compusource

MCMS 5.0 Operational Changes

2016

This document contains brief descriptions of operational changes made to the MCMS and related systems.

MCMS

Table of Contents

General: Utilities and System-Wide Changes

MCMENU new conventions

The MCMS Menu now allows the arrow keys to be used to select an item from the menu. The items can also be selected by the number as they always have. *This allows one less key stroke* since the "Selection OK" prompt is now gone. So, to get help on an individual program without running it, the user can now type in the menu item # followed by a "?" to display the help.

[M5-54]

More help documents

The context-sensitive help that is accessed from the Ctrl+F1 key in MCMS is now available as a compiled help file. This document, that has the operational changes for MCMS 5.0, is also available. To access the new help files as well as the other procedure help, type Ctrl+F1 from the main MCMS menu, select "procedure manuals", arrow to the manual you want to see, and then hit <Enter>.

Run continuous jobs in background on Windows

On Windows operating systems, continuous jobs can be started automatically when you bring your system up, and they can run in the background (in contrast to running them on your workstation).

To start the jobs other than at reboot, log in with the continuous background jobs user; this will give you the Continuous Jobs Menu. Select the "Run Continuous Jobs" option. The batch file "ALL" will start all background jobs that have been defined, and the batch file "STOP_ALL" will stop all background jobs for all companies. The status of each program will print to the terminal. Check the status of the programs after they have started using the Stop Continuous Jobs program.

For setup, see the context-sensitive help for BGRUN, Run Background Jobs.

[UT-936,UT-1040]

Run scheduled tasks

The Run Background Jobs program, BGRUN, can be used to run scheduled tasks from the Windows Task Scheduler. This is available on Windows servers only.

See the context-sensitive help topic "Schedule Tasks" in the Run Background Jobs program for details.

[UT-1040]

Product line dimensions print zeros flag

The Print Zeros Flag in the Product Line file controls whether zeros will print for feet and inches if either one is zero. The default is "N". If set to "A" this is how dimensions will print on all reports and entry programs. If set to "F" the dimensions will print the zeros only on forms.

[M5-3]

Allow order comments to be less than 60 characters

The comments in Order Entry, Quotes, Purchasing, and Inventory Transfers can be defined to be less than 60 characters in the Control file. This might be necessary if you have forms that do not have enough space to print the full 60 characters without printing into the following column. If the size is reduced, existing comments will not be affected, and the comments will print at the reduced size on all forms for the system.

[M5-126]

Skip fields new required field option

The MCMS programs that have field skipping now allow a "required field" option to be set. Any field that is required cannot be blank if it is an alpha field, and it cannot be 0 if it is numeric.

The contact name in Order and Quote Entry is a place where the required field might be desired. And, if the contact name is required and it is blank, the inquiry will pop up automatically.

[M5-152]

MCMS changes for Contacts 2.0

The MCMS system has been changed to work with Contacts 2.0, which allows more flexibility for how each program interfaces with the Contact system. Contact plans are installed so that the contacts will work as before unless you customize them.

The user-defined forms now have a contact plan that is associated with every form since each form might need a different plan even though they are accessed from the same program. (Normally the program is associated with a contact plan.)

[M5-209]

Update and entry tracking

Two new inquiries are on the Utilities Menu:

1. Update Jobs Inquiry displays updates that are currently running with their status. Only programs that have been changed to use the Update Jobs file will be displayed.

2. Entry Jobs Inquiry displays items that are currently being entered. Only entry programs that have been changed to use the Entry Jobs file will be displayed.

The main updates and entry programs are now using entry and update tracking which means that the system keeps track of who has an order open and who is running which update.

If two people attempt to open an order at the same time, the program will tell you who has the order open. If an order is open then the print programs will skip it. If an update is running that conflicts with an order you are trying to open, the program will tell you that there is a conflicting update running.

If an update program has an error and needs to be restarted, the information contained in the Update Job file will be used to restart the program.

The following are the updates that are using the new update tracking:

Daily Inventory Update

Inventory Month-End

Inventory Transfer Receipt Edit and Update

Order Entry Invoice Update

Order Entry Day-End

Order Entry Month-End

Physical Inventory Select Tags

Physical Inventory Update Counts

P/O Receipt Register and Update

P/O-A/P Invoice Edit and Update

P/O In-Transit Register and Update

Release Day-End

Sales Analysis Month-End

The following are the entry programs are using the new entry tracking:

Order Entry: Order Entry, Shipping, Allocations, Holds, Bill of Lading, Shipping Tags, Create S/O from Quote, Immediate Backorder.

Purchasing: P/O Entry, P/O Receipts, P/O In-Transits, Create P/O from S/O, Quick P/O.

Quotes: Quote Entry, Duplicate a Quote.

Inventory Transfers: I/X Entry, Allocations, Holds, Create I/X from S/O.

Physical Inventory: Enter Counts.

P/O-A/P: P/O-A/P Entry

Releases: Release Process Entry

In addition to locking out two people from accessing the same order in the entry program, no one can print an order that is open by a user. When forms were printed continuously, orders were already skipped that could not be locked. Orders are now skipped even if you are printing them in batch; you will be prompted at the end that some orders were skipped if that is the case. Skipping the order prevents the batch from being hung up waiting for the order to be free.

The **Shipment Verification** is a special case. If an order cannot be locked when printing the Shipment Verification, an error will print for that order. The error will look similar to "User joe has S100262 opened, can't be updated." The order will print on the next Shipment Verification if it then can be locked. Also, if an order changes between the times it printed on the report and the report was approved, then the order will not be approved and an additional report will print showing all orders that were not approved because they changed. The program will print a message such as "99 orders were not updated because they changed after the report was approved. See the error report."

[M5-245,UT-1112]

Reports to DMS show all if multiple reports

Some MCMS programs have multiple reports that print from a single menu option. If these reports are printed to document management, the user can now access all of the reports from the DMS hotkey when in that print option.

[MC-1634]

User-defined forms use contact auto email

The user-defined forms now use the contact auto email flag when run in batch or continuously when the output type is email. This makes the user-defined forms consistent with the Forms package.

Also, the user now has a new field that they can use on their forms (email address only if the contact is flagged to auto email). This makes it clearer when looking at a printed copy whether it was emailed or not when they are using "form scraping" to get the email address.

[M5-210]

Special forms no alignment if forms printer

Programs that print continuous forms will no longer automatically print a test pattern if the printer is a "forms" printer. Instead, the program will prompt: Enter "Y" to continue with no test alignment, "N" to print one, "E" to end. Forms printers have a method for printing a test alignment within the forms setup.

[MC-1659]

User-defined forms enhancements

User-defined forms adds the activity description record

If a user-defined forms record is added or changed, the program will either add or change the corresponding activity description (CCACTDS) record. If the activity description record is changed, only the description will be updated to the current form's description. This enables activity tracking to be automatically enabled any time that form is printed.

User-defined forms email 2nd attachment, customize subject

The user-defined forms for email now allow a 2nd attachment. This can be used for boilerplate terms and conditions, or other information that always needs to be sent with the email. The email subject line can now be customized. For sales orders, the customer's purchase order can be included in the subject line.

Multiple comment print flags

More than one comment print flag can be defined for a user-defined form.

[MC-1643,MC-1712,MC-1726]

General fields available for printing

Forms have a new field available to print in the Document Fields (SFFORM.SL) file: User's Login. This can be used by forms that are quick printed to know who printed the form. For user-defined forms the login who requested the print is available from the User-Defined Forms Print file (MCUFPRT). Included in the Document Fields are also page number information and the date and time of print in different formats.

[M5-112]

Special Forms Maintenance enhancements

Change the form name

The form name can be changed in this program now. Select the "F" option (chg Form name).

List option

The "Print" function has been replaced with a "List" function that prints the contents of the whole form.

Other changes

- There is a "Restart" option if there is more than one page of forms so the user can return to the first page of forms.

- The forms file is opened in shared mode until the user actually tries to change the form.

- There is an inquiry on the barcode font files and the user can also call the "Make Barcode Download File" program directly from the maintenance program.

Special Forms Maintenance allow zero suppress of all 9s

Forms have a new setting to print blank instead of printing a number that has overflowed (nine 9s). In Special Forms Maintenance, UTFMSF, set the zero-suppress flag to "9" for this field. If the value is 0 or nine 9s it will print blank. This is useful in Metal Center where the unit price is 99999.9999 (returned by the math routine) when the unit is too large for 4-byte numbers. Forms will be converted automatically to have this function turned on for unit price fields.

[UT-984,UT-986]

Support for Code 128 barcodes for special forms

The Make Barcode Download File has new options. You may select to make either a Code 39 font or a Code 128 font. Code 128 supports upper and lowercase letters, numbers, and several special characters. Code 39 only supports uppercase letters and numbers. Special forms only support one barcode font, so a form can either have Code 128 barcodes or Code 39 barcodes, not both.

[UT-1103,M5-247]

MCUser use CCFLOGIN

MCUser Maintenance will default to the user's CCFLOGIN version of the file first if it exists. CCFLOGIN is 16 characters so it better defines an individual person than CCUSER did. If it does not exist, then the maintenance program will default to the CCUSER. If neither exists, it will default to the CCFLOGIN and that is the one the program will ask if it needs to be created. New users will default to CCFLOGIN. Existing users will continue to work as they did before.

[MC-1737]

General inquiry enhancements

The inquiry can be called by a hotkey

To set up CCINQ to be called by a hotkey, enter the .INQ file name following CCINQ in the Program field. For example:

```
UTFMHK          Hotkey Programs Maintenance


Display Order: 33      Program: CCINQ VENDNO
                    Description: Vendor Inquiry
                   Program Type: B
```

```
                Close/Reopen Files: N
                Save/Restore Screen: N
                 Assigned to HOTKEY:
        Don't Run if Active LOCKs: N
```

The above setup would allow the user to call the Vendor Number inquiry from a hotkey. You may also pass in a search key by adding another parameter to the Program field. For example, if the Program field contains "CCINQ VENDOR ABC", the inquiry for Vendor Number would be displayed with a search key of "ABC". The Program field in UTFMHK is only 20 characters long, so long search keys would be allowed.

The inquiry can have a list option

If the inquiry file is set to allow a list option, then the list option will print all of the available records to the currently selected printer. The current Search and Restart criteria will be used in the print out. The print out will always show the first (based on the Restart, if any) to the last record, no matter what records the user has currently displayed.

When the list option is selected, the user must enter "YES" to actually print in case the option was selected by mistake. The program will verify with the user that the current printer is correct before printing.

