

Accounts Receivable**ECR 45313 Fiserv ACH Support**

A new ACH payment option has been developed for use with Fiserv integration.

In the Point of Sale (POS) screen, a new 'Use ACH' button is available to process an ACH payment from a customer's linked Bank Account established in the Vendor ACH/EFT attribute tied to the Organization record.

Transactions will process through the Fiserv integration and update settlement codes and create the required cash receipt records similar to a credit card payment.

ECR 45618 Update Paytrace to allow unreferenced refunds

Credit Card processing integration with the Paytrace vendor has been updated to allow unreferenced refunds and process the transactions correctly. This is an update to the AdjCC program that handles the processing. Paytrace-integrated customers will need to update the AdjCC.exe program to take advantage of this new functionality.

Programs Affected****AdjCC****General Ledger****ECR 45643 General Ledger Balances**

The GL Accounts-Balances screen has been updated to remove the 'Totals:' calculation lines from the Beg. Balance, YTD Debit, YTD Credit, and Ending Balance columns. Since these columns also carry forward the prior period's last balance, the total values are not useful and totaling these data columns is not needed. Only the PTD Debit, PTD Credit, Closing Ent, and PTD Stat columns will show a total calculation.

Item Control (Inventory)**ECR 45432 Item Master**

Users are unable to delete an Item Master item record if that item has any historical transactions in Quotes, Sales Orders, Purchase Orders or Inventory Adjustments. This is by design to prevent any 'broken' records that can't link to an active item code. Adjutant had added one small exception to this logic to allow an Item Master record to be deleted if the ONLY transactions found are voided/deleted orders. If the Item Master record's only transactions are voided records, the system will allow the Item Master deletion.

Order Entry**ECR 45619 SOLOCKONS2P Override**

A new user option (set in the User in Adjutant screen) has been developed that will allow users with the new option enabled to bypass the SOLOCKONS2P check that prevents edits to SO line items when the item is in production. If a user has the new CLEARSOLOCKONS2P option enabled, that user will be able to edit SO line items that have been sent to production. This new option should be considered a sensitive option and only granted to a user if they understand that they should only make SO line changes to items in production if the changes do not affect the production process or materials used without first deleting the existing PWO. Changes to the SO line's price, description or other data fields that will not directly affect the production team are sometimes safe and this new option allows users to designate a responsible user that can make these types of changes without the need to delete and resubmit to production.

Setup Options CLEARSOLOCKONS2P**
(User Option)

ECR 45672 SO Grid

A new data column - Unapplied Payments - has been added to the SO Grid (SoGrid_S.htm) screen. This new column will display the total balances of payments taken from the POS Cash Receipts screen. For example, if an SO has an open, unapplied payment for \$500, then that balance is displayed in the column. If \$200 of that payment is applied to an invoice, the balance of the payment record will decrease to \$300, and this is what will display in that column. If an SO has multiple POS payments with balances, the total of those balances will display in the column.

Order Entry**ECR 45671 SO Grid**

A new CID Setup Option, SOGRIDEDITDATES, has been developed that makes the following date fields editable inside of the Sales Order Grid.

-SO Date

-Load Date

-Required Date

With the new SOGRIDEDITDATES option active, users with access to the Sales Order Grid screen can edit these key date fields directly in the grid section and the changes will update the associated SO record as soon as the user tabs out of the edited date field(s).

Setup Options SOGRIDEDITDATES****ECR 45573 SOTIMER**

A new CID Setup Option, LOCKWTIMER, has been developed that will complete the Sales Order Timed Alerts (SOTIMER) feature to prevent the SOTIMER from sending any further timed alert emails when the Sales Order has been closed AND all lines on the Sales Order have been fully shipped. Sales Orders that are closed or voided will not send SOTIMER alerts. However, in some cases, when users re-open a Sales Order that still has the potential to send out further alerts (based on the SOTIMER settings), the SOTIMER feature will resume sending emails. This new option is intended to handle cases where a Sales Order was closed, but still has open lines to ship. With the new LOCKWTIMER option active, a Sales Order with open, unshipped quantities will keep the timer active and will allow a re-opened Sales Order to continue sending alerts. When LOCKWTIMER is active, if an order is closed manually or through shipping AND all lines are fully shipped, the SOTIMER will force the alerts to a fully completed state and prevent any future alerts, even if the SO is re-opened and still has event alerts to process according to the Sales Order timestamps..

http://www.abiscorp.com/faq/index.php?title=CID_Setup_Options

Setup Options****LOCKWTIMER****Rule Maintenance******SOTIMER**

Order Entry**ECR 45673 Sales Order Master**

A new CID Setup Option, MSSHOWCREDITSCREEN, has been developed that will prompt an Apply Open Credits screen immediately upon shipping from the Manual Shipping screen.

