Adjutant Desktop Release Notes

Version 1212.984

ECR #	Type	Module/Program	Requested Change:	Change Summary:
21955	Enhancement	Address Book Organization Air Hammer - Invoice	Add taxable, non-taxable, and tax amount columns to Invoice tab of Org Air Hammer. Add sort orders to all columns.	Add Total Tax, Taxable AMt, non taxable amount to Summary invoice grid
21962	Enhancement	Coil Tracking/Processing Mod Processor	Add same balancing logic the commit code uses to the preview report.	Change Preview report to use same balancing logic that the process button uses;
21969	Enhancement	Commission Tracking Commission Calculator	Change Hide zeros to hide lines where totalcomm = 0 on Due tab.	Change hidezero to hide lines where totalcomm =0 on due tab.;
21974	Minor Bug	Contract Management Contract Master Report	Solution Code pricing doesn't print on the Contract Details report (report printed directly from the Contract Master).	Change logic to handle solution codes on report (not linked to items)
21975	UI / Usability	Contract Management Generate Other Charges	Change contract listbox to show more info (contact name and customer name are not fully visible).	Make drop box larger, set columns at 250,300
21977	Enhancement	EDI GS1-128 Label (Fastenal)	Change to use new 3rd Revision layout.	Change template to match new layout. Add logic to fille out lc_asntype based on carton type;
21983	Enhancement	EDI EDI PO	Add logic to handle configurable length questions. Add button to pop up box to allow entry of cut length. Change GenSO code to create correct records for config item with length.	Create new GETLEN screen, add button to EDIPO to allow display if selected item has a "B" question. Change GenSO code to fill out fqty, and make sotranans record;
21960	Enhancement	Expense Reporting People Air Hammer - Expense Reports	Add new 'Expense Reports' tab to People Air Hammer. Columns are: Report Number, Description, Start Date, End Date, Due Date, Status (open/submitted), Approval Status (approved/declined/pending), Mileage Total, Travel Total, Lodging Total, Meals Total, Entertainment Total, Miscellaneous Total, Report Total, Reimbursable Total, Non-	Add new tab and grid, load data from tables, add sorts to all fields. Add drilldowns from Rep# and Descrip to Exp Report screen

ECR #	Type	Module/Program	Requested Change:	Change Summary:
			Reimbursable Total, Billable Total, Non-Billable Total, AP Invoice No., AP Invoice Amount, Paid Amount. Add sort orders to all columns and drilldowns into Expense Report Number and AP Invoice Number.	
21927	New Feature	General Ledger GL Journal Entry	- Add a new date field/variable to the GL Journal Entry Screen that will allow the user to manually enter a POSTING date for Manual Journal Entries. - Change the Undo Batch logic to use same posting date when a manual JE is undone. - Warn user if they enter a posting date outside of the period they are making the JE for. Do not allow posting dates BEFORE the start of the fiscal period. - Default the date to today's date when adding a new Manual JE. - Display the posting date from the GL Distribution table for all system generated batches. - Change the Import Journal Entry program to allow and fill out the new posting date field. If not filled out in template, then default to today's date.	Add new field to screen to hold posting date. If filled out, use as postdate in gldist for manual entries. Warn if after posting period, do not allow if before posting period. Change import to allow import of posting date.; Query added to data update to update old header records with posting date.;
21953	Minor Bug	General Ledger Journal Entry drilldown on ICA	Journal Entry drilldown on ICA Drill down on stock adjustments goes to Transfer Report instead of Adjustments Report. Change to call stkadjust and pass transaction ID into Adjust ID field.	Change to use new stkadjust report if item is ICA. Change stkadjust report to use DrillDown OnTop Logic to keep above drilldown report when launched from drilldown.
21782	UI / Usability	Import/Export Manager Inventory Qty Import	Item History record location is incorrect (hardcoded to Putaway). Fill out Location in ItemAct record also.	Update itemtran and itemact with bin from import file (or putaway if blank);
21885	Enhancement	Invoicing/Shipping Ship Sales Order	Merge SESHIP records by SO/Line#/Serail/Lot before display on Manualship/Proj ship screen.	Add logic to merge SESHIP lines by Line#/Serial/Lot (Merge qtys onto single line, create zero lines that will not ship to clear SESHIP records.) Change logic to not delete zero qty SESHIP lines. Change to not allow checking of zero qty seship lines. Make same change to ProjShip;
21847	New Feature	Item Control (Inventory) Consumables & Non Stock	Add new setup option, CONSUMABLES, that will enforce the following logic throughout the system:	Added consumable flag to itemmaster. Added rule to define inventory accounts other than standard.

