

ECR #	Type	Module/Program	Requested Change:	Change Summary:
28342	Enhancement	Warehouse Management System 1x2 Label Barcodes	Make changes to zlabel to allow for printing of 2 of 5 and UPC barcode to support printing barcodes on 1x2 labels.	Add new options to barcodes to print 2 of 5 and UPC codes (25 and UPC) examples below BC,0.15,0.55,UPC,N,"zitemmaster.upc code BC,0.15,0.55,25,N,"str(zitemmaster.ik ey)"
28336	Enhancement	Inventory Labels 4X6 Labels	Add item code and description as fields to the new 4x6 inventory labels (LInvCxxxxyyy) and production labels (g_inv4x2wdemo).	Update lInvCPanelDemo.prg and G_inv4x2demo.prg to show item and description per example.
28377	Enhancement	Warehouse Management System AMS Barcode - p71, p74, p76	Update prompts 71, 74, and 76 to recognize the AMS tag barcode when scanned in place of the C# barcode.	Add logic to allow AMS bundle code scans to work in prompt 71, 76, and 74 (both inner and outer carton).
27821	Enhancement	Accounts Payable AP Aging Report	Set the second-level sort on the AP Aging (APAGING) detail report for all report variations to sort the detail items by AP Invoice #.	Update second sort to apinvno for all reports.
28234	Enhancement	Production Add Phase to S2P Screen	Add columns for SO line Phase and open Qty to Produce to the Select Qty to Produce screen (S2P). Make the SO line Phase column sortable.	Add phase and open qty to produce fields. Qty to Produce is just qtyord-qtyshp.
27346	Enhancement	System Manager Add ShipTo Security	Create a user security token to disable access to the red plus for generating new ship to records in RFQ, SO and Project screens.	Add new security tokens to limit access to add shipto button on SO, RFQ and Project screens. Tokens below (new /old): SO - S10 / SO,NOADDST RFQ - S15 / RFQ,NOADDST Project - S13 / PROJECT,NOADDST

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28351	Enhancement	Time Billing Additional Bill Changes	<p>Additional changes to the new district bill(PRINTBS5):</p> <ul style="list-style-type: none"> -Like billcodes don't appear to be combining correctly. -Overtime is no longer showing up (rates are not in the description). -If a task is split between 2 pages, the first line at the top of the second page gets duplicated. -Hide lines where nobill ='y'. -Work category from other charge rule should take precedence over the work category from the other charge task. -Hide service location if it matches the district name. 	<p>Duplicate items are actually reg/over time pairs with contract issues. Contract has very few true overtime rates, so nothing is getting flagged as overtime, so - overtime tags are missing. Add new logic to add -OT to descrip if ratecode = O. Add logic to remove -OVERTIME and replace with -OT in descriptions if found to make shorter. Change custom report layout to not print header on new page for taskid group. Add logic to remove lines where billtran.nob = 1. Other Charge rule has very few alternate workcat values, so most say in current category.</p>
28362	Enhancement	Approval Management Apr/Edit Screen	<p>Apr/Edit reprice has issues on tasks where 100% of time is overtime, with minimums. Example contract has 1 hour min, .5 inc, \$200 per hour as O rate, same with \$100 as R rate. Reg time 8 to 5, all other time over time.</p> <p>Enter time line with start time = 02am, stop time at 0215am. System should bill 1 hour at \$200.</p>	<p>Update reprice logic in Apr/Edit screen to handle cases where 100% of time entry is moved to different ratecode (original ratecode was still showing up with qty2bill>0).</p>
28361	Enhancement	Logistics (Shipping Events) BOL Screen	<p>The "FROM" is not populated when adding BOLs from the shipping event. It should pass the top-level carton's warehouse so the FROM and AT fields are filled out correctly. Also, please make the COD Amt field editable again.</p>	<p>Add logic to fill out from whse based on passed data. Correct issue with COD field being locked in wrong times when MSNCOD not enabled.</p>
27102	Enhancement	Contract Management Contract Pricing Rule	<p>Add logic on contract pricing to allow setup for the following example:</p> <p>Regular Hours - Bill a minimum of 3 hours at \$60 an hour, then bill \$60 an hour every hour after the first 3 hours. If 2 hours of work is done, 3</p>	<p>Contract product pricing tab has new hard minimum field (typically on the R code record). This min qty and price will be used when an item is billed, any additional hours will bill using normal logic (overtime if needed). Add logic to both standalone reprice,</p>

