

Adjutant Release Notes

Version 1104.436

ECR #	Type	Module/Program	Requested Change:	Change Summary:
19530	New Feature	Accounts Receivable Shipped and Ready to Invoice	Create new report (or modify existing READYTOINV report) to show sales order that have been marked as shipped on a non-IPT SE (log2 = 'n' on SETYPE rule).  Filters on report are ship date (marked as shipped date) and SO Type (multi-select). Sort/group options are same as on READYTOINV.	create clone of ReadyToINv report  Pull SO's with linked makred as shipped records.  Show Orig Ord Amt and Open amt from header on report ;
19514	Enhancement	Address Book Organization Air Hammer - Quotes	Add rfqmast.orderno to Organization Air Hammer - Quotes tab. Set label of column header to lbl_rfq_refno so that it matches the label on the RFQ screen.	Add Orderno to header grid Add sort to Orderno column set label to lbl_rfq_orderno  Add sort to SHIPVIA and FREIGHT columns
19495	Enhancement	Expediting Expediting Email Template	Create email template to be used by expediting screen. Add POCONTACT info (name, email, phone1, fax) to email template data fields.	Add CONTACT.FULLNAME, CONTACT.FAX, CONTACT.EMAIL, CONTACT.PHONE (phone1) as avail fields in templates.  Change Expediting screens use templates (POEXPMISS, POEXPNEAR, POEXPLATE)
19496	Enhancement	Expediting Expediting	<ul style="list-style-type: none"> <li>- Add Vendor ID column.</li> <li>- Add drilldowns to Vendor ID, Vendor, Item, PO, SO.</li> <li>- Add Estimated Date as a date option.</li> <li>- Change 'Required Date to Use' label to 'Est/Req Date to Use' and default to Line Item Date.</li> <li>- Add Auto-Process logic and send to POCONTACT when there is one. If no POCONTACT and no email address on organization, then print report.</li> <li>- Add sort orders to all columns.</li> <li>- Remove Toggle button.</li> <li>- Move Send Reminders button to bottom of screen and make the button Green. Add message box that says "Send Selected Reminders Now?" to verify send.</li> <li>- Remove Grid Menu button.</li> <li>- Add Buyer as a filter.</li> <li>- Add PO nubmer as a filter.</li> <li>- Add warehouse as a filter.</li> </ul>	<p>Add new date selector (Header REQ and EST, Line item REQ and EST) All 4 dates are in cursor reqdateh, reqdate, estdateh, estdate</p> <p>Selected date is in adate in cursor</p> <ul style="list-style-type: none"> <li>- Add Vendor ID column.</li> <li>- Add drilldowns to Vendor ID, Vendor, Item, PO, SO.</li> <li>- Add Estimated Date as a date option.</li> <li>- Change 'Required Date to Use' label to 'Est/Req Date to Use' and default to Line Item Date.</li> <li>- Add Auto-Process logic and send to POCONTACT when there is one. If no POCONTACT and no email address on organization, then print report.</li> <li>- Add sort orders to all columns.</li> <li>- Remove Toggle button.</li> <li>- Move Send Reminders button to bottom of screen and make the button Green. Add message box that says "Send Selected Reminders Now?" to verify send.</li> <li>- Remove Grid Menu button.</li> <li>- Add Buyer as a filter.</li> </ul>

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				- Add PO nubmer as a filter. - Add warehouse as a filter. ; Add new date selector (Header REQ and EST, Line item REQ and EST) All 4 dates are in cursor reqdateh,reqdate,estdateh, estdate  Selected date is in adate in cursor  Add buyer filter, po filter, whse filter. Move fields around  Add confirm question to send alerts ;  add vnedno, add drilldowns,
19525	Enhancement	Expediting Expediting Email Templates	Add new data fields to all Expediting and PRINTPO email templates:  - Buyer Full Name - Buyer First Name - Buyer Email Address - Buyer Office Phone - Buyer Fax number - PO Number (to expediting templates...already in PRINTPO as PARAM2).	Add buyer fields to template (-buyer.firstname, fullname, office, fax, email)  PO number should be -pomast.pono
19540	Enhancement	Item Control (Inventory) Coil Drop folders	Chagne COILS to use lot number as prefix	Change Drop Folder Prefix for coils to be the lot number instead of the CoilReceipt Keyno ;
19544	Enhancement	Item Control (Inventory) Add2Whse Screen	Add item filter to screen to generate only selected items Add Produce if possible checkbox to produce in selected whse if item produce flag is set	Add item filter, and produce if possible flag to screen. Use fields to update records ;
19547	Enhancement	Item Control (Inventory) Clean Scrap Inventory	Add print button to Clean Scrap screen, prompt for selected or all (cleaninv)	Add print button, ask to print selected/all Create report
19498	Enhancement	Logistics (Shipping Events) Shipping Events	Change times on Ship/Cutoff/OS dates of auto generated SEs (Ship and Cut to 8am, onsite to 5pm)  Change SO to use log5 of shipvia rule to trigger autogen (RFQ to use log3)	Change SHip, Cutoff and Onsite to have times (8am, 8am and 5pm)  Make same change in RFQ generated SEs

