# 16.1 Release Notes

## Task

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| • CF-220 | Customer Invoice |
| • CF-228 | Card History > Expand Transaction Details that shows on the Search Grid |
| • CF-291 | Calc Transaction Rules: Contract Price to set Net Price |
| • CF-301 | Calc Transaction Rules: Remote Taxes |
| • CF-306 | Create Origin Conversions to i21 for Setup |
| • CF-307 | Create Origin Conversion for CF History |
| • CF-311 | i21 Import Tran from Text/CSV |
| • CF-440 | CF table constraints to other module table |
| • CM-1008 | Add some of the field names for ACH Bank File Format if the selected Type is Field |
| • CM-1012 | Add Types in ACH Bank File format |
| • CM-1013 | There should have a way to generate multiple lines in ACH Bank File |
| • CM-1014 | Process Payment should print Payroll Remittance Advise Report for Direct Deposit |
| • CM-1019 | Add Entry Hash Total type in ACH Bank File format |
| • FCOM-968 | num prefix field to use dbl prefix |
| • FCOM-1126 | Include Company Name in the Login screen for the Company combo box |
| • FCOM-1127 | Remove the Reallocation report from Menu |
| • FCOM-1166 | Include files in System Manager |
| • FCOM-1170 | Reverse the FCOM-765 |
| • FCOM-1184 | Remove the background feature |

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| - FCOM-1202 | Add Credit Card Processing panel in System Manager Company Configuration |
| - FCOM-1209 | Open Screen Company Configuration - Default tab: Patronage |
| - FCOM-1215 | Expanding tree menus should automatically move them up so they are fully displayed |
| - FCOM-1265 | Copyright to display 2016 |
| - FCOM-1282 | Need to add 'Position by Period Selection ' menu in the Risk Management Module |
| - FCOM-1289 | Need to modify the menu name in Risk management module |
| - FCOM-1308 | Add and modify Menu Item for Tax Report |
| - FCOM-1309 | Need to modify the strCommand in Risk management module |
| - FCOM-1311 | Add Invoice on Menu |
| - FCOM-1331 | Move Announcements from Help Desk to SM module and provide an interface for Admins |
| - FCOM-1360 | Add Quarterly FUI to Master Menu |
| - FCOM-1361 | Change colors on tree menu for better visibility |
| - FCOM-1362 | Save/Export Favorites Menu |
| - FCOM-1364 | Rework the Login Screen to make it a full page instead of a window |
| - FCOM-1367 | Add a Company Logo upload box to the Company Configuration screen |
| - FCOM-1381 | Remove Quote menu item from Sales module |
| - FCOM-1394 | Enable CompanyPreference for Logistics module |
| - FCOM-1395 | Home Screen Changes |
| - FCOM-1399 | Remove Weight Claims screen from Logistics menu |
| - FCOM-1401 | Add menu under CRM Module named Prospects |

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| • FCOM-1410 | Replace Modern Scrollbars with normal width scroll bars for easier use with touch pads |
| • FCOM-1416 | Provide an SP or SQL Function to retrieve the 'default' currency in a database. |
| • FCOM-1427 | Enhance the UI of the Home Panels |
| • FCOM-1431 | Add a line break between Filter and modules in Tree Menu |
| • FCOM-1433 | UI updates to the Favorites tree menu |
| • FCOM-1439 | MasterMenu: Create AP Transaction By GLAccount Menu for Purchasing Report (simplified reporting) |
| • FCOM-1453 | Add border around login screen |
| • FCOM-1481 | Remove the user preferences from the menu |
| • FCOM-1486 | Rename "Site Group Price Adjustment" to "Remote Price Adjustments" on Card Fueling sub menu |
| • FCOM-1511 | Create a menu under Common Info named Calendar |
| • FCOM-1515 | User Portal - Need Contracts added to Portal Roles |

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| • CT-402 | Code "clean weights and cost" screen |
| • CT-517 | Contract - Add export flag in Contract table for ERP integration |
| • CT-518 | Contract Clean Cost Export - Add export flag in Clean Costs and Weights table. |
| • CT-528 | Changes due to Transport schema changes |
| • CT-529 | Show Contract plan in Contract search screen |
| • CT-531 | Set created date as contract date for the records where created date is null |
| • CT-535 | Participate in Global Search |
| • CT-538 | Provide a view for all fields in cost tab along with contract + sequence number |
| • CT-544 | DP Contract - Add Storage Schedule to Sequence |

