

## What's New in 3.03?

The 3.03 release of the PowerShift Enterprise System adds new features that you have requested.

This topic has these subtopics:

<a href="#">General</a>	<a href="#">Manufacturing</a>
<a href="#">Accounts Payable</a>	<a href="#">Physical Inventory</a>
<a href="#">Approvals</a>	<a href="#">Pricing</a>
<a href="#">Bills of Lading</a>	<a href="#">Project System</a>
<a href="#">Commissions</a>	<a href="#">Purchasing</a>
<a href="#">Customer Service</a>	<a href="#">Receiving</a>
<a href="#">Document Management System</a>	<a href="#">Return Material Authorization</a>
<a href="#">Electronic Data Interchange (EDI)</a>	<a href="#">RF Data Collection</a>
<a href="#">Engineering Change Order (ECO)</a>	<a href="#">Sales and Shipping</a>
<a href="#">Executive Information System</a>	<a href="#">Shipping Manifest Interface</a>
<a href="#">Export - Import</a>	<a href="#">Service Agreements</a>
<a href="#">Fixed Assets</a>	<a href="#">Warehouse Management System</a>
<a href="#">Forecasting and Planning</a>	<a href="#">System Tables</a>
<a href="#">General Ledger</a>	<a href="#">New Programs</a>
<a href="#">Inventory</a>	<a href="#">System Options Changes</a>
<a href="#">Invoicing and Accounts Receivable</a>	<a href="#">Options for Specific Programs</a>
<a href="#">Labor</a>	

### General

- Program-Menu Lookup (MENU) allows you to search for a program name and browse around the PowerShift applications within the same category. For quick access to this program, click the lookup button to the right of the **select** field on the PowerShift menu.
- The new MENUM program allows you to generate your own custom menus based on the entire organization or a specific function, and configure QicLook and Report Generator specifications. You can also control if a menu is password-protected. Changes to the menus, provided as a part of a PowerShift release, are now retained after a release update.
- Two new Enterprise Options (XM) options **View reports as PDF files?** and **PDF device**, launches Acrobat® Reader® with the requested information in PDF file format. This provides you with all the options of Reader, including moving forward and backward in a document, going to a specific page and keyword searches. When viewing a register, two PDF views are launched—one for the register and one for the general ledger report; each will be on its own browser tab. To view PDF files, use Output Device Maintenance (XDM) to set up the PDF device.
- Inquires now include an **Exit** button on the Options screen to allow you to exit to the menu. **Cancel** continues to cancel the options update and return you to the inquiry with no changes. This change is for inquiries that initially allow for Options maintenance.
- Inquiries with selection boxes now include a **Refresh** button to rebuild the sort file.

- The **Quit** button now takes you back to the program from which you started so you can quickly go to the next entry.
- The standard screen size is now 120 characters by 35 lines. The increased screen size:
  - reduces scrolling from left to right and from page to page
  - reduces paging to **Other info**
  - expands menu capabilities
- #FILES additions are now retained at the time of the PowerShift release upgrade.
- Job Scheduler Maintenance (JOBS):
  - Can now be set up to activate your Report Generator and QicLook reports as a scheduled event. This allows your custom reports to be available as desired. Outputs can be to specific output devices and can include printed, spooled, and emailed documents.
  - \*SPOOL can now be used to run a command file, typically used to clear jobs created by the view option.
- Lookup enhancements allow for additional data filtering:
  - When you select the **Xref file entry?** option for a user field in User Fields Maintenance (XMO), the lookup sort can be completed by the user field, and this field is displayed in the list box.
  - User Field Maintenance (XMO) now disables **Xref file entry?** and **Lookup sort key** field entry when there is no sort for the master file.
  - User Field Maintenance (XMO) now allows date fields to be flagged as lookup sort fields.
    - Lookup for the following programs now allows you to display all records or only active customers, vendors, and employees:
      - Customer Maintenance / Inquiry (CM/CQ)
      - Vendor Maintenance / Inquiry (VM/VQ)
      - Employee Maintenance (LSA)
- There are new options to save or recall entered lists—an example is the Standard Cost Rollup (MCR) program.
- Email attachments now support the CSV file format.
- Audit trail reporting has been simplified and the purging of records is removed from the program.
- The ATR list now includes a column indicating if an audit trail is currently active. The report listing now includes the file name and description.
- XAT now allows you to delete audit trail details when an audit trail is de-activated.
- The term “Vendor-managed” has been replaced with “Consignment.”
- Use the new program, User Inquiry (UIQ), to display some of the details associated with a user.
- Notes maintenance now allows a range of lines to be deleted.
- When transferring notes, the program displays each transfer type for your selection
- When a user-defined lists exists, the **List** button now includes a check mark. Clicking Save does not save a list for future use, but now the list is retained until you exit the program. You may view and print multiple times without re-entering the list each time.

## Accounts Payable

- Vendor Invoice Payments (NC) now includes the eligible discount based on the discount percent for the AP terms and the discount date.
- AP Analysis Report (NDU):
  - Now allows for System Options (XM) (Accounts Payable Options) **Grace Period for terms discounts**.

- The report now displays in landscape orientation and includes the discount date, eligible discount amount, and vendor.
  - Report totals now include discounts available.
- Added the capability to generate a “positive pay” file of checks issued or voided for transmittal to the bank.
- Payment vouchers can be printed for all types of payments.
- Receiver Lookup (NVPI) for AP Invoice Entry (NE) includes extended purchase order and receiver values.
- The Accounts Payable Inquiry (NI) display list now includes a discount column and all dates formerly displayed with the toggle button.
- On-Account Payments (NMO):
  - Added an applied balance field to the screen (also in NMOI).
  - Added a warning message if you click **Register** without applying the entire on-account balance.
  - Heading wording has been changed from “Invoice” to “On-account amt” and from “Balance” to “Remaining” (also in NMOI).
- Landed Cost Item History Inquiry (NLHI) now calculates **Total landed costs** at a precision 14.5%. The display list now includes fields formerly displayed with the toggle and **Show** buttons.
- AP-Purchasing Inquiry (NDQ):
  - The "by invoice" option now includes the vendor number, vendor name, and user/date/time, which eliminated the detail box.
  - The "by purchase order" option now includes the vendor number, vendor name, item number, and purchasing branch, which eliminated the detail box.
  
- Unvouchered Receipts Listing (VUV) now includes:
  - Actual cost option
  - The option to print a one-line summary that includes either the GL account number, vendor name, or item number
  - Receiver date sort and selection option
  - Buyer code

## Approvals

Implementing approval cycles in PowerShift is a way to exercise more control over the purchasing, sales, invoicing, and manufacturing functions within your organization. The approvals subsystem ensures that proper review cycles are followed based on criteria you determine, providing discipline and consistency throughout all levels of the enterprise.

- New programs are available for setting up approval cycles for purchase orders, sales orders, shipments, invoices, credit memos, bills of material, and engineering change orders.
- **Existing Orders**—If you want to consider all existing orders and bills of material "approved," run APX before setting up any criteria (hierarchy and approvers in APPM); or you can set up the hierarchy and criteria first, then open orders (and all bills) will be looked at according to the hierarchy and criteria established and set them to approved or requiring approval.
 

If, for example, you are requiring all bills of material to be approved, you may want to run APX first, then set up your hierarchy, otherwise you will need to approve every bill in your database.
- **Substitutions**—The Approval Substitution (APRS) program allows you to select a substitute approver and view or print a list of transactions waiting to be approved.

- **XM Options**—Several enterprise-level options (maintained in XM) control whether the approval feature is active. Use of approvals is further controlled by branch within the enterprise, including:

Manufacturing Options	Bills of material approvals required? Stop mfg receipt for unapproved bills? Notify if unapproved mfg ords released?
Order Processing Options	Sales order approvals required?
Purchasing Options	Purchase order approvals required?

- Once system options for approvals are set and approval hierarchies established, use Approval Activation (APX) to add open orders to the approval cycle.
- The component drill hot key is now **E**.
- The Bill of Material Approval Inquiry (APPMQ) program now asks if you want to use the current production ECL if the **ECL** field is left blank.
- When purchase order approvals are active and a receipt is completed against a purchase order that has not been approved, an email detailing the exception is sent to the approval parties. The system removes the purchase order from the approval queue and automatically approves it.
- Sales Shipment Confirmation (OC) now displays this message: **Shipment must be approved first; it will be confirmed on approval** when attempting to confirm a shipment that is pending approval.

## Bills of Lading

- A SED (Shipper's Export Declaration) number can now be entered during bill of lading maintenance and will be printed on the bill of lading document.
- The audit trail can now be activated for bills of lading.
- Bill of Lading Maintenance (BLM):
  - The maintenance screens are now a single-screen format, eliminating the **Other info** button.
  - The **Confirm** button is now available earlier in processing, allowing you to create and confirm a bill of lading in a single session.
  - The bill of lading listing now displays the status description.
  - If the audit trail is active for the B1A file the **Audit inquiry** button is available.
- Bill of Lading Inquiry (BLQ) now displays the status description.
- The **ICO terms code** field has been added to Bill of Lading Maintenance (BLM). Bill of Lading Print (BLP) prints the International commercial terms (Incoterms) on bills of lading and the codes are updated by the Incoterms Code Maintenance (TINC) program.
- Transfer bills of lading:
  - can now generate a commercial invoice for an international transfer of product.
  - no longer display when the current date is later than the bill of lading confirmation date.
- When printing item details, the harmonization codes can optionally be printed for all bills of lading or only for those shipping to a different country.
- Optionally, a commercial invoice can be printed for all bills of lading or for only those shipping to a different country. Also, Commercial Invoice Print (BCI) now prints the commercial invoice automatically when the Bill of Lading Print (BLP) **Print commercial invoice with BOL?** program option is selected, regardless if the ship-from country is different from the ship-to country.

- The commercial invoice that prints for international shipments has been enhanced to include:
  - Harmonized tariff codes with separate codes for new sales and returns or repairs
  - ECCN designation if required
  - CCATS designation if required
  - **Declared value**—a new field added to ICM. You can use this value when an item is shipped at a zero invoice value.
- New print options for commercial invoices:
  - Customer purchase orders associated with the shipments
  - Notes attached to the bill of lading
  - Tracking numbers associated with the bill of lading

## Commissions

- The **Comm split** button is now available for Sales Order Maintenance (OE), EDI/Sales Quote Maintenance (QOE), RMA Maintenance (RMA), and RMA Inquiry (RMAQ) programs, even if commissions are not active. This change allows for custom applications or reports.
- Set commission eligibility from a sortable list of invoices in the SCE program.
- Customers can be set up so that commissions on invoices for certain customers are paid either at invoice or payment time (overrides system flag in XM)
- Sales Commission Listing (SCL) now includes the option to include or exclude orders with paid commissions.