Don't let <Enter> end the inquiry

In the Activity Tracking Inquiry, hitting <Enter> at an item will no longer end the inquiry; instead the detail will be displayed. The user will have to enter "E" to end the inquiry. This would be true of some other inquiries, too, where the inquiry is only used for information and not for selecting an item.

[UT-791,UT-823,UT-912,UT-913]

System information screen now has options for hotline support

There are two new features to help with support calls; both are available from the System Information screen. Select "I" from the menu to get the system information for your session and then select one of the following:

1. Select "S" to launch the default browser on the client and go directly to the Compusource support call page. This enables you to get to the support call web page without having to browse to the page.

    a. Login (or register for access) and enter your call.

2. Select "R" for remote help when directed by the hotline personnel. This starts the remote assistance application. Follow the instructions of the hotline personnel.

[UT-837,UT-880]

Context-sensitive help (Ctrl-F1) improvements

The Index option will now always display the topics available in the program you are running.

The screen is larger to display more information.

You can now enter a "?" to get system convention help including help on the help program.

[UT-849]

Menu Access List allows a shared directory

The Menu Access List program now has the ability to save all of the access lists in a shared directory so that a user's access will be the same across all companies. If a shared directory is defined, the user will see a new prompt when saving the access list:

```
'Y' to save in shared directory or <Enter> for current
directory:
```

[UT-851]

Entering dates new functions

There are new functions for entering dates:

1. The functions "BY" and "EY" are for the first and last day of the current calendar year. You may also enter the first and last day of previous or future years by using the "+/-" functions. For example, you can enter "-2EY" for the end of year two years ago.

2. The functions "BM" and "EM" are for the first and last day of the current month. The "+/-" functions can also be entered. For example, "-EM" or "-1EM" is the last day of the previous month, "+BM" is the first day of next month.

For reference, following is a complete explanation of how dates can be entered.

Dates can be entered in one of the following formats:

Enter	Explanation
D	Enter the day of the month (e.g., 1 for the first, 5 for the fifth, etc.). The current month is assumed.
MDD	Enter the month and day (e.g., 1001 for Oct. 1, 1205 for Dec. 5, etc.). The current year is assumed.
M/D[/Y]	Enter the date as m/d/y where m = month, d = day, and y = year. The year is optional. If the year is not entered, the current year is used.
T	The default is the current system date.

You can also default to a day +/- a number of days (D), weeks (W), months (M), or years (Y) from today's date. You can specify the first (BY) and last day of the year (EY), and the first (BM) and last day of the month (EM). ("B" is short for beginning and "E" is short for end.) You can substitute the "[n]" with a number, or leave it off completely which means "1".

Enter		Explanation
+n	**-n**	Default to *n* days after or before today.
+[n]D	**-[n]D**	Using "+" the date defaults to *n* days after today; using "-" the date defaults to *n* days before today. (Both the "D" and the number are optional.)
+[n]W	**-[n]W**	Default to *n* weeks after or before today.
+[n]M	**-[n]M**	Default to *n* months after or before today.
+[n]Y	**-[n]Y**	Default to *n* years after or before today.

+[n]BM	-[n]BM	Default to the first day of the month, *n* months from now or *n* months ago. "BM" by itself is the first day of the current month (beginning of month).
+[n]EM	-[n]EM	Default to the last day of the month, *n* months from now or *n* months ago. "EM" by itself is the last day of the current month (end of month).
+[n]BY	-[n]BY	Default to the first day of the year, *n* years from now or *n* years ago. "BY" by itself is the first day of the current year (beginning of year).
+[n]EY	-[n]EY	Default to the last day of the year, *n* years from now or *n* years ago. "EY" by itself is the last day of the current year (end of year).

So, if you enter "+3", the date will default to 3 days after today's date. If you enter "-2Y", the date defaults to 2 years before today's date. If you enter "+3W", the date defaults to 3 weeks after today. If you enter "-EM" the date defaults to the last day of the previous month. If you enter "BY" the date defaults to the first day of the current year. If you enter "T" the date defaults to today's date.

[UT-858]

Hotkeys

Hotkey prevent file unopened in MCMS programs

In Hotkey Maintenance for MCMS programs that use MCOPEN or MCQOPEN, set the "Close/Reopen Files" to "Y".

[UT-935]

Hotkeys Maintenance warn if hotkeys 1 or 10 and use CCUSER

The Hotkeys Maintenance program now warns the user if they try to assign hotkeys 1 or 10 since these are assigned automatically to program help and the Hotkey Menu.

[UT-962]

Printers

User spool file allow deletion using cutoff date

In the user spool file, a cutoff date can now be used to remove spool files. The date must be entered in MM/DD/YY format.

[UT-1034]

Directory for printing to text files can be defined by user

When you run the Available Printer Maintenance and go to the second screen, you may now change the "Override directory for text files" to include one or more environment variables

ASCII text files (printer names that begin with an "*") will be created in the user's current directory unless an override directory is entered here. This is a global setting for all text files.

By having an override directory that contains only the text files, this directory can be shared over a network for users to access the text files only.

This file name may contain environment variables denoted by a $ sign before and after. For example, if the directory name is

```
C:/Compu/TEXTFILES/$CCFLOGIN$/TEXT
```

and the login name is "john", the text files for this login will be created in
C:\Compu\TEXTFILES\JOHN\TEXT. If the variable is the last part of the name, the trailing $ may be left
off. For example:

```
$USERTEXTDIR
    or
C:/Compu/TEXTFILES/$CCFLOGIN
```

The resulting directory *must exist* and, if not, an error will be generated and the report will not be saved.

[UT-956]

Available Printer Maintenance new inquiry option

The Available Printer Maintenance program has a new "Inquiry" option that uses the standard inquiry
program so that the user can search for a printer, start from a particular printer, etc. The inquiry option
sorts by the device name. The find option still allows an inquiry at the display order field that finds by
the description.

The List option is another way to sort the printers by the sequence, printer name, or description.

[M5-994]

New printer where used reports

There are two new reports that can be run from the R-prompt:

1. UTWUCQ - Printer Where Used

2. UTWUBC - Barcode Printer Where Used

[M5-993]

Check Programs: Notify exists or other action

The user will be able to see that records exist in other files that correspond to the information they have
displayed on the screen.

For example, if the user is in a file maintenance program that has Contacts associated with the item
displayed on the screen, they will see the word "Cntcs" displayed on line 3.

The Check Programs file will be created automatically and the available display items will be added by
the system. But, the user can change where the message appears, the display attributes of the message,
and what the message says by using the Check Programs Maintenance program. The user can also
change a display item to be inactive.

This feature can be used for other programs to run automatically based on what program is running and
what is displayed on the screen.

The programs currently available to notify:

Program	Description	Displays

CNDSCN	Display Notification for Contacts	Cntcs
DM011	Document Management Documents Exist	
CCATR	Screen Attributes	
MCDSCM	Display Notification for Customer Memos	CMemo

[UT-971]

New screen attributes feature

The Screen Attributes (CCATR) program allows information on a screen for a particular program to be highlighted with different color attributes. Screen Attributes Definition files (CCATR_program.INF) need to be set up for each program, and a record needs to be added for each CCATR_program.INF in the Check Program Maintenance (CCFMCK).

Use the context-sensitive help to view the setup for this feature. The help on CCATR can be accessed from the "Program to Run" field in Check Program Maintenance.

[UT-978]

Open File Inquiry is available on Windows

The Open File Inquiry can now be run from Windows (with U/BL 5.30 and UBLNTREALINODES set).

[UT-1042]

Program Maintenance and Program Screen Definitions Maintenance

The Utility Menu has been reorganized. New file maintenance options are added for Contacts 2.0 and other programs: Program Maintenance and Program Screen Definition Maintenance.

The Program Screen Definition file contains information about what fields (from the Entity file) are displayed in which program (the Program file), and where they are on the screen. Where the fields are displayed on the screen is used to do screen scraping to interface with programs, like the Contact system.

[UT-1058]

Order Entry and Quotes

Customer and ship-to address changes

Customer and Ship-To Maintenance add skip fields and function security

Customer Maintenance and Ship-To Address Maintenance now use the "skip fields" functionality, including required fields. Invisible fields are also available if used in conjunction with the MCUser setup. Function-prompt security is also available for Customer Maintenance and Ship-To Address Maintenance.

The "Customer Since" field shows on the first screen now as well as the second screen.

[M5-21,M5-132,MC-1820]

More ship-to address fields

The Ship-To Address file has a new field "Ship-To Since".

The Ship-To Address file has these new fields that, if entered, will override the Customer file: freight, print MTRs, comments 1-3, customer inquiry comments 1-2.

If a customer is A/R by ship-to, then the defaults of these new fields must be entered in the Ship-To file: A/R territory and terms. In other words, if a ship-to is entered, Order and Quote Entry will only get the terms from the ship-to, not the customer.

[M5-132,M5-215]

Ship-To Address List asks for ranges

The Ship-To Address List now asks for ranges of ship-to and sold-to customers.

[MC-1600]

Order Entry, Quote Entry, Create Order from Quote enhancements

Order Entry and Quote Line Entry have inquiries on sub files

If an existing line is called up in Order Entry or Quote Entry, there are now options to view any allocations, charge codes, or cut lists for the line, if they exist.

Order Entry and Quote Entry don't ask override contact question

The Order Entry and Quote Entry programs no longer prompt you that you are manually overriding the Contact Name...it just does it and clears the contact number from the header as it did before when you answered "Y". If a contact needs to be associated with the order, the inquiry should be used to select the contact rather than manually typing the contact name.

Contact inquiry automatically

If the contact name is blank, hitting <Enter> in the field will bring up the Contact Inquiry automatically instead of forcing a "?" to be entered. Note that if the Contact Name is set to be a "required" field, then the user will be forced to enter a Contact Name. And if the Contact Name is blank in the master files, the Contact Inquiry will automatically pop up when the user hits <Enter>.

Contact precedence

Since the programs are using the contact plans, you can customize what contact types should be used. In the plan, you can define whether a specific contact type for the customer and/or ship-to should default, or whether the contact should come only from the Customer and Ship-To files.

New abort changes prompt

The "change field #" prompt has an option to abort changes, so Order Entry no longer prompts separately when the bill-to customer is changed.

Entry date warning

The program warns if the entry date is in the future.

Lowercase

The entry programs now allow lowercase in the same fields where lowercase is already allowed in Customer and Ship-To Maintenance and in MetalCentric.

[MC-1477,M5-131,M5-153,M5-215]

Customer and ship-to totals > $21 million

The customer and ship-to totals that are stored in the Customer and Ship-To files can now be greater than $21 million.

