# Adjutant Release Notes

## Version 1103.411

| ECR # | Type | Module/Program | Requested Change: | Change Summary: |
|---|---|---|---|---|
| 19205 | UI / Usability | Accounts Payable<br>AP Invoice - Distributions - Phase | Phase Name is not displayed when billable dist line is selected. | Change logic to show correct phase name |
| 19354 | Enhancement | Accounts Payable<br>AP invoice screen | show accounting void date in red below the VOIDED label | Add red label just below VOIDED label, Show Accounting void date when invoice is voided. (Actual date can be seen in double click) |
| 19359 | Enhancement | Accounts Payable<br>Recurring screen | Enabled delete button to allow delete of recurrence into to stop future generation. | Enable delete button on Recurring setup screen.<br><br>Clean up layout<br><br>Add label that displays when recurrence will not generate. |
| 19380 | Enhancement | Accounts Payable<br>Bank Rec | Add as-of option | Continue work on as of option |
| 19039 | Enhancement | Accounts Receivable<br>Finance Charges | Create process to make Finance Charge Invoices | Process created to generate Finance Charge invocies |
| 19320 | Minor Bug | Accounts Receivable<br>Edit AR Invoice screen | GL Dist tab shows duplicate data (CID issue) | Add CID filter to GL dist tab logic |
| 19347 | Enhancement | Accounts Receivable<br>Invoice Register | Add Customer Transaction Category and Item Transaction Category to the cursor of the Invoice Register report. | Add outer join to billto to get billto.custcat<br><br>itemmaster.itemcat already in cursor (detail only) |
| 19367 | Enhancement | Accounts Receivable<br>Apply Cash Receipts | Add Total Open Balance value next to Cust ID field after customer is selected on Cash Receipts screen.<br><br>See image for example:<br>http://img.skitch.com/20110315-kbyxtssdk9kg8tcm2sitrsug5k.jpg | Add Balance field next to custno field.<br>Balance is updated when upper grid is loaded. |
| 19369 | Minor Bug | Accounts Receivable<br>OrgAir Hammer | CashReceipts that become open credits do not appear on the cash receipts tab of the air hammer. | Change logic to pickup ptype3 = 'o' records (CashRec to Open Credit) |

| ECR # | Type | Module/Program | Requested Change: | Change Summary: |
|---|---|---|---|---|
| | | | | Change INclude/Exclude Credits filter to work when clicked instead of waiting for Binocular button |
| 19203 | Enhancement | Address Book<br>SP/ACCMGR logic | Change screens to use ID's to match SP/ACCMGR instaed of names. | Change screens to use SPID/AMID to load correct SP/AccMGR instead of using SP/ACCMGR value from table |
| 19342 | Enhancement | Address Book<br>Organization Air Hammer | Add Freight column to Quote, PO, Invoice, and Sales Order tabs of Org Air Hammer. | Add Freight column to Org Hammer for RFQ,PO, SO and Invoice (Field from header) |
| 19366 | Enhancement | Bill of Material<br>Bill of Material - Input Cost | Add new column to Inputs grid that shows the item's Base Cost, unless it is a miscellaneous item, then show the cost entered on the BOM. | Change list to grid, add new cost column to grid |
| 19374 | Enhancement | Fixed Assets<br>ECR Screen | add new options for testing fail (Minor Issue, Major Issue), Uncomplete ECR if major issue. Create events for each to allow creation of tasks to correct issues | Add Minor and Major issue checkbox.<br><br>Both create events (ECR-MAJ, ECR-MIN)<br><br>clear complete by, complete date and complete flag on major issue<br><br>Change ProcessAlert to handle events |
| 18982 | Enhancement | General Ledger<br>GL Reports | Create a new printing process for the GL Report system | Create new Maint screen and printing screen. Actual generation logic in seperate program. |
| 19355 | Enhancement | General Ledger<br>GL Balance FIle | Create process to update YTD values | Create screen to update YTD balance fields from PTD fields. |
| 19013 | Enhancement | Import/Export Manager<br>Item importer | Add Min/max/ReorderPoint/ReorderQTy to item import | Fields added to item importer |
| 19201 | Enhancement | Import/Export Manager<br>Import CustNote | Create program to import customer note (SOLDTO field) from XLS file | Create import to import large customer notes to soldto/shipto tables |