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			<p>hours of work will get billed at \$60 an hour for a total of \$180. If 4 hours of work is done, 4 hours will get billed at \$60 an hour for a total of \$240.</p>	<p>and a credit reprice.</p>
			<p>Overtime hours - Bill a minimum of 3 hours at \$60 an hour, then bill \$85 an hour every hour after the first 3 hours. If 2 hours of work is done, 3 hours of work will get billed at \$60 an hour for a total of \$180. If 4 hours of work is done, 3 hours will get billed at \$60 and 1 hour will get billed at \$85 for a total of \$265</p>	
			<p>Mixed time - 5 hours of work done, 4 are in regular hours, 1 is in overtime hours. 4 hours get billed at \$60, 1 gets billed at \$85 for a total of \$325.</p>	
			<p>Mixed time - 5 hours of work done, 2 are in regular hours, 3 are in overtime hours. Since the minimum is 3 at \$60, the split would be 3 at \$60, 2 at \$85 for a total of \$350.</p>	
28319	Enhancement	Quoting Convert RFQ Process	<p>Sotran.projid is not filled out on converted sales order when quote was linked to a project. This was causing downstream issues with billtran.projidh not getting filled out at times.</p>	<p>Fill out sotran.projid on converted SO (from quote) when quote is linked to project.</p>
28287	Enhancement	Order Entry Customer PO Alert	<p>Create a set up option that would show an alert when the Cust PO field on the Sales Order header screen is changed. The alert should say "Check SQFT!" It would just need to be a reminder alert, nothing that would stop the user from saving.</p>	<p>Add setup option SOALERTCPO, show messagebox on lost focus of Customer PO field in edit mode if set and custPO changes.</p>
27795	Enhancement	Time and Materials Deleting Labor Lines	<p>Update the Delete/Edit logic on the Time Entry screen to delete/update any equipment/asset lines that were saved during the labor line save.</p>	<p>Add logic to update/delete linked Equipment or Labor line when other is updated/deleted. Linked through unused sotran.splitid field (adding a</p>

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			This should also work inversely; deleting/editing an equipment line should delete/update the associated time entry.	labor line with linked equipment sets both records splitid to the keynod of the labor line). Also link asset reads added during labor add. Delete linked asset read when labor or equipment is deleted. Also delete linked labor and equipment if linked asset is deleted.
28058	Enhancement	Order Entry Disclaimer Rule	Create a button on the sales order screen that will launch a window to select PDFs to attach to an order. The list will be tied to a rule that will have the name of the PDF document along with a file path for that document as well as a reference to an item attribute. The item attribute when assigned to the item will automatically check the box that it is tied to in the PDF rule. The PDF window will have an A/N button and the ability to select/deselect as you wish, but the checkboxes should remain checked/unchecked when launching and closing the PDF windows. From the print SO message control, selecting "attach linked" will pull in the PDF attachments that are checked (along with anything from the doc vault as is current logic).	Add new rule (SOPDF). Add new button to SO screen. Screen shows list of PDFs from rule. Checked ones are attached to Emailed SO from message control if link attached button is clicked. Items with matching attributes will auto select matched PDFs. Item Attributes start with DL_.
28054	Enhancement	Address Book Email Address Alert	Create a set up option that will display a warning when creating a new organization without an email address filled out. Warning should only display on initial add and should not prevent user from saving. Message should also come up when adding using the blue plus function.	Add new setup option ENTOP1, if set then warning is shown when saving new org without an email address. Add to AddshipTO screen also (for Blue + Add).
28375	Enhancement	Order Entry GenPO from SO	Grid PO Gen screen not picking up costing units from itemmaster in some cases.	Update PO Costing unit from Itemmaster when blank.