## Customer Service

- Control Number Inquiry (SNQ)
  - Displays the control number's basic information and all of the inventory-related transactions:
    - The original order creating the serial number
    - Warranty expiration date
    - Maximum warranty date
    - Service agreement number and expiration date
    - Current RMA status and the last RMA number issued
    - The date the item was morgued (taken out of service)
  - Drill to the original documents where the serial number was created, shipped, or returned
  - Click **RMA** to generate a new RMA or to review the service agreement
  - Click **Expiration date** to change the warranty expiration date.
  - A new **Notes** button added to associate notes with a specific serial number.
- Customer Maintenance (CM):
  - A default ship-to number can now be set. During order entry, if no ship-to number is entered, the default number is used.
  - A ship via account can now be associated with a customer order number. When the shipment is created the account defaults on the shipment as well, allowing you to alter the account number on a specific shipment.
  - When you select **Internal document?**, the printing of the associated documents can be suppressed. This feature works in conjunction with the TDOC **Include internal documents?** option.
- Customer Maintenance (CM) and Customer Inquiry (CQ):
  - New **Default ship-to** branch code field
  - The user branch field is now titled **Default sales br.**

- If the taxing state is by zip code, the **Tax code** field is disabled to allow the zip code as the basis for sales tax.
- Customer Maintenance (CSM) and Customer Inquiry (CSQ):
  - The user branch field is now titled **Default sales br.**
  - If the taxing state is by zip code, the **Tax code** field is disabled to allow the zip code as the basis for sales tax.
  - The **Other Info** button has been removed. All fields display on one screen.
- Customer Contact Inquiry (CLQ) fields display on a single screen, eliminating the **Other info** button.
- Customer Contact Maintenance (CLM) and Customer Contact Inquiry (CLQ) now includes:
  - **Mobile phone 1** and **2** fields for cellular/wireless telephone numbers
  - **Department** field
- The Customer Service Inquiry (CSI) program now displays additional data for each line and a jump to the AR Inquiry (RA) program.
- Customer Invoice History Inquiry (CIHQ) and Customer Sales History Inquiry (CSHQ) display totals— the **Totals** button was removed.
- Credit Inquiry (CCQ) and Credit Maintenance (CCM) screens are now a single-screen format, eliminating the **Other info** buttons.
- Notes have been added to the Remit-to Codes Maintenance (TRM) program. Information from notes can be printed on the invoice if you have details for electronic funds transfer or other information that needs to be communicated.
- A new program, Family ATP Inquiry (ATPF), displays your plan by item and summarized by product family, allowing you to look for alternative trade-offs in the use of capacity.

## Document Management System

- Document Output Parameters Maintenance (TDOC) now includes:
  - An **Include internal documents?** option for sales-related documents. Select if you want to send copies to the customer.
  - A **View logo** button to display the logo associated with the document and verify this portion of the document setup.
  - **Track document history?** for copies, allowing you to specify which copies to track.
  - Two new options to identify the print location for boiler plate.
  - If you change any of these three fields in the document, you have the option to update the changes to all copies: **Header image name**, **Overlay image file** and the **Message code** selection.
- Added the ability to include a URL link and/or tracking number to the email text for a packing list or invoice. This allows the customer to click on the provided link to activate the freight carriers tracking web page.
- For vendor documents, the distribution can include vendor contacts.
- The e-mail address field size was expanded to 128 characters.
- Packing Slip Print (OPAK) prints the certificate of compliance on its own page.
- Allows the “Attachment device settings” to be used. For example, print a PDF file in portrait or landscape orientation.
- Additional option of having the terminal used when calling custom programs from a document, allowing for operator input.
- Two new programs, Customer Document Profile Inquiry (CDQ) and Vendor Document Profile Inquiry (VDQ) allow viewing the customer and vendor document profiles.
- The document distribution can include the user that created the document for sales orders, RMAs, bills of lading, and sales quotes.

- File attachments formats now include CVS.
- Output Device Maintenance (XDM) now includes CC (carbon copy) and BCC (blind carbon copy) options for email devices.
- A restriction has been changed in Output Device Maintenance (XDM) for PDF type spoolers. Previously, if the XDM entry includes a URL path for the auto launch of the viewer, the actual device required a non-queuing PDF spooler. Now the device requires a **queuing** PDF spooler.
- Viewed PDF files are erased as a part of the view process. When PDF view displays you have the option to save the PDF file.
- The Document Print History Inquiry (DOCQ) program is available to display the history of document creation. The new Document Output Parameters Maintenance (TDOC) option for copies, **Track document history?**, determines whether detailed document information displays. Initially, the option is selected by default.
- To identify Reprints, the document header is always written and the reprint message is based on the total number of times printed and sent.

### Electronic Data Interchange (EDI)

- EDI Import - Re-Process Files (EDRO) is a new program that allows an EDI file that included errors to be reprocessed from the provided sequential file.
- Additional fields output for Advanced Ship Notices and Invoices.
- Additional fields input for sales orders.
- When selected by a system option, the EDI transactions files can be *dropped* into the proper Qicware directory and will be processed automatically.
  - For orders with zero errors, the program generates a sales order.
  - As a part of the automation option, the system emails transaction and error logs to the appropriate party.

### Engineering Change Order (ECO)

- This is a new subsystem to support the engineering change process. This allows you to communicate changes to bills of material and routings before they occur. It includes:
  - Input new item numbers
  - Input of the bill of material
  - Generation of costs associated with the change
  - Generation of a new rolled cost for review
  - Work flow for approval of the change and then its implementation
  - Tables to support who is involved
  - Tables to support the type of change
  - The status is set to **F** (finished) when all implementation approvals are received
  - Final approval and processing updates the PowerShift main files
- ECO costs can no longer be deleted. A new **Clear fields** button clears hours and quantity and resets costs to zero.
- The ECO Processing (ECOP) list box now includes the Project, Requested by, and ECO writer; Implemented? date has been removed. Sort options match the listed fields.
- New reports:
  - ECO Report (PEML)
  - ECO Change Report (PEMR)

### Executive Information System

- The open purchase order stats now calculate as: *Quantity ordered – (Quantity received to stock + Quantity rejected)*
- The main screen inventory dollar amount now includes the value of work in process.
- **Inventory value** on the Executive Information Summary (EIS) now includes the value of work in process.
- The Inventory Statistics display has been reformatted to allow for a clearer view of inventory values and how they relate to the **Inventory value** on the Executive Information Summary (EIS) screen.
- The Intransit Status Display includes item number and description, formerly displayed with the **Item no/Desc** toggle button.
- The following rules apply to customer account data views when accounts receivable consolidation (ARC) is used:
  - Sales, bookings, cancellations, and RMA returns are only updated to the sold-to customer number.
  - Invoices, payments, accounts receivable adjustments, and finance charges are only updated to the ARC customer number.

### Export - Import

- Import Sales Tax Tables (TIP) is a new program on the Export-Import Program menu that imports third-party sales tax data to the PowerShift database, thus eliminating the need to set up tax authorities and tax code tables.
- The new Export Sales Tax (TXRO) program has been added to export shipment/tax information based on an input time period, or to re-send an invoice. Currently, SpeedTax™ is the supported output format.

### General Ledger

- Journal Template Maintenance (GSM) now includes an unassigned selection for the **Debit/Credit** field. This allows either a debit or credit entry or both entries.
- To allow for speedier data entry, General Journal Entry (GIP) now positions the cursor in the debit or credit field when a template specifies this information. The list box detail has been expanded to ten lines.

### Fixed Assets

- The lookup for Asset Addition Maintenance (FA) can now be filtered based on the assets status.

### Forecasting and Planning

- Updating planned orders in Planning Profile Maintenance (MPM) is now consistent with the Planned Order Maintenance (MOP) program.
- If an item's status is set to **N** for **Allow mfg?** then the item will not be included for Finished Goods Planning (MFP) and Material Requirements Planning (MRP).
- Planning Profile Maintenance (MPM) and Planning Profile Inquiry (MRD) now display a yes/no **Consignment** field to allow you to see if the displayed item is set up for consignment processing. These programs also display the **In MRB** quantity.
- Planned Order Maintenance (MOP):

- Includes a **Clear** button to allow all planned orders from the one selected to the end of the file to be deleted in a single operation.
- The **Move** button now allows the quantity to be altered when the order date is moved.
- Includes a **Multi orders** button to quickly enter planned orders when the customer requires a repeating quantity on a regular basis.
- Forecast Maintenance (MSF) now respects an item's end-of-life date. Forecast periods can not include the end-of-life date.
- Family view of the available to promise is now available:
  - View the family in total
  - View members of the family
  - Initiate the inquiry via input of the family parent or one of the family members
- Component Supply-Demand Inquiry (ISDQ) program enhancements:
  - Drills to Sales by Item by Customer Inquiry (SIC).
  - The customer purchase order number prints for sales order demand and the parent item number prints for manufacturing order demand.
  - Displays the customer Reference and Customer name for sales order lines.

