



MCMS 6.0
Update 1
Operational
Changes

May 4

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This document contains brief descriptions of operational changes made to the MCMS and related systems for MCMS 6.0 update 1.



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Order Entry and Quotes

Customer parts that apply to all customers

Customer parts can now be set up with no customer number which means they apply to all customers.

[MC601-1005]

Price scheduling for customer parts

In Price Schedule Maintenance, a price schedule can now be set up for a customer part. This allows quantity break point pricing for customer parts. The price basis can be the price in the customer part or some other basis, depending on how the schedule is set up.

Other changes in the Price Schedule Maintenance:

- You can enter the modifier as a divider. This is useful for calculating gross profit percentages. (The multiplier was already available which is useful for markups from cost.)
- Inquiries are available in the find mode so that you can more quickly see what schedules have already been entered. Inquiries are also available in the add and change modes for entering new items.

Customer Part Maintenance prints a message if a price schedule exists for the customer part.

See the related "Inventory Price Inquiry enhancements" topic on page 10.

[MC601-1015]

Default contact overrides by customer

The control-file contact flags can now be overridden by a customer. The control-file flags that can be overridden are "Default Contact Name" and "Force from Contact". This is useful if you have miscellaneous or cash customers where you don't want to force the entry of a contact, but instead want to allow a name to be typed in.

[MC601-1011]

Ship-To Address Maintenance new features

- You can look up the ship-to addresses either by the customer/ship-to or by the ship-to number; the default is by customer/ship-to. The previous and next functions will be based on how you found the ship-to. You can switch between the lookups by entering 'F'.
- You can inquire on existing ship-to addresses when you are in the "find" mode. When you are adding ship-to addresses, you can also inquire at the ship-to number to see existing ship-to addresses for the customer.
- When you are adding a new ship-to address, you can get the next available ship-to number in the same way that you can get the next customer in Customer Maintenance. You can type in a number to get the next available from that number, or enter blank to get the next number from the highest already added.
- New fields if the related customer is flagged to keep A/R by the ship-to customer:

- YTD Payments and Last Year Payments
- Highest A/R Balance Date: Reflects when the customer reached the highest A/R balance.
- ADP/High A/R Calc Cutoff Date: The cutoff date used that determined which transactions were included in the average days to pay and highest A/R balance calculations.

[MC601-1011,1019,1034]

Customer Maintenance new features

- When you are adding a new customer using the "add" function, and if you have a "Customer to Use for Defaults" set up in either your MCUser or Control file, then that customer will be used to default the customer's fields. The default customer field used to be used for quotes if no customer was entered, but now it is also used in Customer Maintenance.
- If a prospect is linked to the customer and the customer is changed, the program used to always ask if the prospect should be updated. Now it asks only if the address, phones, or alpha code are different in the prospect.
- You can look up the customers either by the customer number or by the alpha code; the default is by the number. The previous and next functions will be based on how you found the customer. You can switch between the lookups by entering 'F'.
- You can inquire on existing customers when you are in the "find" and "add" modes.
- If Customer Maintenance is put on a hotkey and a customer is displayed on the screen when you hotkey, the current customer will display automatically.
- New fields:
 - YTD Payments and Last Year Payments
 - Highest A/R Balance Date: Reflects when the customer reached the highest A/R balance.
 - ADP/High A/R Calc Cutoff Date: The cutoff date used that determined which transactions were included in the average days to pay and highest A/R balance calculations.

[MC601-1011,1019,1034]

Customer Form Fields allow view and label fields

The Customer Form Fields file now has custom headings available in the Control file so the fields can be labelled.

If form fields exist for a customer/ship-to combination, "CForm" prints on line 3 of the screen. If Customer Form Fields Maintenance is on a hotkey (MCFMCF), then the fields can be viewed or maintained. If called from a hotkey where the customer is displayed on the screen, only records for that customer and ship-to combinations can be viewed. If the user has menu access to MCFMCF, then the file can also be maintained.