[M5-132]

Default inside salesperson by user

In both Order Entry and Quote Entry, if the Customer and Ship-To files both have zero for the inside salesperson, then the inside salesperson will default from the MCUser file of the person who enters the quote or order.

[M5-135]

Create Order from Quote enhancements

Shows all of the Order Entry fields

The Create Order from Quote program shows all of the Order Entry fields. These fields were added: discount, price list, sales territory, outside salesperson, and inside salesperson. You can no longer change the warehouse, discount, price list, and stock flag in the Create Order from Quote program; they have to be changed on the quote before creating the order or on the order after it is created. This is because when the warehouse or discount are changed in the header, the program will allow you to change the lines; the price list and stock flag only pertain to new lines being added.

Allows user to set program options

The Create Sales Order from Quote program has a new "Program Options" feature that allows the user to set his own program options. These options are only those that don't affect security. The options that can be set up include the following: delete quote prompt, allocate order, create purchase order, print pick list, quick print, and whether holds delay after printing the message.

The user can see the options and change them by selecting "X" at the order prompt.

Don't recalculate freight rollup charges

When creating an order from a quote, if there are freight charges that were rolled up into the lines, the freight will not be recalculated from the Freight file on the new order. Rather, the lines will be moved over to the order exactly as they are on the quote.

Note: The freight was recalculated only if the rates were in the Freight file; if the rates were zero, then the rollup charges were not recalculated anyway.

[MC-1502,M5-135,M5-136]

Customer memo enhancements

Specify the memo types to view
Customer Memo Entry allows you to specify which memo types you want to view.

Check Program: Display that customer memos exist
The MCMS system will now display that Customer Memos exist on any screen where the Customer Memo hotkey will call up the memos. If the memos exist, "Memos" will print on row 3 column 67.

[M5-141,MC-1650]

Customer/ship-to next contact information and report

Customer Memo Entry has a new feature that allows you to keep track of the last time you contacted a customer, the next time you want to contact them, and note the reason. Access to this function is set in the MCUser file.

There is a new Customer Contact List that allows you to print the customers you need to contact, the reason for contacting them, and the last memos entered for them. The report can be accessed from either the Accounts Receivable Menu or the Order Entry Reports and Forms Menu.

[M5-141]

Order and quote special forms new fields available

Order and quote special forms
- The email address of both the inside and outside salesperson is available to print on the sales order, invoice, and quote forms.

- The date and time the order was added can be printed on the both the sales order and invoice forms. The time can be printed in a 12-hour time format.

- The vendor name is available to print from the inventory lot record on inventory transfer and sales order forms (it was available for on-order purchase order lots only).

- Total feet will be accurate to 2 decimal places (was 0) and the total short tons and metric tons will be accurate to 3 decimal places (was 0) on the sales order, invoice, quote, and purchase order forms.

Quote forms bill-to customer and terms
For quotes with no customer assigned, the bill-to customer name and address will be set to the ship-to name and address. (Note: If the quote was created for a prospect, the ship-to name and address will already be the prospect name and address.) The terms description will come from the default quote customer in the Control file.

[M5-149]

In-house certs and sales order special forms allow grade/heat
The In-House Certification Print and all of the order entry special forms programs now allow both the Heat and Grade fields to be printed on the forms. The In-House Certification also allows a single tag to be selected by just entering the tag number instead of forcing selection via the Inventory Lot Inquiry.

[M5-147]

Tax authority changes

Tax Authority Code has 4 digits

The Tax Authority Code is expanded to be 4 digits to allow for more tax authorities (especially payees) to be entered.

Tax Authority List and Sales Tax Status Report

If there is a GST tax authority set up (Canadian tax), it is now included with the payees so that sales is not doubled on the reports. (Note that payees already were not included in the sales totals; only the area and regular tax authorities are.)

[M5-226]

Calculate tax correctly for 1/16%

The calculate program will now look at the tax rate, and if it is within .0005 percent of an even 16th, it will assume that the tax rate is an even 16th. The following table shows what the program will use. Any other rate will be used as is, for example 4.187 will assume 4.1875, but 4.186 will use 4.186 without changes.

If decimal of the rate is	or	The calculation uses the following for the decimal
0.062	0.063	0.0625
0.187	0.188	0.1875
0.312	0.313	0.3125
0.437	0.438	0.4375
0.562	0.563	0.5625
0.687	0.688	0.6875
0.812	0.813	0.8125
0.937	0.938	0.9375

The Tax Authority Maintenance program displays the rate that will be used in the calculation if the calculation is one of the above.

[MC-1745]

Implement Canadian sales tax change HST

For Canadian companies (those who have the GST tax code set in the Control file), there is a new Canadian sales tax called HST, or Harmonized Sales Tax. For any Ship-To Addresses that are in an HST area rather than a GST/PST taxing area, or vice versa, you can now set the GST flag to Y or N in the Ship-To Address file that overrides what is in the Customer file.

[MC-1510]

Order Entry

Order Entry enhancements

Can't change an invoiced order

In Order Entry, if an order is called up that has already been invoiced, nothing on the order can be changed.

[M5-245]

Allow order types to be designated as auto ship

All of the non-regular order types can now be designated whether they should be shipped automatically or not. Before, only credit memos could be specified. The "Auto-Ship Credit Memos" field has been replaced with the "Auto-Ship Order Types" field in the Control file.

[M5-130]

Sales order user-defined document flagged only if order really changed

The Sales Order User-defined forms that are flagged to print whenever an order is changed will only be flagged if the order is actually changed, not just when the user goes into Line Item Entry to review the order.

[MC-1763]

Date and time added in the Sales Order Header

The date and time an order was added is now in the Sales Order Header and so they can be printed on the sales order forms.

[MC-1476]

Sales Order Register asks for warehouse and branch ranges

The Sales Order Register prompts for a range of warehouses and branches.

The question if the report printed OK has been changed to "Approve the register?" to be more clear that it is an update.

The number of orders added and changed prints in the grand total.

[M5-197]

New multi-order bill of lading

The bill of lading number is expanded from 9 to 30 characters.

Order Entry has a new Bill of Lading Print option. Multiple orders can be assigned to the same bill of lading during Shipping Entry or in the Bill of Lading and Stop Number program. Inquiries can be made on the existing bills of lading, and you can inquire on other orders assigned to the same bill of lading. When the bill of lading prints, if the order has been shipped, the shipping holds are removed from the order.

Comments can be printed on the BOL, but a print flag of "B" has to be assigned to the comment.

In Open Order Inquiry, if the order is assigned to a bill of lading, there is an option to see all of the orders assigned to that bill of lading.

[M5-216]

Shipping enhancements

Shipping immediate backorder "next order number" change

Shipping Entry has an immediate backorder feature. The next order number increments with an "A" to "Z". Now, if it ends with "Z", the program will attempt to make the "Z" an "A" and append another "A". It will then increment from "AA" to "ZZ". If it can't automatically create the next number, it will return blank so that the user has to enter the number or get the next one from Control.

[M5-220]

Shipping manual allocation selection change

When a line is partially shipped, the manual option to flag which allocations are shipped will display on-order material (i.e. purchase orders and work orders) but will not allow them to be flagged to ship.

[M5-232]

Shipping allows different decimals to be entered

Shipping Entry now allows a different number of decimal places to be entered in the shipped and/or backordered quantity than were entered on the order. This eliminates the need to know in advance when the order is entered how many decimal places are needed in shipping.

[M5-277]

Shipping Entry extra <Enter> after inquiry on the order

In Shipping Entry, if the order to be shipped is selected from the inquiry, the program now requires the user to hit <Enter> one more time at the Order field to really select it. This is to prevent someone from accidentally selecting the order from the inquiry and then being forced to complete the shipping on the order; the user has one more chance to select a different order.

[MC-1457]

Change to other charges when manually backorder

The shipped and backordered unit prices and costs will remain the same as the ordered unit price and cost for partially-shipped lines. This is because the unit price and costs of the charges are set in order entry, and so should not change just because the line is partially shipped. This was a problem primarily for additional charges that are based on the charge code pricing.

[MC-1638]

Shipping tags enhancements

Shipping tags at order entry time

Shipping tags can now be flagged to print at order entry time. The When to Flag Shipping Tags option in the Control file can be set to "O". Whenever a line is added, the shipping tags will be flagged to print. There is also an option on the order totals screen to reflag the tags. If an order is created from a quote, the shipping tags will also be flagged to print.

[M5-229]

Flag only material lines for shipping tags

The Enter Shipping Tag Information program now only flags sales order lines that are material-type products to print shipping tags.

[MC-1675]

Allocation enhancements

Order Line Item Entry allocation warnings

If an order line is changed that has allocations against it, the Order Entry program will now give an option to view the allocations, and an option to either keep the allocations or unallocate them. If the warehouse, part, dimensions, warehouse, or quantities are changed, and the line has allocations, then the program prompts to view the allocations, keep them, or unallocate. If the stock flag is changed to "N" then the user is warned that the line will be unallocated.

[M5-131]

Auto allocation at Order Entry

There is a new option in the Assign Orders field in the Product Line file to auto allocate at order entry time (T).

[M5-237]

Better tracking of allocations

Allocations have better tracking: an allocation has the user who added it, when it was last changed, from where the allocation was done, and whether it was an automatic allocation. You can see this information on the allocation inquiries.

Activity tracking for unassigning and deleting allocations is available, but is turned off by default. If it needs to be turned on, we recommend that the SOLN, IXLN, and WOLN categories are changed from Active "N" to Active "U" for "Use activity code". This will turn on the ALCDEL and ALCUN (Delete Allocation and Unassign Allocation) without turning on ALCUND (Unassign Detail). The detail will add a record for each allocation that is removed. If ALCUND tracking is turned on, the allocation programs may run significantly slower. The Unassign Allocation should be enough information, giving the total that was unallocated, and one of the tags.

The Inventory Transfer Inquiry has an option to show the allocations.

An explanation of the allocation source and the activity tracking are in the order entry procedures: mcoeproc.doc.

[M5-237]

Partial Allocation Entry recalculates length/lbs for linear if pieces changed

Partial Allocation Entry now recalculates the length and pounds if the pieces are changed...if the quantity UM is an each-type or if there is no quantity UM entered.

[MC-1451]

A/R Invoice and Open Order Inquiry enhancements

See charge codes/cuts from header

The A/R Invoice Inquiry and the Open Order Inquiry programs now have functions to view all of the charge codes (chG cds) and all of the cut lists (K-cuts) for an invoice or order or quote from the header screen. This is similar to the allocations function.

