



MCMS 6.0
Operational
Changes

August 14

2019

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



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Summary of Major Enhancements

BANK RECONCILIATION (ADD-ON PACKAGE)

The Bank Reconciliation system consolidates deposits, checks and miscellaneous transactions in one file. It allows that file to be reconciled with a bank statement either manually or automatically by using a downloaded file from the bank.

ACCOUNTS PAYABLE

- Easier A/P Invoice and Check Entry programs
- New payment methods for vendors: ACH, electronic payments, and credit cards. All payments interface with Bank Reconciliation if installed.
- Inactive vendors. Vendors can be flagged as inactive so the historical activity is maintained.
- Vendor totals can be greater than \$21 million

MCMS

- 7-digit A/R invoice numbers (was 6)
- Inactive customers and ship-to addresses. Customers can be flagged as inactive so the historical activity is maintained.
- The customer inquiry can show information for a single ship-to customer or all
- Improved automatic cash entry
- Inactive part numbers. Parts can be flagged as inactive so the historical activity is maintained.
- Expanded heat number to 18 characters (was 12)
- New transfer history inquiry
- Improved vendor/purchase order inquiry
- P/O line information windows to see previous buys for the material

DOCUMENT MANAGEMENT

The DMS files can be converted to be in SQL.

EMAIL

Emails can be queued rather than sent immediately so that programs that email will run faster. In addition, the user can see the emails sent and fix any email addresses that are invalid.

BARCODE

Code 128 is now supported, in addition to Code 39.

UTILITIES

Companies, users, default printer, printer groups, security groups, are now maintained in files for each user. There is an easy interface for a user to change their default printer.

Larger files (larger than 2.1 gb) can be maintained (i.e. invoice history does not need to be purged after several years).

General: Utilities and System-Wide Changes

Menu enhancements

The menus in MCMS have new functionality:

- 1) **Change companies:** If you have access to more than one company, you can enter 'C' at the selection prompt to change companies. You can also set a default company so that you can go directly to that company when you login instead of first getting the Available Companies Menu.
- 2) **Select printer:** When you enter 'P' at the selection prompt to select a printer, you can set your default printer from there. You can reset your current printer to your default using the F9 function key. The program prompts to display their text files after a text file has been selected and the user selects a different printer or the same text file as before.

[M5-544]

Login Company Information

New login files store company login information. The information includes the home directory, the path, first program to run, and the BBPREFIX (locking prefix for each company). These files will be used in place of the CCCHGCO.IN file that we now use.

User Information

New user files store information about each user and about which companies the user has access to. The user's printer is stored in only one place, in the new User file. The User Company file contains a record for each company the user has access to, their security group, and whether they are a system administrator for that company. A new user can be easily copied from an existing user, and all of the privileges will also be copied.

MCUser Maintenance

The System Administrator and Run from Menu fields are now maintained in the User Company file. The Menu Security Password is maintained in the User file.

[M5-538,M5-540]

Program Security

A new program security system exists where both administrator and default privileges can be defined for a program. Then only special privileges need to be created for a security group or user. (A/P 8.0 will use this new system for security on Vendor Maintenance and the Vendor Inquiry.)

Large files

Larger files (larger than 2.1 gb) can be maintained (i.e. invoice history does not need to be purged after several years).

[UT-1302,M5-526]

Special forms keep line information together optionally

The forms programs that have line information followed by comments, allocations, etc., now have an option that can be set on the form to keep the line information together. In other words, if a line with its information cannot all fit on the current page, then the program will start the line on the next page.

Use the Special Forms Maintenance to turn this feature on in any form where it is desired (sales orders, quotes, inventory transfers, and purchase orders).

[MC-1922]

Entry Jobs Inquiry option to remove all disconnected entries

The Entry Jobs Inquiry has a new option to clear all disconnected jobs. This makes it easier to clear entries when a user is disconnected from the system.

This feature can also be setup as a hotkey so that users can run it without having access to the utilities menu:

```
Program: UTDLEJ /DEL_ALL  
  
Description: Remove Disconnected Entry Jobs  
Program Type: B  
  
Close/Reopen Files: N  
Save/Restore Screen: N
```

[UT-1152,UT-1209]

Update Jobs Inquiry option to view the log file

The Update Jobs Inquiry has an option to view the log file if one exists that is associated with the update. The log file shows the details of the progress of the update.

[UT-1158]

Hotkey Programs Maintenance new inquiry function

Hotkey Programs Maintenance has a new inquiry function that displays hotkeys by program and shows all of the field entries.

[UT-1199]

Order Entry and Quotes

Inactive customers and ship-to customers

Customers and ship-to customers can be flagged as inactive so that no new orders or quotes can be entered against them, but history would still be available for viewing. Orders already entered with a customer that becomes inactive after the order was entered will continue to be processed, but an ****Inactive*** message will be printed in reverse video in both Order Entry and Shipping Entry.

Inquiries will display ****Inact*** in front of the customer name for customers that are inactive.

[M5-403]

Customer List test for activity and add ranges

The Customer List prompts for more ranges and prompts for activity.