## Inventory

- The **Requesting branch** field has been changed to **Receiving branch** for clarification. This change was made to:
  - Branch Transfer Maintenance (ITM)
  - Branch Transfer Inquiry (ITSQ)
  - Branch Transfer Listing (ITL)
- The Prime Location Replenishment Report (IPLR) prints a listing that helps you see future demand requirements that allow you to plan for sufficient item quantities at primary locations. You can specify a time period, a range of items, primary locations, and product classes. The Branch Item Maintenance (IMB) program has a maximum pick quantity established to allow you to pick larger demand quantities directly from a secondary stocking location.
- When displaying sales order demand in Customer Order Inquiry (ISQ), quantities now display in the list box, which eliminated the **Qty** button.
- Component Supply-Demand Inquiry (ISDQ) now includes consignment and floor stock detail and shows the consignment quantity as a separate supply.
- Material Issues and Adjustments (IMI) has a new code of ACI added to adjust the consignment stock balance. The current consignment stock balance displays in the upper right corner of the screen. Adjustments to consignment stock have no impact on the general ledger, as consignment stock is owned by the vendor.
- Material History Inquiry (MHI):
  - Includes an option to report ranges of serial numbers instead of each serial number on a separate line. An "\*" in the column following the control number indicates the line is reporting a range.
  - The display list now includes the control number, warehouse, bin location, and line shipped, formerly displayed with the toggle button.
- Material History Listing (MHP) now includes the demand order type selection option.
- An **Audit inquiry** button and a new field, **Declared value**, has been added to the Item Cost Maintenance (ICM) program. This field is used in the generation of the commercial invoice.
- Item Cost Inquiry (ICQ) now includes an **Audit inquiry** button.
- A new Consignment Inventory Valuation (ICL) report is now available.
- A new Inventory Valuation Cost Report (IVCR) report is now available.
- Systems options for inventory control include:

- A new **Consignment auto pick?** option. Selecting the option forces the transfer of stock from consignment to on hand, using the Move Consigned Inventory (IVM) program. Otherwise, inventory moves from consignment to on-hand based on the picking” process.
- A new **UPC validation?** option that validates that the entered UPC field is 12 digits and the 12th digit is a valid UPC check digit.
- The **Standard value** heading for the Projected Value Report (IPVR) program cost column matches your selection for the **Print Std, Act, or Avg cost** program option.
- Expanded display options for the Component Supply-Demand Inquiry (ISDQ) program.
- **Item status:**
  - The field has been expanded to two characters and is now supported by Item Status Codes (TISM).
  - Can be used in lookup filtering.
  - Controls are supported in sales, purchasing, and manufacturing.
- Enterprise Item Maintenance (IM):
  - The **Make/Buy/Kit** field is now a required selection. If the field is currently blank it will be set to a Make item if the low level code is greater than one. All other items will be set to a Buy item.
  - Now includes a field for an export declaration code. The Export Declaration Codes (TED) program holds the associated export fields, such as harmonization code, ECCN, CCATS, and licensing.
  - Checks are in place to prevent an item from being deleted if the item is in the following files:

Vendor item V1A  
 Planned order MP1  
 Mfg order MP2  
 Mfg comp xref MP9X  
 Sales/consumption 05  
 Physical inv cycle I9A  
 Customer item xref C11X  
 Repetitive billing item C3I

- UPC numbers for an item can not be created or validated by Enterprise Item Maintenance (IM) based on a user option.
    - The new UPC Codes (TUPCM) program allows you to set manufacturer code and last sequential number assigned.
    - The UCC-12 or GTIN-12 (12-digit) number is currently supported. The last UPC number is automatically updated as new UPC numbers are generated.
- Note:** The XM Manufacturing option, **UCC number**, is now obsolete; **UPC validation?** is now available.
- **Pre-assign ctrl no?** field is now a required selection.
  - Includes a **Catalog** button to allow catalog number maintenance.
  - Branch Item Maintenance (IMB):
    - The quantity field has been changed from **Packs per pallet** to **Units per pack** to allow for units that get packed in cartons and then get packed on a pallet.
    - Allows you to set the inspection flag for consignment items.
    - A number of items do not have a pack quantity. For new items the pack quantity defaults to one.
    - Includes a maximum pick from prime location quantity. The field can be used when picking sales orders, to limit the amount picked directly from the primary location.
  - IMI adjustment of serialized items now includes a “range” option.

- Catalog Item Maintenance (IMK) and Catalog Item Inquiry (IMKQ) are new programs for setting up and displaying item catalog numbers. You can also access IMK from Enterprise Item Maintenance (IM).
- Inventory Barcode Label Maintenance (IBLD) is a new program for creating barcode labels.
- Branch Transfer Maintenance (ITM):
  - Now uses the receiving branch's **Ship via** and **Special instructions** as the default values.
  - Automatically transfers branch notes to a transfer.
- Branch Transfer Listing (ITL) now includes the quantity received and quantity received to stock on the printout.
- Intra-Branch Transfer Entry (IBT) is a new program to enter the transfer of items from one location to another within a branch.
- Intra-Branch Transfer Allocation & Shipping (IBTS) is a new program to enter allocation and shipping of items for an intra-branch transfer.
- Intra-Branch Transfer Receipt (IBTR) is a new program to receive items for an intra-branch transfer.
- A new inventory program, Transfer Print (ITP), prints a pick document for a transfer for which a shipment has not yet been created.
- The Inventory Valuation List (IVL) program now includes an option to print only the floor stock value.
- A new Move Consigned Inventory (IVM) program manually moves stock from the consignment quantity to the on hand quantity.
- The Material History (MHI) and Inventory Status (ISQ) Inquiry programs now have options to print ranges of serial numbers. Processing time for demand display has been reduced.
- Standard Cost Rollup (MCR) now includes the list save and recall feature.
- Enterprise Item Maintenance (IM), Enterprise Item Inquiry, Branch Item Maintenance (IMB), and Branch Item Inquiry (IMBQ) now includes an **Audit** button to drill to audit details.

## Invoicing and Accounts Receivable

- The AR Inquiry (RA) program now includes:
  - The column, **Disp?**, to indicate if the invoice is being disputed.
  - The transaction number when viewing in detail mode.
  - Displays Adjustments and Discount given, formerly displayed with a toggle button.
- The Cash Receipts Entry (RCE):
  - Displays the order number and invoice number, formerly displayed with a toggle button.
  - Displays the potential discount amount.
  - Allows the entry of negative payment amounts for payment type of RF (refund).
  - If the new System Options (XM) (Account Receivable) option, **Cash receipts warning message active?**, is active, the operator receives a warning message if the invoice balance, after applying a payment, is less than or equal to the write-off limit.
- Invoice Print (RP):
  - Option to print the currency (if the branch currency code is different from the shipment currency code) has been added even if the Activate Multiple Currencies (CX) program is not active.
  - Option to print modular component prices when "build up" pricing is used.
  - Option to print an item's catalog description.

- Warranty expiration detail prints for items with warranty tracking.
- AR Invoice Maintenance (RM):
  - Includes an **Address** button to maintain the bill-to shipping address.
  - The initial header display of the bill-to address is now based on the shipment header and not the customer master for the bill-to customer number.
  - The maintenance screens are now a single-screen format, eliminating the **Other info** button.
- AR Invoice Inquiry (RQ) and AR Invoice Maintenance (RM) enhancements:
  - All fields display on one screen, eliminating the **Other info** button.
  - The bill-to address on the shipment displays at the top of the screen if there is a shipment corresponding to the invoice; otherwise the customer master address displays.
- Payment Reversal (RVC) now includes a **Void date** entry which can be used for general ledger posting.
- The RMA number now prints on both the associated credit and debit memo as the original order number.
- The new Sales Order Tax Report (OTX) program prints a sales tax report for an invoice date range.
- The Sales Tax by Tax Authority (RTX) program is now titled Monthly Sales Tax Summary Report. The report summarizes sales tax by state and fiscal year.
- The Sales Tax by Invoice (RTXI) program is now titled Sales Tax Detail Report. The Sort option now includes a Subtotal? selection for Tax authority and Month. The Selection option includes Country and State/prov selections. The report includes a Total sales column. The program displays grand totals and subtotals by date. The taxable, nontaxable, and exempt amounts are based on the first authority.
- Repetitive Billing Report (RBIC) online documentation has been revised to properly follow the program prompting.

## Labor

- Employee Maintenance (LSA) has been changed to a single screen format, eliminating the **Other info** button.
- Export Employee File (LSAXML) is a new program to export data from the Employee Master file (LS1) to a Microsoft Excel spreadsheet where you can edit the data before importing it back into your database.
- Labor data collection has been released—real time reporting of shop activities that makes use of the system clock to capture actual time worked:
  - Optionally, log in or out of the facility.
  - Optionally, adjust start and stop to the shift parameters.
  - Lunch hour is automatically deducted.
  - Optionally, account for time lost (time in the facility versus time on activities).
  - Use the new Crew List Maintenance (LTEC) program to support crew reporting. Crews can be changed at the start of an activity. Only the crew leader needs to report the activity. The program requires crew leaders and members to be assigned to the same shift.
  - Barcode Labor Management Sign Out (LRTM) allows you to log a person off an activity when they forget to log out at the end of the day.
  - Bar Code Labor Inquiry (LRTQ):
    - The list now indicates if the reporting line represents a “crew” and the program includes a **Crew members** button to display the list of crew member.
    - Includes an option to sort by “Clock in time.”

- Allows you to enter the percentage completed if the System Options Maintenance (Labor Options) **Enter percentage completed?** option is selected.
  - The Work Center Maintenance (WCM) **Labor eff %** entry is now written to the WIPF file for use in reporting.
  - WIP Order Inquiry (WIQ) and Work Center Operations (WCO) program have been changed to show jobs are currently active (started).
  - Employees' time worked can be split to multiple unattended operations. The split is based on the number of operation sequences being worked on simultaneously.
  - Both the start and stop of an activity is tracked.
  - A badge ID used for time reporting can optionally include a security character to ensure that an actual badge is used.
  - Employee Badge Print (LBP) now includes the shift.
  - The shift reported as worked can be defaulted to the employee referenced on a machine entry.
  - Work order notes can be added while completing time entry. These notes can identify problems with the execution of the operation and be available when completing a job performance evaluation.
- The **Employee no** field label has been updated to **Badge ID** as it can represent an employee or a machine. The **Badge ID** is now used in the Labor Entry (LLE), Labor Import (LEI), Labor Inquiry By Manufacturing Order (MLI), and Labor Efficiency Report (MLP) programs.
- Labor Entry (LLE):
  - Now has a **Notes** button to drill to notes associated with the manufacturing order. You may also reverse labor entries with a negative entry.
  - All field entries are on one screen.
  - When the employee's lunch period is left blank, the lunch period associated with the employee's shift is used for the hours calculation.
- Labor Inquiry By Manufacturing Order (MLI):
  - For unattended operations, shows the machine hours and the employee hours for the referenced employee on a single display line.
  - A **Detail** button allows you to view machine or employee information. If the referenced employee is a crew leader, there is an option to display the associated crew members.
  - All of the detail information is now displayed on a single screen, eliminating the **Other info** button.
  - A sort by operation sequence has been added.
  - A **Notes** button is now available to drill to notes associated with the manufacturing order.
- Labor Inquiry By Employee (LHI):
  - Now reports both current and historical entries.
  - The program option, **Include history?**, has been added.
  - Both the standard work center and the actual work center/machine number displays.
  - The sign in time displays.
  - For unattended operations, the employee reference number displays.
  - The Sort option for date worked now encompasses both the date and time.
- For unattended operation types, rework can now be entered.
- Non-standard operations can now be reported via a machine entry.
- If labor is not interfaced with the general ledger, the Labor Register (LPR) program now ignores invalid GL accounts and posting dates, and any out-of-balance conditions. The out-of-balance condition is still reported, however, the out register completes and deletes, and individual records are marked as completed. Posting Criteria Maintenance (XPC) is then optional.