More fields available

The Invoice and Order Inquiries display more fields: the quote, backorder #, the order it was created from if it was an immediate backorder, the buyout vendor name and P/O.

The Invoice Inquiry also displays the entry date, the price list, and the user-defined comments.

The Order Inquiry also shows the GP$ and who it was added by. The Order Inquiry displays both the system status (i.e. Shipped, Verified, Print S/O, etc.) and the entered status. For example, the status might display like this:

```
Status: Truck|Shipped
```

More fields on the allocation inquiries

The allocation inquiries show the P/O and receipt number of the inventory, and the in-transit number if applicable. They also show more information who added or changed the allocation and from where.

[MC-1754,M5-10,M5-185]

New Tax Transactions Purge program

There is a new program, Tax Transactions Purge, which will allow you to purge the Tax Transactions file through a calendar year.

The Tax Transaction (TXTRN) file contains detailed information about the sales tax that is stored in the Tax Authority (TXAUTH) file. It has a record for every invoice that makes up the total in the Tax Authority file.

[M5-265]

Bookings Summary can print by inside salesperson

The Bookings Summary can now be printed by the inside salesperson.

[M5-275]

Shipment Verification locked message and error report

The Shipment Verification can be run by more than one user at a time. If an order cannot be locked when printing the Shipment Verification, an error will print for that order. The error will look similar to "User joe has S100262 opened, can't be updated." The order will print on the next Shipment Verification if it then can be locked. Also, if an order changes between the times it printed on the report and the report was approved, then the order will not be approved and an additional report will print showing all orders that were not approved because they changed. The program will print a message such as "99 orders were not updated because they changed after the report was approved. See the error report." The orders appearing on the error report could be because someone did change the order, and it also could be that the order was approved by another user.

[M5-245]

Immediate backorder move on-order allocations to new order

There is a change to how the Immediate Backorder program treats allocations on partially shipped lines (Immediate backorders can be created from Shipping Entry). The program now treats on-order material

and in-process material the same as reservations: If there are any allocations for on-hand material that are flagged to be shipped for the line, then reservations, on-order, and in-process material allocations are all moved to the new order. If there are no on-hand allocations that are flagged to be shipped, then the reservations and material allocations that are not for on-hand material will remain with the original order.

In other words, for partially shipped lines, the program assumes that if you have on-hand material assigned to the order and flagged to be shipped, then any reservations, on-order, or in-process allocations should be moved to the new order.

[MC-1507]

P.O.S. Invoice Print changes

Asks for invoice date for POS in batch
The P.O.S. Invoice Print program now has an option to enter the invoice date. If an invoice date is entered, then the program must be run in batch, not continuously. This makes it possible to enter POS invoices for the previous month, just like regular invoices.

[MC-1515]

Make the ship date = invoice date
The ship date will be changed to the invoice date when the P.O.S. invoices print.

[MC-1565]

O/E Backlog Reports enhancements

The Backlog by Promise Date has an option to sort the report first by the salesperson. It also has ranges of salespeople and customers. The salesperson sort and range can be based on the inside or outside salesperson.

The Backlog by Item/Order Number now has a range of product lines as well as a range of part numbers.

The order status now prints on the backlog reports and it is in the new standard so that the shipped status shows before the print status.

[MC-1587]

Commission Report more options

The Commission Report now asks for a range of salespeople and it asks whether to include only the commissionable invoices or all.

[MC-1601]

Sales Journal new sort and range options

The Sales Journal now has more sort and range options. The report can now be sorted by the customer class, sales territory, and customer, and there are new default reports which use these sort criteria. It can also be sorted by both the inside and outside salesperson.

Now all of the reports can be restricted by any of the ranges, not just the fields that are used in the sort: salesperson, branch, and warehouse. Also, these new range criteria can be entered: sales territory, customer class, customer, invoice number. The invoice date range can be entered even if the "Only

invoices that will be on this month's sales journal" is selected. The report can be further restricted by the order type.

Cost Adjustments (Releases)

Release Inquiry enhancements

The Release Inquiry has a few enhancements including:

- There is an inquiry for the order number.

- The inside and outside salesperson are displayed.

- The vendor is displayed if the release was created from a variance (the P/O, receipt, and line were already displayed in the release line description).

- The release number is displayed with the invoice information if it is from a release.

Release entry and processing

Inquiries on release number

Both Release Order Entry and Release Processing Entry now have an inquiry on the release number. Release Order Entry also allows the sales order (already invoiced) to be looked up and brings the invoice number back into the release.

Change to non-stock account

If the stock flag is set to N and the part is non-stock, the credit account will be the non-stock inventory account (rather than the P/O receipt variance account). This allows cost that was wrong for a non-stock part in order entry to be corrected in the release system. So now if the stock flag is set to N then it will always post to the non-stock inventory account, and if it is set to Y then it posts to the variance.

Release Register asks for warehouse and branch ranges

The Release Register now prompts for a range of warehouses and branches.

The question if the report printed OK has been changed to "Approve the register?" to be more clear that it is an update.

The number of orders added and changed prints in the grand total.

Multing

Multing new create and view order allocations

Multing Entry can now create the allocations and remnants from the calculated cut list if the mult is based on a sales order. After the cut list is calculated, the Display Schedule has an "Allocation" option that creates the allocations. The "view alCs" option allows you to view the allocations that are on the sales order. The remnants created can be changed or modified in Partial Allocation Entry.

[ML-22]

Multing release 2.00.00

- The calculation of mults was improved to make better use of material.

- The progress reporting in the mult calculation program is now more accurate.

- A new option was added to update orders or quotes with the used amount for cut lists. This will allow the user to quote or bill the customer for what is used.

- The Cut Sequence is now stored so that the Customer Part or Marking number from the Cut List can be printed on the Multing Schedule.

- A warehouse range can now be used when finding material to use.

- Unassigned allocations are now subtracted from non-lot material usage.

See the operational changes document (ML020000OPC.pdf) for more information.

[ML-24]

Quotes and Prospects

Quote Entry enhancements

Quote Entry allow a quote to be duplicated

Quote Entry has an option to duplicate a quote. The new quote number can be the next quote number available, or it can be typed in, or it can be the next "revision number" for the quote. The next revision number is assigned by adding the letter "A" to it, unless it already ends with a letter, in which case the letter will be changed to the next letter in the alphabet.

A quote can also be appended to an existing quote.

If the next "revision number" is used, then the program will also copy any DMS documents if the DMS Update Interface is set up for program QTCRQT, Create Quote.

[M5-114]

More quote fields

The following fields were added to Quote Entry to match Order Entry: sales territory, terms, and print MTRs.

The customer purchase order from the last sales order created from the quote is now displayed on the screen.

Quote Entry has a blanket quote flag to protect the quote from being deleted accidentally or from being purged by the Quote Purge program.

There is now a lost/closed date and lost reason that can be entered. The lost reasons are validated on the Miscellaneous Description file using a new type "Q" that is for "Quote Lost Reasons".

The prospect defaults from the Customer file so even if the user didn't start in Prospect Entry, the Prospect system will still be updated. Because the customer is associated with a prospect, the prospect will display but can't be changed.

Prospects are updated
Prospects are updated in four ways:

1. When a quote is added a prospect memo is added and the last quote date in the prospect is updated.

2. When the lost/closed date is entered, a prospect memo is added and the lost date and reason are updated in the prospect.

3. When the lost/closed date is cleared, a prospect memo is added.

4. When an order is created, a prospect memo is added and the won date is updated in the prospect.

[MC-1472,M5-215]

Quote Inquiry enhancements

See charge codes/cuts from header
The Quote Inquiry now has functions to view all of the charge codes (chG cds) and all of the cut lists (K-cuts) for a quote from the header screen.

More fields available
The Quote Inquiry displays more fields: price list, header comments, the GP$, quote lost/closed date and reason, and whether it is a blanket order. Descriptions display for the codes.

[M5-10,M5-224,M5-281]

Quote purge allow single customer, not blanket
The Quote Purge will not purge blanket quotes, and a single customer can be selected for the purge. A message displays showing the number of quotes deleted and if any quote couldn't be deleted because it was locked.

[M5-258]

Quote List can be run by the entry date
The Quote List has an option to select a range of quote entry dates.

[MC-1562]

Prospect Management

Contact List allows all salespeople to print

The program will now allow you to enter "A" for all salespeople when you run the Contact List when signed on with the high-security code

[PM-50]

Prospect Entry can find by salesperson/prospect if high security

There is a new function "J-slsp" in the Prospect Entry program for high-security users. The function allows the prospects to be restricted to a particular salesperson or to allow all salespeople.

[PM-52]

Prospect Entry can hotkey to Customer Inquiry

In Prospect Entry, if you hotkey to the Customer Inquiry (OE300), the customer that is in the prospect will be displayed. This way the user can see history and credit information about the customer from Prospect Entry.

[PM-56]

Select Prospects allow selection files to be deleted

The Select Prospects program now allows a selection file to be deleted.

[PM-69]

Create Customers from Prospects adds customer activity

Activity tracking is maintained if a customer is changed or added in the Create Customers from Prospects program.

[PM-81]

Sales Analysis

Sales by Customer and Sales by Warehouse/Part more options

The Sales by Customer and Sales by Warehouse/Part reports have many new options when printed from the menu, including the fact that they can be printed for a range of dates rather than printing only invoices processes in the last sales analysis month-end. The order types can be selected, and the salesperson can be for the inside or outside salesperson. The following ranges can be selected: invoice dates, sales territories, salespeople, branches, and customers. For the report by customer you can also select ranges of warehouses from the headers and customer class. For the report by warehouse/part you can also select ranges of line warehouses, product lines, and parts.

These reports now appear on the Order Entry Reports and Forms Menu in addition to the Sales Analysis Menu.

[MC-1739M5-299]

Accounts Receivable

Inactive Customer Report enhanced

The Inactive Customer Report now prompts for ranges of customer date added, branches, sales territory, and salespeople. These fields now also print on the report.

[M5-30]

A/R Statements enhancements

New options

A/R Statements has two new options:

1. Skip negative-balance customers,

2. Skip zero-balance invoices.

[M5-117]

More fields

More fields are available to print on the A/R Statements:

1. The branch address and phone information,

2. Information from the Invoice Header such as the customer's purchase order,

3. The terms description from either the customer or from the invoice,

4. The A/R Contact (type "A" for the customer).

The "Printing Comment" can be entered in upper or lowercase. (Of course, if you always want an alphanumeric field to print in uppercase you can change the form to do that.)

