

TakeStock 6.0.060 Release Overview



Infor Global Solutions introduces version 6.0.060 of TakeStock. This document provides an overview of the new major feature enhancements and functionality in this release.

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Requirements and Certifications

TCP/IP Manager Electronic Payments Version Requirement

TCP/IP Manager Electronic Payments version 1.2.0 is required for TakeStock V6.0.060.

Progress Version Requirement

Progress® OpenEdge™ version 10.1C03 is optionally required for TakeStock V6.0.060. For more information, refer to the Progress 10.1C03 documentation or the Progress Web site. Note that you may also still use Progress® OpenEdge™ version 10.1B03.

Quick Overview

System Wide Enhancements

Inquiry Program Resize

TakeStock Inquiry programs were enhanced so that users the have ability the resize the window for SO Document Inquiry, PO Document Inquiry, Transfer Document Inquiry and Production Document Inquiry.

Add Ons by Module

Add Ons processing was enhanced in TakeStock a so that users can set up Add Ons for use by document type. The four document types that can have Add Ons are: Sales Orders, Purchase Orders, Transfers, and Production Tickets. Now, the system allows a particular Add On to be used on certain document types but not others, according to rules entered by the user.

The user can indicate which documents any Add on can be added to. The system does not allow Add Ons to be added to a document if the user has restricted it from that document type. Additionally, the system preserves data integrity among the various Add On related tables by not allowing an Add On to be restricted from a document type that it has already been added to.

Report Program Export to MS Excel Option

Processing enhancements to TakeStock now allow you to output report results to MS Excel to either view reports or save the output as an .xls file. If the output is saved to a disk file, you can either save the Excel file immediately to the disk or allow the background processor to save the Excel file to the disk at the scheduled time.

On the Print Setup dialog box, you can click the Disk File radio button, type the name of the file to output to a disk file and select the MS Excel checkbox to create the file output in an xls format. Be sure to include the drive and complete directory path along with the disk file name. The MS Excel checkbox is only visible if the report is one of the 20 TakeStock report programs designed to output to MS Excel. To print to the Excel file to the screen, click the Screen radio button. This option tells the system to send the print to the screen for viewing. From the viewing screen, the report can be sent to a printer. To print the file is MS Excel format select the MS Excel option at the Printer dropdown list.

The following reports have the option of sending output to MS Excel: Inventory Management : Price Schedule Report

Weekday on Date Input

Date inputs in TakeStock support relative dates, in that an entry can be made that can be interpreted as some number of days, weeks, months, or years from the current date. This functionality was expanded to allow a day of the week to be specified in addition to (or instead of) the relative number of days, weeks, months or years.

Lookup

The TakeStock Lookup has been enhanced.

The TakeStock Lookup includes the ability for users to define the column layout of the lookup browser. Part of this feature is the ability to create joins, in order to bring in fields from other tables with a relationship to the main table. This enhancement adds the ability to add a filter to a join, to limit the records that appear in the browser based on values in fields in a joined table. After a user has created a join as part of a layout, the user now has the ability to add a filter to the join. This is done through a new button on the Layout Editor dialog. Once a filter has been associated with a join, it can be changed or removed by choosing the same button. Removing a filter is done by changing to the "ALL" special filter.

The main lookup window contains a visual indication when a layout containing a join with a filter is selected.

The toolbar in the Lookup window has been updated with new icons and improved functionality.

In Sales Order Entry, the Lookup run from the document number field limits the records shown to those where the Document Type field matches the Document Type of the current activity. The document type being displayed appears in the title bar of the lookup window.

In Sales Order Entry, PO Entry, Transfer Entry and Production Entry, deleted documents that have not yet been processed by the corresponding register do not appear in the lookup.

Accounts Receivable

Customer Number Changer

The Customer Number Changer is a new program that allows users change a customer number wherever it may exist in the database, after it has been assigned and transactions entered for that customer.

Inventory Management

Report Program Export to MS Excel Option: Price Schedule Report

You can output the Inventory Management Price Schedule Report to MS Excel and view it on the screen or save it to a disk file in the Excel file format. To view a report in Excel, select MS Excel Printer as the Print To option on the Print Setup dialog box. To create a file with a .xls file extension (if no file extension is entered, the program will append ".xls" to the entered file name), select the Disk File as the Print To option, enter the directory path and file name, then select the MS Excel checkbox on the Print Setup dialog box.