- Labor Export (LPE) now includes a **Manpower selection** program option to allow you to separate labor records based on how an employee is paid. The result is based on the Employee Maintenance (LSA) **Manpower code?** field selection.

## Manufacturing

- Manufacturing Order Maintenance (MIM) due dates changes:
  - When you change the due date of the parent item of a series of cascaded manufacturing orders, the lower level due dates will also be adjusted based on the new due date and the item's lead time.
  - Calculated dates that are prior to the current date are set to the current date.
- When you click the **Demand** button in Manufacturing Order Maintenance (MIM), Branch Transfer Maintenance (ITM), or Work Center Operations (WCO), the programs display the demands for the selected manufacturing order. Subsequent selection of a demand followed by clicking the **Order** button (previously labeled **Detail** button) completes the drills below:
  - MRB drills to MRBQ
  - MFG drills to WIQ
  - P/O drills to VOI
  - TRN drills to ITSQ
  - REQ drills to IRSQ
  - S/O drills to OIQ
  - RMA drills to RMAQ
- A manufacturing order can be linked to an RMA demand order:
  - Open Manufacturing Order Listing (MOOL) now displays the RMA number linked to a manufacturing order and provides a drill to the RMA.
  - Open Manufacturing Order Inquiry (MOOQ) now allows you to drill to the RMA.
- The manufacturing order lookup (BLUWO) now includes the management priority.
- Standard Operation Maintenance (ROM) now transfers multiple setups, setup labor %, and direct labor % to the actual routings when they change and if operator has requested the transfer.
- The Shop Paper Print (MSP) program prints the demand order. If the demand is an RMA repair, the customer and line number print. If you opt to print all serial numbers and a serialized item is associated with a service agreement, the contract number (if it exists), agreement warranty expiration date, and maximum warranty expiration date print. You also have the options to print barcoded components operation sequences.
- Routing Listing (RTL) now prints notes with the sequence number and print flag, as well as the note text. Notes with 0-9 print codes are included when **P** type comments print.
- The Bill of Material Approval Check (BAPPCK) program adds open bills of material to the approval cycle when you make changes to your approval hierarchy or approval cycle.
- Bill of Material Approval Inquiry (APPMQ) displays the status of bills of material that require approval and who needs to sign off.
- A new **BOM** button for Configured Product Where Used (MBW) and BOM Where Used (MWU) drills to the selected item's full bill of material.
- New engineering change order programs listed on the B1 menu, manage, implement, and print engineering change order.
- Controlled Item Inquiry (MCHI) and Controlled Item Inquiry by Order (MCII) now include descriptions for listed fields. The list now includes the item number and description, formerly displayed with the toggle button.
- Labor Efficiency Report (MLP) now prints the indirect labor description in the item number field for reported indirect labor.
- New scrap report inquiries available in summary (MSHQ) and detail mode (MSDQ) are available.

- The manufacturing order on which an item was scrapped is now included in the listed fields in the Material Scrap Detail Inquiry (MSDQ) program. The manufacturing order is now a sort and select option and a drill has been added to the Material Usage Inquiry (MUQ) program. The **Value** column has been renamed **Extended value** and is the standard cost times the quantity scrapped.
- When scrapping a controlled component with the WPMSC overlay, WIP Movement (WIPM) now displays both the quantity scrapped and rejected.
- For disposition code of 3 in the Rejected Material Inquiry (MRBQ) program, the **Return order** button drills to the PO Inquiry (VOI) program. For disposition code of 4, the **Rework order** button drills to the Material Usage Inquiry (MUQ) program.
- Multi-Item Component Availability (MOSG) explodes a list of items to determine component requirements.
- When a full pick can not be completed, manufacturing backflush now sends a notification to the e-mail address associated with the planner for the manufacturing order parent item number. This can occur when a consignment item is involved and the XM Manufacturing option is set to not automatically move stock from consignment to on hand or when the XM Inventory option does not allow for negative inventory to be generated. If no e-mail address exists for the planner, the e-mail is sent to the address entered for **E-mail for mfg order notification** in System Options Maintenance (XM) Manufacturing Options program.
- Material Usage Maintenance (MUA) no longer closes short, floor stock and yield components. These types of components are updated when the manufacturing order is received.
- Material Usage Maintenance (MUA) and Material Usage Inquiry (MUQ) programs now include a **Non-stock** button to drill to non-stock order details.
- Material Usage Inquiry (MUQ) now displays accumulated quantity rejected and accumulated quantity scrapped for control items.
- Work Center Maintenance (WCM) and Work Center Inquiry (WCQ) have been changed to a single screen format, eliminating the **Other info** button.
- A work center scheduling program, Work Center Operations (WCO), is now available:
  - Sequence work to be completed in a number of ways:
    - Operation start date
    - Main material used—allows grouping of common items
    - Tooling—allows grouping by a common tool designation
  - Sort the list by the scheduled start time.
  - The program supports labor or WIP movement entry.
  - Print the manufacturing shop paper on demand. The display indicates if the shop paper has been printed.
  - The option to print operations with the previous operation's good quantity greater than one will also print the initial operation for a manufacturing order. This allows the Work Center Operation (WCO) program to display all operations that could possibly be started at the current time.
  - The program option to display **All** now lists all operations that are incomplete.
  - The **Traveler** button prints a copy of the manufacturing order that actually moves through the shop with the work (a "traveler" that documents parts produced).
  - Job activity is displayed for jobs started.
  - The screen display is in real time—completed jobs are removed and new jobs are added each time the screen is refreshed.
  - A **View image** button displays an associated image, PDF file, or displays an intranet web page, allowing you to make documents such as detailed setup instructions, quality instructions, drawings, MSDS sheets, and other information available to the production floor.
  - Added the capability for the supervisor to set the exact sequence of production.
  - Interfaces for completion reporting:
    - Labor reporting—tracks both start and stop of the operation

- WIP reporting—tracks only the completion of the operation
- Manufacturing Execution System (MES):
  - If you have automated equipment that impacts inventory you can set up an interface in System Options Maintenance (XM) (Manufacturing Execution System Options) to handle this task. Once the interface is defined, you simply generate a transaction file in a specified directory. A background process recognizes the presence of the file and processes it as if someone was manually inputting inventory adjustments.
    - For unattended operations: Just move the update file to the directory and it is processed. You control how frequently to interface the external application.
  - Standard direct labor and overhead can now be assigned to an unattended operation on a percentage basis. Typically, the percentage is set for the number of unattended operations the operator is monitoring simultaneously. For example, if the operator typically runs two machine operations at the same time, you would use 50%. If they run three machine operations at the same time, you would use 33%. For unattended operations, the machine overhead cost is calculated based on the WCM machine rate only. The WCM overhead rate is only used for labor associated with an item.
  - Shop Paper Print (MSP), now includes printing of the demand order line with the demand order number.
  - Consolidated Picking List Selection (MSPK) now includes the program option, **Ignore part designator?** to allow the pick list to display the sum of the requirements by component item number.
  - BOM Where-Used (MWU) now includes an option to report only upper level finished goods items (i.e., order code zero).
  - When receiving serialized manufactured items, you now have the option to have either an alpha prefix or suffix included in the assigned serial number.
  - Work in Process Inquiry (WIQ) now includes the customer reference and a drill to display the routing for the selected operation sequence.
  - WIP Valuation Inquiry (WIVQ) now includes sort and selections options by product class, ABC classification, and inventory account code. Additional columns on the display are Received costs and the Net WIP value, eliminating the **Toggle** and **Detail** buttons.
  - WIP Cost Inquiry (WICQ) now includes a **Labor** button to display labor detail for the manufacturing order.
  - Configured Product Maintenance (MBM):
    - No longer has the **Allow qty maint?** option active for components of a pseudo.
    - The Operations button label is now **Oper**. When the item has operation sequences, a check mark displays on the button.
  - The Component Availability Inquiry (MOS) display list now includes:
    - The item and description in summary/detail mode, formerly displayed with the toggle button
    - The floor stock code in detail mode
    - The quantity in floor stock in summary/detail mode
  - When a manufacturing order is picked (or back flushed) and a consignment component has insufficient quantity on hand, and the System Options Maintenance (Inventory Control Options) (XM) for **Consignment auto pick?** is set to N; the system generates an email to the planner of the work order parent item noting the exception. If the parent item does not have a planner assigned, or if the associated planner does not have an associated email address, the exception is emailed to the address entry for the System Options Maintenance (Manufacturing Options) (XM) for **E-mail for mfg order notification**.
  - Standard Operation Where-Used (ROW) now includes two program options: **Display RTM rtgs for configured items?** and **Print current RRL?**

## Physical Inventory

- The Cycle Count Preparation (HCP) program has been enhanced:
  - Allows you to assign a range of tag numbers to be used to complete a cycle count.
  - For controlled cycle counts (preassigned tag numbers), the Cycle Tag Report (HTQ) reports if a missing tag is Assigned or Unused.
  - If the new option **Controlled cycle?** is checked, tag number assignment can be completed for the cycle count batch. A new button **Tag assignment** is displayed and you are prompted to enter the beginning and ending tag numbers along with the general location where the physical inventory tags will be distributed. Numeric tag numbers are zero filled; numbers with an alpha prefix or suffix will be zero filled if the beginning number entered starts with a 0. The tag status can be maintained as needed.
  - Includes a new option, **Update system on hand at time of count?** Previously, the system count was locked at the time of the HCP generation.
  - Alternate Physical Count Entry (HAE) now includes a **Floorstock?** field. Selecting of the field sets the control number to FLOORSTOCK and the item's floor stock count updates.

## Pricing

- While in add mode, if the Price Contract Maintenance (PCM) **Expiration date** field is left blank, it will be set to 12/31/9999.
- The Price Codes Maintenance (TPLM) program allows you to create your own custom labels for up to nine potential price codes.
- Pricing By Item Inquiry (PIQ) displays pricing for items by branch.

## Project System

- Project Import (PSI) now includes Note types customer, credit, or bills of lading to the import criteria.
- Project Maintenance (PSM):
  - The screen layout has been updated to be consistent with Enterprise Item Maintenance (IM).
  - The Make/Buy/Kit code is now a required field.
  - If the option is to tax by zip code, the tax code field is disabled.
- Entry of existing item numbers is now supported.
- A sales order quote is optionally created at the time of project transfer. There are new options for transfer of project ECLs and RRLs to the live data files.
- The project address can be based on the customer contact information.
- Bills of material and routings can be copied from live data or from other projects.
- You can create projects for items with different engineering change levels (ECLs) and routing revision levels (RRLs) from those that exist in your live database.
- Fields added to the inventory files are also available in projects, for example unit pack data and export data.