For activity, the activity is based on the last invoice date and open orders. You can select recently-active customers only, inactive customers only, or a range of dates based on the last invoice date.

The ranges that can be entered are the following: customer since dates, branches, sales territories, and inside and outside salespeople.

[M5-402]

Customer Inquiry Enhancements

Option to view for a single ship-to

The Customer Inquiry can now display information for a particular ship-to customer or all ship-tos. If a single ship-to is selected, then only quotes, orders, and invoices for that ship-to will display. On the customer information screen, the ship-to defaults will display. If the customer is set to keep A/R by the ship-to, then the YTD and history for the ship-to will display.

The ability to enter a specific ship-to can be restricted with the "X-prg opts" function. By default it is turned on, but you can make it available only for those customers that are flagged as "A/R by ship-to address".

The detail screens now have a restart/find option that calls the inquiry so that search is available and a particular detail line can be found and displayed.

In place of the "new customer" function, all screens have a "find customer" function to find a customer, along with next/previous functions, that will either find the next ship-to for the customer or the next customer. The "find customer" inquiry can be customized in the "X-prg opts" function to either show only customers or to display both customers and ship-to customers.

The Credit History Inquiry also can display for a particular ship-to customer.

The ship-to that can be selected is all ('A' or blank), 0 (have to type in 'N'), a ship-to for the customer, or the will-call ship-to numbers.

[M5-415,M5-580,M5-593]

Quotes are sorted by entry date

The Customer Inquiry now displays the quotes by the latest entered date instead of by the highest quote number.

[MC-1923]

See unposted A/R Invoices

The Customer Inquiry now has an option to view the unposted A/R invoices when on the customer information screen. These are invoices that have been through the Invoice Update but have not been through O/E Day-End. If there are unposted invoices, there will be an '*' next to the A/R Balance field, and the 'Unp a/r' function will be available.

[M5-507]

Program options on quote and A/R history screens

The restart function no longer prompts for the as of date and part number when in the quotes or A/R history screens; instead there is an options function "X-opts" available on those screens.

[M5-507]

Functions more consistent

'Cust info' is now 'cust Info' and 'Inq cmnts' is now 'Cmnt'.

[M5-507]

Detail option displays a menu

When selecting an order for detail, a menu displays with the orders to select. Enter the line number or use the arrow keys to select.

[M5-507]

Days delinquent

There is a new field Days Delinquent that is the difference between the average days to pay and the minimum days past due.

[M5-507]

A/R ageing by invoice or due date

There are program options that allow the A/R ageing screen to be by invoice or due date and where the ageing days can be set. Use the "X-prg opts" function to set them.

[M5-507]

Restrict screen access for some users

The Customer Inquiry now checks what programs the user has access to before allowing access from this program. This includes Sales History and A/R Credit History. Also, if the user does not have access to the Invoice Inquiry they cannot see A/R, A/R History, or the Ageing screens. If the user does not have access to the Open Order Inquiry or the Quote Inquiry then they cannot see the open order screen or the quote screen, respectively.

[MC-1843]

Open orders display both statuses

The open orders screen of Customer Inquiry will now display both the hold and order status in the "Status" field if the order is both on hold and has been assigned an order status: HHH|SSS. Before, the order status would have printed since it took precedence over the hold code.

[MC-1988]

Order and Quote Entry default contact new options

The Order and Quote Entry, and Create Order from Quote programs now allow new options on how the contact for the order is selected. Options are to not default the contact name so that it has to be selected, and to force the entry of a contact rather than typing in the name. And, the contact can be forced to have an email address.

There are 2 new settings in the Control file under "Contacts" that can be set separately for Order Entry and Quote Entry:

- **Default Contact Name:** Set to 'Y' to default the contact name from the contact plan as it has done before. Leave blank to not default so that the user has to choose a contact.
- **Force from Contact:** Set to 'N' to work as it has before where the contact name can be typed in or selected from the Contact file. Set to 'Y' to force the contact to be from the Contact file. Set to 'E' to force the contact to have an email address. Because there could be some contacts that don't have email addresses, the entry programs force the user to enter 'YES' to accept a contact with no email address when the 'E' option is chosen.

The contact name by default is now set to be a required field, although you can change that default. This forces the field to be entered. If the 'Force from Contact' setting is 'E' or 'Y' and the field skipping is set to "required", then the contact inquiry will pop up automatically when the user hits <Enter> instead of having to type in '?'.

In Order Entry, Quote Entry, and Create Order from Quote the contact name now only defaults from the contact plan. (It was defaulting to the contact name in the Customer or Ship-To Customer files even when the default was removed from the contact plan.)

The email address displays next to the contact's phone number.

The prospect contacts are now available from Order Entry. In this way a contact doesn't have to be entered again under the customer.