When saving an Excel compatible file, you can select to run in the background processor by selecting the Run in Background checkbox. If the Run in Background checkbox is unchecked, the printing process outputs the report data to a MS Excel file "filename.xls" (the content is html format). If you double click the file, MS Excel will automatically open it.

Note that some selected report options may generate duplicated data in the Excel file. These report options are selectively ignored if Excel is chosen as the report destination.

Item Inquiry

Enhancements to the Item Inquiry program now allow the user to view all existing quotes for an item. A new Quotes panel was added to the standard Transactions view. Users can add the Quotes panel to the any custom view.

Transfer Document Inquiry

Enhancements to TakeStock now allow the Transfer Document Inquiry to be resized when run as a window.

Item Ledgercard Report

Enhancements to the Item Ledgercard Report now include the adjustment code and memo for each transaction. For adjustments, the adjustment code is included as part of the "Document" column on the report, meaning the adjustment code is always included as a part of the report. A new "Memo" option was added to the template screen, if chosen all transactions that have a memo will have the memo printed on a second line below the Document field.

Sales Orders

Confirmation Options Dialog—Change Invoice Date

Enhancements to TakeStock have added the ability for users to change the invoice date during confirmation from the Confirmation Options dialog, without having to go to the Header Screen of Confirmation Entry.

Further processing enhancements have added the ability for users to restrict the documents processed by the Daily Sale Register to a smaller range of invoice dates than that provided by the GL Period.

Sales Order Lookup

In Sales Order Entry, the Lookup run from the document number field limits the records shown to those where the Document Type field matches the Document Type of the current activity. The document type being displayed appears in the title bar of the lookup window.

In Sales Order Entry, PO Entry, Transfer Entry and Production Entry, deleted documents that have not yet been processed by the associated register do not appear in the lookup.

Convert Quote

The Quote Convert dialog box, accessed from Quote Entry was enhanced to also provide the option to create price schedules. When the option to create price schedules is chosen, one price schedule will be created for each line on the order (or each selected line, if that option is chosen).

System Mangement

Add On Maintenance

The Factoring view of the Add On Maintenance program was renamed to Documents view. The program was enhanced to include four new toggle-box fields. Four existing toggle-box fields, SO Discountable, PO Discountable, Affect Gross Margin, and PayPal Freight, formerly on the General tab, were moved to the new Documents tab. All the fields on this tab are organized into four groups based on the document types they relate to. Each document type group of fields is headed by a toggle labeled "Allow" that controls whether that Add On can be added to documents of that type. In addition, since all the other fields related to that document type are not relevant if the Add On is not allowed, all the remaining fields are disabled if the "Allow" toggle is un-checked.

Add On Defaults Maintenance

Validation logic in the Add On Defaults Maintenance program was enhanced to prevent a record from being saved if it includes an Add On that is not valid for the document type of the record. Note that you cannot include an add on in the Add On Defaults Maintenance program that is not valid for the document type of the record in Add On Maintenance.

Enhancement Details

Accounts Receivable

Customer Number Changer

The Customer Number Changer is a new program that allows users change a customer number wherever it may exist in the database, after it has been assigned and transactions entered for that customer, including transactions that contain that customer number.

Processing Details

In the Old Customer field contains the customer number that you want to change to a new customer throughout the system. In the New Customer field the new customer number that you want to use for the customer throughout the system. In the Changes section of the screen, the system displays the customer number that you want to replace with a new customer number. Select the **Add** button to add customer numbers to this section. If you want to remove a customer number from this section, highlight the customer number in the Changes section and select the **Delete** button. Select Update to replaces the old customer numbers with the new customer numbers in every table in the TakeStock system where the old customer number was found and in all records and transactions.

TIPS: If you change a customer number that is set up in a report template, the report template is NOT changed. The values in report templates must be changed manually.

Inventory Management

Price Schedule Report

Report Program Export to MS Excel Option

You can output the Price Schedule Report to MS Excel and view it on the screen or save it to a disk file in the Excel file format. To view a report in Excel, select MS Excel Printer as the Print To option on the Print Setup dialog box. To create a file with a .xls file extension, select the Disk File as the Print To option, enter the directory path and file name, then select the MS Excel checkbox on the Print Setup dialog box.