## Purchasing

- Kanban Purchase Requisition Creation (KBE) generates purchase requisitions with minimal operator entry. The stockroom can then initiate stock replacement with a "two-bin replenishment system." Optionally, you can define a label and printer to conveniently print the label during the requisition generation process.

- Requisition Maintenance (IRM) has been enhanced to allow for selection by the program that created the purchase requisition. The program also no longer validates the vendor number field for a manufacturing requisition.
- In addition to moving consigned inventory to regular stock for shipments, use Move Consigned Inventory (IVM) to specify item quantities to move from consignment inventory to stock on hand.
- Vendor Price Maintenance (VMM) now allows the inspection flag to be set for consignment items. The program displays both the vendor number and vendor name, formerly displayed with the toggle button.
- A new program, Vendor Contact Maintenance (VLM), maintains a list of vendor contacts which can be used in document distribution. This program is similar to Customer Contact Maintenance (CLM) that maintains customer contacts.
- Vendor Contract Maintenance (VCM) now filters for only open contracts.
- Open PO Summary Report (VMSPR) is a new program that prints a report of purchase orders with item quantities not yet received to stock.
- Receiving Report (VRR) now includes the status selection **I** to include receivers with the inspection status on the report.
- Parts on Order Listing (VPL) now includes sort and selection of the buyer and the buyer prints on the report.
- PO Print (VOP)
  - A “boilerplate” option has been added.
  - The print option for closed lines is no longer only related to reprinted purchase orders.
  - There is a new option to print **Date wanted** or the **Date promised** on the purchase order. The title of the field changes, depending on the option selection. the **Due date** no longer prints.
  - Print license 1 and Print License 2 has been replaced with **Print sales tax license on PO?** with multiple selection options.
- The PO Maintenance (VOE) and PO Detail Inquiry (VOQ) programs' line display has been enhanced to include additional details.
- PO Maintenance (VOE):
  - Displays revised messages pertaining to changes to the first promise date. The update of the first promise date impacts the vendor performance reports. The unit cost for outside services (ie material/labor code L lines) now comes from the routing operation.
  - New **Ext amt** button for PO lines to calculate a unit cost based on an entered extended amount and purchase quantity.
- PO Receipt Register (VRJ) now provides drills to the associated receiver or order.
- Inspection & Dock-to-Stock Status Report (VIS) now includes the capability to sort and select by buyer; order number has been added as a selection option.
- The Parts on Order Inquiry (VPI) display list now includes vendor number, original quantity ordered, and unit cost, formerly displayed with the toggle and **Show box** buttons.
- The Vendor Purchases Inquiry (VPQ) display list now includes unit cost and all fields formerly displayed with the toggle and Show box buttons.
- Vendor Performance by Item Inquiry (VAI) now includes the received date on the cost screen.
- The purchase order type displayed for a vendor return with no replacement has been changed from **No inventory returned** to **RTV; No replacement**.
- PO-Receiver Archive (VEX) now includes consignment receivers in the archive.
- A new program, Morgue Serial Numbers (MRG):
  - Adds the capability to “morgue” a serialized item when the item is no longer in service and is not a component on an open manufacturing order.
  - Items with this status cannot be processed in future transactions.
  - A **Notes** button allows you to associate notes with a specific serial number.

## Receiving

- Receiver Maintenance (IRC):
  - Now handles entry of the manufacturers barcode for consignment items and automatically flags non-compliant items for inspection. It also allows the you to flag a consignment receipt for inspection.
  - Now displays the quantity stocked and the receiver status for manufacturing orders
  - Message terminology for vendor-managed inventory is now consignment inventory
- Receiving and Inspection (IRI) column headings for quantities received, inspected, and rejected are now consistent with the displayed data.
- The **VMI** button is now labeled **Consignment**.
- The Order-Receiver Inquiry (IORQ) includes a total for the quantity received and a sort based on the PO line, allowing you to print subtotals by the PO line.
- Receiver Inquiry (IRCQ):
  - Now includes an option to list the range of serial numbers for a line rather than each serial number separately. A range is indicated by an "\*" in the Range column. To list all the serial numbers for a range, select the line and click **Serial no**. The IRCQ screen displays additional fields for stocking unit of measure, purchase quantity received, rework quantity and order status.
  - The field labeled **Qty reworked** is now **Qty reworked/repaired**.
- Receivers for repair and rework orders can only be reversed if the item number received is the same as the item number ordered.
- Rejected Material Disposition (MRB):
  - If you opt to stock items "as is" and the date stocked is blank in the receiver line, the date stocked is set to the current date.
  - Added Entered date to the display and lookup.
  - An audit trail for the MRB Header file can now be activated with Audit Trails (ATR).
  - The **Return order** button now drills to Shipment Lines Inquiry (OSIQ).
  - A new **Replacement** button drills to the PO Inquiry (VOI).
- Rejected Material Disposition (MRB) now includes live and history files; and Rejected Material Listing (MRBL) now includes the option to include history.
- You are no longer allowed to select a receiver where the received order number is included in a Manufacturing Order Close (MJC) batch. You can not reverse a receiver that:
  - has been reversed or voided
  - has been selected for register update
  - is associated with a manufacturing order selected for close with Manufacturing Order Close (MJC)
- Receiver Print (VRP) now includes the option to print control numbers.
- PO Receipt Register (VRJ), RMA Receipt Register, (SRJ), Transfer Receipt Register (IRJ), and Manufacturing Order Receipt Register (MRJ) now provides drills to the associated receiver or order.

## Return Material Authorization

- RMA Maintenance (RMA):
  - Now includes a **View Rcvr** button on the lines display to drill to the receiver inquiry for the displayed RMA line.

- Now allows the operator to enter a destination customer and have this customer number and associated name and address used when manually creating a debit or credit memo.
  - The **Ship branch** may be changed to another manufacturing branch if any line has a repair order.
- RMA Maintenance (RMA) and RMA Inquiry (RMAQ):
  - The customer service representative field is now maintainable by the order entry operator.
  - The **Ship branch** field has been added to the header and can be maintained by the order entry operator. This field defaults to the value in the customer ship to master file.
  - The **Default sales branch** has been added as a maintainable field and defaults based on the customer ship to master file if a ship to number was entered or to the customer master if no ship to master was input.
- RMA Listing (RML):
  - **Ship branch** is now available for sort and selection criteria.
  - **Sales branch** is now available for selection criteria.
- The new RMA Line Inquiry (RMAI) program displays all the supporting orders—repair order, credit and debit memos—created by an RMA.
- An RMA can be generated from the Control Number Inquiry (SNQ) and Service Agreement Tracking Maintenance (WTM) programs.
- An RMA may now be attached to an invoice that has been moved to history. However, if the shipment that created the invoice is moved to history, the RMA must be created not attached to an invoice.
- If you opt to print all serial numbers on RMA Acknowledgment Print (RMAA) and a serialized item is associated with a service agreement, the contract number (if it exists), agreement warranty expiration date, and maximum warranty expiration date print.
- If the RMA includes a replaced item, the replacement item assumes the warranty characteristics of the item being replaced.
- A setting for the RMA receiver inspection flag, a default price code, and a default for the RMA force repair has been added to Systems Options Maintenance (XM) Return Material Options.
- Price codes entered in a service agreement are copied when an RMA is created from the service agreement.
- Credit and debit memo details are now displayed.
- The credit memo / debit memo quantities are no longer defaulted; they are based on operator entry.
- An option to issue credit or debit memos from a branch other than the authorizing branch has been added.
- The RMA receipt can optionally create a repair manufacturing order. The RMA receipt in a non manufacturing branch no longer attempts to generate a repair type manufacturing order.
- The **Force repair?** option for RMA line entry forces repair orders to be created on non-inspected receipts.
- RMA line entry now allows manual entry of a control number as long as it does not exist anywhere in the system. The restriction to only enter the item number or control number has been removed; both fields can now be entered.
- Line entry now includes a “range” option for the addition and removal of serial numbers associated with an RMA.
- For control-number items, RMA line entry displays the beginning control number attached to a line.
- An option to print item control numbers on the RMA acknowledgment has been added.
- Repair harmonization tariff codes now print on the RMA Acknowledgment Print (RMAA) and RMA Packing Slip Print (RMAP) that is included with the returned product.

## RF Data Collection

- Added the capability to run custom RF programs from the PowerShift RF Menu.
- Sales order picking enhancements:
  - Supports input of sequential serial numbers by range.
  - Use a range of sequential serial numbers for input.
  - Allows for a “smart barcode” prefix for the verification scan (item number or control number).
  - Streamlined scanning to simplify entry.
  - User interface options for presenting pick information—directed mode to inform the operator what to pick, or undirected mode to allow the operator to determine the pick sequence.
  - Option to disallow over-picking.
  - Ability to delete a picked line number.
  - Entering the order number, then **USR** in the line number displays the users currently picking the sales order.
- New companion RFOSS program for printing of pick lists for sales orders shipping.
  - From the time the pick is printed, until it is picked or canceled, order maintenance is disallowed.
  - Printing of the pick list from RFOSS can disable the printing of the document from other applications.
  - The earliest ship date remaining open for the order is displayed, and only lines within a predefined shipping horizon are printed on the pick list, allowing for the handling of blanket order shipments.
  - Drill to view approval detail.
- Stock PO Receipt (RFIRCPO) enhancements:
  - Supports scanning of manufacturer's item number, including any smart barcode prefixes and the ability to force inspection if the correct barcode is not scanned.
  - Enter **LOOKUP** in the **Pack slip** field to view packing lists currently in the process of being received.

Up to five users can be associated with a packing list. Only the last user to exit receives the prompt to complete the receiver.
  - Enter a packing list number and then **DEL** in the purchase order field to delete the packing list reference. If there is a receiver associated with the packing list, the program prompts to close the receipt. If there is not an associated receiver, the program prompts to delete the packing list reference.
  - Enter **USR** in the purchase order number field when a packing list number has been entered to display users currently working on that packing list number.
  - Control number, warehouse and bin location are now passed to the label interface. The same label program \$RCVONE has been updated to reflect these additions.
- Manufacturing Order Receipt (RFIRCWO) now allows for the entry of a range of serial numbers. If both the starting and ending numbers are entered, all numbers will be checked against the serial master file to insure that they have not been issued. If any one serial number of the entered range has been used, the entire range entry is rejected and the receipt is not processed.
- Support for the picking of transfers.
- A new restock prime location function along with a return from the prime location.