[MC-1870,M5-562,M5-571]

Create Order from Quote allow change to restricted fields

Create Order from Quote now allows the warehouse, discount, taxable flag, price list, and stock flag to be changed when creating the order, but the help indicates that the lines will not be changed. The fields are still printed in the dim font to indicate that these normally shouldn't be changed in this program. If these fields need to be changed, they should be changed on the quote before creating the order, or change them on the order once it is created so that you are prompted with the following:

The default warehouse has been changed. Do you want to change all the lines?

[MC-1862]

Order Cart (MCCART)

The Order Cart¹ program has new features:

- The contact can now be entered. It follows the same rules as Order Entry and uses the skip field from Order Entry to determine whether the contact is required or not.
- If a customer or part is inactive, you cannot create a quote or an order.

¹ The Order Cart (MCCART) program allows you to add inventory tags to your own cart from the Lot Detail Inquiry program, and then create either an order or a quote from that inventory. It is run only from a hotkey.

- There are program options that can be set for whether some prompts display and what the default answers are. The program options can be accessed from the "Cust" option and then "X" for program options.
- Added security so can create an order or a quote only if the user has access to that program.

[M5-595]

Order Entry

Invoice Inquiry and Order Inquiry new functions

The A/R Invoice Inquiry and Order Inquiry programs have new functions.

The "N" function for a new invoice or order is now "F" for find to be consistent with the other programs. The "find" option no longer clears the screen (like the "new" order or invoice function did). Inquiries will start with that invoice or order if just a "?" is entered.

In the A/R Invoice Inquiry, to switch between finding by the invoice or order number, the user needs to type in "F" to switch. (Entering a blank or hitting <Enter> will switch between finding by the order or invoice only if no invoice or order has been entered yet. This makes it easier if the A/R Invoice Inquiry is run from the menu and you want to find the invoice by the order number.) The new "next" and "previous" functions will either display the next invoice for that customer or the next order alphabetically for any customer. If you are searching based on the invoice number, you can use the "find" option to find an invoice for a different customer.

The Order Inquiry has new "next" and "previous" functions that will display the next order for the displayed customer only. You can use the "find" option to find an order for a different customer. (The Quote Inquiry has the same change.)

Both the A/R Invoice Inquiry and the Order Inquiry have a new "payment" function that is available for orders that have been cashiered. The Payment Information Window now displays the invoice number and invoice date if the invoice was printed. It also prints whether the invoice is waiting to be printed.

[M5-548,M5-560,M5-593]

Invoice Print easier entry

The Invoice Print programs (both the regular Invoice Print and the Point-of-Sale Invoice Print) print the screens in advance of entry and allow you to back up to the previous prompt. There is a different screen for the initial print and the reprint. When reprinting, the available invoices that were already printed by the computer can be seen in the inquiry. Standard entry options are used, including the availability of inquiries and the standard date entry features.

[M5-533]

Prospect contacts are available for Order Entry

The prospect contacts are now available from Order Entry. In this way a contact doesn't have to be entered again under the customer.

[M5-562]

Order Entry view recent orders for a customer

Order Entry has an option to view recent orders for a customer at the Customer's Purchase Order field.

[M5-505]

Shipping Entry can email salespeople

Shipping Entry has the ability to email the salespeople on the order when an order has been shipped. The email can be for only shipments with backorders or all shipments. Either the inside salesperson, the outside salesperson, both, or neither can be chosen. If an order is subsequently cancelled, then the same salespeople will be notified.

The flags to set which salespeople are emailed are in the Control file in the "Invoicing" section.

[M5-451]

Pick List prompt change and allow to be quick printed

The pick list can now be quick printed and is defined in the User-Defined Forms Maintenance program. This gives a lot more flexibility on when and how it is printed. It has the same functionality as the other sales order user-defined forms except that it can only be printed (not faxed or emailed unless they are defined in MCFORMS). The Pick List Print Type can be defined in the forms definition.

You will notice a change in how the program prompts to print the pick list if you had it set to prompt you in the Control file. It used to prompt when you ended the order:

Do you want to print a pick list for this order? (Y/N):

The prompt will now appear in a window and will look like this:

Do you want to flag Sales Order #S4820 to print form #3 'Pick List Print'? (Y/N): Y

The items that can now be customized:

- If the pick list appears on the quick-print menu
- When the pick list is flagged to print
- Separate definitions for new orders versus changed orders
- Whether to print the pick list if the order is on hold
- Which comments to print based on the comment print flags
- Which Pick List Print Type to use when quick printed

[M5-482]

Sales Backlog by Promise Date more fields

The Sales Backlog by Promise Date prints the freight code, the ship-to number, and it prints the ship-to name if it is different from the bill-to customer name.

[MC-1907]

Assign Allocations indicates allocations even if 0 qty

Assign Allocations prints "Has Alcs" if the allocated amount is zero but there are some allocations assigned to the line (possibly processing allocations for non-material lines).

[MC-1871]

Bill of Lading and Stop allow freight carrier

The Bill of Lading and Stop program allows the freight carrier to be entered.

It also allows a blank to be entered to get the next BOL number instead of having to type in an 'N'.

[MC-1881,MC-1856]

P.O.S. orders default cashier

The cashier now defaults from the MCUser file for P.O.S. orders.