See also the setup help from the Customer Form Fields Maintenance program.

[MC601-1012]

Customer Inquiry more detail

The Customer Inquiry has a new function on the customer information screen to show "more Dtl". This is a toggle that shows more fields and then, when selected again, returns to the original screen.

[MC601-1034]

Add part predefined comments if change the part

In Order Entry and Quote Entry, if you change the part on an existing line and there are comments associated with the line, the program asks if you want to delete the comments. The question gives you an option to view them first. You might want to delete them because they might be associated with the part. In addition, if the part has a predefined comment associated with it, then you must delete the comments if you want the program to automatically add the predefined comment. If there is a predefined comment associated with the new part, the prompt displays that information.

If you pull up an existing line, you now have the option of viewing the comments associated with the line if there are any.

In Order Entry and Quote Entry, the line numbers are now left justified to be consistent with purchasing.

[MC601-1016]

Markup versus gross profit percentage

In Order Entry and Quote Entry, the descriptions when marking up the price from the cost have changed to differentiate properly between calculating the gross profit and marking up from the cost. The actual calculations are the same as before, just the help has changed. In the unit price, entering 20% gives a gross profit of 20%, entering .8% divides the cost by .8 which also gives a gross profit of 20%. Entering +25% calculates a markup of the cost of 25% which also gives a gross profit of 20%.

[MC601-1014]

Tax Authority Maintenance has inquiries

The Tax Authority Maintenance has an inquiry available in the find mode.

[MC601-1007]

Order and quote forms more fields available

The "nominal gauge" from the Inventory Master is available to print with the line items on quotes and orders. For orders, it can also be printed based on the allocated material. On shipped forms, a "Shipped complete yes/no" field is available to print.

[MC601-1032]

Order Entry

Shipping Entry can view allocations

The Sales Order Shipping Entry program now has a function that allows you to view the allocations against the order. This is the same inquiry that is available in the Open Order Inquiry when on the header screen.

[MC-2086]

Invoice Print has options for sort and invoice date

The Invoice Print program now has program options that can be accessed from the first prompt when it asks if this is a reprint. In the program options, you can specify the following:

- You can specify that you want the invoices to print in order by the customer's alpha code. If you leave the option blank then the invoices will continue to print by the order number.
- If you always use the ship date for the invoice date, you can specify that here so that you don't have to type in "SHIP" each time. If you leave the option blank then the invoice date works as before where you can either enter a date or enter "SHIP".

[MC601-1021]

Shipment Verification changes

Shipment Verification and Shipment Detail Report save options

Both the Shipment Verification and the Shipment Detail Report save the options entered last by user so the prompts will default the next time the program is run.

The Shipment Verification no longer prompts to go to the terminal for the abbreviated format (Print Ship Verification in Detail set to 'N'); it always prints to the printer.

[MC601-1028]

Shipment Verification prints more header information

The Shipment Verification now prints the warehouse, branch, inside salesperson, outside salesperson, ship-to number, and ship-to name in the header information for each order. The ship-to number and name print only if the ship-to number was entered.

[MC-2070]

Flag Orders to Print Shipping Tags has program options

The Flag Orders to Print Shipping Tags program now has program options so that you can specify whether you want the program to prompt to print the shipping tags or not when the program is ended. If you do want the program to ask, then you can specify a default answer.

[MC601-1040]

Quotes

Open Quotes by Part more ranges and more fields

The Open Quotes by Part report now prompts for a range of branches, dates, and salespeople. The date can be the entry, promise, or expiration date and the salesperson can be either the inside or outside salesperson. The new fields also print on the report, along with the ship-to name.

[MC601-1013]

Activity tracking for adding and deleting quotes

Activity tracking for adding and deleting quotes is now available. It is under category "QT" and the activity codes are "ADD" and "DEL".

Accounts Receivable

Average days to pay and highest A/R balance calculations

The new ADP and High A/R Balance Update program calculates the average days to pay and the highest A/R balance for customers using a cutoff date for selecting which A/R transactions to include. The new ADP and High A/R Balance Report can be printed in summary, or it can be printed in detail to show how the fields are calculated.