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| - CT-546 | Code changes due to Ext js upgrade |
| - CT-549 | Demand Analysis Inquiry- Short/exess of demand should be in green when positive |
| - CT-564 | Do not save contract while duplicating |
| - CT-567 | CT- Stop pre-loading of files after login |
| - CT-573 | Show market's default UOM as price UOM in contract sequence if pricing type is HTA, Basis or Priced |
| - CT-574 | Additional Column for Contract Views |
| - CT-576 | Update numeric precision to 18,6 in SP |
| - CT-578 | Applied field in contract sequence screen |

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| - EM-636 | Add Tax Options for different State |
| - EM-731 | Remove all references with tblSMTaxGroupMaster table in EM tables. |
| - EM-741 | Add Username and remove Entity No in User Search screen |
| - EM-759 | Update Entity Models - tblPREmployeeEarning.dblRateAmount |
| - EM-770 | Optimize Code |
| - EM-776 | Add strStockStatus field in CustomerBuffered Store |
| - EM-784 | Include "Enable Two-Step Verification" in the User Profile screen |
| - EM-789 | Create common combo box for Static Store used in EM |
| - EM-910 | Hide all the id column in grid combobox in Entity Management |
| - EM-933 | Use the new feature from GCE to move the config file |
| - EM-944 | Additional option in Customer Email Distribution Option |
| - EM-947 | Add functionality to edit contact admin role |

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| • EM-988 | Add intCent and ysnSubCurrency on Vendor Entity store |
| • EM-990 | Add drill down functionality to user role in contact screen |
| • FRM-2499 | Smart Dates - Allow Any typed Date Format in Date fields |
| • FRM-2768 | Update the Two-Step Verification screens |
| • FRM-2758 | Need a global keyboard shortcut that will move the cursor to the grid from any header fiel |
| • FRM-2760 | Home Menu Panels |
| • FRM-2762 | Export All search grid rows or only the selected rows |
| • FRM-2773 | Additional functions in web API iRely.Common.Security |
| • FRM-2822 | Two-Step Verification name in Google Authenticator should be "iRely i21" instead of just "iRely" |
| • FRM-2823 | Update SMS message for Two-Step Verification |
| • FRM-2835 | Ability to filter just like search grids on Home Menu Panels |
| • FRM-2848 | Upgrade to Sencha ExtJS 5.1.2 |
| • FRM-2850 | Additional Home Panels |
| • FRM-2851 | Drag a search grid column to filter on the fly |
| • FRM-2856 | Extend Global Search |
| • FRM-2864 | Add Tooltips for the Header Menu icons |
| • FRM-2865 | Export grids with header and footer |
| • FRM-2870 | Remove the Validation on drill down for Phantom data. |
| • FRM-2876 | Prevent Search Grid Columns from getting to narrow on smaller displays |
| • FRM-2877 | Comments & Messages Panel Enhancements |

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| • FRM-2878 | Add a Cancel button to the Opening Attached File screen |
| • FRM-2890 | Need hyperlink for text field label |
| • FRM-2893 | Grid Filter should only allow filtering on columns displayed in the grid |
| • FRM-2927 | Merge Help Desk Editor with Comments and include the full toolbar editor in Comments |
| • FRM-2935 | Adding of cell information as one of the parameter in drill down event |
| • FRM-2957 | Include a way to add a Link to the Attachments tab |
| • FRM-2959 | User Profile button to Log a User Out of all Devices |
| • FRM-2960 | Hotkeys for Message box buttons |
| • FRM-2964 | Make i21 load faster under low bandwidth by enabling Cache, reducing the modules that load and minifying the code |
| • FRM-2965 | Create a Screen Dock to hold any collapsed screens |
| • FRM-2996 | Need a way not to retain the filtered column |
| • FRM-3045 | Create a way to append configuration settings outside the main view controller file of a view |
| • FRM-3119 | Rework Add Screen Shortcut screen |
| • FRM-3124 | Move Visualization tab to right of Contract Details tab in Search grid for Contracts |
| • FRD-653 | Make sure that FRD conversion to use the tblGLCrossReference |
| • FRD-845 | Run the FRD Post deployment script |
| • FRD-870 | i21 Performance Tuning |
| • GL-2149 | Migrate error messages to uspGLErrorMessages |
| • GL-2252 | Account Template for Sales |
| • GL-2276 | HDTN-172139 - Error in GL Account ID detail drill down from Trial Balance Detail report. |

