

Version 1303.1023

ECR #	Type	Module/Program	Requested Change:	Change Summary:
22050	Enhancement	Accounts Payable Manual Check Counter	Add a new check counter for manual check sequence. - Add new field to Checking Accounts screen for manual check counter. - Add new checkbox to Checking Accounts screen to enable manual check counter for each account. - Modify Manual Check payment screen to use the manual check counter when enabled.	Add new Manual check counter, and use manual counter checkbox to AP Chk Acct Screen. Change Manual Check screen to use counter if option is selected;
22175	UI / Usability	Accounts Payable Voucher List	Change logic to keep place in list when screen gets focus.	Change delete logic to keep place in list. handle file open issues when copying and deleting files
22184	Enhancement	Accounts Payable Voucher screen	Change logic to use random temp file name when shelling out documents. (Prevent errors when shelling out second document, when first has not been closed).	Use new temp file name for each file opened. Add code to delete files older than 1 day from tmpoutput.;
22193	UI / Usability	Accounts Payable AP Invoices	Do not allow change to PayPriority = C after first Save.	Change screen to not allow change of Payment Priority during edit if set to C.
22162	Enhancement	Accounts Receivable Print invoice	Add option to invoice form rule to allow sorting (like PWOs). Add resource name to main cursor.	Change print invoice logic to use text5 of invoice form rule as sort order (for invoice only, not packing list) Make same change in PDF maker.;
22209	Enhancement	Accounts Receivable AR Aging	Add "Include AR Notes" checkbox that will run the logic to fetch all collection notes.	Add checkbox option to fill out collection notes (ARNOTE/ARNOTEC), default to not checked.;
22210	Enhancement	Address Book Update Salesperson	Add Zone filter to changesp program. Use lzone as label caption for Zone field.	Add zone as filter for Change SP/AM program. ;
22199	Enhancement	Auto Alert Email Templates	The Subject line on emails sent from Adjutant needs to be trimmed. There are many (hundreds?) of spaces after the end of the subject.	Change email programs to trim spaces from subject and body.

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22166	Enhancement	Bill of Material Bill of Material	Add logic that would allow a Bill of Materials' inputs to display line by line on an RFQ, Sales Order and Invoice. The user will have the option to show just the BOM line, or show the BOM line with all of its sub lines, or input lines, underneath (separate forms). Reasoning: Customers of client have requested to see all inputs in certain "packages". Currently, user would have to list the BOM, and then add each line item separately, then hide the prices on these (and 0 them out).	create function to convert bom into formatted string. Add bomlist to cursors of PrintSO, PrintRFQ and PrintInv, call function to fill out data. add bomlist to report form to show. Should be in a monospace type (courier new)
22177	UI / Usability	Contract Management Other Charges	Change Price column to 4 decimal places.	Change othercharge tab on Contract master to use 4 decimal places
22143	Enhancement	Custom Reports Project Status by Dollar Value	Change screen to remember user's settings (project status, project types, dollar value). Verify that "Total Dollar Value" is open amount and not ordered amount. Add label captions to all labels. Add summary section that lists each month, the total value, and the percentage of the total. The month is determined by the Load Date. Projects without a load date go in the 'Unscheduled' month.	Save list checks and total dollar amount with settings. Add label captions. Change logic to make total amount = open amount instead of order amount. Add summary block (lc_summary), grouped by linked SE load date
22200	Enhancement	Expense Reporting Expense Report - Calls/Visits Section	Change company lookup to be limited to Suspects and Customers (suspect and soldto attribute).	Modified company lookup ajax function to filter by suspect and soldto attributes only.;
22159	Enhancement	General Ledger Balance Sheet	Add new variables, II_lastyear and II_lastper, to control which balances should print.	Add II_lastyear and II_lastper, set if the mtaching option is picked.; Change to use new report format.;
22171	UI / Usability	General Ledger GL Journal Entry	It is possible to cancel out of batch entry, and lose unsaved lines without message. Enter header and save. Enter line and save (repeat as needed). Cancel on blank line. Go to master tab, click on cancel again. Dist lines are removed, order is reset to original status without	Add warning on cancel from master tab if in edit mode. Add F11 to show audit log.;