| ECR # | Type | Module/Program | Requested Change: | Change Summary: |
|---|---|---|---|---|
| 19363 | Enhancement | Import/Export Manager<br>Item Detail (OHF) Import | Add new fields, Purchase Select and Stock Code, to the Item Detail Import program (ITEMIMPORTDET). | Added pselcode, stkcode2, bgqty,bgcost fields to import<br>Add Export Template button,<br>Add validate to txt file option |
| 19208 | Enhancement | Item Control (Inventory)<br>BOM | Change BOM to allow save of differenet description for MISC type items in BOM.  Allow these items to be purchased as either part of GenPO process for the attached SO, or as QuickBuy Items.<br>Allow cost to be saved in BOM | Change BOM screen to allow change of description for MISC type items.  Also allow entry of cost and vendor for misc type items.  Change PO generateion to pickup any MISC items entered into BOMs.  Generate POs or Quickbuys as needed |
| 19258 | New Feature | Item Control (Inventory)<br>Consignment Inventory Report | Create new consignment usage report.<br><br>Report Filters are:<br>- Date Range<br>- Item Code<br>- Item Class<br>- Commodity Code<br>- Warehouse<br>- Bin#<br>- Owner<br>- Serial/Lot<br>- Transaction/Accounting Date (either)<br>- As-Of Date<br><br>Report is sorted by Owner, then Warehouse, then Item, then Transaction/Accounting Date. | Created report per spec |
| 19299 | Enhancement | Item Control (Inventory)<br>Label Engine | Change Lable engine to FTP label template files to printers instead of printing them | Change lable engine to FTP data file to printer instead of printing it if FTP printer option is set in printer control |
| 19344 | Enhancement | Item Control (Inventory)<br>MultiOwner Items | Add new fiels to cost tiers  (ocost,oid).  Store other owner cost and ID in fields  (Assume only one other owner) | Add new fields to cost tiers.  Pouplate fields with correct data when a multiowner item is produced |
| 19362 | Enhancement | Item Control (Inventory)<br>Purchase Select and Stock Codes | Add two new fields to OHF on Item Master:<br><br>- Purchase Select<br>- Stock Code | Added PSelectCode, StkCode to itemdet screen.<br><br>Changed layout of screen to fit new fields.<br><br>added Stkcode to cursor of quickbuy screen  (field is |

| ECR # | Type | Module/Program | Requested Change: | Change Summary: |
|---|---|---|---|---|
| | | | Both fields should be 10 character text fields.<br><br>Purchase Select must be added to the cursor of the Inventory On Hand, Serial/Lot, and Inventory Usage reports.<br><br>Stock Code must be added as a column on the Quick Buy screen and to the cursor of the Quick Buy report. | stkcode2 in table) |
| 19371 | UI / Usability | Item Control (Inventory)<br>Item Master - Cost Tiers | Set dropdown to FIFO by default if item is not serial/lot controlled and cost method is SI-FIFO.<br>Set dropdown to SI by default if item is serial/lot controlled and cost method is SI-FIFO. | Change Cost Tier tabs to default to Non-SI version of cost method if item is not serial or lot controled |
| 19326 | Enhancement | Logistics (Shipping Events)<br>SE Load screen | if carton is destroyed, delete any seship records linked to it, and any cartons contained inside it. | Delete any unprocessed SESHIP records if carton is detroyed |
| 19373 | Enhancement | Logistics (Shipping Events)<br>SE Loading Sch report | Add new field based off of SONO field. Add customer name after weight | Create new field in cursor named SONO2. Same layout as sono field, with addition of customer name on end. |
| 19337 | Enhancement | Order Entry<br>SO Screen | Make Shipping label open line shipping event if one is loaded in field | Open Shipping event on left click if only one, open SE Add screen on right click if only one. |
| 19346 | Enhancement | Order Entry<br>Sales Order - Ship In Full | Add a 'Ship in Full' checkbox to the SO Header (next to template).<br>Allow user to toggle shipinfull status that is defaulted from the SoldTo/ShipTo. | Add checkbox. SOLDTO or SHIPTO will set, can be cleared |
| 19368 | UI / Usability | Production<br>Orders Not Submitted to Production | Exclude closed and voided orders from report. | Add filter for not(status = 'c' or status = 'v') to report |
| 19372 | Enhancement | Production<br>Print PWO | Add option to print second form during processing loop | Add new second report form name to PWO type rule (text6)<br><br>If text6 is set, then the print loop runs twice for that PWO (first loop with default form, second loop with new text6 form.) |

| ECR # | Type | Module/Program | Requested Change: | Change Summary: |
| --- | --- | --- | --- | --- |
| 19252 | New Feature | Project Management<br>Job Cost by Invoice Date Report | Create new report per included spec (see attached document for sample and explanations).<br><br>New report consists of projects that are completed and have a linked invoice within the given date range.<br><br>Filters are:<br>- Invoice Date Range<br>- Project Type (multi-select)<br>- Customer ID/Name<br>- Account Manager<br>- Salesperson<br><br>Columns on report are:<br>-Project Add Date<br>- Project Number<br>- Project Type<br>- Customer Name<br>- Base Price (Selling price of all STEEL items)<br>- Material Cost (Total of costs in the ESTDEPTCOST project UDF form)<br>- Percent of Base (Material Cost / Base Price)<br>- Gross Margin ((Base Price - Material Cost) / Base Price)<br>- Percent of Total (Base Price % of report total for base price)<br>- Estimated Weight (Estimated Weight from K-D Building lines (rcode = TW from K-DBLDG))<br>- Actual Weight  (Actual Weight from PWO's linked to Project)<br>- Weight Difference  (Actual Weight - Estimated Weight)<br>- Percent of Difference Weight  (Weight Diff / Est Weight)<br>- Standard Cost (Total standard cost from linked SO's)<br>- OSM/ISM (Account Manager and Salesperson on Project) | Create new report per spec |
| 19350 | Enhancement | Project Management<br>Project Master Screen | Enable Delete button to work on master.  Make same checks as when deleting phase.  If not used, delete from msnphase table, msncust table and msn table. | Add logic to Delete button to allow delete of project when Master tab is selected.  Checks SOs, POs and Tasks for project use.  IF not used, delete is allowed.  Project, Phases and PROJ Customer tables are deleted. |