- A new move-to-floor-stock function along with a return-from-floor-stock.
- Consignment Inventory Receiving (RFVMI) is now available. It prompts for a packing list entry to make the entry consistent with the receipt of a purchase order and provides the capability to combine multiple receipt scans for a single item and packing list number to a single line on a receiver.
- Email messages can be optionally sent for purchase receipts outside a predetermined set of options, for example, dollar value, percentage over, and quantity over.

Email messages can be optionally sent for sales order shipments that are greater than the quantity ordered.

- For one-step purchase order receipts, multiple entries for the same packing list and purchase order are combined to a single receiver line. This feature allows mixed-load containers to be received in any sequence and still result in a single line on the receiver per purchase order line received.
- When prompted for an item number, the UPC number, customer item number, vendor item number, and manufacturer's item number can be optionally scanned.
- Tag Cycle Count (RFHAE) enhancements:
  - To input a floorstock count, the operator responds with **F** at the **Correct?** prompt. If the item is controlled (lot or serial) floor stock is now allowed and the **Correct?** prompt is **(Y/N/Ref)**. For non-controlled items the prompt is **(Y/N/F/Ref)**. A reference needs to be input prior to the **Y** or **F** entry.
  - If you are entering a floor stock count for a warehouse/bin location controlled item, input a value in the location. It is suggested that a **FLOORSTOCK** barcode be created for scanning. This location is not written to the count file.

## Sales and Shipping

- Order Entry (OE):
  - The order entry screen as been redesigned to a single screen format. The fields commonly entered for a sales order are listed first so you can exit entry after a few entries to expedite the order entry process. Fields added to the screen:
    - **Sales Branch**—Defaults to CSM or CM value and can be maintained by sales order.
    - **Internal Document?**—Allows you to override standard document distribution and indicate that a copy will not be sent out. This option also effects quotes, RMAs, and shipment documents.
    - **Customer Service Representative**—Defaults to CM value and can be maintained by sales order.
    - **Ship partial?**—Defaults to CM value and can be maintained on an order-by-order basis. (Other changes have been made to disallow the confirmation of a partial shipment.) The option must be selected for partial shipments to be created or confirmed for the sales order.
    - **Comm split** button is available if sales representative 2, 3 or 4 and related split values require manual input.
    - Address display has been expanded to 70 characters. The **Address** button displays the entire address record.
    - **Ship via acct**—Defaults to CSM value and can be overridden on an order-by-order basis.

- If desired, a **Default Ship to** number can be created in CM. If no ship to number is entered during original order entry, the default ship-to number is used.
  - Displays the order's extended **Volume** and **Weight**.
- Sales orders now have both a sales branch and a shipping branch associated with each order number. The sales branch is used to determine the proper logo to be printed on the document.
- If the selected Freight terms code in the Freight Codes Maintenance (TFP) program has **Bill for freight?** selected and a flat freight rate has been established, the amount is added as estimated freight when the order number is created. Selecting this option is only to insure that freight is included on the invoice; there can be freight and miscellaneous charges without selecting this option.
- The carrier account code defaults from the ship to master file, but can be overridden during order entry.
- For a non-stock item only, you can now enter the item's weight per unit of measure, shipping category, and export declaration code. This information is required in the generation of shipping documents.
- Added new functions to map (XMAP) and process (MAPIT) a file created by third-party software applications like UPS WorldShip or FedEx Ship Manager. Information on container weight, shipping cost, size, etc., can all be imported to PowerShift shipments with the shipping cost optionally used to bill freight to the customer.
- The **Decl value** button is now always available. The accelerator key is **1**.
- If the line discount percentage is greater than zero, the net unit price (price less discount) displays to the right of the selling price.
- Lines that are totally obligated or shipped can no longer be split. Previously, the program allowed creating a new line for a zero quantity.
- You now have the option to maintain configured products components based on the configuration of the bill of materials. You can select components from an indented BOM listing with the added ability to change previously selected options. To activate this option, select the new System Options Maintenance (XM) Order Processing Options **Use BOM for component maintenance?** option for your branch.
- A new **Merge cfg** button allows you to copy an order line for a configured product from an entered line or from another sales order's line.
  - Component costs update to the then current costs
  - Pricing is based on the copied line
- Order Entry (OE), Sales Order Inquiry (OQ), EDI/Sales Quote Maintenance (QOE), and EDI/Sales Quote Inquiry (QQQ):
  - The screens are now a single-screen format, eliminating the **Other info** button.
  - The customer service representative field is now maintainable by the order entry operator.
  - The **Ship via acct** field is now maintainable by order.
  - The **Partial shipment?** flag is now maintainable by order.
  - The **Ship branch** field has been added to the header and can be maintained by the order entry operator. This field defaults to the value in the customer ship to master file.
  - The default **Sales branch** has been added as a maintainable field and defaults are based on the customer ship to master file if a ship to number was entered or to the customer master if no ship to master was input.
- When a sales order is on hold, the header now displays the reason code associated with the hold.
- Two new programs have been released for globally updating sales order dates. Use Order Date Revision Options (ODRS) to set default processing options for the Order Date

- Revision (ODR) program. Use the ODR program to globally update sales order dates—a real time saver if you need to change the expected ship date on multiple sales orders.
- The shipping branch displays for each order.
  - If sales order dates cannot be changed, you have the option to print an error log.
  - Sales Order Listing (OL) now includes maintainable lists for customer number and product class.
  - Sales Order Line Component Inquiry (OICQ) now includes an option to display information from the history files.
  - Sales Shipment Confirmation (OC) now allows you to maintain the header notes associated with the shipment after shipment confirmation and invoicing.
  - Sales Shipment Confirmation Inquiry (OCQ) now includes the bill of lading status of Open; previously only the statuses of Confirmed or Invoiced displayed.
  - The Sales Order Summary (OSQ) display list now includes customer number and name and gross and net amounts, formerly displayed with toggle buttons.
  - Acknowledgment Print (OPS) now includes a program option to print modular component prices when “build up” pricing is used.
  - Order Print (OP):
    - Now respects the order’s **Partial shipment?** flag. If partial shipments are not allowed, the program ignores the option for printing of lines by a range of expected ship dates and all lines for the order print.
    - The account number associated with the designated ship via is now printed on the document.
    - Prints the warehouse and bin location entered in Branch Item Maintenance (IMB) when the item is not warehouse/bin-location controlled.
    - Now gives you the option to print harmonization information.
  - Acknowledgment Print (OPS) and Order Print (OP) now include the option to print an item’s catalog number description.
  - Packing Slip Print (OPAK) now includes the harmonization information.
  - When printing sales-related documents (OP, OPAK, OPK, OPL, OPS, QPS, RMAA, RMAP, RP), the logo is based on the sales branch. When printing directly from one of these programs, the TDOC settings for the order’s sales branch (not the user’s login branch) are used. This allows you to print the proper logo on the document when printing directly from one of these programs regardless of your login branch.
  - A System Options Maintenance (XM) (Order Processing Options) option, **Allow delete MFG-supply from OE?** has been added. If active, the **Remove MFG** button is available on the obligation screen. This allows you to break the link to an existing repair manufacturing order and ship substitute items. This new button is only available on RMA-created debit memos.
  - The new program, EDI/Sales Quote Inquiry (QOQ), displays a sales quotation, regardless of the order’s status.
  - Quote Acknowledgment Print (QPS) is now similar to a sales Acknowledgment Print (OPS) which includes the option to print configured product component prices.
  - The **Create shipment** button has been removed from EDI/Sales Quote Maintenance (QOE). Shipments can not be created—the off-line order has been transferred to a sales order.
  - Several options set in System Options Maintenance (XM) (Order Processing Options) impact EDI/Sales Quote Maintenance (QOE) functionality:
    - **View margin in sales quotes?:** When selected, a **Margin** button displays that shows margin-related data associated with the quotation line.
    - **Place new sales quotes on hold?:** When selected, new quotations are placed on hold using the default **Quote hold reason code**.
    - **Quote hold reason code:** Allows you to select a default reason for placing the sales quote on hold. For quotations not on hold, click the **Update contract** button to allow for the creation of a contract price based on the quotation.

- **Default tax code based on zip code?:** Select this option to set the quotations tax code based on the ship-to zip code. (This is part of the sales tax import enhancement.)
  - **Display cost/margin in product config?** Select to control if you want the order entry operator to see the cost, profit, and margin of a configured product.
- Sales tax reporting has been enhanced.
- Sales Analysis By Sales Region (SR) now includes a program option to select the sales region by ship-to number or by sales ID.
- Sales by Product Class (SPC) now prints the product class and subclass.
- Top Customer Sales Report (SLTOP) now has an expanded percentage of increase field and the new forecast is shown as an annualized quantity to better align with the order quantities displayed.
- A customer-specific label can be associated with the nine price levels.
- A new Pricing By Item Inquiry (PIQ) program allows a quick view of prices set up by item and branch.
- The customer master includes a **Commission payable** flag that overrides the XM system option when set. Paying of the commission based on the invoice date or payment date can now be set at the customer level. If the field is left blank the XM system option setting is used.
- A new program, Set Commission Eligibility (SCE), allows the commission eligibility to be set from a list rather than from calling up each customer/invoice separately in the Sales Commission Maintenance (SCM) program.
- Service Agreement Tracking Maintenance (WTM) processing has been enhanced:
  - The type of RMA associated with the service agreement can be set. For example, do you send a replacement immediately, or is the original item repaired and returned to the customer?
  - Supports line entry by control number.
  - The RMA can be generated directly from the service agreement program.
  - You can set a default branch for the credit memo and debit memo.
- The AR Invoice Maintenance (RM) program now allows the purchase order associated with an invoice to be updated.
- When partial shipment is not allowed for a sales order, Order Shipment Selection (OSS) is based on the earliest line expected ship date with all lines of the order listed. When one line is selected / de-selected all lines for the order are selected / de-selected.
- Order Shipment Selection (OSS) and RF Order Shipment Selection (RFOSS):
  - Allows checking the approval status for the release of a pick list.
  - The heading **Mult?** has been changed to **Prtl?** to be consistent with the Partial Shipment selection.
  - The program now checks the order ship-to country and branch country codes are not blank. If the codes are different, the order is considered international.
  - If you attempt to release an international order where not all the items have an export declaration code the program prevents order release and displays the message: **International order; missing export declaration codes.**
- RF Order Shipment Selection (RFOSS) now uses the System Options Maintenance (XM) (RF Program Options) **Sales: Cutoff days for sales picking** setting. The program option for the **Ship Date** range was removed to insure all programs used the same criteria.
- A range option has been added for the obligation of serialized items.
- The Credit Hold Release (CHR) program now displays the earliest ship date on the sales order.
- The Sales Shipment Confirmation Inquiry (OCQ) program now includes a **Track** button.
- If you try to maintain an order that is in RF/WMS picking, a message displays and the Sales Order Inquiry (OQ) executes to allow you to see the order details.

