

Accounts Receivable**ECR 45479 AR Invoice Master**

AR Invoices emailed directly from the AR Invoice Master screen will now generate a Note record linked to the AR Invoice and the Company Organization record with the invoice document attached to the Note record. This functionality existed in the Desktop application, but was recently updated to work in the Adjutant 20/20 environment. Because the Adjutant 20/20 invoice creation process has additional abilities beyond Desktop to produce invoices merged to a single PDF, there are some cases where the document attachment links will not get created, but single invoice links will work as expected.

ECR 45146 Gross Margin Reports

A new CID Setup Option, FILTERBYPLANT, has been developed for the Gross Margin (Invoice) and Gross Margin (Profile/Invoice) reports that changes the Shipping Warehouse filter to a Production Plant filter. With the new FILTERBYPLANT option enabled, both Gross Margin report screens will have the Warehouse filter re-labeled as Plant (Production Plant). With the FILTERBYPLANT option enabled, both reports will filter and report based on the plant instead of the shipping warehouse.

Setup Options****FILTERBYPLANT****ECR 45521 Daily Invoice Summary**

The 'Terms' expression has been added to the Daily Invoice Summary report as an available report expression. Users that wish to see invoice terms on this report can now customize their default report to display terms.

ECR 45048 Fiserv Credit Card Vendor

Fiserv has been added as an integrated credit card vendor with support for core credit card transactions. Additional support for expanded refund types will be delivered in future enhancements.

Setup Options****ADJCCFISERV****ECR 45377 POS Receipt form**

The Adjutant 20/20 POS Receipt form has been updated with a new form expression, 'tamount', that will report the payment amount plus any credit card surcharge amount. Existing receipt forms will need to be customized to take advantage of the new form expression. The default Standard form has been updated to use the new 'tamount' expression.

Accounts Receivable**ECR 45395 Finance Charges**

The Generate Finance Charges screen now has a 'Terms' field that will set the Terms for all of the generated finance charge invoices. The new 'Terms' field will default with the Terms value defined as the Default in the TERMS Rule Maintenance record. If the 'Terms' value on the Generate Finance Charges screen is blank, Adjutant will use the system's hard-coded default term of 'Due on Receipt', which may not exist in some systems. If that specific term value is not defined in the TERMS Rule Maintenance record, the generated finance charge invoices will show with blank terms.

Rule Maintenance****TERMS****Auto Alert****ECR 45378 Email Templates**

A new logic code has been developed for certain date expression codes available in the Email Template screen to hide the timestamp portion of a date value. Users can replace the '-' character at the beginning of a date code with a 'd' character to force the value to format as a date-only field. For example, the standard date code of ~-SOMAST.ESTDATE~ can be changed to ~dSOMAST.ESTDATE to print the ESTDATE value as 08/25/25 rather than 08/25/25 08:00.

Blocks**ECR 45458 Production Completed Block**

A Production Plant filter is now available on the Production Completed block. In order for plant filtering to work as expected, users should include the plant as a displayed column on the block.

Contract Management**ECR 45495 Contract Master**

A new CID Setup Option, TASKBILLTOCONTRACT, has been developed that will expand the Contract drop-down options in the Task Master to include active contract records for the SOLD TO and for the BILTTO records. This new option will allow companies that utilize contracts for billing to create and apply contracts at the BILLTO level as well as the SOLDTO level.

Setup Options TASKBILLTOCONTRA
CT**

MBS/Roll Former Integration**ECR 45276 MBS Import**

This change allows verifying MBS matchups with diamond report. These diamond reports can be processed with a new 'AutoProcess' button on the MBS grid to verify the matchups.

All diamond reports will need the following in the WHERE clause: where keynoh = ??thisform.v1 and userid = '??thisform.v2'

An example of a diamond report could be the following, which makes sure the item ends in 'STAN' if the description from MBS is saddle tan:

*select * from ztmp_mbsgrid WHERE descrip like '%Saddle Tan%' and icode not like '%STAN' and keynoh = ??thisform.v1 and userid = '??thisform.v2'*

<https://www.abiscorp.com/adjwiki/RULE-AUTOMBS.ashx?NoRedirect=1>

Rule Maintenance AUTOMBS**

Order Entry**ECR 45532 SO Confirmation Form**

The Ship To contact and the Sold To contact email address values have been added the cursor as available fields on the Adjutant 20/20 SO Confirmation form.