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27909	Enhancement	Project Management Job Card Report Changes	Update the Job Cost tab and the Job Card report to use the sotran.cost on stock items versus the item average cost and use the billtran.cost once shipped. Add a report option to the Project Job Cost tab to extract all of the line (lower tab) details associated with the cost totals. Include the cost category (i.e. price group) and the date for the detailed cost (the same date that is used for grouping the details in the Job Card report).	Update JC logic on project screen to use sotran.cost from unshipped stock items. Add new report to project screen for JC tab. JobCard logic appears to match request.
27584	Enhancement	MBS Integration MBS to Excel	MBS file conversion issue where lines show footage of 12' 11" but the calculated inches is 145 instead of 155. This resulted in the order lines having a length of 12'1" instead of 12' 11".	Issue with String FT/IN to IN calc if IN has 2 numbers (10 or 11). Remove space between "-" and Inches to correct.
28349	Enhancement	Order Entry MakeSO Error	Error when calling MakeSO function.	Set default value for rfqkeyno = 0 to prevent data type mismatch error in cases where it is not used.
28305	Enhancement	Message Control Message Control	Add new "New Printer Select" and "Old Printer Select" checkboxes. They can be used to override the current setting of the ALTPRINTBOX CID setup option. New = ALT Print Box Old = Default Windows Print Box	Add new checkboxes to allow selection of either Alt Printer Select or Default Printer Select, no matter what the current status of the ALTPRINTBOX setup option.
28271	Enhancement	Time Billing New Bill Changes	Make the following changes to the new bill format: <ul style="list-style-type: none"> • Display count items as whole number in the Qty column, display non-counts as hours rounded to 1 decimal place. • For count items, change the 	Add new iscount field (.t./f.), then setup two qty fields with different input masks, and print based on iscount. Change sdate2 to 3 letter month for count items. Add new sorter2 column to sort ocharge items. Use iscount to hide descrip. Add new lc_invlst variable. Create new form with new

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			<p>Date column to display the Month abbreviated to 3 characters instead of an actual date (Jan, Feb, Mar, etc.)</p> <ul style="list-style-type: none"> For the other charges that will not be given a work category, sort by the value from the Order column on the OCHARGE rule (Num2). It currently sorts alphabetically. Hide the billcode if the task is a count type task. Add invoice number to the cursor, this will be a list if more than 1. Add more spacing between tasks 	<p>taskid group band. Put first line of each task in this band. Add logic to suppress printing first line again in detail band if more than one line on task (roller = 0 on first line). Count decimals and hiding billcodes done with print whens. Invoice number in Ic_invlst. Delete lines where qty = 0. Add logic to merge lines with like taskid, bcode and ratecode to single merged).</p>
28393	Enhancement	Time Billing New Bill Date Reference	<p>Change the date that is displayed on the PRINTBS5 bill to be the date of the latest time entry associated with that task instead of the task date. For example, if the task date was 05/08, and the task had time entries of 05/08 and 05/09, 05/09 would be displayed on the bill.</p>	<p>Change logic to use latest transaction date as date on report instead of CompByDate.</p>
28083	Enhancement	Time Billing New District Bill	<p>Create a new version of the district bill that gets generated from the approve edit billing screen. The format for the bill should be based on the attached PDF. Grouping should come from the new standard task count options mentioned in ECR 28081. If neither of the options are selected, the tasks should just be broken out individually, having one line for each task performed. Other charges should be split up and put in their proper work category using the logic from ECR 28082.</p>	<p>Create new custom billing statement to match example document.</p>
27927	Enhancement	Purchase Orders New PO Receipt Screen	<p>New PO receipt screen does not handle receipt of configurable items where cost is based on weight from</p>	<p>Update new PO Receipt logic to use fqty to extend cost if needed.</p>