When a user ships lines on a sales order using the Manual Shipping screen, the Apply Credits screen will prompt, allowing the user to immediately apply open credits against the generated invoice. If the user does not need to apply any open credits, they just hit Cancel to ignore the prompted screen.

This new functionality is intended for specific use-cases where customers take large deposits or pre-payments that may apply to multiple orders. This new option allows those users to selectively apply a portion of an existing open credit directly against a shipment. With the new option enabled, an 'Apply Payment' button is also available on the Sales Order screen to select and apply credits.

Setup Options** **MSSHOWCREDITSCRE
EN**

ECR 43904 Allocated Coil Weight

When a specific coil lot is allocated to a sales order line, the sales order line weight will use the actual weight for the allocated lot# from the coil tag, rather than a theoretical weight. This weight should carry through to all shipping documents and report as the weight for the item(s) being shipped.

Production**ECR 45510 Production Estimates**

The Production Estimates screen has been added as a tab to the Adjutant 20/20 Project Master screen. The Production Estimates screen can be used to manually enter production demand tied to a project. The estimates can be seen in Production Scheduling from the Project link.

Shipping Events (Logistics)

ECR 45600 Virtual Terminal

Wireless Scanner Prompt 10 (Move Carton) has been added as an available function to the Adjutant 20/20 Virtual Terminal.

System Manager

ECR 45669 Screen Tab Order

The Screen Options - Tab Order tab (accessible from the Info drop-down menu) has been changed to only allow edits if the logged in user has the ADMIN credential. This screen can dramatically affect the functionality of certain screens and should be limited to users with the right level of access to complete these changes. The screen will still display for all users, but only users with the ADMIN credential will be able to save changes.

ECR 45718 Print SO

The PrintSO form has been updated to include 3 new data fields for reporting the specific address data entered on the Organization Address3 field. The new data fields available are:

**soldto_address3a*

**billto_address3a*

**shipto_address3a*

The existing _address3 fields (without the 'a') report the combined City, ST Zip data as a preformatted field.

System-Wide / UI

ECR 45681 Layout Changes

A new Adjutant 20/20 theme has been developed that adjusts the color to a more subdued palette and introduces rounded corners. The new theme overlay is still considered a work in progress as minor adjustments and tweaks are found, but the theme is available for use now.

The Adjutant 20/20 End User Update screen will have two new action buttons:

'Install New Theme' will load the new theme

'Install Default Theme' will restore the previous default theme

**NOTE* - The theme setting is global, meaning it will apply to all users in the same system.*

Task Management

ECR 45544 Schedule / Reschedule Task

A new CID Setup Option, BUMPDUE DATE, has been developed that will automatically set the Task Due Date time to 11:59PM on the date of the last assignment when any of the following actions happen:

- 1) Drags the assignment to another date or resource on the Schedule;*
- 2) Uses the reschedule modal (developed on ECR 45224) to bump an assignment*
- 3) auto-schedules the task*

Setup Options****BUMPDUE DATE**

ECR 45224 Reschedule Task

This update adds a new RESMULTISPLIT user option that changes the logic of the 'Reschedule' modal. The changes are as follows:

- 1. Allows changing the resource on multiple assignments at once.*
- 2. Also allows changing the start date on an assignment and bumping the later assignments to follow the selected date -- skipping non-working days on the Working Calendar. For example, if the task has assignments on 5/16, 5/19 and 5/20/25 for John Doe, you can choose the first assignment -- on 5/16/25 -- and set a new start date of 1/1/26 and a new resource of 'Jane Doe'. This would push the 5/19 and 5/20 assignments to 1/2/26 and 1/5/26 (skipping January 3 and 4 because they are non-working days on the Working Calendar).*
- 3. Adds a new option to delete the selected assignment, as well as future ones on that task for the same resource.*

Setup Options****RESMULTISPLIT (user option)**

Time Billing

ECR 45719 Approve Edit Billing

The Contract field in the grid details of the Records tab of the Approve/Edit Billing screen has been changed from a typeahead lookup field to a drop-down selection field. This is intended to make it easier to select the correct contract without having to memorize contract names. The drop-down selection will display all active contracts as well as any 'Default' contracts that are valid for the Organization.

**** 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: 18