[MC601-1034]

ADP and High A/R Balance Update

The ADP and High A/R Balance Update program updates customers and ship-to customers with the average days to pay and the highest A/R balance as of a cutoff date. The cutoff date determines which A/R transactions to include so that you can see the recent trend of how your customers are paying. Ship-to customers are updated only if the related customer is set to keep A/R by the ship-to. This program can be run in two ways:

1. This program can be run from the menu which will update all customers who have either paid an invoice or reached a new highest A/R balance on or after the cutoff date.
2. It can be set up to run automatically from A/R Month-End Update for only customers with new transactions.

It is recommended to run this program once from the menu, and then from the month-end automatically going forward. To do this, set up the "Default Avg Days to Pay Cutoff" in the Control file. The default date is used to determine the cutoff date for which transactions to consider (i.e. the last 12 months, the beginning of the year 2 years ago, etc.). A second new field "ADP/High A/R Calc Cutoff Date" in Control is updated that reflects what cutoff date was used when the update was last run.

ADP and High A/R Balance Report

The ADP and High A/R Balance Report shows what the average days to pay and the highest A/R balance are for customers in the selected range as of a cutoff date. The cutoff date determines which A/R transactions to include so that you can see the recent trend of how your customers are paying. Ship-to customers are printed only if the related customer is set to keep A/R by the ship-to. This program can be run in two ways:

1. It can be set up to run automatically from A/R Month-End Update for only customers with new transactions. In this mode, it prints the summary version showing the customers and ship-to customers that were updated.
2. When the program is run from the menu, you can select any cutoff date. You can also print the report in summary or detail. If printed in detail, you can choose to see the detail of either how the ADP or the highest A/R balances were calculated. You can also choose a range of customers.

A/R Month-End Update

A/R Month-End Update automatically recalculates the average days to pay and highest A/R balance for customers with new transactions if you set the "Default Avg Days to Pay Cutoff" in the Control file. It also prints the ADP and High A/R Balance Report in summary for any customers that are updated.

If you do **not** enter the default date, then month-end will continue to calculate an historical average days to pay only with no cutoff date. It will not recalculate the highest A/R balance.

Automatic Cash Entry prompts for a batch number

The Automatic Cash Entry program now always prompts for the batch number when you run the program, even if your edit file is empty. It used to assume you were using batch 1. The batch number prints on the screen to be clearer.

You can now use a check amount of zero.

[MC-2065]

Year-End Customer Sales Report changes

The Year-End Customer Sales Report prints when you run the A/R Year-End Update. It can now be printed in customer number or customer alpha order. You can optionally include last year's totals. The report prints the YTD and last year's payments in addition to the sales and COGS. It no longer asks for the number of copies to print.

[MC601-1019]

A/R Statements and service charges more fields available

The A/R Statement Print and Service Charge Invoice Print programs can both now print fields from the Customer Form file.

[MC601-1027]

Purchasing

P/O Entry

More defaults from the Vendor P/O Address file

The P/O remarks, country, mill, and P/O FOB can be entered in the P/O Address file so that they will default when entering purchase orders for the specific vendor.

The purchase order address can be left blank to use the vendor address.

[MC601-1025]

Add part predefined comments if change the part

In Purchase Order Entry, if you change the part on an existing line and there are comments associated with the line, the program asks if you want to delete the comments. The question gives you an option to view them first. You might want to delete them because they might be associated with the part. In addition, if the part has a predefined comment associated with it, then you must delete the comments if

you want the program to automatically add the predefined comment. If there is a predefined comment associated with the new part, the prompt displays that information.

If you pull up an existing line, you now have the option of viewing the comments and/or the charge codes associated with the line if there are any.

[MC601-1016]

Purchase Order forms

The header comments and remarks can now be printed in the header and footer sections of purchase order forms.

