date or solution code.	Add check for billed srvord (rttask.billstat = 'y'), fail validation if billed.

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27549	Enhancement	Time and Materials Change Warehouse Security Token	Create a new security token (LOCKWHSE) under the TIMEENTRY token. If LOCKWHSE is turned on, restrict the ability to change the warehouse on the Material tab of the time entry screen.	Add new TIMESHEET,S7 (TIMESHEET,LOCKWH) security token, if set then the whse field on the material tab is locked, and cannot be changed.
26215	Enhancement	Warehouse Management System Prompt 48 Terminals	Prompt 48 creates incorrect itemact records (the qty has the sign backward).	Change Prompt 48 logic to make correct ItemAct entries.
27336	Enhancement	Warehouse Management System Cycle Count	Add zero count packs does not work correctly (whse filter is not used to add zeros).	Change zero qty bag, add logic to handle whse filter correctly.
27347	Enhancement	Warehouse Management System Terminal Control	Update scanner terminals to accept '+' in addition to '*' as a prefix character to call a program. For example, currently on a scanner you can type *45 to load prompt 45. We need to be able to type +45 and have it load prompt 45. This will allow creating a form expression of +45 to scan and load prompt 45.	Allow + to be used to load prompts just like * does, so +46 will load prompt 46 from any menu page.
27349	Enhancement	Warehouse Management System Setup Option for Prompt46	Create a setup option that when enabled will allow the user in prompt 46 to press Enter to confirm to assign the entire remaining input item quantity if the quantity entered to use exceeded the quantity on hand. Image of prompt step is in the document vault.	Add new 46USEMAX setup option. If user enters more to use than on hand, the max qty avail is shown on scanner, but pressing enter does not use this qty, it uses the calculated qty. Change prompts to make this clearer. If 46USEMAX is enabled, the qty on hand will be used. Prompts updated to make this clearer.
27521	Enhancement	Warehouse Management System Update to P78 - Unload	Add to the prompt 78 logic to allow scanning other types of codes (PL,	Add logic to support scanning L, PL and PD codes.

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			PD, L etc..) to unload. Once the code is scanned, display the current PL, PD, L, etc. quantity packed and request the quantity to unpack.	
27574	Enhancement	Warehouse Management System Cycle Count	<ol style="list-style-type: none"> <li>1. Create an item attribute that will tell the cycle count prompt to count the item in pallets and bags rather than the current stock unit of lbs.</li> <li>2. Change Cycle Count prompt to have user enter pallets and bags. Pallet and bag count will be saved in the cycle count table for future report capability.</li> <li>3. System will calculate the LBS based on the item master fields for LBS/bag, bags/pallet, and LBS/pallet and enter the counted LBS into the Pending Cycle Count billing tab.</li> <li>4. Add the "Section" field from the hazmat default screen into the cursor of the Pending Cycle Count report.</li> </ol>	Create new CCOUNTPB item attribute. Items with this attribute show two new prompts during 58 cycle count (Full Pallet Qty and Full Bag Qty). Count qty is calculated from these two inputs. Pallet and Bag count saved to cyclecount table. Add Pallet and Bag to Pending tab, if updated on tab, count qty will be updated using same logic. Add hazmat.grade (section) to pending tab. Add new CCCOUNTPB setup option to show/hide the new Pallet and Bag columns (enable to show).
27577	Enhancement	Warehouse Management System VTerm	Generate a new smaller version of VTerm to run on custom Intermec scanners.	Create new smaller display screen for vterm. Enable with VTERMS2 setup option. Screen is ~ 220x300 px in size.
27591	Enhancement	Warehouse Management System ItemTrack Shipped Check	Update logic to check for itemtrack.shipped !='y' instead of = 'n' to handle blank shipped values better.	Update logic to use shipped != 'y' instead of shipped = 'n'. Update cyclecount to create itemtrack records with shipped = 'n'.

**Total Number of Changes: 62**