| ECR # | Type | Module/Program | Requested Change: | Change Summary: |
|---|---|---|---|---|
| 19697 | Enhancement | Accounting Connector<br>Quickbooks Integration | Create process to export invoice and GL distribution data. | Create screen to export invoices to iif files to allow import into QB<br><br>Add logic to group items into proggrp lines on QB invoice. Use QBEXPORT rule to setup groups<br><br>text1 = ProgGrp/AR/TAX<br>text2 = QB Item code<br>text3 QB Descrip<br>text4= QB GL Account<br><br>(only need to fill out GL acct for AR and TAX) |
| 19996 | Enhancement | Accounts Payable<br>AP Invoice Master | Add a Payments/Debits tab to AP Invoice Master.<br><br>Columns include: Check No., Check Date, Checking Acct, Discount, Inv Pay Amt, Check Amt, NonCheck, Voided, Void Date<br><br>Highlight voided checks in RED. | Add payments tab.<br><br>Show checkno,checkdate, paidamt, discamt, chkacct, voidstatus, voiddate, noncheck, checkamt<br><br>drilldown on checknum to checkinfo screen<br><br>show voids in red ; |
| 20040 | UI / Usability | Accounts Payable<br>PrePay Check | Change logic to make double post of PP account (one for Inv, one for check).<br><br>If double is not make, invocie does not have any dist lines, and makes an out-of-balance batch if ever voided. | Add back double post logic (AP invoice did not have any dist line,s and made OOB entry if voided) |
| 20059 | UI / Usability | Accounts Payable<br>AP Aging | Add GL Mask to AP Account field on AP Aging. | Add GLMask input mask to AP Account filter |
| 20016 | UI / Usability | Accounts Receivable<br>Generate Finance Charges | Add a Progress Bar to the Generate Finance Charges screen. | Add progress bar to Generate FC screen |
| 20017 | Enhancement | Accounts Receivable<br>Generate Finance Charges | Change program to create one invoice line on the FC invoice per invoice that is charged interest.<br>Append the Invoice number to the description of the | Change logic to make line items for each invoice in total, use current description + " - INV# 9999" |

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|-------|------|----------------|-------------------|-----------------|
| | | | line item (i.e. Interest Charge - Invoice# 12345). | |
| 20044 | UI / Usability | Accounts Receivable<br>Edit Invoice Header | Change name of invmast screen to 'AR Invoice Master'. Dropdown list for invoice number is behind tabs. Change wiki link to point to invmast.ashx | Change caption, bring list back to front<br>Change wiki link |
| 20015 | New Feature | Address Book<br>Organizations | New Setup Option >> ORGPERSON<br><br>If on, then an Organization/Person dropdown appears.<br><br>If Contact selected, then show Last Name and First/Middle Name fields when in Add/Edit mode.<br><br>When saved, show 'Last Name, First Name' in Org Name field. Save Org ID as first three chars of last name and then number counter (001). For example, mine would be SAN001.<br><br>If Contact selected, change Contact and Title fields to be Phone3 and Phone4 (changed by labels). Add two new fields into ENT to hold those numbers.<br><br>On Add or Edit, save all info into Default Contact record in VCONTACT. | Add ORGPERSON setup option<br><br>If set, show a new dropdown (Organization/Person)<br><br>IF person selected, show new fiields (Firstname, lastname, MI, phone3, phone4)<br><br>Use LastName, FirstName MI as company name, use first 3 letters + counter as custno<br><br>On edit, show firstname, lastname fields. Always show phone4, phone3 if Person<br><br>Update default contact with name info, OF and FA phone data on save |
| 20013 | Enhancement | Asset Tracking<br>Asset Information | Asset Information - Change label caption<br>Change label caption on Name field from lame to lassetname. | Change label captionname to lassetname |
| 20053 | Enhancement | Bill of Material<br>Sales Order BOM | SO Screen - Don't allow edit of BOM once assembly has started.<br>Don't allow update of cost once assembly has started also. | Change logic to not allow edit of BOM once something has been assembled.<br><br>Also change logic to not update cost from bom once something has been assembled |