ECR #	Type	Module/Program	Requested Change:	Change Summary:
		Inventory	Add new flag to Item Master named "Consumable." Place under 'Misc Item' option (move Serialized to second column of checkboxes, above Lot Controlled). For consumable items, add logic to OHF tab that prevents an inventory account to be selected as the control account. Inventory accounts are defined by the CID Maintenance screen (Accounts>Inventory) and on the Warehouses screen. Add a new rule to allow additional inventory accounts to be added to this logic. For consumable items, add logic to the PO line items tab that prevents an inventory account to be selected as the GL Account. Add logic to the PO Receipt screen that does not allow a consumable item to be received if the PO Line GL account is blank and the corresponding OHF control account is blank (would default back to the non-stock inventory account). For non-stock items (not consumables and not mod-ins), add logic to the PO Line Items tab that warns a user if a line item is saved without a SO link ("Item is non-stock, must be linked to a Sales Order before receipt. Link now?" If yes, cancel save of line and allow user to link to SO). For non-stock items (not consumables and not mod-ins), add logic to the PO Receipt screen that forces a SO link before the item can be received. If no link, notify user on lost focus of QtyRec field ("Item is non-stock, must be linked to a Sales Order before receipt. Please update PO Line and receive again.") -- Create new report, 'Non-Stocks Not Shipped' that shows non-stock items that have been received or produced, but not yet shipped on their linked sales order line(s). Report is sorted by vendor ID, then PO Number, then Line Number. See attached spreadsheet for sample of report. --	Added logic to OHF (on save of itemmaster) to prevent an inventory account being selected for a consumable. Added logic to PO screen to prvent an inventory account being selected for a consumable. Added logic to PO screen to warn user if non-stock item is saved w/o a SO link. Added logic to PO receipt to prevent a consumable from being received if no GL acct on PO line and no GL acct on corresponding itemdet. Added logic to PO receipt to prevent receipt of non-stock item if not linked to SO line (notify on lost focus of qtyrec and prevent on save). Created new report to show Non-Stock items still in system.

ECR #	Type	Module/Program	Requested Change:	Change Summary:
			---------------------- Setup option will be deprecated later once logic is finalized and all systems have been updated. -- Recommendation: For companies using the Modification Processor, it is recommended that you setup a secondary non-stock account specifically related to Modify Add-In Items (painting, freight, slitting, heat treat, etc). This will help in reconciling non-stock inventory.	
21964	UI / Usability	Item Control (Inventory) Item Detail Update Service	Move NiteInv Processing. Move to ItemDetUpSvr as Nightly process (like usage). Set to start at 1am every night.	Move NiteInv over to ItemDet Service, run at 2am. Do not run again if data already exists for current day; Test new NiteInv on Clould server; Install at MLT, stop other nite inv service, monitor results.;
21966	Minor Bug	Item Control (Inventory) Item Master Air Hammer	Date range for the transaction history does not filter anything. The file attached shows a date range for 11/1 - 12/3 and the grid continues to show the items full history.	Change TransHistory query to use date filters
21949	New Feature	Logistics (Shipping Events) Branch Transfer Report	Create new *custom* Branch Transfer report to show related costs moving between warehouses via Shipping Event Transfers and shipments.	Create new report to show batch transfers. Change Transfer logic to add more data to transfer ITEMACT records to allow display of SE# and allow linking between in and out record. Changes installed on 12/9/12.
21957	New Feature	Order Entry Order Entry - Point of Sale	Add new POS functionality to Order Entry screen. Add POS button and screen to process cash receipt transactions directly from the Sales Order. Link cash receipt to order and apply open credit to invoice when it is created. Do not allow POS transactions for closed orders. Force a refno when entering the POS transaction. Insert the SO number at the end of the Open Credit number (e.g. _OPENCR-R-POS-CASH-S654321). Set the default to Yes on the "create open credit"	Create POS button where Pick Button was. Make new screen to allow entry of cash/check info. Make open credit, link to SO to allow batch process to auto-apply.; Require Cash/Check Ref. Set focus to this field on start. Change credit# to include SO# Change confirm prompt to Process Cash Receipt, default to Yes Add quick print option on Print Receipt prompt, and make default.;

