

Version 1308.1134

ECR #	Type	Module/Program	Requested Change:	Change Summary:
22745	Minor Bug	Accounts Receivable Invoice Register	Correct error when account manager is chosen and then changed on screen.	Correct issue when AM is changed on screen.;
22750	Enhancement	Address Book Customer History - billto/soldto	<p>Change layout of customer history section according to attached screenshot.</p> <ul style="list-style-type: none"> <li>• Current AR - Total AR balance for customer (including credits and deposits).</li> <li>• Open SO - Sum of Open Sales Orders.</li> <li>• Total Open - Sum of Current AR and Open SO</li> <li>• YTD Invoiced - Sum of invoices YTD excluding open credits and deposits</li> <li>• Last Invoice - Total Amount of last invoice (by invoice date, then inv number desc) that is not an open credit or deposit</li> <li>• Last Payment - Last cash receipt (by trans date, then keyno desc)</li> <li>• Open Credits - Total AR balance of open credits and deposits</li> </ul>	Change layout to match screen shot. Adjust logic to use invocies as data source for last sale and last sale date.;
22741	New Feature	Approval Management Change Order List (changeorder)	<p>Add Approval Processing logic to changorder report.</p> <ul style="list-style-type: none"> <li>- If Sales Order has not been approved to print, then do not allow any user other than the SO creator to print the change order.</li> <li>- Add APS button to changeorder screen; applies to change order number selected.</li> <li>- Add approval status to cursor of changeorder.</li> </ul>	<p>Add APS button to screen.</p> <p>Do not allow printing if not approved to print, unless the person printing it is the add user</p> <p>Add AppStat to cursor (p = pending, a = approved);</p>
22742	New Feature	Approval Management Approval Processing	Change 'PRINT' approval logic (RFQ, SO, PO, BPO, ECR, Task) to always allow the approver to print the document.	Change CheckApprStat logic to allow print if the printing user is on the approval list for document, no matter what the current approval status is.
22744	New Feature	Approval Management Approval Setup	<p>Add dynamic user approval logic:</p> <ul style="list-style-type: none"> <li>- Add User (do not allow on AP or Expense Report)</li> <li>- PO Buyer (on PO and AP)</li> <li>- Project Manager (on RFQ, SO, PO, Task)</li> <li>- Project Account Manager (on RFQ, SO, PO, Task)</li> <li>- Project Salesperson (on RFQ, SO, PO, Task)</li> <li>- Project Extra1 (on RFQ, SO, PO, Task)</li> <li>- Project Extra2 (on RFQ, SO, PO, Task)</li> </ul>	<p>Change ApprSetup to allow selecting Dynamic approvals based on type of document.</p> <p>Change ResetAppr to process dynamic approvals; Add Buyer Dynamic alert to AP Invoice;</p>

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			- Project Extra3 (on RFQ, SO, PO, Task) - RFQ/SO Account Manager (on RFQ, SO) - RFQ/SO Salesperson (on RFQ, SO)	
22757	Minor Bug	Approval Management Approval Setup - Sales Order Type	Sales Order Type is not saved (sometimes).	Change logic to keep Document type if edited and not tabbed thru
22782	Enhancement	Asset Tracking Asset Information (rtasset)	Add Owner ID as field next to Owner name.	Add Custno box next to Owner box (company);
22765	Enhancement	Bill of Lading Freight PO	Freight POs are missing MDSString.	Add logic to fill out MDSString on POMAST record when making FRT POs;
22723	New Feature	Bill of Material BOM Audit Log	Add audit logging to Bill of Material screen (on Item Master, Quote, and Sales Order). Audit bomlist and bomh (add, update, delete).	Add audit logging to BOM screen, add f11 key for quick audit log. Add fast audits for deletes (records deleted from table);
22759	Enhancement	Configurator MM conversion in FT-IN Box	Change MM logic in FT-IN boxes to handle rounding issues better (remove rounding logic used to force dec ft back to correct 16ths.) Make MM logic work in IN only mode also.	Change logic to not round MM numbers, direct convert to FT - IN, round 16th down. Add same logic to IN box when in IN only mode.;
22776	UI / Usability	Contract Management Contract Screen	Only allow link to projects with matching customer (SOLDTO).	Change contract screen to validate Project SoldTO against Contract soldto unless contract is for -DEF.;
22719	Enhancement	Custom Reports Sales Territory Commission Report	Update the first group of the report to list PAMISC as line 11 and move seam cap items to line 12. Below is an example of what needs to be added for 11 & 12:  Thisform.sname = 'Panels' Thisform.grouperC = ' 1'  ; "PATL25", "TL25", "", 1) ; "PASL25", "SL25", "", 2) ; "PASL20", "SL20", "", 3) ; "PAIL20", "IL20", "", 4) ; "PADL15", "DL15", "", 5)	Change first section per Davids Email. Add new PAMISC, move last block down one.;