[M5-34]

A/R Ageing enhancements

New options

The A/R Ageing has the following new options:

- There is a new option "I" to summarize by the invoice number. The invoice prints only if the balance is not zero.

- There is a new option "U" that will print detail for all lines except for the unapplied cash and service charges, which will print one line. (Unapplied cash is invoice 999999 and service charges will print one line if you are using 999998.) If there is more than one transaction, ">1" prints in the transaction type column.

- The sort and selection can now be by either the inside or outside salesperson.

- All memos can print.

- If a customer is set to keep A/R by the ship-to, the invoices can all be combined under the customer number.

Security on customer memo types

The user can print customer memos on the A/R Ageing only if they have access to those types. The set up for the Viewable Types is in the MCUser file.

A/R history is no longer optional

Keeping A/R history is no longer optional. You used to be able to turn A/R history on and off by customer and system wide.

The A/R Month-End "purge date" now says "cutoff date" since the A/R transactions are being moved, not purged.

A/R History Purge changes

The A/R History Purge warns that Invoice History will be purged during S/A month-end for any A/R that is purged by this program. The purge date defaults to the end of year 5 years ago and warns if a date more recent than this is entered.

Customer average days to pay enhancements

The Credit History Inquiry used to show only the average days to pay for each of the last 12 months. It now also shows the weighted average days to pay for each of the last 12 months. It shows both of the averages for the whole 12-month period. It also shows the historical average days to pay and # invoices in the calculation. The contact displayed is now based on the contact plan for the Credit History Inquiry and displays the A/R contact. (Hotkey to Contact Maintenance will display all of the information for that contact.) Inquiries are allowed for both the customer and customer alpha.

The historical average days to pay is now restricted to a maximum of 999 invoices.

The Customer Inquiry now shows the number of invoices included in the calculation of the historical average days to pay, and the prospect number is displayed. Lowercase is allowed on the inquiry comments.

A/R Month-End updates the average days to pay in the Ship-To file if A/R is being kept by ship-to.

A/R Transaction List customer range, exclude A/R history

The A/R Transaction List allows a range of customers to be entered. It also has an option to see only transactions that are currently on the A/R Ageing. The selection criteria are included in the headings. All transaction types selected appear in the totals.

A/R Entry, Edit and Update new features

Post A/R to G/L in detail

The General Ledger postings from Accounts Receivable can now post in detail (depending on the Chart of Accounts Detail Flag) and the program will no longer ask for a G/L date but rather will post based on the transaction dates entered. The detail in G/L will include the customer, the check, the invoice, and the transaction date.

The bank (cash) account also by default uses the Chart of Accounts Detail Flag to determine whether the A/R will post in summary or detail, but this can be overridden in the Control file with the "Post to Bank in Detail" flag in the General Ledger section.

Our recommended setting is to set the Chart of Accounts Detail Flag to "Y" and leave the Control file "Post to Bank in Detail" flag to blank. In this way you have the detail if you need it, and the G/L Trial Balance can be printed in different ways so that you can either see the detail or not. And, if you export the cash account to a CSV file, you can see both the detail and the totals.

If your cash account is posted in detail and you want to be able to drill down from totals to see the detail, print the Trial Balance by journal number and export it to a CSV printer. In Excel make a new column concatenating the journal type and journal number. Select all of the data and add subtotals by the new column and total the debits, credits, and the net. On the left you can now show only totals, all detail, or selectively view the detail for a journal.

[M5-244,M5-321]

Update tracking

The A/R Entry and A/R Edit and Update are using the new entry and update locking feature, so it will be easier to determine who is running the update and what the status is. If the update has an error, the restart of the update will be handled through the new update tracking feature.

[M5-244]

New report to show used and unused invoice numbers

The Used and Unused Invoice Numbers (ARLSIN) report can be run to find unused invoice numbers and find what invoices can be purged. It is a system manager program.

[MC-1730]

Accounts Payable

Check Writing enhancements

Barcodes or MICR can be printed

Barcodes or MICR can be printed on the Accounts Payable checks.

[AP-347]

Prints zero checks if G/L postings are required

A/P checks that total to zero will always print if any G/L postings are required for the check, even if the user said they do not want to print zero checks. G/L could be required if the discounts taken do not net to zero, or if an exchange rate is involved. By printing the check, all of the G/L postings print on the Check Register and the G/L is in balance.

[AP-328]

Check reconciliation enhancements

From Check Reconciliation, if a check is voided (enter "V" at the Cleared Amount), the program now calls the Void Check program to actually perform the void. A void needs to reverse the payment-only portion of the payable. The invoices that were paid need to be reversed as a separate function...just as if the check had never been written in the first place. This is the best audit trail and the best accounting practice.

If a range of checks are selected to be cleared, the program only clears the checks that are not already cleared or voided.

The G/L date is validated against the General Ledger system. The program also asks the user to verify the fiscal month that will be posted and checks that the month is not closed in Accounts Payable.

If a batch total to be cleared is entered, the program displays the remaining amount to be cleared as well as the current cleared amount.

Either "A" or "+" can be used to clear the check for the original amount. This way the 10-key pad can be used for clearing checks.

[AP-337]

1099 efile program available

If this is a requirement for the client (or just desired), they should do the following:

Review the procedures as you must register and test before you can actually submit your final file. The procedures are located in the IRS publication 1220 (http://www.irs.gov/pub/irs-pdf/p1220.pdf)

A directory should be shared on the server (if one not already available) so the file can be retrieved. This directory should be entered in the 1099 Path on the other ("O") screen of A/P Control Maintenance.

The 1099s should already be printed and approved.

[AP-340,AP-357]

Recurring payables for different periods

Recurring payables can now be generated for periods other than monthly. They can be generated on a weekly or monthly basis, and the number of weeks or months between invoices can be specified. Thus, quarterly, weekly, and bi-weekly invoices can be generated, for example.

[AP-344]

Recurring payables with cash codes and 1099 flag

The A/P system now allows recurring payables to be generated for vendors that have a cash code assigned. Also, the 1099 flag can now be specified for each recurring payable; if it is not assigned, then it will be set to "Y" as it was in the past.

[AP-351]

Vendor Maintenance allow the vendor cash code to be changed

The cash code in the Vendor Maintenance can now be changed with these exceptions:

- Neither the old cash code nor the new cash code is for foreign currency.

- Changing the cash code would result in the A/P account to be changed and there are open payables.

The Vendor Maintenance program was also changed in the following ways:

- The alternate A/P account cannot be changed if there are open payables.

- The alternate A/P account must be a liability account.

Activity tracking is added if either the alternate A/P account or the cash code is changed for a vendor.

[AP-367]

Reports to Document Management show all if multiple reports

Some Accounts Payable programs have multiple reports that print from a single menu option. If these reports are printed to the Document Management system, the user can now access all of the reports from the DMS hotkey when in that print option. The affected programs: Vendor Memo Entry will display the Vendor Memo Print, the Data Entry Proof Report will also display the Manual Check Register, the Select Invoices for Payment will also display the Cash Requirements, and Check Writing will display the Check Register.

[AP-370]

New A/P positive pay export interface

The positive pay feature will allow you to generate a "Positive Pay" export file based on the accounts payable outstanding check file (OUTCHK) that can be transferred to a financial institution for the purpose of validating check information. For more information, see the release notice APEXPPOPC.PDF.

[AP-373]

General Ledger

Change Account Number supports a move between companies

The Change Account Number program now supports moving an account number between companies.

[GL-222]

Journal Entry can inquire on open journals

Journal Entry now requires the user to enter "A" at the Journal Number to add a new journal, and there is an inquiry available to view existing journals.

[GL-227]

Reports to Document Management show all if multiple reports

If the Journal Proof and Journal Posting reports are printed to the Document Management system, the user can now access all of the reports from the DMS hotkey when in that print option.

[GL-228]

G/L Year-End can close all years only if they have same fiscal year

G/L year-end allows all companies to be closed at the same time only if they are all on the exact same fiscal calendar. A warning will display if they are not and the user must close companies individually. If they are all on the same fiscal schedule, then the year being closed will display.

[GL-232]

Trial Balance has new print options for journal sorts

The G/L Trial Balance has new print options if one of the journal sorts is selected. If printing in detail, the user can specify to always print the journal total, never print the total, or only print the journal total if there is more than one detail line. If printing in summary, the user can specify to print the detail instead of the total if there is only one detail line.

[GL-252]

Journal import enhancements

Allows import files with DR/CR in columns

The Journal Import program now handles import files that have DR and CR in columns.

[GL-239]

Enter description information at import time

If the description, reference, extended description and extended reference are not mapped in the import format, then the user will have the option to enter these at import time.

[GL-244]

Purchasing

Purchase Order Entry enhancements

General P/O header and line inquiries

The P/O header inquiries (accessed wherever the P/O number can be entered and "Inq" is displayed) have more information in the inquiries and have detail options so all of the P/O header fields can be viewed. The due date is included on the P/O line inquiries.

Allows more options for source

The Purchase Order Entry program now allows more options for the "Source" field. The new options are Email, Fax, and Website. It still allows Mail, Phone, sales Order, or blank.

Header displays allocations and warns if may be deleted

P/O Entry has a function on the header screen to view any allocations that are assigned to the purchase order. In addition, if the due date or warehouse is changed in the header, the user will get an additional warning that this will affect allocations.

Line items better handling of allocations

Purchase Order Line Item Entry has better options for handling allocations that are against the P/O line.

- The allocations can be viewed when an existing P/O line is selected; only a line with allocations will have the "View alcs" option.

- The program will warn you that the allocations will be removed if you choose to delete a line with allocations or if you change the quantities so there isn't enough on order to accommodate all of the allocations. You can view the allocations at that point, continue with the change and they will be removed, or end without making the change.

- When the allocations are removed, the one being removed is turned into a reservation with the same warehouse, part, dimensions, and quantities that the allocation had. The program used to unallocate that order line completely; it no longer does this.

- Reducing the cost of the P/O line no longer causes the allocations to be removed since the cost of the allocations is reprorated during the update when the allocations are moved to the on-hand inventory anyway.

- The activity tracking for changing and deleting the P/O line shows if the line was unallocated.

Activity tracking for due date changes & allocations

There is now activity tracking when the due date is changed on a purchase order line: LNDUE. It shows the new date, the old date, and the number of days changed. If the line is allocated, that is also noted on the activity tracking.

There is also activity tracking if a purchase order line is unallocated: UNALC. It shows the order type, order number, and line number of the first four allocations that were removed; if there are more than four then it shows how many more order lines were unallocated.