To save a report output as an Excel file, select Disk File as the output destination, enter a file name with extension ".xls" (if no file extension is entered, the program will append ".xls" to the entered file name), then select the MS Excel checkbox. When saving an Excel compatible file, you can select to run in the background processor by selecting the Run in Background checkbox. If the Run in Background checkbox is unchecked, the printing process outputs the report data to a MS Excel file "filename.xls" (the content is html format). If you double click the file, MS Excel will automatically open it.

Note that some selected report options may generate duplicated data in the Excel file. These report options are selectively ignored if Excel is chosen as the report destination.

Item Inquiry

Enhancements to the Item Inquiry program now allow the user to view all existing quotes for an item. A new Quotes panel was added to the standard Transactions view. Users can add the Quotes panel to any custom view.

The new Quotes panel displays header and footer detail for quotes, such as the expiration date, refer number, and quote total. The browser display begins with the number and/or date you specify.

Transfer Document Inquiry

Enhancements to TakeStock now allow for Transfer Document Inquiry to be resized when run as a window.

Manufacturing Control

Production Inquiry

Screen resize

Enhancements to TakeStock now allow the Production Document Inquiry program to be resized when run as a window.

Production Entry

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Production Entry now includes only Add Ons marked as valid for production documents in Add On Maintenance.

Disassembly Entry

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Disassembly Entry now includes only Add Ons marked as valid for production documents in Add On Maintenance.

Reconfiguration Entry

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Reconfiguration Entry now includes only Add Ons marked as valid for production documents in Add On Maintenance.

Purchase Orders

PO Document Inquiry

Screen resize

Enhancements to TakeStock now allow the PO Document Inquiry program to be resized when run as a window.

Purchase Order Entry

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Purchase Order Entry now includes only Add Ons marked as valid for purchase orders in Add On Maintenance.

Suggested PO Entry

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Suggested PO Entry now includes only Add Ons marked as valid for purchase orders in Add On Maintenance.

Return PO Entry

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Return PO Entry now includes only Add Ons marked as valid for purchase orders in Add On Maintenance.

Sales Orders

Confirmation Options Dialog Box

Change Invoice Date

Enhancements to TakeStock have added the ability for users to change the invoice date during confirmation from the Confirmation Options dialog, without having to go to the Header Screen of Confirmation Entry.

A new Invoice Date field was added to the Confirmation Options dialog I confirmation processing. The new Invoice Date field defaults to the current date. Any date entered in this field displays in the Confirmation Entry Header screen.

SO Document Inquiry

Screen resize

Enhancements to TakeStock now allow the Transfer Document Inquiry to be resized when run as a window.

Daily Sales Register

Invoice Date Limit By Option

The Daily Sales Register program was enhanced so that a new Limit By option, Invoice Date, was added. This option has the effect of limiting the documents processed to those where the invoice date is in the specified range. Since the GL Period also limits documents to those in a range of invoice dates (the beginning and end of the GL Period), it is possible that both limitations will apply. So, if the two ranges do not overlap, nothing will print. This is consistent with the PO Receipts Register.

Quote Entry

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Quote Entry now includes only Add Ons marked as valid for sales order documents in Add On Maintenance.

Blanket Order Entry

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Blanket Order Entry now includes only Add Ons marked as valid for sales order documents in Add On Maintenance.

Future Order Entry

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Future Order Entry now includes only Add Ons marked as valid for sales order documents in Add On Maintenance.

Sales Order Entry

Document Number Field Lookup

In Sales Order Entry, the Lookup run from the document number field limits the records shown to those where the Document Type field matches the Document Type of the current activity. The document type being displayed appears in the title bar of the lookup window.

In Sales Order Entry deleted documents that have not yet been processed by the Daily Sales Register do not appear in the lookup.

Layouts and filters created by users in previous versions of TakeStock for the Sales Order lookup will no longer be available in Sales Order Entry. Those that are still applicable will need to be re-created.

Add Ons by Module

The list of available Add Ons that appears when you press the "More..." button on the footer screen of Sales Order Entry now includes only Add Ons marked as valid for sales order documents in Add On Maintenance.

Convert Quote Dialog

Create Price Schedules

The Quote Convert dialog box, accessed from Quote Entry will be enhanced to also provide the option to create price schedules. When the option to create price schedules is chosen, one price schedule will be created for each line on the order (or each selected line, if that option is chosen).