# Adjutant Release Notes

## Version 1103.411

| ECR # | Type | Module/Program | Requested Change: | Change Summary: |
|---|---|---|---|---|
| 19365 | Enhancement | Purchase Orders<br>Generate PO | Add Freight field to Generate PO (POQUEST2) screen. Set to default from SoldFrom and pass value to PO. | Add Freight combo to POQuest screen. Default to soldfrom freight default, otherwise default to rule default (log1)<br><br>Use entered value to create PO |
| 19376 | Enhancement | Purchase Orders<br>Print PO | Add first linked so# and line# into main cursor | Add SOLINE to cursor. Fill with first linked SO line (example = SO500-1)<br><br>Make same change to PDFMaker |
| 19353 | UI / Usability | Quoting<br>Quote - Acct Mgr and SP | Change Quote screen to NOT replace Account Manager and Salesperson fields if the field is filled out and soldto/shipto is blank (don't replace a field that's filled out with a blank). | Add check for blank before updating SP/AccMgr |
| 19357 | Enhancement | Quoting<br>Quoting Screen Changes | Change Quoting screen per email requests | Change listprice to be editable if item is a non-stk misc type item. |
| 19358 | Minor Bug | Quoting<br>RFQ Screen | Corrections to RFQ screen | Misc correcttion to screen, tab orders, clearing fields, only allow edit and delete of filled in line |
| 19377 | Minor Bug | Quoting<br>Customer RFQ processing | SP and ACCMGR id's not looked up correct in some cases by processalert2 | Change logic to filter contact table better, and use attributes to match SP/ACCMGR name into vcontact table to get ID |
| 19145 | Enhancement | System Manager<br>SecToken Import/Export | Create process to Import/Export new Security and Option Tokens | IMport and export buttons added to Token Master screen |
| 19308 | Enhancement | System Manager<br>CID clean up Tool | Create process to delete CID (remove all data)<br>Delete data linked to CIDs that do not exist anymore<br>Allow change of CID | Create tool to delete cid, remomve data from cids that no longer exist, rename CIDs<br>Process uses a foxpro table that has data of tables to process |

| ECR # | Type | Module/Program | Requested Change: | Change Summary: |
|---|---|---|---|---|
| 18544 | UI / Usability | System-Wide / UI<br>All Reports | Look at changes needed to support running any reports in a batch (setup a list of reports to run with options, run all reports in a batch) | Concept works. Installed on a few reports for testing. Can be installed on any report |
| 19303 | Enhancement | System-Wide / UI<br>New Org Serach screen | Create a POC for a new Global Org Serach screen to replace dropdown lists | Screen created. Other ECRs exist to install as needed into screen |
| 19140 | Enhancement | Task Management<br>Recurring Task Generator | Add option to allow every x week generation | Enable Every Week spinner. Add logic to handle every x week generation. |
| 19156 | Enhancement | Task Management<br>Emailed Appts | Verify Time values in Generated VCS files | Create function to figure out current DST value, and target date DST value. if different, calucalte offset for GMT time calculation.<br><br>Use function when generating VCS files. |
| 19042 | Enhancement | Time and Materials<br>TaskPunch Screen | Make a TaskPunch Screen similar to the ProjectPunch Screen | Task Punch screen created per example |
| 19314 | Enhancement | Time and Materials<br>Custom Invoice Statement | 1) Make BillSumCust2 loop by BillCycle/CustID/ProjID<br>2) Make balances/agings in BillSumCust2 by Cust/ProjID<br>3) make FinCharge invocies by custid/project (setup option) | Add new field to billmast (projidh)<br><br>Populate with project from first SO (assume the billing is grouped by project)<br><br>Change FC to generate by Custno/ProjID if FCBYPROJ setup option is enabled.<br><br>Change BillSumCust2 to group by CustNo/Project<br><br>Change CashRec screen to populate new fields on Create of OPen Credit.<br><br>Change custom statement to only pick up matching project invocies and FCs for aging and FC amount field. ; Add project filter to Custom Statement Report<br><br>Change APREdit to default to Org/Project Invoice Group, and Org/Project Report format (Summary) if |

| ECR # | Type | Module/Program | Requested Change: | Change Summary: |
|---|---|---|---|---|
| | | | | PrintC2Stmt enabled.<br><br>Change Custom Statement screen to populate Client if project entered and no client selected.<br><br>Run query to populate new projidh field used to make Custom statement only show related project invocies |

**Total Number of Changes: 46**