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|---|---|---|---|---|
| 20012 | Enhancement | Coil Tracking/Processing<br>Laser Labels | Add all fields from coilreceipt to g_invlaser. | Load all Coil Receipt data into coilrec cursor |
| 20031 | Enhancement | Coil Tracking/Processing<br>Coil Tag - Processor Name | Change Processor Name on Coil Tag screen to a listbox (searchable) field with only processors included.<br>Create new attribute named 'PROCESSOR' that populates the listbox.<br>Create new setup option that changes Processor field to listbox. Add field in database to store entid. | Add COILPROCESSLIST CID option.<br><br>If set, listbox is used for processor field.<br><br>List comes from Orgs with PROCESSOR attribute ; Add field to Displaycoil and Coil Jump also ; |
| 20052 | Enhancement | Contract Management<br>Contract Master | Add base cost and list price to cursor of printed report on Product Pricing tab of Contract Master. | Add price,basecost,avgcost,stdcost to cursor of Contract report |
| 19796 | Enhancement | General Ledger<br>GL Periods | Change GL period/year to two drop-downs. First one is Year which always defaults to the current year. Second one is Period which always defaults to the current period.  The period dropdown would show the Period number and name (001 - January). | Add new GL period selections to GLBALSHEET,GLINCSTATE,GLGENLEDGER reports |
| 19994 | Enhancement | General Ledger<br>General Ledger Reports | Add all fields from glbatchh table to the GL Distribution report and GL General Ledger report.<br><br>Add company name to both reports. | Add all fields from glbatchH (they might have alternate names (since all fields for gldist are included also, duplicates will have suffixes)<br><br>Add company field (looked up from orgkeyno first, then custno) |
| 20039 | UI / Usability | General Ledger<br>General Ledger Report | Fill out BegBal on each line to allow headers on overflow pages to show correct BegBalance.<br><br>Change total logic to handle BegBal Change. | Fill out BBal on each record to make group headers appear correct on overflow pages<br>Make new bsbal field to use for total calculations.<br>Custom reports need to have the variable SBAL changed to use bsbal instead of bbal as value |
| 19750 | Enhancement | Item Control (Inventory)<br>Item Search | Search using Item UDF answers, add logic like serachcode serach, newlookup.<br>Add to all item searches | Create new UDF Search screen.  Use | (pipe) to call<br><br>Added to itemmaster, so, itemxfer screens |

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| 19775 | Enhancement | Item Control (Inventory) Item Master | Remove onhand checkbox. Add Allocate details button - show allocations and wip. | Remove Wip check box Make new screen to show allocate/wip items Add report<br><br>Make qty's have same sign between allocate and wip |
| 19776 | New Feature | Item Control (Inventory) Lot History screen | Logic from History button on lot tab, stand alone report, ask for item and lot number. | Move logic to new screen.<br><br>Change itemmaster to use new screen |
| 19958 | Minor Bug | Item Control (Inventory) Item Master | Error on Item Master. | Add try /catch block to trap error |
| 19998 | Minor Bug | Item Control (Inventory) Clean Scrap Inventory | Change screen to update On Hand Qty in itemdet table after update. | Add code to update OHF during scrap processing |
| 20063 | Enhancement | Item Control (Inventory) Item Master | Unit Weight field does not save value that was entered into cell. 3.325 entered, but 3.33 saved. Appears that update query needs to be changed to alter database field. | Add additional commands to update queries to drop possible constraint, and add back when done.  (will generate error if constraint does not exist) |
| 19988 | UI / Usability | Logistics (Shipping Events) Unload Carton | Change unload carton program to update location on Asset record when serialized items are transferred from one warehouse to another. | Update asset with new location on unload |
| 20008 | Enhancement | Logistics (Shipping Events) Shipping Event Viewer | Add logic to SE Viewer that checks for and flags shipping events that have a linked SO line with one of the following conditions:<br><br>1.  PWO line is not complete<br>2.  PO is not received<br>3.  On Hand qty is less than qty ordered<br>4.  Backordered<br><br>Highlight 1-3 in the Results tab as yellow. Highlight backordered lines as orange. If any of conditions 1-4 are met and the SO is flagged as Ship in Full, then | Add checks for each SE on Results tab.<br><br>Put flag in new Status Column<br><br>PWO<br>OOS<br>PO<br>BO<br><br>Flag 1 -3 in yellow, 4 in orange, unless ShipinFull is set, then flag in red |