Processing Details

If field audit history is enabled for any field in the icPrSched table, an audit history record is created for the new record, including the date, time, and user code.

If the customer has a bill-to customer assigned, and the option to price by bill-to is turned on (Customer Maintenance) then the price schedules are created for the bill-to customer.

If the warehouse on the quote has a pricing warehouse assigned, then the price schedule is created for the pricing warehouse. No quantity breaks are set up in the created price schedules.

If an active price schedule already exists for the customer/item combination, a warning message is displayed.

You can set functional security for this screen.

System Management

Add On Maintenance

Add Ons By Module

Add Ons processing was enhanced in TakeStock a so that users can set up Add Ons for use by document type. The four document types that can have Add Ons are: Sales Orders, Purchase Orders, Transfers, and Production Tickets. Now, the system allows a particular Add On to be used on certain document types but not others, according to rules entered by the user.

The user can indicate which documents any Add on can be added to. The system does not allow Add Ons to be added to a document if the user has restricted it from that document type. Additionally, the system preserves data integrity among the various Add On related tables by not allowing an Add On to be restricted from a document type that it has already been added to.

The Factoring view of the Add On Maintenance program was renamed to Documents view and redesigned. The program was enhanced to include four new toggle-box fields.

Four existing toggle-box fields, SO Discountable, PO Discountable, Affect Gross Margin, and PayPal Freight, formerly on the General tab, were moved to the new Documents tab.

All the fields on this tab are organized into four groups based on the document types to which they relate. Each document type group of fields is headed by a toggle

labeled “Allow” that controls whether that Add On can be added to documents of that type.

In addition, since all the other fields related to that document type are not relevant if the Add On is not allowed, all the remaining fields are disabled if the “Allow” toggle is un-checked.

In the Sales Orders, Purchase Orders, Transfer and Production documents you can select the **Allow** checkbox indicates whether this add on is allowed for SO documents. If you do not select this check box, none of the other fields in the section for each document type are available. For Sales Orders and Purchase Orders, you can select the **Discountable** checkbox to indicate the add on is discountable.

For Sales Orders, Transfer and Purchase Orders, you can select the Factoring Defaults checkbox indicates how the Add On is to be factored to add non-inventory costs to sales documents and optionally factor these costs for more accurate gross margin accounting on sales documents, transfers or purchase orders. From the dropdown list, select: **Yes (always)** to always factor the cost of the Add On to the cost of items sold on sales orders documents. **Not Allowed** to never include the Add On when factoring non-inventory costs on sales orders documents. **Default to Yes** to set the default for cost factoring to Yes, but the default can be overridden when the sales order is invoiced. **Default to No** to set the default for cost factoring to No, but the default can be overridden when the sales order is invoiced. For Sales Orders, from the radio buttons, select which cost should be affected by cost factoring for sales order documents. **Both** to post to the cost of sales account associated with each add on code and allocate to the cost of sales accounts for each line item. **SA** to post non-inventory add-on costs to a sales order to the cost of sales account associated with each add-on code. **GL** to allocate non-inventory add-on costs to the cost of sales accounts for each line item. For Sales Orders, you can select **Factoring Basis** to determine the default option for factoring the add on value. You can select from: **Not Used (default)**, **Units**, **Cost**, **Weight**, **Cubes**.

Add On Defaults Maintenance

Add Ons by Module

Validation logic in the Add On Defaults Maintenance program was enhanced to prevent a record from being saved if it includes an Add On that is not valid for the document type of the record. Note that you cannot include an add on in the Add On Defaults Maintenance program that is not valid for the document type of the record in Add On Maintenance.

TakeStock System Dialog Boxes and Functionality

Date Inputs

Date inputs in TakeStock support relative dates, in that an entry can be made that can be interpreted as some number of days, weeks, months, or years from the current date. This functionality also allows a day of the week to be specified in addition to (or instead of) the relative number of days, weeks, months or years.

You can enter information that TakeStock interprets as the following (or previous) particular day of the week, optionally relative to any other relative date that may currently be entered.

If you enter any relative date, which includes a period followed by some number at the end of the input, TakeStock computes the relative date from that day, the next (or previous--if a negative number is entered) specific day of the week from that day.