P/O line charge inquiry shows only charges with parts

The P/O Line Additional Charge inquiry will now show only charges that have part numbers associated with them since these are the only ones that can be entered.

More purchasing history

P/O comments and additional charges in history
The P/O receipt history inquiries now show the P/O comments and show additional charges that were entered against the purchase order, both line and order additional charges.

In-transit information available
If a purchase order was received through the P/O In-Transit system, the in-transit number is reflected in the purchasing history. If an open purchase order has been put in-transit, then the in-transit number is printed on the open purchase order.

P/O Receipt Inquiry display lines
The P/O Receipt Inquiry has an option "Ln inq" to display all received lines for the purchase order for all receipts.

P/O Receipt Detail Inquiry header option with additional charges
The P/O Receipt Detail Inquiry displays the lines first, but the user can select "Header" to see the header information. The header information displays any order additional charges that were on the purchase order. If the P/O you are displaying is an order additional charge purchase order then the "from" P/O is displayed.

P/O Receipt Detail Inquiry detail option
The P/O Receipt Detail Inquiry has an option to display the "Detail" of a line so that all of the fields can be viewed (e.g. the job/reference number). The information displayed is from the Inventory Purchase History Inquiry. Tags, comments, and other charges can be viewed from here as well.

Inventory Purchase History Inquiry tags, charges, and comments
The Inventory Purchase History Inquiry has options to view the tags, the charge codes, and comments.

Inventory Purchase History Inquiry can go to Tag Detail
The Inventory Purchase History Inquiry now allows the user to either view detail about the tags or to go to the Tag History Detail Inquiry.

When viewing detail on a P/O receipt line, the user has the option "tag Dtl". This pulls up an inquiry on the tags, and the user can view the detail by selecting "D" in the inquiry, and then selecting "E" to end. If the user wants to go to the Inventory Tag History Inquiry - Detail, then the user can just hit <Enter> to select the tag.

Always keep P/O receipt history
P/O receipt history is now always maintained; it is no longer optional in the Control file.

[M5-159,M5-212,M5-230]

Show in-transit information
The P/O in-transit number, P/O receipt number, and vendor name now print on all of the lot detail screens. The P/O in-transit number also prints wherever the open purchase order header prints or with received purchase orders.

There is a new program Display In-Transit Information, PODSIT, which can be set up as a hotkey so that anywhere the in-transit number is printed on the screen, the user can see the in-transit header information.

To signal to the user that the hotkey is available, you can setup screen attributes to highlight the in-transit number on screens where the in-transit is displayed. (See the "Program to Run" help on the utility Check Programs for help on setting up the screen attributes (CCATR).

For example, MC307 is the Lot Detail Inquiry. Create the file CCATR_MC307.INF:

```
:ATR
Inventory Lot
Rev 000

[FIELDS]
:Number of Fields
:Row,Col,Length,Attribute,Full Length=1
1
18,67,09,1,0
```

You can then add this record to the Check Programs and the in-transit number will be highlighted on this screen:

```
CCFMCK                        Check Program File Maintenance
Rev  6.10.00

Calling Program: MC307      Lot Detail Inquiry
        Sequence:   1
 Program to Run: CCATR      Screen Attributes
```

[M5-166]

Open Purchase Order Inquiry enhancements

Header function

The Open Purchase Order Inquiry has a "header" function to display header information. This is always available from the detail screen for a line and is available from the lines if the open purchase orders are being displayed for a purchase order (rather than by job or part). If open purchase order lines are displayed for a job or part, then select detail for the line and then select header.

Exchange rate

The exchange rate is displayed for both open and received purchase orders.

[M5-167]

Show additional charges

The Open Purchase Order Inquiry and P/O Line Inquiry both show additional charges against the line.

Show allocations

The Open Purchase Order Inquiry has an "Alcs" option that will display the allocations of any of the open P/O lines if you have inquired by the P/O number. If the display is by part number or job/reference, then

you must select "Detail" for the line and then "Alcs" to see the allocations for that line. An "A" prints next to the line if it has allocations. The "Alcs" option is always available from the P/O Line Inquiry.

Restart/find inquiry option
The "Restart" option in the Open Purchase Order Inquiry is now "Restart/find" so that you can find the P/O line you want to display.

[M5-159,M5-200]

P/O changed ETA in lots to be mm/dd/yy format
The purchase order and in-transit inventory lot records now show the due date in "mm/dd/yy" format in the status field; the due dates used to display in the format "Mon dd, yyyy".

[M5-169]

P/O header changes

Last job/reference in P/O header + totals
The P/O header now has the last job/reference that was entered on a P/O line so that the job/reference can be printed in the same place on forms for the purpose of DMS. This allows the purchase order to be saved with the DMS documents for the sales order.

Total pieces, length, pounds, cost of the purchase order
The total pieces, length, pounds, and cost of the purchase order lines are in the P/O header. The programs used to total them only if order additional charges were entered but now the programs always calculate the totals. This is useful when using the reporting tools.

[M5-171]

Open P/O reports enhancements

Selected ranges print in the headers
The open purchase order reports were changed so that all of the ranges selected print in the headers. And, the prompts are clearer that the warehouse and due dates being selected are from the lines.

[M5-177]

Open Purchase Orders by Part asks for a product line range
The Open Purchase Orders by Part asks for a range of product lines that works with the range of part numbers.

[MC-1604]

Create P/O from Sales Order enhancements

Move the order comments to the purchase order
The Create Purchase Order from Sales Order program now has the ability to move the S/O comments to the purchase order.

General inquiries

The Create Purchase Order from Sales Order has standard inquiries from the sales order and the purchase order, and you can still go the other inquiries from the sales order field.

Due date of P/O and promise date of the S/O

The Create Purchase Order from Sales Order displays the S/O promise date and warns the user if the due date of the P/O is after the promise date.

Program options

The Create Purchase Order from Sales Order has program options that allow the user to customize how the program works. From the sales order prompt or from the Create P/O prompt, there is an "X" option that will let you view and/or change the program options. These options are only those that don't affect security. The defaults are set so that the program will work as before. The options that can be set up include the following:

- Default the due date: Y to default it, blank to force entry.

- # days before the promise date: If Y to default the due date, this is the number of days before the S/O promise date to default the due date.

- S/O header comments: Y to transfer any S/O header comments to the purchase order. All of them will transfer, but you can delete those you don't want if you also turn editing on. The print flags will be set to the default P/O header print flags in Control.

- S/O line comments: Y to transfer any S/O line comments to the purchase order line if the S/O line is selected. All of them will transfer, but you can delete those you don't want if you also turn editing on. The print flags will be set to the default P/O line print flags in Control.

- Edit comments: You can choose to edit only the comments that are transferred (so that you can delete those you don't want), or edit all comments (so that you can add comments to any line or header comments), or you can set it to never edit the comments.

- Allocate the order to the P/O: You can turn off the fact that the order is automatically allocated to the sales order. You can also have the program ask each time, and you can set the default answer. If you don't allocate the sales order, then you will have to allocate it manually.

[M5-199]

P/O receipt update better restart and logging

The P/O Receipt Register and Update no longer prompts the user if the Update General Ledger with P/O Receipts report printed okay. The report is now called "P/O Receipts General Ledger Report" and just prints at the end.

If G/L is posted in summary for any account, the summary posting now says "Summary Postings from P/O Rcpt".

[M5-218]

P/O-I/T update better restart and logging

The P/O In-Transit Register no longer prompts the user if the G/L report following the edit printed okay. The G/L report is now called "P/O In-Transit G/L Report."

If G/L is posted in summary for any account, the summary posting now says "Summary Postings from P/O-I/T".

P/O Receipt Entry option to cancel if zero received

P/O Receipt Entry will ask the user if they want to cancel the P/O receipt if at least one line was received but no lines have any received or rejected quantities. This enables the user to record that material was ordered but never delivered by a vendor.

Purchasing allow all non-foreign cash codes

In purchasing, if the vendor for the main purchase order is in a foreign currency, then the additional charge vendors can now be for a vendor with the same cash account or for any local-currency cash account. The restriction used to be either the same cash account or the blank cash account only.

P/O-A/P Entry has a new P/O line inquiry

P/O-A/P Entry now allows an inquiry on the P/O lines that were received on this P/O receipt. The quantity UM displays on the line.

P/O-A/P update better restart and logging

The P/O-A/P Edit and Update no longer prompts the user if any of the reports following the edit printed okay. The G/L report is now called "P/O Invoice G/L Report."

If G/L is posted in summary for any account, the summary posting now says "Summary Postings from P/O-A/P".

The P/O-A/P Edit displays the invoice and variances totals on the screen before the update question.

P/O-A/P Discrepancy Report has report ranges in the header

The P/O-A/P Discrepancy Report has the selection criteria in the headers.

Inventory

Tag History Inquiries more options

The Tag History Inquiries have more options.

Tag History Inquiry by Whse/Part: Tags are now displayed in reverse tag order, and there is an option to display the tags by the tag creation date. If sorted in tag order, then the user can also find a starting tag to display. There is now a "back" option to display the previous screen of tags. The user can get out of the "Line" prompt if chosen by mistake. There is a previous option to view the previous

warehouse/part/dimensions. The vendor name is now printed. There are now inquiries on the warehouse and part.

Tag History Inquiry - Transactions, - From Tag, - Where Used: These all allow inquiries on the tag and tag revision. There is also an option to view the previous tag.

Tag History Inquiry - Where Used: There is now a "preV tag" function. If there are more than 10 where-used levels, the program displays this information.

[MC-1577,M5-165]

Inventory Lot Detail purchasing information

The P/O in-transit number, P/O receipt number, and vendor name now print on all of the lot detail screens.

[M5-166]

Restrict # tags to print

The number of inventory lot tags that can be scheduled to print is now restricted:

# Tags Flag	Description	Max # Tags
A	Ask	9
P	# Pieces	Maximum of 1 or the # pieces on the tag, but not more than 99
1-9	The number to print	1-9
N	None	0

[M5-168]

Inventory Lot Entry enhancements

Activity tracking change location

If the location is changed in Inventory Lot Entry for tagged inventory, activity tracking is added for the change. It is recorded under category "ITAG", and activity description "CHGLOC". The Barcode Change Lot Location program does the same.

View allocations

Inventory Lot Maintenance has an "aLcs" function to display allocations assigned to the inventory lot.

Tags to print

The # of tags to print has been changed in Inventory Lot Maintenance: The program will not default to print tags when changed, just when added.