[M5-416]

Commission Report option to select salespeople in customer

The Commission Report now has an option to select the salespeople from the customer or from the invoice header. It used to always select by the salespeople in the invoice header.

[M5-485]

Shipping tags skip for credit memos

The Flag Orders to Print Shipping Tags program will prompt if the order is a credit memo to be sure the operator wants shipping tags for the order.

From all of the other programs that flag shipping tags, credit memos will be skipped.

[MC-2029]

Quotes

Quoted Part Entry sorts by the entry date and new find option

The Quoted Part Inquiry now uses the quote entry date for sorting instead of the quote number. If a dimension is entered, then the lines are sorted first by the dimension starting with the dimension entered in ascending order, and then by the quote entry date in descending order. If no dimension is entered, then the lines are sorted by the quote entry date in descending order so that the newest lines display first. Both plate dimensions are now both compared against each line so that only the plates with both dimensions greater than the entered ones will display.

The "New part" is now "Find part" to be consistent with the other programs. The "Redisplay" is now a "Rstart/fnd" option that allows searches on the displayed quote lines.

[M5-537]

Quote Inquiry new functions

The Quote Inquiry now has an "F" for find function instead of the "N" for a new quote function to be consistent with the other programs. The "find" option no longer clears the screen (like the "new quote" function did). Inquiries will start with that quote if just a "?" is entered.

The Quote Inquiry has new "next" and "previous" functions that will display the next order for the displayed customer only. You can use the "find" option to find an order for a different customer.

[M5-560]

Prospect Management

Can hotkey to prospect management programs

The Prospect Entry, Comments, and Parts programs can now be called from a hotkey and the prospect will be displayed automatically if the calling program displayed the prospect number.

[PM-90]

Prospect management activity tracking for customer change

Prospect Entry will ask if the customer should be changed only if one of the fields in the customer will be changed (i.e. alpha, name, address, phone, or fax); it used to ask if any field in the prospect was changed. The program still asks only if authority is given explicitly for this feature in MCUser.

[PM-93]

Bank Reconciliation

The Bank Reconciliation system consolidates deposits, checks and miscellaneous transactions in one file. It allows that file to be reconciled with a bank statement either manually or automatically by using a downloaded file from the bank.

Bank Reconciliation is a new system that is run from MetalCentric and needs to be purchased separately from MCMS, but there are some programs that are also needed in MCMS to interface with other systems, such as A/R and A/P.

[BR-1, BR-2, BR-9]

Accounts Receivable

7-digit A/R invoice numbers

MCMS now allows up to 7 digits for the A/R invoice number.

[M5-533]

Automatic Cash Entry new options

The Automatic Cash Entry program has a lot of new options, including program options that can be set up by user. The biggest change is that the automatic application can be turned on or off and it can be selected "on the fly" if it is turned off for the user.

Changes can be made to the lines starting at a particular line to the end of the page, and backup is allowed. '=' or '+' can be entered for the amount to use the invoice balance. ('=' is better if you are using the keyboard and '+' is better if you are using the number pad.) The entry of discounts can be disabled if it is not used.

The sales order prints on the invoice line. Unapplied cash can be entered if there are no open invoices. Invoices can be overpaid. Negative discounts can be entered. Defaults can be set up in the program options for the questions that are asked regularly. The first page of invoices displays when the customer is entered.

[M5-420]

A/R update match G/L to bank trans per month/batch

Bank transactions are now in summary per month and batch. G/L no longer uses the chart of accounts detail flag for the bank (cash) account. The default for G/L will be the same as the bank transactions: in summary by month/batch. The detail option is still available.

The A/R General Ledger Report has a "Deposit Summary by Journal/Batch" at the end of the report.

[MC-1990]

A/R Ageing allow double space in summary

If the A/R Ageing is printed in summary, the user can choose to print a blank line between customers.

[MC-1876]

A/R Detail Inquiries display the reference for adjs/discs

The A/R Detail Inquiry and A/R History Detail Inquiry display the reference for payments, adjustments, and discounts. The history was displaying the payment reference, but now displays for adjustments and discounts as well.

[MC-1847]

General Ledger

Trial balance new print options for journal totals

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 can convert account numbers

The journal import function has been enhanced to optionally convert incoming account numbers into internal account numbers.

[GL-254]

Company Maintenance has a base currency

Company Maintenance has a new base currency field. All currencies other than the base currency will then be considered foreign. Currencies are assigned to accounts in the Bank Account and A/P Account files.

[GL-261]

Accounts Payable

A/P 8.0 is a new release of accounts payable and it has its own operational changes document: [ap_opc.pdf](#). It can be found on the A/P menu context-sensitive help.

P/O-A/P

P/O-A/P Discrepancies allow range of vendor categories

The P/O-A/P Discrepancies report now allows a range of vendor categories to be entered.

[M5-406]

P/O-A/P Entry

The "invoices" and "variance" that displays for the P/O receipt now includes the invoices that are in the batch. (It used to only show the prior invoices.)