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			Change RFQ to use new time logic	Change SO to use log5 of shipto rule instead of log3 (RFQ still uses log3)
19501	Enhancement	Logistics (Shipping Events) Pre-Load Report	Add 'Number of Copies' option to Pre-Load Report print screen.	Add number of copies question to PreLoad report screen ;
19502	Enhancement	Logistics (Shipping Events) Sales Order	Change logic on Sales Order screen (and convert RFQ) to NOT auto-create Shipping Events (based on ShipVia) when the SO is a drop-ship type sales order type (log8 = 'y').	If SOtype has log8 set (dropship type SO), don't auto generate shipping event Same logic on convert of RFQ ;
19512	Enhancement	Logistics (Shipping Events) Shipping Event Viewer	Add 'Selected' checkbox to the grid on the Results tab. Add All/None buttons. Only print Pre-Load report for selected Shipping Events.	Add selected checkbox to results grid Add All/None buttons. Only print preloads for selected items
19517	Enhancement	Logistics (Shipping Events) Shipping Event Viewer	Add new "Printed" filter (Yes/No?Both) to SE Viewer. Show Printed column in Results.  PreLoad is printed	Add new filter (PreLaod printed) Add code to Preload report to set new PLPRINT flag in shipevent. Add setup option to start on first tab (SEREPORTTAB1)
19523	Enhancement	Logistics (Shipping Events) Shipping Event - Transfer Items	Can we get search code to work in the Add Transfer Items screen in the shipping event master?	Add SerachCode logic to Add Transfer Item field
19531	Enhancement	Logistics (Shipping Events) Carton Details	Save grid settings on CARTSTATE.	Save grid settings Add hotlink for tracking number add scroll buttons add SE#
19499	Enhancement	Order Entry Generate Recurring Sales Orders	Offset EST and REQ dates from template SO/PO date Update header and line items with offsets  (PO and SO)  Add estdate back to PO header (in table, not on screen at this time)	Change GenRec to base offsets on offset from template. PO/SO Reqdate and EstDate  Header date is put on line items.  Change PO screen to put estdate back on screen (in table, but removed from screen at some point)

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19513	Minor Bug	Order Entry SO Header Notes	Notes not displayed correctly in some cases (clicking on ALL notes when not in edit mode blanks out all of the notes)	Change logic to handle notes correctly in all cases ;
19516	Enhancement	Order Entry Sales Order - PWO Details	Add Summary/Detail option to PWO Details tab. Default to Summary view. Change tab to reload on click.  Columns in Summary view: PWO#, Due Date, Sched Date, Plant, Department, PWO Comments, Complete (y/n), Complete Date, Printed (y/n).	Add Summary/Detail option to PWO Details tab. Default to Summary view. Change tab to reload on click.  Columns in Summary view: PWO#, Due Date, Sched Date, Plant, Department, PWO Comments, Complete (y/n), Complete Date, Printed (y/n).
19522	Enhancement	Order Entry Sales Order Credit Check	Change logic to exclude template type SOs and Non-Allocatable type SOs	Add logic to exclude no allocate type SOs and Template SOs from Creditlimit check  Don't check credit limit on add/update of template type orders
19546	Enhancement	Order Entry Sales Order - Lock Price	Change Lock Price/Cost to just Lock Price, make work in BOMCOST logic	Change Caption to Lock Price Respect flag in BOMCOST function (don't recalc price)
19520	Enhancement	Procurement Quick Buy	Add buton to bring up new filter options (vendor).  Allow saving of options sets.	Add multi-select list to pick vendors. Add buttons to save and load filter sets (TASKGRID logic)
19545	Enhancement	Procurement Quick Buy	Add Include Consig inventory option to include consignment inventory in same whse in qty on hand number  Change PO gen logic to make owner of PO = Vendor if Vendor is an owner.	Add Inc. Consig. OnHand checkbox. If checked, Consig Inv from same whse will be included in on hand total  Change PO logic to make owner of PO Line = Vendor if Vendor is a consig owner for that item in that whse/heldfor
19515	UI / Usability	Production Assign Serial/Lots - Allocate to Serials	Change name of SY Allocate button to Allocate to Serials.	Change font and size to fit new label (Allocate to Serials)

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				Change logic to only enable if line item is a serial item
19524	Enhancement	Purchase Orders PO Req Date and Est Date	If PO Header is edited and Req Date or Est Date is changed, then ask user if they want to update the corresponding dates on OPEN line items.  If Req Date changed: "Required Date changed to xx/xx/xx. Update open line items with this date?" If Est Date changed: "Est Delivery Date changed to xx/xx/xx. Update open line items with this date?"	Add questions on save if Header REQ or EST date change. Ask to update open line items (qtyrec<>qtyord)
19532	Enhancement	Roll Former Integration Auto-bundle process	Change location tag to BundleCode - AUTOBUNDLE  Populate bgross and bnet of carton using qty * unitw2 from sotran	Change location field logic change bundle building logic to update Wts Install at SBS ;
19538	Enhancement	System-Wide / UI Diamond Report Tool	Create a select only version of sql tool to allow creation of quick ad-hoc report exports	Clone the SQLTOOL, but only allow select queries to be ran ; Add more restricted words to query check. Prompt to open file on export. ;
19533	Minor Bug	Task Management Task Screen	Task screen slow to finish loading on new task in some databases	Look at load speed of task screen. Traced slow issue to problem with Activity Load function. Changed logic of function to work faster. ;
19432	New Feature	Time and Materials Project Expense Entry	Create screen that allows entry of Project, Phase, Item, Description, Qty, Cost, Price. Auto-populate Phase field with 'Expenses' phase if one exists for the project. If not, default to first phase. Save records into a grid as they're added. Allow user to click a 'Create' button to create separate service orders (use EXPFROMAP rule for std task) for each Project/Phase.	Screen created to allow entry of project, phase, item, cost, price, qty.  items are grouped into project/phase groups, and task is created for each based on expfromap task rule

Total Number of Changes: 28