Order Entry

ECR 45269 Order Entry / Quotes

A new Rule Maintenance record, STANDARDLEN, has been developed that allows users to define standard ID1 and ID2 values for TrackLength configured items during order and inventory transactions. Once the new rule is created and set up with item codes and standard values, the Quoting and Order Entry screens will show drop-down values for the ID1/ID2 values that match the defined standards from the STANDARDLEN rule. This new functionality can enforce ordering only standard configurations of specific TrackLength configured items. The defined standard ID1/ID2 values can also be used in Purchase Orders, Inventory Adjustments, and Modification Processing.

Rule Maintenance**

STANDARDLEN

Production

ECR 45353 Production

A new feature has been developed that will allow users to specify the preferred BIN location to pull materials from when auto-assigning material to Production Work Orders. The new logic is defined in a new Rule Maintenance record, named DEPT2. This new rule record must be manually added before the feature is available. The source BIN preferences are tied to the Production Dept.

Once the DEPT is set in the new rule and tied to a preferred BIN, any production items matching the DEPT will check in that bin location for any parts from the BOM of that item. It will pull from there first when auto-assigning on Prompt 45, assigning on Prompt 48, as well as the auto-assigning feature in the screens (Adj2 and Mobile). If any BOM input items aren't in the preferred bin location, the auto-assign will fail and not complete.

Rule Maintenance**

DEPT2

Project Management

ECR 45212 Project Grid

The following new columns of data are available on the Project Grid screen:

** Project Remarks - This field is editable directly in the Project Grid and will allow users to update the Project Remarks directly from the Project Grid screen.*

** Project Extra1, Extra2, Extra3 - The Project Extra resources are now available to display in the Project Grid.*

Users may need to access the 'Show/Hide Columns' button on the Project Grid to enable the new columns by checking the box next to each desired new column.

Quoting

ECR 45505 Quotes

A new CID Setup Option, SKIPWHOLEREPRICE, has been developed to bypass the Quote reprice logic that reprices the entire quote based on quantity breaks. For some customers that handle very large quotes and do not use pricing that relies on quantity tiers, enabling this option can speed up Quote processing greatly.

Setup Options** SKIPWHOLEREPRICE

Shipping Events (Logistics)

ECR 45308 Shipping3

The On-Site date value from the Shipping Event record has been added as an available column on the Shipping3 Dashboard screen.

ECR 45492 Carton Label

A new label function has been developed for applying a time offset to certain database fields that can print on labels. A new 'TIMEOFFSET' code can be applied in the label configuration screen that allows users to define a single offset value to the printed value. For example, if you want to show the carton created timestamp on a carton label, which is saved under the server time zone, but you want the printout to reflect a time 2 hours earlier, the label code would look like this:

DA,##,##,##,zcarttrack.datein,TIMEOFFSET,-2h

The formatting is exact and will only allow a single offset value, either in days (-1d), hours (-1h), or minutes (-30m). A positive sign would add time, while the minus sign will reduce time.

System Manager

ECR 45475 Security - Rule Maintenance

The Rule Maintenance security token (RULES) for Adjutant 20/20 has been updated to include two new special security options.

Security Option S2 - Edit Rule Header - will allow users to edit the Header Record for any Rule Maintenance record.

Security Option S3 - Delete Rule Header - will allow users to delete the Rule Header record.

These new options must be set up in the Security Token Maintenance screen before first use.

Access to edit and/or delete Rule Maintenance Header records should only be granted to a system admin user that fully understands the risks of data loss that comes with modifying or deleting Rule Maintenance Header records. This new security control allows users to restrict that access to the header record while still allowing users to edit the details.

