



MCMS 6.0 Update 2 Operational Changes

July 16

2021

This document contains brief descriptions of operational changes made to the MCMS and related systems for MCMS 6.0 update 2. Last change 7/30/2021.



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Order Entry and Quotes

Sales Tax Resale ID is by state

The resale ID is no longer in the Customer and Ship-To Customer files. A new file Tax Exempt contains all the resale IDs for a customer/state. *The biggest impact of this change is that the sales tax exemption is based on state, not just on the customer.* You used to be able to make all ship-to customers use the customer's tax exempt information, but now that ability exists only if the ship-to customer is in the same state as the customer. *And, you cannot make an order non-taxable without entering a resale ID.*

In order to avoid changes to how the existing software works for our customers, if any ship-to customers are in a different state and were using the customer's resale ID, then those ship-to customers will be assigned the resale ID of **"* REVIEW *"**. A report (MCU060B3) prints during the update (that can also be run later) that prints these ship-to customers and also prints customers and ship-to customers that had no state assigned but had a resale tax ID (since this is no longer allowed).

Mostly this change is transparent to the user in that the Customer Maintenance, Ship-To Maintenance, and Customer Inquiry still display the resale ID. If the resale ID is changed, the TXEXMPT record is changed and the previous resale ID is updated to the previous resale number. The maintenance programs have an option "Resale" to view and/or maintain the resale numbers. Whether a user has the option to only view the Tax Exempt records or change and add them depends on whether the user has access to the Tax Exempt Maintenance from the menu. Anyone who has access to the Customer Maintenance or Ship-To Maintenance can change the existing resale ID in those records as they have always been able to do.

Because an order or quote can no longer be changed to be non-taxable if there is no resale ID, if a walk-in customer is nontaxable, or if a taxable customer has a job that is nontaxable, an override resale ID can be entered for the order or quote when changing the taxable flag to nontaxable.

[MB-4]

Tax Authority by Tax Location

Order and Quote Entry can continue to work as they did before where the tax authority is based on what is entered in the Customer and Ship-To Customer files.

A new file, Tax Location, can be implemented.

1. Have no entries in the Tax Location file. This will cause the tax authority to be assigned the same way as before. The tax authority is maintained in each customer and can be overridden in each customer ship-to address. The tax authority in the ship-to/customer is assigned to the order or quote when it is entered, and it can be overridden.
2. Keep entries in the Tax Location file. Every city/state/country that can be entered in an order or quote has to first be entered in the Tax Location file that contains the proper tax authority for that location. All customers and ship-to addresses will also be validated on the Tax Location file. A state and/or a country can be entered with no city signifying that all cities in the state/country have the same tax authority. The tax authority cannot be overridden.

[MB-4]

Add predefined comments for new orders

Order and Quote Entry can now add header predefined comments for the Customer/Ship-To and/or for the Terms when the order or quote is first added. If the customer, ship-to, or terms is subsequently changed, then you need to change the comments manually.

Use Customer Maintenance and/or Ship-To Address Maintenance to designate the predefined comment that you want added and which header comment to add it to. As with other fields in the Ship-To file, if the Ship-To predefined comment is entered, then that field overrides the one in the Customer file. If it is blank, then the predefined comment in the Customer file is used.

You can also add a predefined comment in Terms Maintenance. If the starting comment number is not yet used (by the customer predefined comment), then the terms comment will be added. The customer/ship-to comment takes precedence over the terms comment.

[MB-12]

Warn if freight code different when customer changed

Order and Quote Entry now warn the user if the customer or ship-to is changed and the freight code for that customer is different. The user can then change the freight code if needed on the totals screen.

[MC-2109]

Customer Inquiry option to show shipped total on open orders

The Customer Inquiry has a new option to show the shipped total on the open orders screen in place of the ordered total if the order is shipped. If the shipped total is displayed, it will print in dim so that it stands out. The total of all orders will remain the total of the open order amounts.

[MB-3]

Customer Maintenance changes

Prompt if A/R by ship-to changes

If a customer is set to keep A/R by the ship-to, and if you change any of the fields that are set separately by the ship-to, then the program will ask you if you also want to review the ship-to customers.

Access to Ship-To Maintenance

Both the Customer Maintenance and the Ship-To Address Maintenance programs have an option to switch to the other maintenance program.

Resale ID changes

When the resale ID is changed, the change is actually made in the Tax Exempt file. There is an option "Resale" that gives access to the Tax Exempt file for the customer. If the user has access to the maintenance from the menu, then they can make changes to the file. If not, then the user can only view the file.