An inactive vendor is allowed if it is the same as the P/O Receipt, but "***Inact***" displays and is highlighted so it can be overridden.

The inquiry on the P/O receipts now shows only the open P/O receipts since those are the only ones that can have new invoices entered.

G/L date entry options

The G/L date is now entered after the invoice date. By default, it defaults to the invoice date entered. But, there are now program options (access this from the P/O number field) that can be set so that the G/L date will default to the last one entered, and the G/L date can be set to skip. If the G/L date is skipped, the user can backup to change it.

[M5-554]

Enhance miscellaneous expense entry

P/O-A/P Entry has a couple of enhancements in the line item miscellaneous expense entry: the program goes into "auto add" mode if the balance of the lines does not match the invoice total, the amount defaults to the difference, and the miscellaneous description is repeated from the previous line if more than one line is entered.

P/O-A/P Invoice Edit

The A/P journal is created as part of this update. (The A/P G/L Distribution report no longer needs to be run to create the journal.)

The P/O-A/P Invoice Edit prints the total of the invoices to the screen; it used to print only the variances.

[M5-457,M5-414]

Purchasing

Purchasing works with new A/P features

The MCMS Purchasing system works with Accounts Payable 8.0. The main features in the new A/P that affect purchasing:

- Inactive vendors: For vendors, new purchase orders cannot be entered, but when invoices are entered, the program will warn that it's inactive but it will still be allowed. This is because by the time the invoice arrives you have already agreed to pay. The vendor can still be overridden.
- New vendor fields
- Changes in A/P invoice entry for purchase orders
- Exchange rate is in the new A/P account

Purchase Order Entry

Inactive vendors cannot be entered when adding a new purchase order. If a purchase order is already entered with a vendor that became inactive, *Inact* will be highlighted and displayed on the screen.

There is now a "change field" option when changing the header and when adding a new P/O. This feature is similar to the one in Order Entry.

Vendor contact from the Contact system

The P/O Entry and the Create P/O from a Sales Order programs now allow the vendor contact to be selected from the Contact system and associated with that purchase order. The entry programs use a contact plan that includes the contact from the P/O address and vendor files and from the P/O-type contact. Like sales orders and quotes, the contact name uses the options in the Control file on how the contact for the order is selected. Options are to not default the contact name so that it has to be selected, and to force the entry of a contact rather than typing in the name. And, the contact can be forced to have an email address. If the Vendor Attention is set to be "required" in field skipping, then a contact has to be entered. Making it required works well if the Control file is set to not default the contact and forcing it to be from the Contact system.

Note that when contacts are added from P/O Entry, the contact type will default to the P/O Address file if there is a P/O address for the vendor; otherwise, it will default to the Vendor file.

There are 2 new settings in the Control file under "Contacts" for purchase orders:

- **Default Contact Name:** Set to 'Y' to default the contact name from the contact plan as it has done before. Leave blank to not default so that the user has to choose a contact.
- **Force from Contact:** Set to 'N' to work as it has before where the contact name can be typed in or selected from the Contact file. Set to 'Y' to force the contact to be from the Contact file. Set to 'E' to force the contact to have an email address. Because there could be some contacts that don't have email addresses, the entry programs force the user to enter 'YES' to accept a contact with no email address when the 'E' option is chosen.

The contact name by default is now set to be a required field, although you can change that default. This forces the field to be entered. If the 'Force from Contact' setting is 'E' or 'Y' and the field skipping is set to "required", then the contact inquiry will pop up automatically when the user hits <Enter> instead of having to type in '?'.

The email address displays next to the vendor attention name.

[M5-575]

Display more information about the P/O

The user who added the order and when it was added displays on the first screen. If the order came from a sales order, the last job/reference also displays. It is the last job/reference because each P/O line could have come from a different job. If the purchase order was received before, the last receipt date is also displayed.

[M5-576]

P/O quantity on same row as pieces, length, and pounds

The P/O quantity and UM used to be on row two of each line in P/O Line Item Entry, and the pieces, length, pounds, and cost were on the third row. The P/O quantity is now on the third row with its related fields. The line number is left justified so that the user can still differentiate visually where a new line starts since the quantity is so far to the left.

[MC60-2057]

P/O line information windows

P/O Line Item Entry has information windows that can be optionally displayed and toggled off and on ('W' function). The default is stored in Program Options and can be accessed with 'X' at the line number.

The history information window shows purchases for the same part and dimension and, if there are less than 10 for the same dimension, larger dimensions are shown. The types shown are open P/O lines "Opn" for the same vendor, open P/O lines for other vendors "VOp", and received purchase orders "Rcv".

The available information window displays the inventory that is available.

[M5-527]

Don't allow the due date or vendor to be changed

Skip fields can now be set for the due date and vendor so that these fields also can be set to 'X' to block changes to an existing purchase order.

[MC-1960]

Warns if change vendor on subsequent receipt

If a completely received purchase order is added back in as an open P/O, the program will not allow you to change the vendor. The vendor will be set to the vendor on the last receipt. The vendor can then be changed by a user who has access to change the vendor on open purchase orders. If the vendor is changed on an open P/O that has been received, the program warns the user and confirms that it is okay to change.