Task Management

ECR 45412 Schedule

A new Rule Maintenance record, TASKHOLDCOLOR, has been developed that allows users to specify a unique color for Tasks on Hold status on the Schedule screen. The new rule will allow specifying a unique color code in RGB HEX Code format for both light mode displays and dark mode displays. Contact ABIS Support for assistance with setting up the new rule record.

Rule Maintenance** TASKHOLDCOLOR

Task Management**ECR 45330 Task Master**

A new CID Setup Option, TASKRESCOMP, will change the task completion logic so that assignments are completed by resource instead of someone completing the entire task. Once the last resource has completed their assignments, the entire task would be completed.

When more than one resource is assigned to a task on the Task master record, completing a task will display a new modal with the logged-in resource defaulted. This new modal will display when a user completes a task either through the right mouse menu or using the complete button on the Time Entry screen. The modal allows the user to complete ONLY their portion of the task assignments. If only one resource is assigned to the task, the completion logic should remain the same as it is today. A new Sub Complete status will display grid to indicate when a specific resource has completed their portion.

Users would be restricted by default to completing only their assignments on a task. A new security option (s13) on the TASK screen will allow users to complete tasks for other resources. Supervisors should have special security to choose the resource to complete. The task is marked complete once the last resource completes their assignments.

The 'Hide Complete' option on the Schedule screen will hide completed assignments for the indicated resource. For example, if Tom and Sue both have assignments on task# 123 and Tom has completed his assignments. The 'Hide Complete' option should show task #123 on Sue's schedule but not Tom's (since Tom has completed his part).

Setup Options****TASKRESCOMP****ECR 45271 Auto Schedule**

A new User Security Option, IGNORESKILLCHK, has been developed for use with the Task AutoSchedule feature. This new Security Option must be manually added to the Security Token Maintenance - Option tab before it can be assigned to individual users.

With the new User Option enabled, the AutoSchedule modal screen will show a new 'Do NOT use Skill filter' checkbox that will remove the Skill Group filter information and show all available resources in the resource grid, allowing specific users to override the skill requirements and assign resources that may not have the required skills.

This is considered a security override and should only be considered for users that have the authority to override the defined skill requirements.

Setup Options****IGNORESKILLCHK
(User Security Option)**

Task Management

ECR 45323 Override Task Complete Date

A new setup option, TSUPDATECOMPDATE, has been developed that allows updating the Completed timestamp value in the Time Entry screen for a completed task. If the new TSUPDATECOMPDATE option is enabled, the 'Completed On' value will be editable and a new 'Update Complete Date' action button will be available in the Time Entry screen that will save the updated Completed value to the task. This will allow users to adjust a task's completed date to a specific value.

Setup Options TSUPDATECOMPDATE**

ECR 45463 Standard Task List Report

The Standard Task List Report screen now includes a multi-select Department filter that will filter the list of Standard Task codes by their Department value.

ECR 45241 Schedule

Tasks that have passed their Due Date will display as light red on the Schedule screen once their Due Date has passed.

Time and Materials

ECR 45227 Resource Time Summary

A new CID Setup Option has been developed - RESTIMESQUAD - that changes the logic for the 'Supervisor' filter on the Resource Time Summary Report. With the RESTIMESQUAD option enabled, the Supervisor filter will be treated as a Squad Supervisor filter and will return resource records tied to a squad with the selected 'Supervisor' as the Squad Supervisor.

Setup Options RESTIMESQUAD**

**** Additional information for the Setup Options, Rules, and Programs areas**

Setup Options

Setup Options are system-wide controls that must be enabled/disabled in CID Maintenance. Some Setup Options will not display until the related application has been accessed. Contact your consultant for assistance with enabling/disabling Setup Options.

Rule Maintenance

Rules are added or updated in the Rule Maintenance screen. If you are not familiar with adding or updating Rule Maintenance headers or details, contact your consultant for assistance.

Programs Affected

Programs are system-level routines that must be updated manually by ABIS personnel. You must contact your consultant to coordinate updating the associated Program before taking advantage of the enhancement.

Program updates may require system downtime, or may be required to occur outside of business hours.

Total Number of Changes: 25