## Shipping Manifest Interface

- Map your carrier manifest output to a PowerShift format. A map is saved for each carrier (e.g., FedEx Ship Manager, UPS WorldShip, Other carriers capable of exporting manifest data).
- Tracking numbers and actual freight costs are to be added to the shipment file.
- Optionally, freight billings can be added to the shipment.

## Service Agreements

- The Service Agreement Tracking Maintenance (WTM) program includes a lookup by invoice number. If you select an invoice to add a service agreement, the program populates field entries from invoice data.
- A return material authorization can be generated directly from the Service Agreement Tracking (WTM) program.
- A service agreement can be accessed directly from the Control Number Inquiry (SNQ) program. Each time an item covered by the service agreement is added to or subtracted from inventory, it is logged and these transactions can be displayed in this program.
- The **Warranty tracking active?** field in Systems Options Maintenance (XM) (Warranty Tracking Options) has been changed to **Service agreements active?**. Four new fields have been added: **Default warranty RMA type**, **Max warranty duration**, **Create SA at invoicing (RR)?**, and **Warranty repair extension (days)**.
- If there is a current warranty for an item, warranty expiration information is printed on sales order, picking lists, packing slips, and invoices.

## System Tables

- Branch Maintenance (TBM) now includes:
  - **Notes** button to enter branch-specific notes.
  - **Documents** button to run Branch Document Profile Maintenance (TDM) to input branch-specific document parameters.
  - **UPC codes** button to run UPC Codes (TUPCM) to input branch-specific UPC code parameters.
  - Single-screen format, eliminating the **Other info** button.
- The Item Status Code (TISM) program replaces the Item Status Codes Maintenance (XIS) program and now provides two-character status codes, giving you hundreds of code options for determining whether an item can be sold, purchased, or manufactured.
- Use the new Customer Item Control Codes Maintenance (TCICC) program to identify what changes to the product are controlled by the customer (CIX), allowing you to track when the customer has to be involved in a product change. Typically, control is used for items that are manufactured under private labels, for example any changes to:
  - Product labeling
  - Packaging
  - Firmware loaded to an electronic component
  - Certain items on the bill of material
- Export Declaration Codes (TED) replaces Harmonized Tariff System Codes (THC).
- Four fields have been moved from Ship Via Table (TSV) to Freight Code Maintenance (TFP) to facilitate the application of freight via an automated interface. Fields that moved include:
  - Freight application—freight rules used on all shipments or only the initial shipment
  - Freight charge type:
    - Additional charge added to the actual amount
    - Use actual billable freight amount

- Flat freight charge amount
  - Minimum freight charge amount
  - Use manually entered shipment freight charges
- Freight amount (dollars)
- Freight adjustment (percentage)
- Additional fields display in the Freight Code Maintenance (TFP) list box:
  - Bill for freight option
  - Freight amount
  - Miscellaneous charges
- The code tables to support the new ECO Maintenance (ECO) program that you can use for managing and implementing engineering change orders, include:
  - ECO Signoff Codes Maintenance (TESO)
  - ECO Compliance Code Maintenance (TECOM)
  - ECO Implementation Codes Maintenance (TEIMP)
  - ECO Change Type Maintenance (TETOC)
  - ECO Rate Codes (TECORT)
  - ECO Priority Codes (TEPR)
  - ECO Close Reason Codes Maintenance (TRME)
- Price codes (TPLM) allows you to associate labels with the nine price codes instead of the codes of 1-9.
- Progress Payments Terms (RTER) and Terms Codes Maintenance (TER) programs now allow you to include or exclude sales tax and surcharges in the discount calculation.
- Tax Code Maintenance (TCM) has been redesigned to allow for changes of both the tax jurisdiction and rate by effective date. Authorities are validated and added to the TAM table as required. The **Print tax detail?** option has been removed. It is now set in the State Descriptions Maintenance (TSM).
- Use Tax Authorities Maintenance (TAM) to input a list of tax authorities and their corresponding descriptions. The **Print** button allows a list of the authorities to be printed. This program no longer contains any tax rate data.
- Tax Authority Where-Used Listing (TAL) is now obsolete. A printout of the tax authorities can be generated with the Tax Authorities Maintenance (TAM) program.
- Tax Code Rate Listing (TCL) now has authority descriptions and total tax rate by code. Total option was removed; selections were added for state code and effectivity date.
- State Descriptions Maintenance (TSM) has additional fields:
  - Nexus state/prov?
  - Print tax detail?
  - Tax payer IDs
  - Country name
  - Tax authority name
  - Assign tax code by zip code?
- Manufacturer Approval Status Codes Maintenance (TMA) is a new program for creating manufacturer approval status codes for the Compliant Items by Manufacturer (VGMI) program.
- Morgue Inventory Codes Maintenance (TMOR) program allows you to assign codes that indicate the reason for an item to be placed in the "morgue" status with the Morgue Serial Numbers (MRG) program.

## Warehouse Management System

- Interface Log Inquiry (WLOG) now displays transaction **Type** to designate transactions sent (OUT) or received (IN) and a new **Interface** selection option.

## New Programs

These programs have been added to PowerShift since the last release:

Name	Program	Use to
APPCQ	ECO Approval Inquiry	display the status of engineering change orders (ECOs) that require approval and who needs to sign off
APPHM	Approval Hierarchy Maintenance	set up and change a hierarchy that determines the approval cycle for bills of material, credit memos, engineering change orders and change order implementations, purchase orders, sales orders, sales order invoices, and sales order shipments
APPHQ	Sales Shipment Approval Inquiry	display the status of sales shipments that require approval and who needs to sign off
APPIQ	Sales Invoice Approval Inquiry	display the status of sales invoices and credit memos that require approval and who needs to sign off
APPLQ	ECO Implementation Approval Inquiry	display the status of engineering change order (ECO) implementations that require approval and who needs to sign off
APPM	Approval Maintenance	set up and change the credit memo, bill of material, engineering change orders and change order implementations, purchase order, sales order, sales order invoice, and sales order shipment approval cycles for each level in the approval hierarchy
APPMQ	Bill of Material Approval Inquiry	display the status of bills of material that require approval and who needs to sign off
APPOQ	Sales Order Approval Summary	display sales orders with approval or approval pending with shipment status
APPSQ	Sales Order Approval Inquiry	display the status of sales orders that require approval and who needs to sign off
APRS	Approval Substitution	select a substitute approver for orders waiting for approval
APX	Approval Activation	approve all existing orders immediately after approval activation as a one-time action
ATPF	Family ATP Inquiry	display an item's associated family parent item number and all of its components along with their individual popularity
BAPPCK	Bill of Material Approval Check	add open bills of material to the approval cycle when you make changes to your approval hierarchy or approval cycle
CDQ	Customer Document Profile Inquiry	display customer document profiles
DOCQ	Document Print History Inquiry	display the history of document creation
ECO	ECO Maintenance	enter, change, or close an engineering change order (ECO)
ECOI	ECOs By Item Inquiry	display engineering change orders by parent or component item
ECOL	ECO Print	print an engineering change order
ECOLPM	ECO Print Queue	process the queue for engineering change orders,

		process selected change orders in the queue, and change output information for a change order list
ECOP	ECO Processing	process approved engineering change orders
ECOQ	ECO Inquiry	display an engineering change order
EDRO	EDI Impot - Re-Process Files	reprocess an EDI sequential file that previously included errors
IBLD	Inventory Barcode Label Maintenance	add an inventory barcode label
IBT	Intra-Branch Transfer Entry	enter, change, and close a transfer of items from one location to another within a branch
IBTR	Intra-Branch Transfer Receipts	receive items for an intra-branch transfer
IBTS	Intra-Branch Transfer Allocation & Shipping	enter allocation and shipping of items for an intra-branch transfer
ICL	Consignment Inventory Valuation	print a report of the current value of consignment inventory based on standard, or average cost
IMK	Catalog Item Maintenance	set up, change, and delete catalog numbers for items
IMKQ	Catalog Item Inquiry	display catalog numbers for items
IPLR	Prime Location Replenishment Report	print a report that helps you see future demand requirements that allow you to plan for sufficient item quantities at primary locations
ITP	Transfer Print	print a transfer to use the document as a picking list
ITPPM	Transfer Print Queue	process the queue, process selected orders in the queue and change order output information in the queue
IVCR	Inventory Valuation Cost Report	print a report of standard, actual, and average costs and the difference between the actual and standard percentage
IVM	Move Consigned Inventory	move vendor-managed (consigned) inventory to the classification of stock on hand
KBE	Kanban Purchase Requisition Creation	create a requisition for a preferred vendor
LRTM	Barcode Labor Management Sign Out	clock out an employee who is clocked into a manufacturing order
LSAXML	Export Employee File	export data from the Employee Master file (LS1) to a Microsoft Excel spreadsheet where you can edit the data before importing it back into your database
LTEC	Crew List Maintenance	add and delete crew lists and replace a crew leader
MENUI	Program-Menu Lookup	search for a program using several search options
MENUM	Menu File Maintenance	create menus and configure QicLook and Report Generator specifications for execution
MOSG	Multi-Item Component Availability	print a list of component requirements for a group of parent items
MRG	Morgue Serial Numbers	morgue a serial number
MSDQ	Material Scrap Detail Inquiry	display scrapped material detail
MSHQ	Material Scrap History	display a summary of the scrap history for an item