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			warning.	
22208	Enhancement	Import/Export Manager Vertical/Choke/Basket Import	Add new fields to wirerope import program (legs, wsize, winches).	Add legs, wsize and winches to import wire rope screen.;
22153	Enhancement	Invoicing/Shipping SOAUTOCLOSE	Add SOAUTOCLOSE logic/setup option to Ship Sales Order screen (manship).	Add autoclose logic to manual ship screen. Enable with same option SOAUTOCLOSE
22163	Minor Bug	Invoicing/Shipping Recalc SO and dollar shipped lines	Recalc SO (SO - F9 - Reset shipped counters) does not handle dollar shipped lines correctly (qtyshp +1 for every time dollar shipped), should just stay at zero.	change recalco logic to set dollarshipped lines to qtshp = 0 on recalc.;
22152	Enhancement	Item Control (Inventory) Description search using NewItemLookup	500 record limit limits to 500/# of whses from itemmaster. Change logic to remove 500 record limit from description search.	Change Descrip search logic in itemfind to remove 500 row limit. Now returns all matching items;
22172	Enhancement	Item Control (Inventory) Security	Add security token to item master that will only allow add/edit/delete on CV tab (can change either customer or vendor parts).	Add new token to allow add/edit/delete of Cust/Vendor parts ITEM,CVEDIT in old security Item, S4 in new security
22089	Minor Bug	Logistics (Shipping Events) Transfer to SE	Change logic of Transfer to SE button (SE Master, Xfer Items tab) to only show SEs with the corresponding ShipTo AND ShipFrom Warehouse. Currently, all SEs with the corresponding ShipTo are displayed, regardless of where the SE is originating from.	Change transfer items logic to check for matching Se whses.
22138	Enhancement	Logistics (Shipping Events) Load Shipping Event	UI and functionaity changes: 1. Remove tabs (second tab not needed). 2. Add two new buttons next to carton field: - Lock/Unlock: set the carton status to locked. - Ship: ships a single carton (new logic to ship	Change layout per screen shot Add new Lock button. lock carton using same logic as Carton Status screen. Add new ship button.; Add new logic to handle shipping single carton using Ship Carton button.;

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			selected carton). 3. Add setup option to show Package/EDI Label buttons. 4. Rearrange icons and buttons on screen (see attached).	
22140	Enhancement	Logistics (Shipping Events) Post-Load Report	Change Post-Load Report to sort on and page-break by drop number.	Have a look at SEPOST2 (this version should be able to sort by drop no);
22160	Enhancement	Logistics (Shipping Events) Pre-Load Report	Change empty top-level cartons to be linked to drop 9999 (so they print first on the pre-load report).	Changed Pre-Load Report to print cartons first.
22154	Minor Bug	Order Entry Generate PO from SO	Misc BOM items to existing PO does not work in some cases. Add two lines to SO with custom BOMs and Misc items. Generate POs for items. Close screen. Open Screen. Add new misc item to line 1, generate po for misc item to existing PO. Edit line 2, add misc item, generate PO for misc item to existing PO. PO will not be added to, line will be marked as generated.	Troubleshoot issues with adding to existing POs in some cases. Found issue with filters and unique index logic. Change indexes to handle issue.;
22185	Minor Bug	Order Entry Sales Order Screen	Trap record out of range errors on refreshes.	Trap all page refreshes to handle random record out of range errors.;
22151	Minor Bug	Procurement Quick Buy - 60 Days Usage	60 Days Usage column is not correct (always zero).	Change logic to load 60 usage when not in consig mode.
22176	Minor Bug	Project Management Project Screen, RFQ Tab	RFQ drilldown goes to SO screen (both summary and detail).	Change RFQ # drilldown to call RFQ screen instead of SO screen. (Quotes tab, both summary and detail);