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| | | | highlight line as red. | |
| 20029 | Enhancement | Mail Reader<br><br>Coil Inbox | Automatically link MTRs and other scanned documents to coils via the mail reader.<br>One attachment will link to multiple coils; email tag can be COILDOC[123,124,125,126] where each coil number is separated by commas. The tag may also be seen multiple times in the email such as, COILDOC[123] COILDOC[124] etc.<br><br>Create new setup option to link documents by Mill Coil number instead of lot number. | Change Inbox reader to process COILDOC tags  (save attachments in coil drop folders)<br><br>Add logic to handle comma seperated lists of coil numbers (Coildoc[abc,123,xys] will be saved to 3 different coildrop folders ; Add new set option COILDROPMCOIL, if set, the mill coil will be used as the name of the drop folder instead of the adj lot number.<br><br>Change messagecontrol to link attached coil files if link attached button is clicked  (setup option COILLINK). |
| 20030 | Enhancement | Message Control<br><br>Attach Linked | Attach linked coil documents to invoices from Message Control via the 'Attach Linked' button. Create setup option to enable this logic. | Add setup option LINKCOIL. If set and Attach Link is clicked, all linked coil drop folder files will be attached to email. |
| 19984 | UI / Usability | Order Entry<br><br>Sales Order - Shipping Event | Show all linked shipping events when Shipping Event link is clicked and multiple SE's are linked to the SO. | Change logic to launch all linked SE screens on left click.<br><br>Change SE screen to offset starting location to avoid all stacking on top of each other |
| 20027 | Enhancement | Order Entry<br><br>Print Sales Order | Add allocated lot numbers to cursor of Print SO. | Add allocated lots to cursor of printed SO (lotalloc field) |
| 20037 | Enhancement | Order Entry<br><br>Sales Order | update basecostL value on BOM edit that changes cost of BOM | Change logic to update basecostL on BOM cost change |
| 20061 | Minor Bug | Order Entry<br><br>Sales Order | Error:  Cannot access selected table. c_contract.conno,key no<br><br>Occurs every time when Warning Note is set to pop up. | Change logic to clear recordsource of contract cbo before reset |

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| 19987 | Enhancement | Procurement<br><br>Quick Buy - BOM Buyouts | Update unprocessed Quickbuy records (so2qb) with new vendor when the vendor is changed in the bill of material. | Change BOM screens to update addtoqb records with new vendor if not processed yet. |
| 20042 | Enhancement | Procurement<br><br>Quickbuy - Add Vendor | Change the 'Add Vendor' screen to handle miscellaneous item (when more than one of the same item code is in the quickbuy list). | Make new AddVendor screen for QB use.<br><br>Only allows adding the selected item, makes correct record in QB cursor to allow updates of sobompo and addtoqb when bought |
| 19985 | Enhancement | Production<br><br>Submit to Production | Add setup option to change S2P logic to name the production work orders by line number when SINGLEPWO is turned on.<br><br>Example: Sales Order # 123456 has 5 lines on it. Lines 1, 3, and 5 are sent to production. The resulting PWOs would be 123456-1, 123456-3, and 123456-5. | Add setup option SPWOBYLINENO, if set, and SINGLEPWO is enabled, PWO will have SONO-Linenumber as WONO |
| 19992 | Enhancement | Production<br><br>Production Work Order | Add new expression to report that prints open qty for the line item (ln_openqty). | Add new var to hold open qty (qtytomake-qtyalreadymade)<br><br>ln_openqty |
| 20007 | Enhancement | Production<br><br>Production Schedule | Add function to export schedule to excel. | Add XLS export button, ask for file name, dump cursor to file |
| 20010 | Enhancement | Production<br><br>Serials in Production | Add a new setup option that automatically swaps the current serial number to a '_UK' number when the serial is assembled. | Add setup option to swap serial to _UK at assembly point<br><br>PWOSWAPSERIALUK |
| 20032 | Enhancement | Production<br><br>Production Summary | Production Summary - Misc Items<br>Use the BOM description instead of the Item Master description for miscellaneous input items.<br><br>Use the SO description instead of the Item Master | Use BOM Descrip if there is one on inputs,<br><br>Use SO descrip if there is one on outputs<br><br>Add Lang label swap, resize logic |

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|       |      |                | description for miscellaneous output items. |  |
| 20033 | Enhancement | Production<br>PWO Screen | PWO Screen - Don't auto assign lines that have linked POs<br>Allow PO receipt to assign them | Change auto-assign logic to skip MISC items linked to PO's |
| 20035 | Enhancement | Production<br>Production Work Order | Change assign logic to look up BOM Cost and BOM Description when manually assigning a non-stock item. | Lookup BOM cost for misc items that cost in BOM |
| 19991 | Enhancement | Purchase Orders<br>Backorder Allocation Report | Exclude sales orders that are shipping from a warehouse other than the receiving warehouse.<br><br>Fix PO Number field at top of report; currently prints the vendor name. | Changed to only show SO's iand PWO's n receiving whse<br><br>Corrected lc_pono field |
| 20000 | Enhancement | Purchase Orders<br>PO Receipt | PORec - Auto Assign on linked Misc Items to PWO lines.<br>Change logic to save enough info In soxpo table to link receipts back to original PWO line.<br>Change logic to handle serial assignments correctly  (ie, 10 serial lines, order 10 misc item, receive 5, assign to 5 of the lines, receive 5 more, assign to the other 5) | Make changes to support multiple misc items with same item code on same BOM. ; |
| 20064 | Enhancement | Purchase Orders<br>PO - Last Cost on Coils | Change logic of OHF last cost lookup to use itemdet.lcostlbs or itemdet.lcostft depending on the Purchase Unit.<br><br>If Purchase Unit is LBS, then use itemdet.lcostlbs and convert to Costing Unit. | Chagne PO screen to use lcostlbs and lcostft if item is a coil<br><br>Change POREC to update lcostlbs and lcostft correctly if item is a coil |