[MC-1474,M5-166]

Inventory Transaction Entry enhancements

Allows heat entry for new part

If the customer is keeping track of heat information, if the "from" lot has a heat and a grade, and if the "to" lot is for a different part, the program will now ask:

```
Do you want to enter Heat information for this lot? (Y/N):
```

If they enter "Y", they will be able to enter new heat information.

[MC-1756]

Show other job if already running

The Inventory Transaction Entry program will now give a message if the program is already running for the user.

```
You (user XXXXX) are already running this program on
another job.
Do you want to display the (J)ob, (E)nd, hit <Enter> to
retry:
```

A user can be running the Inventory Transaction Entry program only one time. If you are already running the program, the program will display an option for you to display your other job, retry running the transaction entry again, or end. The program will automatically try to run again every 5 seconds. If you select "J", the job will display in a window; hit <Enter> to retry; enter "E" to end the program.

[MC-1465]

Inventory Transaction List enhancements

Range of transaction types

The Inventory Transaction List allows a range of transaction types to be selected.

[M5-187]

Print login if reference is blank

The Inventory Transaction List will now print the login of the person who entered the transaction under the "Reference" heading if the reference is blank. Transactions entered in Inventory Transaction Entry, Inventory Lot Entry, and Transfer Lots Between Warehouses all record the login.

[M5-1482]

Inventory Price Inquiry defaults to last price list entered for all

In Inventory Price Inquiry, the Price List field will default to the last price list the user entered if they selected all customers.

[MC-1546]

Inventory reports ask for a part number range

The following inventory reports now ask for a part number range. The range selections are printed in the header:

- Inventory Detail List

- Inventory Status Report

- Inventory Usage Reports

- Inventory Turns Report

Also, the Inventory Status Report no longer prompts for the number of copies or whether this is a reprint.

[MC-1592,MC-1593,MC-1597,MC-1598,M5-188]

Inventory to G/L Audit Report

The Check Inventory Against G/L report is now called the Inventory to G/L Audit Report.

[MC-1594]

Update Cost/Price make the questions more clear

The Inventory Update Cost/Price program has some minor changes: There is a change to the way the user specifies whether the Inventory Master and Inventory Warehouse files are updated. Before, the user entered "0" for the first warehouse if they wanted to update the Inventory Master file, and entered a non-zero last warehouse if they wanted to update the Inventory Warehouse file. Now there are two new fields: Update Inventory Master and Update Inventory Warehouse. The warehouse range will now mean what it does in other programs: A beginning warehouse of 0 means the first warehouse and the ending warehouse of 0 means the last warehouse. The warehouse range will only be asked for if the Update Inventory Warehouse flag is "Y".

[MC-1805]

Grade List has report ranges in the headers

The Grade List now has the selection criteria in the headers.

[M5-193]

Inventory Control Month-End

Inventory Control Month-End no longer allows the month-end to be run in advance. The program warns if it is run earlier than 4 days before the end of the month, and the program doesn't allow it to be run 14 days before the end of the month.

[M5-245]

Plate drawing enhancements

Plate drawing shows the tag and revision

The Plate Drawing Display now shows the tag number on the screen where the company name usually prints.

[M5-195]

Plate drawing has a print option with lot information

In the Plate Drawing Display program there is a new Print option that will print the drawing plus inventory tag information that is defined in the new special form MC 39.

[MC-1705,M5-45]

Heat Maintenance view and list options

If Heat Maintenance is called (Heat option from Inventory Lot Entry/Change) and the heat has already been entered, the program will give you an option prompt to view, change, or delete the heat. It used to put you in the change mode every time. The default is to view so you can see the entries screen by screen instead of field by field. There is also a list option on the function prompt to take you to the Heat List program.

[M5-142]

Part inquiry change

The part inquiry, "?P" that prompts for a product line, now starts at the exact match when looking up part descriptions, and then includes all of those that follow. This is specifically so that the user can start with a specific size when there are many parts in the list.

[M5-142]

In-house certs and O/E special forms allow grade/heat

The In-House Certification Print and all of the order entry special forms programs now allow both the Heat and Grade fields to be printed on the forms.

The In-House Certification program allows a single tag to be selected by just entering the tag number instead of forcing selection via the Inventory Lot Inquiry.

[M5-147]

Inventory Transfers

I/X reports ask for part number ranges

The following inventory transfer reports now ask for a part number range. The range selections are printed in the header:

- Open Transfers by Whse/Due Date

- Transfer Discrepancy Report

[M5-189]

I/X receipt update better restart and logging

The I/X Receipt Register and Update no longer prompts the user if the Inventory Transfer G/L Update report printed okay. The report is now called "Inventory Transfer G/L Report" and just prints at the end.

If G/L is posted in summary for any account, the summary posting now says "Summary Postings from I/X Rcpt".

[M5-219]

Physical Inventory

Physical Inventory Update Counts

Physical Inventory Update Counts no longer prompts to view users who are still entering counts since that is handled automatically with the update tracking when the update is first run.

[M5-245]

P/I reports print P/I tag and count sheet

The Physical Inventory Results prints the P/I tag number and prints the report ranges and selection in the header.

The Physical Inventory Variance Report asks to print the P/I tag and location. It also asks to print the lot comment instead of using the Legs Description Flag in the Control file. The selections are printed in the header.

The Physical Inventory Count Sheet is on the menu and prints from the Physical Inventory Lot file. The tag, P/I tag, and location are printed. The selections are printed in the header.

[M5-192]

Print tags from physical inventory

The Physical Inventory Counts allows the # tags to print to be entered so that the tags can be printed before they are updated. The tags are printed from a new barcode program "Physical Inventory Tag Print".

The Physical Inventory Counts program also only allows fields to be entered that will be updated to the Inventory Lot file. There are new inquiries when finding tags by the tag/revision.

[M5-207]

Select Tags for Inventory allows the P/I file to be cleared

The Select Tags for Inventory program now allows you to initialize the Physical Inventory file completely but only select a range of warehouses for counting.

[MC-1512]

Flag Uncounted Tags as Counted changed to ask for warehouse range

The Flag Uncounted Tags as Counted program will now ask for a warehouse range. The user can enter "E" at the first warehouse to end the program.

[MC-1557]

Management Reports

Expected Cash Flow Report has in-transits and P/O receipts

The Expected Cash Flow Report has two new columns: P/O in-transits and open P/O receipts. If the P/O-A/P Interface is not being used (i.e. if A/P invoices are not being entered in the purchasing system, then the "Use P/O-A/P Interface" flag in the Control file should be set to "N".

[MC-1583]

Contacts

Contact Maintenance enhancements

Supports mail groups

The Contact Maintenance program has the following changes:

1. Either a first or last name must be entered, they cannot both be blank.

2. The email address is validated, it must contain both "@" and ".", or be valid in the MAILGRP file.

3. The email option will send an email to a mail group as long as the total length of the addresses is < 256, otherwise you will get a message that you can't do that. Highlights address and phone if they are overridden

If the company name, address, phone, fax, or the phone extensions were overridden from the master record, they display in highlighted text. Fields which were not overridden will display in dim text.

The "sYnc" function displays only if there is a linked-to file and the address or phones were overridden.

First contact is displayed

Contact Maintenance displays the first contact for the master record when the user hotkeys to Contact Maintenance. The contact ID is also displayed for reference, but it cannot be changed.

[CN-15,CN-17]

New auto fax flag

There is a new auto fax flag in the Contact file that is similar to the auto email flag. The default will be that auto fax is on, so it will have to be set to "N" for any contacts who should not receive a fax. The auto fax flag will be used by the Forms system for any form that is set to fax via the "to" contact information: If the contact is set to "N" for the auto fax, then the form will not be faxed. The default flag for new contacts is in the Contact Control file.

[CN-28]

New Update Addresses in Contacts

The Update Addresses in Contacts program updates the addresses and phone numbers in the Contact file to match what is currently in the linked-to file for any address or phone number that was not overridden. This is necessary if you are using report writers to print the address and phone information directly from the Contact file.

The fact that the program was run is logged in the Program Log Inquiry.

<div align="right">[CN-18]</div>

Contact Inquiry enhancements

The Contact Inquiry is available from specific programs (like Order Entry) to view all of the contacts according to the Contact Plan you have set up.

General contacts are available to be displayed

General contacts can be made part of a contact plan so that they will display along with the contacts for the master file. All general contacts can be made available, or only a specific type. For example, you may want to include the general contact type "employees" to be made available as well as the customer's contacts when emailing a document.

<div align="right">[CN-17]</div>

Uses the general inquiry

The Contact Inquiry program uses the general inquiry so that you may search for specific words in the available contacts, see detail from the inquiry, etc.

<div align="right">[CN-23]</div>

Check Program: Display that contacts exist

The Contact system will now display that Contacts exist on any screen where the Contact Maintenance hotkey calls up the contact automatically. If any contacts exist, "Cntcs" will print on row 3 column 1. The setup for this is in the Check Program on the utilities menu.

<div align="right">[CN-27]</div>

Contacts release 2.00.00

For detailed operational changes see this document: CN020000OPC.pdf.

No more CNTACT.INI; information is now in files

The CNTACT.INI file is being replaced by regular files. This makes it possible for the users to maintain the files and to inquire on them.

Contact plans

The user can now set up contact plans for those programs that access the contact system directly. In this way they can customize which files and file types are accessed.

Security

There are more options on contact security: The user can specify who has access to view, add, change, and delete by file type. There is also a new option to restrict a particular file type that only a contact administrator can change or delete them.

<div align="right">[CN-30]</div>

Document Management

Document Management release 4.00.00

- Added option to allow wildcards to be used in storage locations.
    - %YYYY% - Replaced with current 4 digit year
    - %YY% - Replaced with current 2 digit year
    - %MM% - Replaced with current month
    - %DD% - Replaced with current day
    - %SYS% - Replaced with document system
    - %TYPE% - Replaced with document type
- Storage directories created automatically if they don't exist (and you have permissions).
- PDF documents can be treated as a native image type and viewed directly, broken up into multiple documents, or combined together.
- New option to email images as PDFs.
- New option to delete documents after they have been added when using the "read" function.
- Support for wildcards in the change document location program.
- New program to change all default document locations.
- Much quicker DMS client startup by moving the fax option into a separate program.

See the operational changes document (DM040000OPC.pdf) for more information.

[DM-117]

New options when scanning using barcodes

There are new options in CCDMS when adding documents using barcodes. The user may now, optionally, choose to allow the user to override the reference numbers that were read from the barcodes. This allows the user to fix barcodes that might have become unreadable. There is also now an option to treat consecutive documents that have the same reference number or numbers as one multi-page document; before the change, it would treat each page as a separate document.