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22136	New Feature	Purchase Orders PO Receipt Summary Message Control	<p>Add logic that allows user to create an email template for the PO Receipt Summary Screen. This will allow user to create a template such as this one:</p> <p>--BUYER.fullname~, Your Purchase, Purchase Order # --POMAST.PONO~ has been received.</p> <p>Thank you, ~*UFULLNAME*~</p> <p>When a user receives a PO, and is prompted to print, the message control will automatically populate a template (such as the example above), which will notify the buyer on the PO that their order has been received.</p>	<p>Add logic to allow use of template named POREC (or POREC-x, where X is po type) All PRINTPO template fields are available. ;</p>
22179	UI / Usability	Purchase Orders Close PO receipt	Check balance logic, add another check for Dist file balancing to zero before starting clearing process.	Change balance logic to work in a different way. Add check for distfile balance = 0 before start of close logic. If not balanced, clear checkboxes and let user start again.;
21699	Enhancement	Roll Former Integration AMS Processing	Change AMS processing to use cost tiers if enabled.	Change AMS load coil to use cost tiers if ICNEWCOST is enabled. Install on SBS server.;
22111	Minor Bug	Task Management Task Grid F12	Security Tokens are for Task Entry instead of for Task Grid when using F12 functionality.	Program that builds the data for F12 screen picking up last token as token group. TASK in this case. Remove TASK token, transfer to TASKGRID. Change program to remove TASK reference from F12 datatable;
22164	Enhancement	Task Management Task Due Date at 5PM	Add new setup option, TASKDUEAT5, that forces the task due date to 5PM on route generated tasks.	Add setup option TASKDUEAT5, if set, duedate will be set to 5pm for route generated tasks

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22196	Enhancement	Task Management Resource Schedule	Add trapping for starting tab from resource = 0 or set to tab that does not exist anymore.	Add logic to handle cases where users default tab does not exist anymore (deleted out of rule);
22206	Enhancement	Task Management Resource Scheulde	Add Start Date, End Date, and Due Date to tooltip on Resource Schedule Screen.	Add Start Date, End Date and Due date to tool tip on schedule. Remove ShortCust from end of customer name.;
22134	Enhancement	Time and Materials Time Entry - Inspections	Add new rule to populate Inspection and Inspection2 fields on Time Entry. Use current hardcodes if rules not filled out. text1 = descrip text2 = code log1 = inspect1 log2 = inspect2	Change timesheet to use new inspection rule if filled out.;
22187	UI / Usability	Time and Materials Quick Time	Do not allow save if lines not filled out (labor/material/equipment).	Add checks for empty required values on labor and material tabs.; Add checks for blank resource, items, whses, asset tag IDs etc. ;
22156	Enhancement	Web - CRM Tools Inspection Report (inspectionrpt_item.cfm)	Descriptions with quotes are not displayed correctly after saving...everything after the quotes is not shown. (3/4" X 6 X 25 IWRC SWAGE SLING WITH STANDARD 12" EYES is displayed as just 3/4)	Added javascript to replace " to 2 ' in the description field as " end the string in the form. Also modified the display value to replace " with ' . Testing done after changes.;
22201	Enhancement	Web - CRM Tools Time Entry - Solution Code field	When page opens, the Solution Code field should be blank unless there is only 1 record in rtssolcode for the corresponding standard task. If more than one record or no records, then the field should be blank and the user should be forced to choose one.	Modified Time Entry to default the solution code to be blank unless there is only 1 record in rtssolcode for the corresponding standard task;
22202	Enhancement	Web - CRM Tools Time Entry - Assets section	Change Asset ID lookup field to search everything in rtasset. There appears to be some other search criteria that's being applied, but I can't figure out	Modified Time Entry page assets section, asset lookup to search in name,descrip,tagid and serial fields using or logic and removed the custid filter. Modified asset

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			what it is.	lookup function adding allfield search option and modified all places that uses asset lookup, adding new field.;
22207	Minor Bug	Web - Enterprise Tools Work Order Revenue	Work Order Revenue Standard Task filter does not work correctly on Work Order Revenue report. Please verify that it is matching up based on rtstask.keyno=rttask.staskid instead of matching on standard task name and task name.	Modified work order revenue and resource schedule report to decode the correct field value in std task filter. Testing done after changes.;
22165	Enhancement	Web - KPI Tools Day Rates - WO Revenue Report	Day Rate billings are not picked up by the WO Revenue report.	Modified the following functions to include phantom lines.(crm : ship, shipdetail, so,sodetail) (Report: inv,rescostperqty,revpervisit,ship,so,worevenue) ;

Total Number of Changes: 41