Numbers that correspond to days of the week are:

- 1 Sunday
- 2 Monday
- 3 Tuesday
- 4 Wednesday
- 5 Thursday
- 6 Friday
- 7 Saturday

Examples for the date 5/15/2009:

Input	Interpreted as	Result (assuming current date is 5/15/2009)
W1.2	The Monday following 1 week from today	5/25/2009
D0.3	Next Tuesday	5/19/2009
M3.-2	The Monday before 3 months from now	8/10/2009
D0.-4	Last Wednesday	5/13/2009

As an alternative to the number, you can also enter the first 2 letters of the weekday, i.e. mo for Monday or tu for Tuesday.

Lookup

The TakeStock Lookup has been enhanced in several ways:

Creating Filter Joins

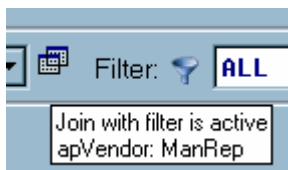
The TakeStock Lookup includes the ability of users to define the column layout of the lookup browser. Part of this feature is the ability to create joins, in order to bring in fields from other tables with a relationship to the main table. This enhancement adds the ability to add a filter to a join, to limit the records that appear in the browser based on values in fields in a joined table. After a user has created a join as part of a layout, the user now has the ability to add a filter to the join. Note that deleting a filter which is currently being used in a join is not allowed.

This is done through a new **Filter Join** button on the Layout Editor dialog. The **Filter Join** button accesses the *Filter Manager* screen to add a filter to a join, to limit

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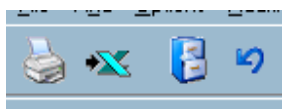
the records that appear in the browser based on values in fields in a joined table. Once a filter has been associated with a join, it can be changed or removed by choosing the same button. Removing a filter is done by changing to the "ALL" special filter.

The main Lookup window contains a new icon as visual indication, when a layout containing a join with a filter is selected. The new icon to right of Layout combo-box indicates presence of a filter on a join; Tooltip of this icon says "Join with filter is active" followed by the name of the table(s) and filter(s) that are used by joins in the layout.



New Icons and Improved Functionality

The toolbar in the Lookup window has been updated with new icons and improved functionality. New icons for the Print, Export, and Maintain buttons are now present in the toolbar.



The "Move and Lock Columns" function has been removed from the toolbar and menu; moving columns has been available through direct manipulation and locking columns can be done through the Column Layout Editor dialog.

Lookup by Document Type

In Sales Order Entry, the Lookup run from the document number field limits the records shown to those where the Document Type field matches the Document Type of the current activity. The document type being displayed appears in the title bar of the lookup window.

In Sales Order Entry, PO Entry, Transfer Entry and Production Entry, deleted documents that have not yet been processed by the DSR do not appear in the lookup.

Issues Addressed—Listing

Request Number	Program/Module	Description
ERP-00000-66158	Allocation Entry	Prevent error when after selecting account in lookup from browse cell.
ERP-00000-58260	AP Check Print	Check print will not run with a saved template that uses a check date outside the allowable range.
ERP-00000-58377	AP Check Print	New extension points added.
ERP-00000-58759	AP Check Print	Added extension point.
ERP-00000-53524	AP Invoice Entry	AP Recurring Document Entry will prevent more than 10 characters from being entered in the invoice number field.
ERP-00000-52556	AR Aged Trial Balance	Print correct values for original amount and aging amounts in detail mode.
ERP-00000-55047	AR Aged Trial Balance	Excel export will work with Ship To sort.
ERP-00000-62033	AR Aged Trial Balance	Added extension point.
ERP-00000-48166	AR Statement Print	Prevent error message in certain circumstances; improve control code handling.
ERP-00000-61017	Archive Inquiry	GL Period and member operations work correctly. Print/Export options added to browse.
ERP-00000-61239	Audit History	Display all lines in Audit History browser.
ERP-00000-56449	Auto Commit Backorders	New option added when EWMS is used, to control whether SO documents on hold should be committed.
ERP-00000-53947	Automatic Update	Menus that contain the old SO, PO or MC document inquiries (presented in a dialog) will be changed to run the new version (presented in a window).
ERP-00000-55257	Automatic Update	Past Po Balance will be displayed correctly in lookup.
ERP-00000-54439	Cash Receipts & Adj. Register	Miscellaneous cash checks will appear on Cash Receipts Register when customer name sort order