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			;"PADL20","DL20","",6) ;"PASS10","SS10","",7) ;"PABS15","BS15","",8) ;"PANS10","NS10","",9) ;"PANS15","NS15","",10) ;"PAMISC","MISC.",",",11) ;"PASSCAP","Seam Caps",",",12) ;"PABSCAP","Seam Caps",",",12) ;"PATLCAP","Seam Caps",",",12)	
22771	Enhancement	Document Imaging Asset Doc Vault Logic	Change to use TagID + Custno as prefix.	Change docvaults to use TagID-Custno as prefix for assets.
22760	Enhancement	EDI GS128 - 856 logic on SEADD2 screen	Change logic to not print GS128 label, send 856 file for empty boxes.	Add quick check for items in cartons (all cartons must have item or other cartons packed) If carton found without items, labels/856s will not print/generate. Empty carton must be destroyed.
22764	Enhancement	EDI EDI PO Screen	Change logic for force taxable to EXEMPT-XX if taxable is missing from SHIPTO record.	Change GenSO logic in EDIPO screen to use EXEMPT-XX as tax table if shipto does not have taxable. Verify the SHIPTO taxable is used if filled out.;
22777	UI / Usability	EDI Add Ship To	EDI PO screen sets global address variables to speed entry of new shipto addresses. They should be cleared after use. If you then add a shipto from a normal sales orders, the saved globals are used again as the default values.	Clear out gc_P vars set by EDIPO screen after they used to load the ADDSHIPTO screen.;
22763	Enhancement	General Ledger GL Distribution Report	Change GL Acct filter to be range filter.	Add second GL account filter, use them as a range.
22773	Minor Bug	General Ledger GL Balance Sheet	Do not try to calculate income for prior year in prior year column (this would actually be two years back, and this year has to be closed, so it will not have a income/loss).	Do not calculate Prior Year Income when processing Prior year data (this would be 2 years back, and this year should be closed with income already rolled up into RE);

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22749	Minor Bug	Invoicing/Shipping Ship Sales Order - Posting Window	Ship SO screen does not respect posting window (in some cases). Tested in DEMO by entering SO and shipping with date outside of posting window.	Add check for Posting window if newship is enabled.;
22450	Enhancement	Logistics (Shipping Events) Carton Scanning	The "scan history" button I assume would give us some information about date, time, user, item scanned, etc. It does to a point, but I would like to enhance the data so that a supervisor can monitor how much of an SE is getting scanned and how much is being done manually in the office. We would like to see what they are scanning when. In theory there should be several minutes between scans. This allows for the bundle or line item to be placed on the truck. If you see several scans within seconds of a certain or different material type you can assume that the user is "mass" scanning the items and not utilizing the tool as we have expected. This scan history report needs to have the following columns added: 1. Line number 2. Lower level bundle ID 3. Line or bundle (department) description	Add new fields to capture inner carton and SO Line info. Change report to show SO#, Line Number, Item Description or Inner Carton Name. Change BoxLog to save new data. Change SEAdd2 to save new data, change SE Load on terminals to save new info.
22769	Enhancement	Logistics (Shipping Events) SE Pickup Date	Add Pickup Date column to Shipping Event Viewer (results grid) and to Shipping Event tab on Project Control.	Add pickup date with sort to results grid of SE Viewer. Verify on SE tab of Project.;
22770	Enhancement	Logistics (Shipping Events) Shipping Event Viewer	- Add SO Type (text1) as column in SE Viewer Results. If more than one type linked, show 'Multi' - Proj# is in grid, but is not filled out. Fill out with linked SO project. If more than one, show 'Multi'	Add SO type to Results grid, set to Multi if more than one SO. Change ProjID to ProjNum, fill out from linked SO project, Multi if more than one.
22781	Enhancement	Order Entry SO Type - Priority	- Add text10 to SOTYPE rule for Priority (text2 of PRIORITY rule). - Add logic to sor3 to fill out pricode and priority fields based on selected SO Type. Add logic to header	Set Header Priority based on SOType on lost focus of SO Type field when in add mode. Set SO Priority based on SOType when converting RFQ to SO.;