To setup these options, go into the "Workstation" settings (either from Document Management Client Configuration or from your Windows menu) and set the new options on the Barcode Settings tab.

[DM-128]

The DMS Interface Program enhancements

Handles multi-program report documents

If a menu option prints more than one report and the user hotkeys to see the associated DMS documents (program "DM010"), the interface will show all of the different reports printed.

The window title will now say "Documents for Program: XXXX Cycle where XXXX is the first program in the cycle. For example, O/E Day-End will print "Documents for Program: OE100 Cycle (99 found)" and all of the day-end reports will be displayed.

[DM-132]

Can view document details without change or delete permissions

For users who do not have change/delete permissions, there will be a new option "deTl" (for detail) that will take them to the detail screen.

[DM-189]

Change Document Paths enhancements

Add more selection criteria

The Change Document Paths program (DM190) has been updated to make it easier to move documents. It now does the following:

- Add system selection criteria.

- Add begin/end scan date selection criteria.

- Allow the use of document variables (%YYYY%, %SYS%, etc.) in the "new" path.

[DM-141]

Optionally creates a batch file for the move

A new prompt to create the batch file has been added to the program. The batch file will be created in the "INI" folder with the name DOCMOVE_DATE_TIME.BAT and the full path/name will be displayed upon the completion of the run. This batch file can then be run from Windows to move the documents.

[DM-142]

Document Search has a new option to verify if documents exist

There is a new option "Verify Document Exists" that can be selected to print a report of Document Storage (IMGSTOR) records that don't have a corresponding physical document file.

[DM-167]

Convert images to PDFs

Image-type documents (TIFs, JPGs, GIFs, etc.) can be converted to PDFs when they are added to the Document Management system by changing a setting in the Document Management Control File: Save Images as PDF.

[DM-170]

@DM printer now pulls up the document to print

The Document Management printer options (i.e. printers that start with @DM-) will now open the document that was just created and saved in DMS. This will allow the user to view the document they just created and print it to their own printer if they desire. This will also be a good alternative to pass-through printing.

If the DMS client needs to be called, the documents will not be opened automatically for viewing.

Notes:

- If the user wants to file to DMS and always print to a particular printer, then they should use the Forms option to both file and print.

- If the user wants to view a document that does not need to be filed, then they should use a PDF printer, which is also a good alternative to pass-through printing.

[DM-175]

Add documents via drag/drop

Documents can be dragged from Windows explorer or from email attachments and dropped directly on the "read" tab list box when adding documents to DMS.

[DM-179]

Document Management release 4.20.00

This mod releases the 4.20.00 version of DMS. See the operational changes for more details (DM042000OPC.pdf).The following is a summary of features:

1. Documents can now be stored which are not connected to any file/system in the software (miscellaneous documents).

2. User Security has been added to the system and document level.

3. Activity tracking has been added to the document inquiry with the ability to track additions, changes, deletes, moves, archives, and emails.

4. Document search has new criteria of the "add user" and "add workstation".

5. The CCDMS client now allows documents to be pasted into the add window (formerly only through browsing or drag/drop).

6. The default action for <Enter> in the document inquiry (DM010) is now view instead of change.

7. The substitution character (tilde ~) for invalid filename characters can now be changed.

[DM-185]

Forms

Forms Menu has new options

The Forms Menu has frequently needed programs from other systems so that setup can be done without having to switch between menus.

[M5-50]

New View OVL Printer Init Codes

The View OVL Printer Init Codes program displays any printer initialization codes that were entered when a PCL file was converted to an overlay file. The codes dictate items such as cpi, line spacing, etc.

[UT-914]

Forms setup enhancements

Email sets "from" address to current user if not already set

You can now set up a form in the forms package to email that does not have a "from" email address defined anywhere, and the form will be emailed from the user that printed it. The user must be in the Email Names file. If the user is not found in the Email Names file, then an error will be generated that the mail cannot be sent without a "from" name.

[EM-19]

Changes to variable overlay/attach names

Forms can be set up to use different overlays depending on a variable that prints on the form (i.e. the branch number). If a variable overlay name is used, a default overlay with no variable name should be created, and then any overlays that are different. The program will look first for the specific overlay using the variable, and then, if not found, will use the default overlay with no variables.

[FR-40]

Allow DMS attachments on emailed forms

The Forms system now has the ability to attach documents from Document Management to an emailed form. What document types are attached can be defined by form, and they can be further defined by a specific code that is printed on the form. A possible use for this would be to email the MTRs for an order when the invoice is emailed.

[M5-52]

Forms use the auto fax flag from contacts

There is a new auto fax flag in the Contact file. Only contacts that are flagged to automatically fax will be faxed when faxing via the "to" contact information. If the contact is set to "N" for the auto fax, then the form will not be faxed. Existing contacts that do not have the flag set will continue to automatically fax as they did before.

[M5-54]

Email

Global email include text flag

There is a new Include Form Text in Email flag in the Company Control file that determines whether the default for the Email package will be to include the text of the attachment in the body of the email. The default is to include the text in the body of the email.

This setting is effective if you have defined a user-defined form to email directly instead of printing and going through the Forms system. The Forms system has this setting on every form.

[EM-27,UT-881]

Email send static text based on overlay name

The static text sent in the body of emails with attachments can be customized by the overlay name: EM_*.TXT files, where * is the name of the overlay without the extension.

@EMAIL printer now remembers the last "To" address

When printing to the email (@EMAIL) printer, the "To" address will now default to the last "To" used for that user.

Support for SSL encrypted email servers

The email programs support email to an email server that requires SSL encryption (e.g. gmail).

Faxing

The fax name can be included in the fax logs

System administrator change: You can now display the fax name (e.g. %F000025) in the fax logs. This is done by clicking on the Fax Status tab in CCFax, and then right clicking on the grid titles. You will be presented with a list of fields that can be displayed. Check the UserData option. You can then use your mouse to click and drag the columns to the right position and size them. The fax name in the fax logs makes it easier to match up the CCFax log and the FaxMan log.

Faxing release 3.00.00

Stop Continuous Jobs is used in place of Stop Faxing. Send Faxes can be run in background in Windows using Run Background Jobs. See the operational changes: FX030000OPC.pdf.

Fax gateway to email support

Faxing now supports internet-based faxing via email (for example, ringcentral.com). In this scenario the fax is transmitted to the service via email and then the service sends the fax. When transmitted this way, the faxes are immediately set to the status "acknowledge". An email should be returned from the fax service indicating the actual fax transmission success/failure.

Barcode

Barcode Reader Menu

The Barcode Reader Menu was re-organized to have the entries under the main categories of "Inventory" and "Orders".

Warehouse range prompt

The Barcode system has a new Control-file setting that determines whether the inventory warehouse range will be prompted for each time the user runs an inventory-related program from the menu, or if it prompts for the warehouse range only the first time after the user logs in. In addition to this, the warehouse range can be changed on demand from the Barcode Reader Menu by typing in "W" at the function prompt.

[BC-17,M5-38]

Define primary inventory quantity

The primary inventory quantity to be entered can now be defined in the two barcode entry programs that deal with inventory: Allocations and Physical Inventory. If the primary quantity for the product line needs to be length or pounds (rather than pieces), then set the Primary Quantity flag in the Product Line file.

[BC-18,M5-42]

Barcode inventory change locations

Allows non-lot inventory for each-types

The Change Lot Locations program now works for non-lot inventory if the product line is an each type. Enter "L" at the tag field to toggle to non-lot, then "L" at either the warehouse or part field to toggle back to lot inventory

[BC-21]

Activity tracking change inventory location

An activity tracking record is added when the location is changed from the Barcode Change Locations program. The category is "ITAG" and the activity description is "CHGLOC". The Inventory Lot Entry/Change program does the same.

[BC-16]

Barcode physical inventory counts

Allow non-lot for each-type inventory

Enter Physical Inventory Counts now works for non-lot inventory if the product line is an each type. Enter "L" at the Tag field to toggle to non-lot, then "L" at either the Warehouse or Part field to toggle back to lot inventory. The "recount" question defaults to "Y", and counts can be added to an existing count (pieces and pounds) by typing in "A" or "+" before the number being added. To subtract from the existing count, enter "-" followed by the number to subtract.

Second quantity can be entered

Physical Inventory now allows a second inventory quantity field to be entered. Also, in the Physical Inventory program, the counted quantity defaults to the system quantity.

[BC-18,BC-19]

New Enter # Tags to Print for Inventory

The Enter # Tags to Print program allows the # tags to print to be entered for inventory tags, both lot inventory and each-type, non-lot inventory. The # tags defaults from the Print Tags field in the Product Line file.

[BC-22]

Allocate Material allows lot dims < needed dims

Barcode Allocations allows the lot's dimension to be smaller than the needed dimension. The program will display a warning and the user will have to enter the quantity to allocate.

[BC-27]

Barcode tags printed from physical inventory

Inventory tags can be printed from the physical inventory before the inventory is updated to the live inventory. The number of tags to print is entered during the Physical Inventory Counts (PI020) and defaults from the Product Line file for new tags. If the # tags to print is entered when the counts are entered but not printed, then the # tags to print will update to the live inventory system when the counts are updated.

[BC-28]

MCFile

MCFile interface prints tag number

The program MCFile Interface program (MI010) reads, displays, and allows changes to the tag number. The program has also been changed to not prompt for the email address when faxing, and to not prompt for the fax number when emailing. The tag number is one of the fields that can be printed on the edge of the MTRs.

[MC-1530]

MCFile to Document Management and emailed with another form

MCFile documents can be moved to Document Management when the order and invoice documents are flagged to print if the material is allocated. See the Forms system for how to attach the MTRs to an email with the invoice or order. This change is available only on Windows systems.

[MC-1657]

Flag MTRs for printing can now be emailed

MTRs that are printed when an MCMS form is printed can now be emailed rather than printed for selected customers. To implement the email MTRs feature, set up the new "from" and "to" contacts in the Control file and add the contacts for the customer and/or the ship-to when the A/R is by ship-to.

[MC-1674]

Web Interface

Web default and override customer

The web default and override customers give you a way to set default and/or override information for orders and quotes that are created via a website. If no customer is entered, then that feature will be inactive. See the context-sensitive help for these fields in the Control file.

[MC-1672]

New MCCart feature

The user can access the Order Cart program using a hotkey from the Detailed Inventory Inquiry screen. Once there are items in the cart, then the program can be accessed from any screen using the hotkey. The cart items are written to the Cart files using the login as the key. The cart items can then be turned into a quote or an order.

[M5-89]