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Request Number	Program/Module	Description
		is used.
ERP-00000-46869	Close Paid Documents	Close Paid Documents will not print or update AR invoices which have pending payments or adjustments.
ERP-00000-50590	Count Sheet Print/Capture	Execution time reduced.
ERP-00000-56878	Credit Memo Entry	Negative sales order lines will not be allowed for an e-wms warehouse in Credit Memo Entry.
ERP-00000-59419	Credit Memo Entry	Credit Memo Convert will direct ship lines correctly.
ERP-00000-64390	Credit Memo Entry	Cost calculation for a man rep credit memo with a commission will calculate correctly.
ERP-00000-52393	Customer Inquiry	SO Document Inquiry VCR buttons will limit records displayed to the current customer when run as a drill-down from Past SO Invoices in Customer Inquiry.
ERP-00000-52905	Daily Sales Register	DSR will complete successfully for invoices with cash payments.
ERP-00000-60500	Demand Action Report	Demand Action Report will not turn on the "Include Zero" option when a saved template is edited.
ERP-00000-54826	Document Delivery - Email	Document delivery by email has been enhanced to handle SMTP servers that require email addresses to be in angle brackets. In addition, the program will time-out if there is no response from the SMTP server for 2 minutes, and pressing Cancel during the email transmission process will usually cancel the transmission.
ERP-00000-50481	Document Inquiries	No error message when displaying line number 10 or more in PO Document Inquiry.
ERP-00000-58309	EDI	EDI SO Export will not give error when negative add on has been factored.
ERP-00000-54683	Field Audit history	Show complete field audit history when record creation information is not on file.
ERP-00000-62364	Financial Report Writer	Zero lines will print when the "Suppress Zeros" option is turned off and the detail line is not set to combine centers.

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Request Number	Program/Module	Description
ERP-00000-55352	FRW Row Maintenance	Copy and Paste of FRW rows will work correctly.
ERP-00000-53253	GL Budget Entry	Browse columns will be sized so that the entire column label is visible.
ERP-00000-54942	GL Trial Balance	Excel export will include detail and transaction detail information when selected.
ERP-00000-54954	GL Trial Balance	Excel Export will display account or center description without error in Ending Balances format.
ERP-00000-50949	Hold Review	Hold review will update the document review status when holds are reviewed or un-reviewed.
ERP-00000-52871	Inquiries	Customer, Vendor, Item, Account, and Center Inquiries will no longer display (generally duplicate) urgent notes when run linked to another program, i.e. not from the main menu or Jump menu.
ERP-00000-65327	Inquiries	Customer, Vendor, Item, Account, Center, and Bank Inquiries will no longer redisplay urgent notes more than once for the same record when child windows are opened.
ERP-00000-59984	Item Inquiry	Tabs with a warehouse input tab will display "Not valid for this item" when a whse is entered that has not been set up for the item.
ERP-00000-65417	Item Inquiry	Cost Schedule panel will display complete effective and expiration dates.
ERP-00000-60725	Item Maintenance	Prevent application crash when closing Item Maintenance under certain circumstances.
ERP-00000-52747	Lookup	Lookup will correctly sort by date fields.
ERP-00000-52916	Lookup	Default lookup browse column widths to appropriate value for format when using non-default format.
ERP-00000-52930	Lookup	Lookup "Starts With" functionality works correctly when the first column is an array field.
ERP-00000-65324	Main Menu	Main menu colors will change when changing company from the Global menu and the new

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Request Number	Program/Module	Description
		company has colors defined.
ERP-00000-53202	Maintenances	In Item Maintenance, unabbreviated view descriptions are corrected. In all Maintenances, pressing F2 will function the same as pressing the button labeled "Go" in the toolbar.
ERP-00000-60802	Maintenances	Defaults for user fields will be used for new records.
ERP-00000-61936	Management Alerts	Duplicate Management Alerts will no longer be sent after a company is copied.
ERP-00000-51570	MC Document Inquiry	Document will display when MC Document Inquiry is run from drill-down on serial transactions.
ERP-00000-64989	MC Document Inquiry	Required quantity will be calculated based on remaining quantity to produce instead of total quantity.
ERP-00000-41205	MC Parent Inquiry	Display costs rounded correctly.
ERP-00000-61662	MC Production Entry	Correct WIP cost when cost changes on backordered components.
ERP-00000-47677	Past PO Print	Print Past PO without error message:
ERP-00000-60010	PDA Field Sales Bulk Load	Avoid error message when around 40 customers are selected for the update.
ERP-00000-50120	Physical Count Entry	Physical count entry will properly handle a discrepancy cost of zero.
ERP-00000-53754	Physical Count Entry	Vendor for lots created during Physical Count Entry will be the item's default vendor.
ERP-00000-51653	Physical Count Removal	Physical Count Removal will work correctly when the 'based upon' template name includes a comma.
ERP-00000-52102	Physical Inventory	Lots with zero on-hand quantity will not display in the list during physical count entry.
ERP-00000-50846	PO Cost Adjustment Entry	Masking errors in Cost Adjustment Entry and Cost Selection are prevented.
ERP-00000-60871	PO Cost Adjustment Entry	"No Cost" flag will not be set when cost is adjusted to zero but PO Control Flag Allow Invoice for Zero Cost PO Receipt option is checked.