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| | | | If Purchase Unit is FT, then use itemdet.lcostft and convert to Costing Unit. | Chnage CoilReceipt screen to lock out receipt field (if receiving in lbs, user cannot change act wt in coil receipt screen) |
| 20009 | Enhancement | System Manager<br>Printing Labels via FTP | Add option to set a max limit of labels to FTP to a printer at one time. | Add new field to Printer Setip (FPT Max Label count)<br><br>Change Label engine to limit label count in batch to MaxC if >0 |
| 19993 | Enhancement | System-Wide / UI<br>Air Hammers | Create new rule that allows all air hammer screens to have a default number of days history.<br><br>Text1 = Air Hammer screen<br>Text2 = descrip of screen<br><br>Num1 = days<br><br>Log1 = 'All' | Setup new Rule AIRHAMMERDEF<br><br>text1 = name (ITEM,ORG,PEOPLE,ASSET)<br>text2 = descript<br>num1 = number of days<br>log1 = ALL<br><br>Change screens to set days and all checkbox based on rule |
| 20006 | Enhancement | Task Management<br>Task Status Report | Add solution code and description to cursor of the Task Status Report. | Task Status Report<br>Add solution code and description to cursor of the Task Status Report. |
| 20049 | Enhancement | Task Management<br>Print Service Order | Add current meter number from connection info to cursor of working and completed service order form. | Add current meter number to lc_meternum in all svrord reports |
| 20056 | Enhancement | Task Management<br>Task Right Click Menu | Add Void Task and Show Doc Vault options.<br>Enable Complete Task and Timesheet options in all cases. | Add Void Task and Show DocVault options to right menu.<br><br>Change to always enable Complete and TimeSheet lines |

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| 19967 | Enhancement | Time Billing<br>Billing by Project Report | Create new Billings by Project Report per attached example.<br><br>Summary version is same as attachment.<br>Create detailed version with Invoice number, Invoice date, Invoice amt, Invoice Balance.<br><br>Add a new column to report that has the total balance of all invoices for the Project (balance of billed value column).<br><br>Filters are:<br>- Transaction Date (range)<br>- Resource<br>- Project Number / Name<br>- Project Manager<br>- Account Manager<br>- Salesperson<br>- Extra1<br>- Extra2 | Create report per spec |
| 19980 | Enhancement | Time and Materials<br>Quick Time Screens | Quick Time Screens - Add Security Checks  Old = QTIME,VIEW, new  = QTIME | Add Security checks to Quick Support, Quick Time Entry screens (QTIME,NEW or QTIME)(old/new)<br>; |
| 20026 | Enhancement | Time and Materials<br>Time and Material Entry | TimeSheet - Don't allow overship if ShipNoNegs CID option is set | Don't allow overship if SHIPNONEGS is enabled |
| 20050 | Enhancement | Time and Materials<br>Custom Billing Statement | Add logic to print when only charge is finance charge. | Add logic to allow statement to print for a month with no non-FC invoices in billing cycle |
| 19989 | Enhancement | Warehouse Managment System<br>Cycle Count | Add OHF WIP Qty column to Completed Counts tab. | Add TOTWIP column to Completed Tab |

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|---|---|---|---|---|
| 20018 | Enhancement | Warehouse Managment System Cycle Count | IF PROCESSFLAT CID option is set, and total serial count do not match Total system Serial Count, remove or add serials to make counts match (remove at random (_UK if possible) , add using _UK numbers) | Add new logic to handle auto processing of flat serial lines<br><br>If new count is lower, serials are removed (processed by alpha to remove smallest ones first (_UKs if any)<br><br>If new count is higher, added with _UK numbers.<br><br>Added progress bar for commit loop<br><br>Added checkbox to skip OHF update (Can run OHF update after) |

**Total Number of Changes: 53**