[MC-1960,MC-2032]

Additional Charge Entry (P/O Entry and Receipts)

The part inquiry only displays non-material parts since these are the only ones that can be entered.

Create Purchase Order from Sales Order

Inactive vendors cannot be entered.

The skip field for the Vendor Attention in PO010 is used to test for "required" in PO050.

The three user-defined header fields can be entered for the purchase order.

[M5-566]

Create P/O comments from S/O only if blank or 'O'

The Create Purchase Order from Sales Order program will now transfer comments from the sales order to the purchase order only if the print flag for the comment is blank or includes an 'O' flag. It was including comments that were specifically restricted, i.e. "S" for sales order only.

[MC-1921]

Vendor/Purchase Order Inquiry

The functions have changed to make them more consistent across programs. There is a "Fnd vend" instead of "New vend" and there are now "Nxt vend" and "prV" functions. The find/next/previous can be by vendor number or by vendor alpha. The "Vend info" is now "vend Info". There is a new option "A/p vend inq" to go to the A/P Vendor Inquiry in order to see checks and A/P invoice. On the detail screens, the "Find" and "Restart" are combined into "Rstart/fnd".

Displays last year and this year for totals instead of this year and next year (but can now easily go to the A/P Vendor Inquiry for more information).

This program can be setup on a hotkey and it will display the vendor automatically if it was on the previous screen.

This program has skip fields available to make some fields invisible for some users. Whether masking and invisible fields is turned on or not is based on the A/P Vendor Inquiry setup. The tax ID is masked by default.

If vendor memos exist, "VMemo" displays at the top of the screen and can be accessed by a hotkey to the Vendor Memo program. Vendor memos can also be accessed by first going to the A/P Vendor Inquiry ("A") and then "S" for memos.

If any amounts are in-transit when viewing the open purchase orders, the in-transit number will print. Select "T" to view the amounts in-transit. There is now a "Dtl" option when viewing the In-Transit screen.

Open Purchase Order Inquiry

Displays the vendor and prints *Inact* highlighted if it is inactive.

Function is "Fnd po/part/job" instead of "New po/part job".

The Open P/O Inquiry will display the P/O in-transit quantities when displaying by purchase order or part.

[M5-437]

P/O Receipt Inquiry and P/O Receipt Detail Inquiry

Displays the vendor and prints *Inact* highlighted if it is inactive.

The P/O Receipt Inquiry displays the "from" purchase order. For purchase orders that are additional charges, the "from" purchase order is displayed next to each receipt. This information is available also when viewing the header information for the additional purchase order.

The function "New po" is now "Fnd po" to be consistent with the other inquiries.

[M5-457,M5-579]

P/O Receipt Register new fields

Prints customer name on allocation

The Purchase Order Receipt Register now prints the customer number and name on the Allocations Assigned to P/O Receipts page at the end of the report.

[MC-2022]

Prints the job/reference in the header

The Purchase Order Receipt Register now prints the job/reference, if any, with the header information. The job/reference in the header is the reference of the last line entered that had a job/reference in the line.

[M5-580]

Manual close of a P/O receipt finds next open

The next and previous functions in the Manually Close a P/O Receipt program now find the next open P/O receipt.

[M5-567]

P/O In-Transit Entry

Displays the vendor and prints *Inact* highlighted if it is inactive, but still allows the P/O to be put in transit if the vendor is inactive.

P/O In-Transit User-Defined Form

A user-defined form can now be defined for a P/O in-transit, form type "T" in the User-Defined Forms Maintenance. Form 15 exists and is formatted to be used with the POIT overlay.

If any P/O in-transit forms are defined to allow to be quick printed, then a quick-print option is available at the P/O prompt in P/O In-Transit Entry.

Inventory

Inactive inventory parts

Inventory parts can be flagged as inactive so that no new orders can be entered against them, but history would still be available for viewing.

- Existing sales orders with inactive parts can be shipped and invoiced, but both shipping and the Shipment Verification will warn.
- Quotes cannot have lines with inactive parts. Existing lines can remain, but if they are changed, an active part must be selected. Lines with inactive parts cannot be made into an order.
- Inventory transfers and inventory transactions, inventory maintenance will show that the part is inactive but they will be allowed.
- Purchase orders cannot have lines with inactive parts. The total additional will allow existing ones to be updated but will show that they are inactive.

[M5-525]

Inventory Master and Inventory Warehouse

Track price and cost changes

The Change Cost/Price program writes both the old and new costs and prices to a file (CPCHG) if any costs or prices are changed. The Inventory Master Maintenance and Inventory Warehouse Maintenance now write to this same file if a user changes any of the costs or prices. A new “c/p Inq” function is available to inquire on the changes.

Skip fields and program security

Skip fields are available in the Inventory Master and Inventory/Warehouse so that some users can be restricted to not be able to change the cost. Average cost and last actual cost are blocked by default. Invisible fields can also be set.