[MC601-1024]

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.

[MC-2057]

Inventory

Inventory Price Inquiry enhancements

The Inventory Price Inquiry now shows you the price from the customer part if there is one. If a customer is entered, the customer part defaults from the system part that was entered (and from the dimensions that were entered when you called the inquiry). If customer parts exist for that customer or for all customers, then you can select a different customer part. The new system part and dimensions are displayed.

Other changes in the Inventory Price Inquiry:

- The source of the price prints on the screen.
- Instead of having two functions (Group and Regular), there is now just one (toggle Group). The group toggle is not available for customer parts that have the override price flag turned on since group scheduling doesn't apply in that case.

See the related "Price scheduling for customer parts" topic on page 4.

[MC601-1015]

Inventory Lot Inquiry see tag transactions

The Lot Detail Inquiry has a new function "tag trnS" that allows you to quickly see the tag transactions if the inventory lot is tagged material. This may help to see how the tag was created and what changes were made to it. This is the same information that is on the "Inventory Tag History Inq - Transactions" screen.

Run the Inventory Lot Inquiry, select Detail for a tag, and then the "tag trnS" function will be available. Remember to keep the transactions current by running the Daily Inventory Update every day.

[MC601-1002]

Inventory Sales History Inquiry display the GP%

The Inventory Sales History Inquiry now displays the GP% on the detail and all summary screens. If the only range was a range of warehouses, it displayed the all parts screen. If sorted by date, it now displays the ranges screen so more relevant information is shown.

[MC601-1031]

Inventory Purchase History Inquiry display the P/O number

The Inventory Purchase History Inquiry now displays the P/O number on the summary line. It also displays who received the purchase order receipt. If the only range was a range of warehouses, it displayed the all parts screen. If sorted by date, it now displays the ranges screen so more relevant information is shown.

[MC601-1031]

Inventory Lot Purge for a warehouse range

The Inventory Lot Purge has more options, including that a range of warehouses can be selected. The purge date defaults to the end of the last month. The report used to always double space, but now this is optional. It is clearer that a report prints first, and the number of lots to be purged is printed to the screen.

The heat number prints in place of the test result field.

[MC601-1039]

Inventory usage more fields available

Four new fields that show the number of months that material is available can be printed on the report: on hand + on order - allocated, on hand - allocated, on hand + on order, and on hand.

[MC601-1023]

Forms

Forms Reprint can resend documents to DMS

The Forms Reprint program now allows documents to be re-sent to DMS if DMS is defined on the form. Since this would be unusual, the program defaults to not resend to DMS and warns if you enter 'Y'. The program has an updated interface and so is easier to use.

[FR-68]

Email

View and Acknowledge Queued Emails change error status

View and Acknowledge Queued Emails now has an option to change multiple 'E' status entries (errors) to either resend or delete if you are a system administrator.

If an email address is wrong, you can now change and resend those that have already been sent. You can still change and resend those that had errors.

[EM-60]

Accounts Payable

Procedure manual

Accounts payable now has a pdf procedure manual (ap_opc.pdf) that is available from the A/P Menu context-sensitive help (usually Ctrl+F1). The help includes instructions on setting up and using ACH payments.

[AP-420]

Enter ACH payment date in Select Invoices for Payment

Select Invoices for Payment now allows the user to enter the ACH voucher date. This is because some banks require this date to be the next bank business day. There are now program options in this program to designate whether the ACH date is skipped by default and whether weekends need to be skipped. The Cash Requirements prints the ACH date if there are any ACH payments.

[AP-428]

General Ledger

Warn # days before year end and year-end changes

Journal Entry now warns if the user needs to run G/L Year-End Update within the next 90 days. The number of days can be changed in the G/L Control file.

[GL-277]

Journal List enhancements

The Journal List, previously called the Posted Journal List, has new options. You can now select a range of journals if you select a single journal type. You can select a range of fiscal months. And, you can select posted or unposted journals. The printer is displayed and can be changed before printing if you choose to output to the printer.