ECR #	Type	Module/Program	Requested Change:	Change Summary:
			window and change "Create open credit" to "Process Cash Receipt?" Add a Quick Print (print to def printer) option on the "POS Processed, Print Receipt?" window and make that button the default.	
21984	Enhancement	Order Entry Copy Voided Order	Change logic to allow a user to copy a voided order (current logic excludes voided lines).	Change logic to copy voided lines. Make same change to RFQ
21985	New Feature	Order Entry Margin Limits	Add new rule (SOMARGIN) to set allowable min and max margin percentage per SO Type. Warn user when SO margin is outside of allowable limit (exclude freight and packing). Create event (MARGINLIMIT) that can fire an email with corresponding information.	Add Num3 and Num4 to SOTYPE rule for Low/High Margin Check after save, if outside limit (Excluding frt), make event (SO-SOTYPE-MARLOW or SO-SOTYPE-MARHIGH), CR type event.
21863	Enhancement	Production Print PWO	Add option to load AMSXref values into main cursor (needed for AMS barcode scanning).	Add setup option to load AMS data fields into PWO detail cursor. Create new version of PWO form with barcodes for Product and Material on line items, and a SO barcode at the top (all for the ams controllers). Create query to change product and material codes to upper case, and swap periods for dashes.;
21982	Enhancement	Production Print PWO	Change logic to not use Serial/Lot Onhand location(bin) logic when serial/lot is preassigned.	Do not use Serial/Lot Onhand location(bin) logic when serial/lot is preassigned
21986	Enhancement	Production PWO Assembly	Add check for assembled cost more than X% different than current avgcost, warn if true.	Add new logic to check assembled cost vs whse avgcost, and warn if more than 2x current avg cost. Ask to continue assembly, cancel if needed, make PWOAVGCOST-999 event if continue. Do for both Complete and Partial assembly
21965	Enhancement	Purchase Orders QTR Vendor Rebate Report	Make version that can run for any type of item (not just consig items), remove S1-Steel Producers filter.	Make new version of QTR Vendor rebate report that does not have consig filter, and S1-Steel Producer filters. Runs off live data, not niteconsig file.;

ECR #	Type	Module/Program	Requested Change:	Change Summary:
21981	Enhancement	Sales Tax Automation Sales Tax Due	Change report to seperate tax with same code, but different tax rate, into separate lines.	Change report to split summary tax lines by State/Type/Code and Tax Rate to handle cases where the same State/Type/Code have different rates.;
21970	Enhancement	Tapping Tap Setup	Insert the builder's address into the note of the Tap service order. Builder Name Address1 Address2 City, State, Zip Phone	Verify builder info in note,add address2, move sec/block//lot and inspect note to bottom
21961	Enhancement	Task Management Task Grid - Asset ID	Add Asset ID column to Task Grid. Add sort order and drilldown into Asset Info screen.	Add asset TagID to grid, add sort on new column
21971	Enhancement	Task Management Task Grid	Add a street name filter (of the shipto) on the Task Grid.	Add new shipto address1 filter. Add shipto address1 to grid.
21438	New Feature	Time Billing Day Rate Billing	Add new functionality that allows users to set day rates for labor and to automatically bill specific service orders at a day rate. - Add option to Standard Task screen to default task to day rate. - Add option to Task Entry screen to set day rate on individual tasks (details tab). - Add logic to Time Billing to correctly price day rate billings per contract -- Create phantom lines per resource, per day. -- No bill and hide hourly entries.	Add DayRate checkboxes to StandTask and Task Details. If checked on standtask, then the task is always day rate based. Other task can be set as day rate by checking box on details tab of task screen. If dayrate flag is set, and contract rate is setup (matching labor code with unit = 'DAY', then each resource/tdate set is billed at day rate, and all other labor is nobilled. Explode = 'n' is set on all nobilled lines.;
21972	Enhancement	Time Billing Approve/Edit Billing	- Add a service order number search/filter on the Matching Data tab (to quickly locate a service order in the grid). - Add 'Sort By' option to grid (same functionality that is on the Task Grid). - Remove the 'View in Excel' and 'Print with Excel'	Add SvrOrd filter below grid Add Sort By Button (same logic as Task Grid) Remove View in Excel, Print with Excel from right menu Add Change Work Category option on right menu, call popup screen to select new WorkCat Update grid and master table (Saved at that point)

ECR #	Type	Module/Program	Requested Change:	Change Summary:
			options on the right click menu. - Add a right-click option to change the Task Work Category (open small window with current workcat and allow user to change it to something else). - Add a right-click option to change the Contract (open small window with current contract and allow user to change it to something else). - When editing the Bill Code in the upper section, reprice the line on the lost focus of the field (according to the contact on the service order). Notify user, "Line Item repriced, please verify changes."	Add Change Contract option on right menu, call popup screen to select new contract. Update grid and master table (Saved at that point) Change reprice logic to use main reprice code, reload grid on complete. Flag edited lines with NeedReprice flag, add new button to just reprice changed ones. ;
21973	Enhancement	Time and Materials Time and Material Entry	Add a 'Transfer to Billing' button at the bottom of the Time and Material Entry screen. Button provides same functionality as button on the Service Order Lookup Tool (transfers all lines to billing).	Add Transfer to Billing button to Timesheet screen

Total Number of Changes: 30