Program security is available for both of these programs using Program Security Maintenance. Functions can be turned off or on. Also, this is where some users (such as the administrator) can change blocked skip fields.

Activity tracking in the Inventory Master

Activity tracking is available for changes in the Inventory Master file:

Cat	Code	Desc	Purpose
PART	ADD	Add Part	Recorded when a part is added.
PART	CHANGE	Change Part	The beginning and ending bytes changes are recorded.
PART	CHGPN	Change Part Number	The old and new part numbers are recorded.

PART	DELETE	Delete Part	The part number deleted is recorded.
PART	INACTV	Inactive Part	If a part is changed from inactive to active or vice versa, it is recorded.

[M5-525,M5-568]

Expand heat number from 12 to 18 characters

Inventory now allows 18 characters to be entered for the heat number.

During the conversion process, a HEAT_CONV.CSV file is created that can be used in MCFfile to change the heat numbers there to match. A conversion is necessary if any heat number has any invalid characters in them (lowercase, spaces, non-alphanumeric with the exception of “./-”).

[M5-520,M5-550]

Inventory Lot Entry calls Heat Maintenance if heat info changed

Inventory Lot Entry/Change now asks if the heat information needs to be entered if any of the heat information fields are changed: grade, heat, or vendor. The user used to have to select the 'Heat' function.

[M5-521]

Detailed Inventory List allow page break between product lines

The Detailed Inventory List optionally allows a page break between product lines. The program always does a page break between warehouses.

[MC-1969]

On-order inventory lots use due date for create date

The create date for on-order inventory lots is now the due date instead of the entry date of the purchase order, in-transit order, or inventory transfer. This helps when setting up the detail to display in the Inventory Lot Inquiry so that either the status or the receipt date can be selected and the on-order lots will still show the relevant information.

[M5-565]

Inventory Transfers

I/X add activity tracking and allocation warnings

I/X Order Entry has a function to view any allocations that are assigned to the transfer if there are any. In addition, if the due date or 'to' warehouse is changed in the header, the user will get an additional warning that this will affect allocations.

I/X Line Entry has a function to view any allocations that are assigned to the transfer line if the line is called up for editing. If the line is then deleted or changed so that the order needs to be unallocated, an additional warning is displayed with an option to abort the change.

Code	Description	More explanation
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ADD	Add I/X Order	Activity is added if a transfer order is added.
DEL	Delete I/X Order	Activity is added if a transfer order is deleted. Specific line information is also recorded with the LNDEL code.
RCV	Receive I/X Order	If the order is received, the status of the receipt is recorded.
CANCRC	Cancel I/X Receipt	If a receipt is cancelled, this is recorded in activity tracking.
DUECHG	Due Date Change	It shows the new date, the old date, and the number of days changed. If any line is allocated, that is also noted on the activity tracking.
WHSCHG	Warehouse Change	Because the 'to' warehouse affects allocations, if the 'from' or 'to' warehouse is changed, activity tracking WHSCHG is added.
LNCHG	Change I/X Line	If the line is changed, the old part and quantity are listed.
LNDEL	Delete I/X Line	If the line is deleted, the old part and quantity are listed.
UNALC	Unallocate I/X Line	If a line that is allocated is deleted (or changed to be a different part or too small of a quantity, the line is unallocated and the orders unallocated are listed. More detail can be added for allocations, if desired, using the IXLN activity type.

[MC-1991]

I/X Received and Open Inquiries

I/X Received Order Inquiry is a new inquiry on the Inventory Transfer Menu that allows the user to see the history of a particular transfer order. The Inventory Transfer History Inquiry is still available on the Inventory Availability Inquiry that shows the history by warehouse and part.

The I/X Open Order Inquiry is changed to be like the Received Order Inquiry. The find function has an option to toggle between the three sorts for finding orders.

Both inquiries have find, next, prev, and last functions for finding orders. In the open inquiry, orders can be found by the order number, by the 'from' warehouse and order, or by the 'to' warehouse and order. Both inquiries can view the lines and allocations and the order additional charges. The line additional charges can be viewed in the history by selecting detail in the inquiry. Both inquiries have an option to go directly to each other, and both have an option to view the allocations.

[M5-408]

Track allocations in inventory transfers

From the Inventory Transfer History Inquiry, the allocations function (alCs) shows who made the allocation and when. Both the old and new tag information is available. This allocation information is stored in the IXHTAG file.

[M5-407]

Order Entry don't allow actual if cost method average

I/X Order Entry no longer allows the user to transfer items at actual cost if the transfer was from an average-cost warehouse. The Cost Method field will display but cannot be changed.

[MC-1903]

Physical Inventory

Physical Inventory Counts updated and new are more clear

Physical Inventory Counts prints "Updated" or "Not Updated" when an inventory tag is displayed if the count has been entered. If a new tag was entered during the physical, then "New tag" prints next to the tag and revision. This is to give more information to the user.

[M5-515]

Contacts

Field skipping in Contact Maintenance

Field skipping is available in Contact Maintenance to speed up entry when adding a new contact. Restrictions can also be made to force entry of some fields.