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			save to update pricode and priority based on type. - Add logic to convrfq to fill out pricode and priority fields based on SO Type.	
22791	Enhancement	Order Entry COD Amount	Change mask on COD amount field on Quote Header, SO Header and Bill of Lading screens.	Change COD mask to 99,999,999.99;
22778	Enhancement	Production Disassembly	Add logic to stop disassembly of item if the linked SO line is shipped (qtyshp > 0).	Add check for shipped line when disassembling PWO line. If line has been shipped at all, do not allow disassembly.;
22740	Enhancement	Project Management Project Control - SO and PO	Add color coding and color key to Quote, SO, and PO tabs. Yellow = Pending Approval Red = Voided	add color coding to PO, SO and RFQ tab grids. Add code key to tabs.
22743	New Feature	Project Management Project Control - Project Extra 3	Add new field, Project Extra 3, with same logic as extra1 and extra2. Add to Standard Task Resource list and Alerts list.	Add New Extra3 field to project screen. Add as dynamic alert to task and standard task (-32). Add to filter lists on reports that have extra1 and extra2  Add to Standard task dropdown as alert type. Rebuild help file to add to label list.;
22762	UI / Usability	Project Management Project Screen	Add blanks to all the People dropdowns to allow removal of the selected person.	Add/Verify blanks for all People dropdowns (SP,AM, PM, Ext1,2,3)  If Person not in list anymore, change back to blank.;
22748	Minor Bug	Purchase Orders PO Receipt	Error if PO is not drop shipped and linked to dropship SO line.	Correct issue if PO line is linked to SO line that is drop shipped (alert is missing variable);
22751	Enhancement	Quoting RFQ Check Credit logic	RFQ using older logic looking for OVER return from CheckCredit2 Function. Function now also can return DAY/OVER and DAY. Both count as over credit. Change to check for both.	Change ConvertRFQ to check for DAY and DAY/OVER also. Stop if DNE or user does not have exceed credit limitm;

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22784	Enhancement	Report Sets Report Sets - csv/xls	Add option to generate report as csv/xls instead of PDF.	Add new option to save files as xls/csv (based on row count). Change printRS to save as XLS/CSV. Change the viewer from the auto schedule screen to show the PDF/XLS format. ;
22761	UI / Usability	System Manager F11 Audit log	Change audit log that is called with F11 key to be sorted by date instead of by user.	Change sort order to by table and date, change report to remove user break.;
22775	Enhancement	System Manager CID Maintenance	Add auditing to CID insert/update.	Add auditlogging to CID updates. Add F11 audit log.;
22766	UI / Usability	System-Wide / UI MDS Strings	Change logic to use first 30 chars of generated GUIDs as random strings. Look at possibility of changing fields to 32 chars to allow use of full GUID	Change getrandstring to use first 30 chars of system generated GUID to string as random strings.;
22754	Enhancement	Tapping Tap Setup and Reinspection - Task Status	For tap and inspection tasks generated from Tap Setup and Reinspection screens, set rtask.taskstatus = text2 of taskstatus rule where log1 = 'y' (the default task status).	Make TaskStatus to rule default when making tasks from Tapping screen and reinsepct screen
22739	Enhancement	Task Management Task Status Report (svrreport)	Add Ship To name (ent.company of shipto) as filter on Task Status report.	Added new filter for Ship To.
22746	UI / Usability	Task Management Resouce screen	Add check for duplicate RID, warn user on save if found (allow, but warn).	Check for duplicate RID in same CID, warn if found.;
22755	Enhancement	Task Management Task Grid - Task Status	Add Task Status as column and filter to Task Grid. Add sort order to column.	Add taskstatus to grid, add sort to column Add Task Status as filter to grid.;

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22785	Enhancement	Task Management Google Calendar Integration	Send email in addition to making GCal entry.	Add code to send email at same time GCal entry is made.
22772	Minor Bug	Time Billing Approve/Edit Billing	Error on load if user does not billing right.	Disable Invoice button correctly if user does not have billing right.;
22780	Enhancement	Work Flow Routing Route Maintenance	Add lc_routename to print logic to allow printing of routename on report. lc_routename=thisform.routename	set Lc_RouteName = thisform.routename to allow printing of routename on report.;

**Total Number of Changes: 41**