Request Number	Program/Module	Description
ERP-00000-57978	PO Cost Change Update	Cost Change Update will allow manual cost to be changed by a negative percentage.
ERP-00000-53146	PO Document Inquiry	Tabbing out of document number will bring up document.
ERP-00000-53541	PO Document Inquiry	PO Document Inquiry, Items tab, will display the correct items for received POs.
ERP-00000-39316	PO Entry	Zero quantity Suggested POs will not be presented to be imported into a PO.
ERP-00000-54692	PO Entry	When direct ship lines are imported into a PO, any SO header notes marked as "Copy to PO" will be copied to the PO.
ERP-00000-61188	PO Entry	Inquiries opened from PO Entry will appear on top of the PO Entry window.
ERP-00000-50174	PO Import Shipments	When an existing shipment is selected in the shipment lookup, all fields will be displayed and the document will be available for editing.
ERP-00000-28962	PO Receipts	Choosing Stop Receipt of a previously used serial item will no longer cause the serial number to be marked on hand.
ERP-00000-61849	PO Status Report	Export to Excel works correctly with all sorts.
ERP-00000-61852	PO Status Report	Document notes will print on the report for all sort options, when the option is checked.
ERP-00000-48714	Printing	Windows client printing will use exact match on printer name even if another printer 'starts with' match exists. Printer Maintenance will preserve printer name choice on edit and save. New functionality to easily populate graphics character fields for common fonts.
ERP-00000-58790	Printing	PDF files are able to be viewed and printed if the full version of Adobe Acrobat is installed instead of Acrobat Reader.
ERP-00000-51738	Purchase Orders	Purchase Orders received through Radio Beacon, which subsequently have a cost change, will update item's costs correctly.

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Request Number	Program/Module	Description
ERP-00000-61851	Purchase Orders	Data entered in the "Contact" field on a PO will be preserved in the Past PO record.
ERP-00000-32082	QDSR	In Quick Direct Ship Receipt, AP Batch distributed amount will be displayed correctly.
ERP-00000-35161	Replenishment	Surplus stock for other warehouses will be calculated correctly in Replenishment Report.
ERP-00000-65054	Replenishment Report	Suggested order quantity calculation will include safety stock when using advanced replenishment.
ERP-00000-64806	SA End of Period	SA data by Major Category older than the number of years kept will be deleted, consistent with other types of SA data.
ERP-00000-47609	SA Reports	Export to Excel will display complete and correct information.
ERP-00000-50310	SA Reports	Salesperson/Customer/Item Multiperiod Report will print item description correctly.
ERP-00000-63246	SA Vendor/Item Detail Report	Report will print without masking error.
ERP-00000-53345	Safety Stock Report	Update will run without error 180.
ERP-00000-51048	Serial/Lot Removal	The presence of zero quantity physical inventory records for a lot will not prevent the lot from being removed if the other criteria for removal are met.
ERP-00000-52293	settrain.p	Added logic to settrain.p to change PayPal credit card processors to use a test processor on the training database.
ERP-00000-53281	SO Audit	SO Audit report will print correctly.
ERP-00000-48109	SO Confirmation	When serial or lot allocation is cancelled during SO Confirmation, and the line is a return the line will be confirmed with the order quantity unchanged and committed (nothing shipped or backordered).
ERP-00000-64020	SO Confirmation	Prevent Progress error message when Fax Options button is chosen.
ERP-00000-43951	SO Credit Memo Entry	In Invoice Reversal, the Sales Tax option will default to checked, and a warning will be displayed