	Inquiry	
PEML	ECO Report	print an engineering change order report
PEMR	ECO Change Report	print engineering change order changes to parents items
OTX	Sales Order Tax Report	print a sales tax report for an invoice date range
PIQ	Pricing By Item Inquiry	display an item's price for a specific branch
QOQ	EDI/Sales Quote Inquiry	display a sales quotation regardless of the order's status
RFOSS	RF Order Shipment Selection	obligate and create shipments for selected RF sales orders or order lines
RMAI	RMA Line Inquiry	display an RMA's repair order and credit and debit memos
SAPPCK	Sales Order & Shipment Approval Check	add open sales and shipment orders to the approval cycle when you make changes to your approval hierarchy or approval cycle
SCE	Set Commission Eligibility	set commission eligibility from a sortable list of invoices
SNQ	Control Number Inquiry	display basic information and inventory-related transaction activity for an item's control number
TCICC	Customer Item Control Codes Maintenance	enter and change codes to provide selections for a customer-controlled item in the Customer Item Maintenance (CIX) program
TECOM	ECO Compliance Codes	add compliance codes that you can use for managing and implementing engineering change orders with the ECO Maintenance (ECO) program
TECORT	ECO Rate Codes	set the amount of costs and the description for each code that you want to display in the ECO Maintenance (ECO) program
TED	Export Declaration Codes	enter and change export declaration codes for selection in the Enterprise Item Maintenance (IM) program  (Previously known as the Harmonized Tariff System Codes (THC) program)
TEIMP	ECO Implementation Codes Maintenance	add Implementation codes that you can use for managing and implementing engineering change orders with the ECO Maintenance (ECO) program
TEPR	ECO Priority Codes	add priority codes that you can use to prioritize engineering change orders with the ECO Maintenance (ECO) program
TESO	ECO Signoff Codes Maintenance	add engineering change order signoff codes that you can use for managing and implementing engineering change orders with the ECO Maintenance (ECO) program
TETOC	ECO Change Type Maintenance	add change type codes that you can use for managing and implementing engineering change orders with the ECO Maintenance (ECO) program
TIP	Import Sales Tax Tables	file import settings that you can use to import sales tax tables from a third-party database program
TISM	Item Status Codes	define and change an item status code that determines whether an item can be sold, purchased, or manufactured  (Previously known as the Item Status Codes

		Maintenance (XIS) program.
TMA	Manufacturer Approval Status Codes Maintenance	add, change, copy, and delete codes are that are used by the Compliant Items by Manufacturer (VGMI) program
TMESM	Manufacturing Execution System Interface Maintenance	enter manufacturing execution system interface parameters for selection in the System Options Maintenance (XM) (Manufacturing Execution System Options) program
TMOR	Morgue Inventory Codes Maintenance	add, change, copy, and delete morgue codes that you can use to assign a reason for setting a serial-number item to morgue status
TPLM	Price Codes Maintenance	add custom labels for up to nine price codes
TRME	ECO Close Reason Codes Maintenance	add codes for the reason an engineering change order is closed that you can use for managing and implementing engineering change orders with the ECO Maintenance (ECO) program
TUPCM	UPC Codes	add branch-specific Universal Product Code parameters
TXRO	Export Sales Tax	export the desired shipment or tax information to a third-party application based on an input time period, or to re-send an invoice
UIQ	User Inquiry	display a user name, login branch, email address, and contact numbers
VLM	Vendor Contact Maintenance	enter, change, copy, and delete contacts for a vendor
VMSPR	Open PO Summary Report	print a report of purchase orders with item quantities not yet received to stock
VAPPCK	Open Purchase Order Approval Check	add open purchase orders to the approval cycle when you make changes to your approval hierarchy or approval cycle
VDQ	Vendor Document Profile Inquiry	display vendor document profiles
XMAP	Format Mapping Maintenance	create format mapping for XML files
XMI	Manifest Input/Output	select manifest input and output formats

### System Options Changes

A number of options have been added to the System Options Maintenance (XM) program. Many are not yet fully implemented. In the help these are described with the phrase "For future use."

Option category	Change
Accounts Payable Options	Added: Post ck register cash by payment no?
Accounts Receivable Options	Added: Cash receipts warning message active?
EDI Drop File Interface	EDI Drop files active?, System administrator email, Directory for seq files, Default user ID, Default shipping branch, Delimited or Fixed length?, Delimiter, Use existing line numbers?, Skip price validation?

	Use header date if line date is blank?, Use EDI pricing?, Use system pricing?, Use system pricing when zero?, Adjustment window (days), Date wanted offset, Date Promised offset, Expected ship date offset, Auto-obligate orders?
Enterprise Options	Added: View reports as PDF files?
Inventory Control	Added: Consignment auto pick?, UPC Validation?
Labor Options	Added: Enter percentage completed?
Manufacturing	Added: Bills of Material approvals required?, Stop mfg receipt for unapproved bills?, Notify if unapproved mfg ords released? Removed: Ucc number
Mfg Execution System Interface	Added: MES Interface active? System administrator email, Directory for seq files, MES Package  MES Interface Maintenance (TMESN): Changed field label <b>Delimiter</b> to <b>Field delimiter</b> ; removed two fields: <b>File name prefix</b> and <b>Download bill of material?</b>
Order Processing	Added: Sales order approvals required?, View margin in sales quotes?, Place new sales quotes on hold?, Quote hold reason code, Use BOM for component maintenance?, Warn of multiple component connections? Removed Default tax code based on zip code? (See State Descriptions (TSM))
Purchasing	Added: Purchase order approvals required?
Return Material Options	Added: RMA Credit Memo branch, RMA Debit Memo branch, Force serial-no for current item?, Force detail entry of serial-no?, Allow address changes in RMA?, RMA Override branch, RMA default price code, RMA Inspection (A=Always, I=Item, R=Rcv), Default the RMA force repair active?
RF Program Options	Added enterprise options: RMA Credit Memo branch, RMA Debit Memo branch, Force serial-no for current item?, Force detail entry of serial-no?, Allow address changes in RMA?, RMA Override branch, RMA default price code, and RMA Inspection (A=Always, I=Item, R=RCV) Added branch settings: Added RMA Credit Memo branch, RMA Debit Memo branch, and RMA Inspection (A=Always, I=Item, R=RCV).
Tax Export Interface	Added enterprise options: Tax export active?, Directory for seq files, Tax package, Delimiter, File name, System administrator email
Warehouse Mgt System Interface	Added: System administrator email, Directory for seq files, WMS Package, Cutoff for date wanted (no of days)
Warranty Tracking Options	Changed Warranty tracking active? to Service agreements active? Added Default warranty RMA type, Max warranty duration, Create SA at invoicing (RR)?, and Warranty repair extension (days)

### Options for Specific Programs

Program	Options
APPQ	Added Type sort option.
APPV	Changed Selection and Sort field label Order/Item to Order/Item/ECO

AR	Added Summarize freight record for EDI file? program option.
BCI	Added Print order summary? and Print serial number ranges? program options.
BLP	Added Always print harmonized tariff code? program option.
CHR	Changed Date wanted to Earliest ship date selection option.
EPILG	Changed Enter name of error file program option to Enter name of order log file
HAA	Added Excludes for each 109 item status program options.
HDL	Added Subtotal? and New page? sort options.
HTQ	Changed Only print missing tags? program option to Include missing tags? (Y/N/Only). Added Include void tags? (Y/N/Only) and Include unused tags? (Y/N/Only) program options. Added Location sort and selection options.
INR	Added Include ctrl items with neg obl? program option.
IRL	Changed Preferred vendor to Vendor number sort and selection options. Added Program sort and selection options.
IPI	Removed Include M=Material, L=Labor, or B=Both program option.
ISS	Added Item status selection option.
ITL	Changed Req branch to Rcv branch sort and selection options.
IVL	Added Floor stock only? program option. Added Exclude item status 0-9 program2 options.
LHI	Added Include history? program option. Date worked, Labor code, Mfg Order no, Oper seq, and Parent item no selection options.
LPE	Added Manpower selection program option.
LRTQ	Added Shift, Employee dept, Employee no, Clock in date, and Clock in time sort options.
LTEQ	Added Employee dept, Shift, Employee name, and Clock in date sort and selection options.
MBR	Added Operation seq no sort and selection options.
MHP	Added Dem order type selection option.
MHI	Added: Reference and User ID sort and selection options.
MIQ	Added Dem order type selection option.
MJC	Added Mfg order no, Date completed, and Parent item no sort and selection options.
MJP	Added Mfg order no and Date completed sort and selection options.
MLI	Added Operation seq no sort option.
MLL	Added Mfg order no selection option.
MLP	Added Ref employee no sort and select options.
MOOL	Added Branch selection option.
MOS	Added Display shortages only? program option.
MRBL	Added Include history? program option.
MRR	Added View mode default program option. Added Item number sort option.
MSB	Added Summary/Detail?, Entity Identity?, and Forecast entity program options.
MSDQ	Added Mfg order no sort and selection option.

MSP	Added Print barcoded components? and Print barcoded operation seq? program options.
MSPK	Added Ignore part designator? program option.
MWU	Added Show finished good items only? program option. Added Exclude item status 0-9 program2 options.
NE	Added Date received sort and selection option.
OAP	Added Exclude lines with no available stock? and Exclude order or lines not approved? program options.
OLDQ	Added Source type selection option.
OP	Added Print input underlines for ctrl items? and Exclude lines that are not approved? program options.
OPAK	Added Print warranty date detail? program option
OPS	Added Print CP component prices? program option. Added Sales rep 1 sort option.
OSDQ	Added Source type selection option.
OSS	Added: Exclude orders or lines not approved? program option.
OVQ	Changed Selection date program option to Select date.
PSL	Added Include project notes? program option.
RMAA	Added Print control numbers? program option.
RML	Added Ship branch sort and select options.
ROW	Added Display RTM rtgs for configured items? and Print current RRL only? program options.
RP	Added Print CP component prices? program option.
RTL	Added Print one routing per page? program option.
RTXI	Added Subtotal? selection for Tax authority and Month sort options. Added Country and State/prov selection options.
SBI	Added Qty open, Selling price, and Customer number sort options
SCL	Changed Eligible? Y=Yes, N=No, B=Both program option to Include eligible Y=Yes, N=No, B=Both; changed Processed? Y=Yes, N=No, B=Both program to Include processed? Y=Yes, N=No, B=Both. Added Include paid Y=Yes, N=No, or B=Both program option.
SCOG	Added Include history? program option.
SII	Added Include history? program option.
SPCR	Added Include history? program option.
SIC	Changed Branch selection option to Branch or branch grp.
SLPLN	Added Exclude MFP planned items?, Exclude manually planned items?, Exclude MRP planned items?, and Include flr stk qty in qty on hand? program options.
SR	Added Enter sales region to use program option.
TCL	Changed Base tax rate listing on what date? selection option to Tax code effectivity and added Tax code and Tax code state selection options. Removed Program tab. Removed Total option.
VCRP	Added option to print last schedule number if you print by contract number.
VIS	Added Buyer sort and selection option. Added Order number selection option.

VOP	Exclude closed PO lines on reprints? changed to Exclude closed PO lines?.
VPL	Added Buyer sort and selection option.
VRR	Added Exclude voided and reversed receivers? program option. Added I (inspection) to Status selection option.
VUV	Added Date received sort and selection option
WCO	Added Start date sched and start time sched sort options and Start date sched selection options. Added Mgmt priority and Order type sort and selection options. Add Label code program option.
WIPV	Added Order type sort and selection option.
WIVQ	Added Product class, Invty acct code, and ABC class sort and selection options.
WLOG	Added Interface selection option.