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			configuration question.	
27928	Enhancement	Purchase Orders New PO Screen	Coil returns are not checked correctly for stock on hand in some cases.	Correct issue with return of coil lot items. Qty on hand is not always checked correctly if a single lot is returned.
28376	Enhancement	Time Billing New Pending Bill	Create a new version of the pending billing report that will have the same logic and formatting as the printbs5 billing statement. The new format will only be available if the "Approved Only" checkbox is checked.	Add button to launch PrintBS5 report from apredit screen. Add logic to PrintBS5 report to run on approved but not billed time entries.
28360	Minor Bug	Report Sets Non Stock Not Shipped Report	The 'Exclude Known Good' checkbox appears to get saved as checked if you create a saved report for the Non Stock Not Shipped Report (INVNONSTOCK).	Add Exclude Known Good to Report Set Save/Load Logic.
28272	Enhancement	Order Entry PO Link Mod	Create a set up option that will prevent the user from being able to edit a sales order line that has been linked to a purchase order, similar to if it was linked to a PWO.	Create new setup option (SOLOCKONPO), if set then do not allow edit of line that is linked to purchase order.
28337	Enhancement	Purchase Orders PO Receipt	Add logic to POREC POCHECKCOST to handle cases where In_ucost is very small or zero (Currency out of range errors).	Add logic to pocheckcost to handle cases where last cost was 0 or very small to prevent Currency Out of Range errors.
28374	Enhancement	Time and Materials PO Receipt Completed Tasks	Add a setup option that will allow items received on a PO that is linked to a completed task to show up on the materials tab of that task. They currently only get inserted into the materials tab of the task if the task is open. (Locked tasks will still act as they currently do and will not insert the materials from POs that are linked and received.)	Add new POTASKLINKCOMP. If set then allow linking to completed tasks.

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28258	Enhancement	Production PWO Groupings	Group PWO form by allocated material. If no material has yet been allocated, use any subgroupings already established.	Create a new setup option (PWOALLOCSORT), if set then items are sorted by first assigned lot number as first sort. PWO forms can be setup to group by this value, and show on form (ALLOCLOT is data field that has the lot number. Set to zzzzz for items without an assigned lot to make them sort to the bottom). If using custom rule based sort orders, allocot needs to be added as the first sort. Update logic to handle unassign and reassign to item (never really unassigned, just neg allocated to net out).
27299	Enhancement	Approval Management Pending Approvals	Add a column in the Pending Approvals grid to show the Cust PO# (Icustpo) from the sales order record.	Add SO customer PO to pending approval grid.
28236	Enhancement	Logistics (Shipping Events) Phase Column Load SE	Add a column for Phase in the item grid on the Load Shipping Event screen. It should display the phase from the line item on the Sales Order. Make the Phase column sortable.	Add Phase column to grid, add sort to phase, linenum and sono.
28301	Enhancement	Accounts Payable Positive Pay Format Change	Currently the positive pay file exports with quotes ("") around each field, which is being stopped by the import. Remove the quotes from the positive pay export.	Update NewPP format to remove quotes around fields.
28289	Minor Bug	Quoting Print Change Order	Immediately after converting a Change Order type quote (marked as change order in SO Type Rule) to a live sales order, the PRINTSO screen prompts. It needs to recognize the new Sales Order is a change order type and prompt up the CHANGEORDER print screen.	Add logic to call the ChangeOrder screen instead of the Print SO screen if the converted SO is a change order, and the converted SO is linked to a project.

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28286	Enhancement	Order Entry Print SO Cursor	Add to the cursor of the print SO: the Resource ID from the Resource Screen of the Project Manager to the project linked to the sales order.	Add a_pomast.projresno to a_pomast cursor. Fill out with Resource ResNo of Project Manager from project if project manager is a resource.
28303	Enhancement	Production Production Labels	Create version of g_inv4x2w label that looks like the existing coil tag.	Make custom version of g_inv4x2w that looks like existing Coil Tag. Enable with setup option PWO4x2W.
28247	Enhancement	Warehouse Managment System Prompt 46	Add usertrace of PWO Scan event, capturing the data scanned.	Add user trace logging of PWO Scan step in Prompt 46.
28312	Enhancement	Coil Tracking/Processing Pup Coil Weight Calculation	Currently when yield is pup coil (slits, etc), a screen pops up and allows coil info to be put in. The system currently defaults actual weight to theoretical weight. In the pup coil situation, check the master coil lbs/ft for that coil, use width of pup/master*lbs per foot to convert theoretical weight. 48" master, 1 lb/ft slit new width 24" 24/48*1= default weight	Add new setup option (PWOSPECFAC), if set and producing coil, and coil unit is in FT, then figure new CWFACT from ratio of output width vs input width and current CWFACT from input coil.
28256	Enhancement	Report Sets Quarterly Usage Report	Create a report that will show monthly and quarterly usage (as well as Quarterly average) for coil. Allow options to group the report by color and gauge. Create a data dump that will export to excel the detail of the report.	Create coil report based on sample provided. Current reports are just simple start points. (export only type report).
28340	Enhancement	System Manager Rule Screen	Update logic on CID change to either load correct values for current rule, or reset to a blank screen.	Add logic to load matching rule in new CID, or load first rule and update screen to show new data.