Request Number	Program/Module	Description
		if it is unchecked.
ERP-00000-50058	SO Document Inquiry	SO Document Inquiry, Items tab, will display the correct items for invoiced SOs.
ERP-00000-52199	SO Document Inquiry	Prevent error message when Add On description is long.
ERP-00000-52734	SO Document Inquiry	Pick Tickets button will not be enabled for past documents.
ERP-00000-52872	SO Document Inquiry	Allow blanket and recurring document numbers to be entered in SO Document Inquiry.
ERP-00000-52874	SO Document Inquiry	SO Document Inquiry will no longer get stuck with an hourglass mouse pointer when entering a past document.
ERP-00000-53147	SO Document Inquiry	Drill-down from stock reservations dialog works for past MC and PO documents.
ERP-00000-54277	SO Document Inquiry	Display Temp Ship to on past documents correctly.
ERP-00000-55806	SO Document Inquiry	For orders with multiple invoices, entering a different invoice number will correctly bring up that invoice.
ERP-00000-61918	SO Document Inquiry	Prevent error message from Item Find function.
ERP-00000-43135	SO Entry	Create direct shipment POs correctly when backordered warehouse shipments are on the same document message 964 has been answered 'yes'.
ERP-00000-46178	SO Entry	Return SOs will not be put on hold because of an item which is under the minimum GM%.
ERP-00000-46723	SO Entry	SO Entry will respect the warehouse limitation on the ability of a user in another warehouse to commit stock.
ERP-00000-50153	SO Entry	Inactive items on orders converted to quotes will no longer have an order quantity of zero on the quote.
ERP-00000-53859	SO Entry	Country code will be stored in soTempShip and

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Request Number	Program/Module	Description
		available to shipping system.
ERP-00000-54339	SO Entry	Cost Change flag will not be set when component line is edited but cost is not changed.
ERP-00000-55033	SO Entry	On Pricing panel, last price will display the last price invoiced for the item, for the current customer or any other customer with pricing by bill-to and the same bill-to customer.
ERP-00000-55798	SO Entry	Add On costs factored by item cost when item cost mask has more than 2 decimals will calculate correctly.
ERP-00000-57722	SO Entry	Document memo will be preserved when document is placed on hold and then brought up for editing.
ERP-00000-58088	SO Entry	Taxes will be recalculated correctly when a partial shipment is confirmed.
ERP-00000-59187	SO Entry	Focus will return to item number field in auto-add mode after a containerized item.
ERP-00000-60509	SO Entry	Quotes that have been changed from 'new' customer to a real customer can be converted to orders.
ERP-00000-62316	SO Entry	Correct bill to when quote changed from new customer to real customer.
ERP-00000-50351	SO Order Status Report	Report runs without error when currency mask uses parenthesis for negative values.
ERP-00000-56209	SO Quote Entry	Errors that occur when converting a quote to an order will be reported with more detail.
ERP-00000-52645	Stock Status Report	Stock Status Report, output to Excel, will display correct major category, cost mask, and quantity masks.
ERP-00000-62600	Stock Status Report	Output to Excel will include the primary bin from Whse/Item Maintenance when the option to include bin information is selected.
ERP-00000-53197	Table Maintenance Audit	Audit functionality will work correctly in Maintenances that include fields from a secondary table.

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Request Number	Program/Module	Description
ERP-00000-58314	TakeStock Database	Indexes added to improve performance.
ERP-00000-48907	Tax Code Maintenance	Once a tax code has been used to post taxes, it will no longer be editable through Tax Code Maintenance. Instead a note will appear on the screen stating that the tax code cannot be changed.
ERP-00000-52703	Taxes	Taxes will be recalculated correctly on a multi-warehouse order when confirmation is stopped.
ERP-00000-37522	Vendor Review Dates Report	Items listed under "Current Needs" in Vendor Review Dates Report will no longer include inactive items.
ERP-00000-48642	Whse/Item Maintenance	Warehouse/Item Maintenance - Transfer Change Code on Bin Location; allow warehouse to be entered to limit records processed.
ERP-00000-59989	Blanket Orders	Notes for blanket sales orders will be kept with the past blanket record.
ERP-00000-54767	MC Production	Production Register will post GL correctly for Non-stock and Non-inventoried component items.

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