[MB-4, MB-19]

O/E and quote forms more fields available

The order entry and quote forms can now print the sales territory description in the header and the discount description in the header and line.

[MB-8, MB-22]

Order Entry

Email when order off hold

The Miscellaneous Description Maintenance has a new field for holds: Email Off Hold. This email address will be used when a sales order is taken off hold.

[MB-1]

Shipping hold removed if the shipment is cancelled

Shipping Entry has the ability to add a shipping hold to an order. It can be added automatically based on the freight code, or it can be added manually. If a shipping hold is added and then the shipment is cancelled, the shipping hold is now automatically removed.

[MC-2146]

Preshipment Detail Report easier to enter a single order

The Preshipment Detail Report now asks if you want to print a range of orders or a single order. This makes it easier to print a single order because it only needs to be selected once instead of entering it for both the beginning and ending order numbers.

[MC-2111]

Allocation inquiries show promise date and lot status

The detail option on the allocation inquiries prints the order line promise date and the inventory lot status. For purchase orders, the status shows the due date of the P/O line.

[MB-16]

Accounts Receivable

New invoice history index for MConnect reports

Often MConnect reports begin with a date range for invoice history. By adding the index, the reports will run substantially faster.

[MB-18]

Inventory Transfers

Email when order off hold

The Miscellaneous Description Maintenance has a new field for holds: Email Off Hold. This email address will be used when a transfer order is taken off hold.

[MB-1]

Accounts Payable

Accounts payable 8.0 update 1 and update 2 have both been released. See the operational changes for the changes from the A/P menu (ap80_u1_opc.pdf and ap80_u2_opc.pdf).

[AP-437, AP-448]

Bank Accounts

Bank Account Maintenance now displays the exchange rate and date if the account is in foreign currency. There is a function that can be accessed to change the exchange rate and date.

[BR-29]

Document Management

Document management 5.10 is released. See the operational changes from the Document Management Menu (dm51_opc.pdf). Note that many of the Program Interface records are no longer necessary if the entity is defined in Document Systems.

[DM-248, MB-21]

Email

Allow emailing on remote machine and add delay

Email can be setup to allow emails to be sent on another networked machine (or to another directory) by changing the Email Control to point to that directory. That directory has to have the Email Control file (EMCNTRL) in it. The server or directory that is running the actual Email Server (EMSERV) can be directed to an EMAIL directory. This can be useful if you have several companies but want all email to go out from one place and view all emails together. The alternative would be to set up email separately for each company (and then each company has its own view option).

A delay can be added between emails being sent since some mail servers may require a small delay.

[EM-62]

General: Utilities and System-Wide Changes

User-defined reports to CSV file

Any of the MCMS reports that are user defined can now be printed in a CSV format simply by selecting a printer that is an ASCII text file that has a CSV extension.

The reports affected by this change are the following: the inventory usage reports, the inventory status reports, and the sales journals.

Accounts payable user-defined reports also can be printed in a CSV format. See the A/P 8.0.2 operational changes for the details.

[AP-448, MB-13, UT-1481]

Allow no comment print flags on user-defined forms

User-defined forms can now be defined to not print any comments unless the comment is entered with no print flags, which means all forms. You used to have to define at least one comment print flag to print.

[MB-2]

New activity tracking hotkey inquiry

A new utility can be accessed via the hotkey system to show activity for entities that are currently displayed on your screen. Add the program CCACHK, Activity for Screen Entities, to your hotkeys and then run hotkey when the entity (i.e. the order, customer, vendor, quote, etc.) is displayed on the screen.

```
Display Order: xx      Program: CCACHK
                        Description: Activity Entity Inquiry
                        Program Type: B

                        Close/Reopen Files: N

                        Save/Restore Screen: N

                        Assigned to HOTKEY:

                        Don't Run if Active LOCKs: N
```

When the hotkey is hit, it will display activity for any category that corresponds to a field on the screen AND has current 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 activated.

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 Note

The hotkey program CCACHK determines if an entity is on the screen or not if the activity category is tied to an entity ID.

MCMS and A/P have updates to the CCACT.INF and CCACTAP.INF files that will automatically update (CCUPAC) the entities to the Activity Categories (CCACTCT) file. If these INF files are not installed, you can also add the entities manually using the Activity Categories Maintenance program.

[MB-14, AP-447, UT-1419]