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28378	Enhancement	Task Management Service Order Status Report	Add the AVR# / UB Acct# (lavrxref) field from the Connection Info screen to the cursor for the Service Order Status Report (SVRREPORT). The expression should pull the value from the AVR# field in ConnInfo for the associated ShipTo record on the service order.	Add avrxref from Connection screen to main cursor.
28390	Enhancement	Logistics (Shipping Events) Shipping Event Cartons Tab	When creating a new shipping event, the information on the Cartons tab from the previously viewed SE is carrying over onto the new SE, and isn't cleared until you scroll back and forth between SE's.	Clear cartons tab on new.
28298	Enhancement	Logistics (Shipping Events) Shipping Events	Default check box in logic1 is not updating truck type when creating a new shipping event.	Add logic to SE screen to use default truck if set (otherwise use first one). Add logic to auto generate SE code in SO and Convert RFQ logic to use default truck if set.
28288	Enhancement	Task Management Task Lock PO Check	Create a setup option that will work just like CHKTSKPOLINK (checks for open POs before allowing complete), but run the check when the lock button is clicked instead of the complete button.	Expand existing TSCHECKPOLOCK logic to use new check that returns list of open PO's.
27898	Enhancement	Import/Export Manager Tax Import	Add usertrace log at start to note the checkbox settings, and file name of import. Change sql that updates acttable to 'n' to set editdate = now for updated records.	Add usertrace record to show checkbox status and filename of imported file.
28225	Enhancement	Warehouse Managment System Terminals (79)	Truck1 (top-level) >> Pallet1 >> Bundle1 >> Item Item is packed into Bundle1 (prompt 74) Bundle1 is packed into Pallet1	Add logic to update all inner cartons with parent carton SEN when packing in Prompt 79.

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			<p>(prompt 74) Pallet1 is packed into Truck1 (prompt 79)</p> <p>Cartrack.sen on Bundle1 is 0. It should be updated with the shipping event number from Truck1.</p>	
28410	Enhancement	Time and Materials Time Entry Screen	<p>Limit Meter options in serial dropdown to current meter when using update. Serial2 is what is updated, Serial must match the current meter, which is checked during save. So limiting options to the current meter will make the process easier for the user.</p>	Limit selection of meters when processing update to current meter.
28290	Enhancement	Task Management Vendor Column PO Tab	<p>Add a column to display the Vendor Name on the Purchase Order tab of the Task Master screen. (Desktop version of ECR 28279)</p>	Add Vendor to PO tab on Task screen.
27935	Enhancement	Task Management WaterApp Screen	<p>Assign correct contract to generated tasks based on district and current date.</p>	Add logic to assign correct contract based on district and date.
28350	Enhancement	Task Management Work Order (Completed)	<p>Add expressions to the completed work order cursor that return the resource start and stop times for each labor entry logged in Time and Material Entry for that task. This will be the raw data and will not reflect any considerations for overtime. The expressions should print the start/stop entries for each line if multiple resources or multiple time entries exist. The expressions should be in a table that is in the main cursor and is printable from the main Task Entry screen or the Service Order Lookup screen, or the print command from the Task Grid.</p>	Add start and stop times to cursor (start, stop). Add to Completed svr, All completed svr and PDF Maker.

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28352	Enhancement	Task Management Work Order (Completed)	<p>Add expressions to the completed work order cursor that return the actual Equipment ID (Asset tagid) and the Asset Description for the Equipment items added in the Time and Material Entry - Equipment tab. The current description expression returns the description from the associated Item Master record. For example, customer wants to see 'TRUCK11' or 'Service Truck 11' rather than just 'Service Truck'. The expressions should print the corresponding entries for each equipment line if multiple equipment entries exist. The expressions should be in a table that is in the main cursor and is printable from the main Task Entry screen or the Service Order Lookup screen, or the print command from the Task Grid.</p>	<p>Add tagid and tagdesc to main cursor to hold asset tagid and description for equipment lines. Add TagName to cursor also.</p>

Total Number of Changes: 52