[CN-46]

Document Management

DMS in SQL database

DMS can now optionally be in a SQL database. See the DMS 5.0 update notes for more details.

Forms

Forms printers can be printed to another forms printer

Now, forms printers can be chosen as the output of a form sequence. This gives the user more control of printing. For example, if a form sequence can't be emailed, it can be directed to a form that emails to a different address, or prints two copies, etc.

[FR-59]

Forms Description Maintenance better inquiries

In the find mode, inquiries can be made on the current file contents. In the add and change modes, 'I' at the form name is available for the forms printers that have been defined in Available Printer Maintenance. Inquiries are available on the contact fields.

[FR-62]

Email

Emails can be queued rather than sent immediately

Emails can now be queued instead of sent immediately. Before this change when printing a form that emailed, the program had to wait while the email server was contacted and the email sent. This could add several minutes to a form run. Now, the emails and attachments are saved and can be run by a new server program running in the background. An email status view program can be run to see which emails have been sent and which ones errored out. Also, the sender or a manager can be notified when an email fails to go through.

[EM-42]

Emails can be reviewed and resent

Emails with invalid email addresses can be reviewed and resent with the correct email address.

[EM-42]

Windows Email Setup better functionality

The Windows Email Setup now handles specific condition exceptions (i.e. different configurations for specific users, programs, forms, or from email domains) more clearly.

The program has four new functions:

- **Add** - This allows you to add a section to NTMAIL.INI for specific conditions (user, program, form, and/or domain); before this was done with the change function.
- **Find** - This displays a menu box that will show the different specific conditions that have been defined in NTMAIL.INI. This only shows if any specific conditions have been defined.
- **cLear extra** - This will remove any extra properties in NTMAIL.INI but leave the standard ones.
- **Remove** - This will remove the current specific condition from NTMAIL.INI.

The program allows you to view (but not change) NTMAIL.INI if it is in use. A message is displayed at the top of the program, and the add and change options are not shown.

[UT-1157]

Barcode

Code 128 is now supported

On the form in Barcode Forms Maintenance you can designate "128" for the barcode type which will then print the barcodes in Code 128.

[BC-37]

Intermec landscape option rotate 180 degrees

Intermec labels in landscape can now be optionally rotated 180 degrees.

[BC-30]

Coils prompt for weight and length

In both the physical inventory count and in the allocation programs, coil now prompts for weight and length instead of pieces.

[BC-34, BC-36]

Product line barcode primary entered quantity for coil

Product Line Maintenance now allows the barcode primary entered quantity to be length for coil.

[MC-1900]

New formatted simple tag print

There is a new Formatted Simple Tag Print option on the Barcode menu. This program has nearly identical options as the Simple Tag Print form. The difference between these two options is that the Formatted Simple Tag Print program can be changed to print any configuration including printing CODE 128 instead of CODE 32. Because of this, the tag number can be up to 20 characters long.

[BC-42]

Barcode allocations allow other parts to be allocated

The barcode allocation program normally restricts allocations to be the same as the ordered part. Now you can allocate other parts if you flag the product line of the ordered part to allow other parts to be allocated (BC Other Parts). This feature is useful if you are allocating several types of parts to make a fabricated part.

[BC-43]

MCFile

Allow override entry date

The Scan, Batch Add and Barcode Add options allow an override entry date to be entered.

Override the current data directory

MCFile optionally stores the current data directory in the Server tab of the Change Server Information option. If the current data directory is defined, this will override the current data directory for all users, preventing users from scanning images to their local PC.

Debugging tool

Debugging can be turned on and off within MCFile. If you press Alt-D in the System Information form, it will ask you if you want to turn debugging on or off and, if you turn it on, you can specify the output file.

Main fixes

Doesn't mess up images when rotating or annotating

Fixed problems that caused an image to be blanked out if you did a counterclockwise rotation on an image that had a default rotation.

Fixed problems with annotating PDF files.

FaxMan no longer required

MFile no longer uses FaxMan or requires it to be run unless the user wants to use faxing and they have a fax device on their computer.

Doesn't interfere with DMS or CCFax

MFile no longer stops working if either Document Management or CCFax is installed on the same machine.

Doesn't hang in the background if a cert can't print

The error handling is better in the MFile Interface Print program so that it doesn't hang if it gets an error, and it doesn't flag the image as printed.

Web Interface

Auto allocate web orders and allow warehouse override

Control Maintenance, the Web/Cart Interface section, has a new field "Auto Allocate" that, if set, will auto allocate the order when it is created even if the Product Line file is not set to auto allocate at order entry time.

[MC-1928]

Web cart service more override fields available

The Web Cart service has an option to override the warehouse when an order line is created. By default the warehouse comes from the customer information. It can be overridden for the whole order or individually by line. The promise date on a line can be overridden.

Most order and quote header information can be overridden, including the contact, ship-to, and freight.

[MC-1928, MC-1939]

New web api all S/O lines for customer

All open sales order lines for a customer can be returned to the web using the new web api.

[M5-519]