[GL-279]

General: Utilities and System-Wide Changes

Control Maintenance new functions and new fields

The Metal Center Control Maintenance program now has new functions: "Nxt scrn" and "prV" to navigate through the screens. Descriptions of fields now display (e.g. the chart of accounts description).

The Control file has two new fields on the screen 1:

- **Default Avg Days to Pay Cutoff:** The default date so that A/R Month-End Update will recalculate the average days to pay and highest A/R balance for customers with new transactions.
- **ADP/High A/R Calc Cutoff Date:** The last cutoff date used by the ADP and High A/R Balance Update program that determined which transactions were included in the average days to pay and highest A/R balance calculations.

[MC601-1034]

Update Jobs Inquiry new restart function

The Update Jobs Inquiry has a new option (Chg status) to change the status from 'R' to 'E' so that an update that is no longer running (possibly from a system crash) can be restarted. This option is password protected so that only your support representative can change the status. Your representative will verify that the update truly is not running. If the status is changed, the update's log file (if it exists) is updated with the fact that it was changed. An entry is also made in the Program Log Inquiry.

[UT-1396]

Available Printer Maintenance two new options

In Available Printer Maintenance, ASCII text file printers can be set to an override maximum lines/page of -1 so that the report prints with no page breaks. This is useful for importing the text file to a spreadsheet. Note that not all reports will work with this new feature.

A printer can be set to resend the initialization codes and overlay with every page. Using this feature would be very unusual, but some printer drivers lose the initialization codes when a form feed is issued.

[UT-1414]

Hotkey option to show related Activity records

The new program Show Activity for Screen Entities (CCACHK) may be added to the Hotkeys Programs Maintenance to display activity for fields on the screens that have activity records. For example, if customer 123 is displayed on a screen, and CCACHK is called from a hotkey, it can display any activity records that exist for customer 123:

```

Program: CCACHK

Description: Activity Inquiry
Program Type: B

Close/Reopen Files: N
Save/Restore Screen: N

```

When the hotkey is hit, it will display any activity category that corresponds to a field on the screen and has activity. If only one category has activity, it will skip asking the user which category and just display the available activities. If no fields on the screen have activity, nothing will display when the hotkey is pressed.

When the user has selected which category they want to display, the program will display the specific types of activities that have data. If only one type has data, just the activities for that type will be displayed. If more than one type has data, the user can elect to display all types or select one of the types to display.

When the specific activity information is displayed, the user can show the detail information for any line.

Setup: The activity category has to be defined with an entity ID. The hotkey to CCACHK must be added.

[UT-1419]

Hotkey to run a specific program in any company

You can set up a hotkey for CCCHGCO, Change Company Directory, to call another program, such as MC300, Inventory Availability, to make MC300 available to run in any of the companies to which you have access. An additional feature is that no one can run a program that they don't have access to. Only companies to which they have access are displayed. If they select a company but don't have access to the program on the menu, then they also can't run it.

```

Program: CCCHGCO MC300

Description: Availability Inquiry Companies
Program Type: B

Close/Reopen Files: N
Save/Restore Screen: N

```

Note: In MCMS 6.0.1 and later, MC300 is accessible from the menu. In MCMS 6.0.0 and before, MC399 is called. So if MCMS is rev 6.0.0 or earlier, use "CCCHGCO MC399"; if MCMS is rev 6.0.1 or later, use "CCCHGCO MC300".

[UT-1420]

Menu Access better handling of security groups

Menu Access Maintenance warns you if you are changing a user's menu access list that is not in effect either because the user is a system administrator or because the user is assigned to a security group that has a menu access list. If you are changing a security group's menu access, you can view which users are assigned to the group.

The Security Group Maintenance program prints a message if a menu access list exists for the security group.

In User Company Maintenance, if a user is assigned to a security group that has a menu access list and the user is not a system administrator, a message prints that the group menu access exists since the user is subject to that access list.

[UT-1426]