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| • GL-2487 | Remove the dblOpeningBalance in vyuGLAccountView |
| • GL-2314 | Rename 'Auto Negative' Account Category to 'Auto Variance' |
| • GL-2366 | Double Arrow down should be replaced by drill down label |
| • GL-2478 | Kindly add "Deferred Revenue" account category of type Liability. |
| • GL-2488 | Implement Framework Changes (i21 Upgrade to ExtJS-5.1.2 (affected codes) |
| • GL-2491 | Allow xtype account combo box to allow account category without filter |
| • GL-2511 | Minor Adjustments for GL Reports |
| • GRN-312 | Implement early days functionality while listing contract in scale. |
| • HD-944 | Create mapping between HD Modules and SM Modules |
| • IC-1100 | Inv Shipment - Update contract schedule qty on save |
| • IC-1160 | Create a column named "strBackColorName" in table tblICLotStatus |
| • IC-1574 | Add Warehouse instruction button in Inventory Shipment and open warehouse instruction screen |
| • IC-1690 | Pass Shipped flag as false to prevent pick lots recurring in Inventory Shipment popup screen |
| • IC-1736 | Inventory shipment integration with contract |
| • IC-1738 | Participate in Global Search |
| • IC-1746 | Convert Long UPC to short UPC |
| • IC-1775 | Include intLoadToReceive and ysnPosted in ReceiptItemTableType and update the same in uspICPostInventoryReceiptIntegrations SP |
| • IC-1799 | Receipt - Total to be displayed below gross weight and net weight columns |
| • IC-1800 | IR Screen- Populate BOL number entered in the inbound shipment screen |
| • IC-1832 | Add a transaction type in tblICInventoryTransactionPostingIntegration table to call adjustment SP from iProcess |

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| • LG-342 | Ext js upgrade related changes in Logistics module |
| • LG-348 | Change intLoadNumber to strLoadNumber in Load Schedule table |
| • LG-353 | Add Franchise % and Shipped quantity in logistics view to get Weight Loss in Receipt |
| • LG-355 | Add strCurrency,strMainCurrency,ysnSubCurrency,dblMainCashPrice in ShipmentContractReceipt view |
| • LG-357 | Add Weight UOM in logistics view for demand planning |
| • MFG-798 | Blend Production: Add Lot Status column |
| • MFG-958 | Item Substitution |
| • MFG-1044 | Quality graph in Soluble Production like in ACS |
| • MFG-1223 | Work Order Planning: Once the work order is create from the sales, we should a copy of recipe at time of saving |
| • MFG-1272 | Warehouse: Picking alternate lot from handheld should allow |
| • MFG-1360 | Pattern generation |
| • MFG-1400 | Work Order Management: Provide default dates for Order Date, Required Date and Planned Date |
| • MFG-1477 | Need validation for Lot reservation in Inventory view |
| • PR-430 | Mirror the Employee Entity Earnings tab to Employee Template |
| • PR-448 | Update Tax Table component to latest version 2015.14 |
| • PR-473 | Update Tax Table component to latest version 2016 |
| • PR-482 | Create ACH Advise Report |
| • PR-483 | Update Tax Table component to latest version 2016.02 |
| • PR-499 | Void Paycheck |
| • PR-515 | Update Tax Table component to latest version 2016.04 |

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| • PR-516 | Add W2 field in Deduction |
| • PR-532 | Upgrade to ExtJS 5.1.2 |
| • PR-534 | Display the Bank Account Number in Bank Account field regardless if the Origin Integration is ON or OFF |
| • AP-1929 | Need a buffered store version for AccountsPayable.store.PurchaseOrderDetail |
| • AP-1967 | Implement Cost Adjustment |
| • AP-2010 | Participate in Global Search |
| • AP-2050 | Create a link on 'Amount Paid' field of voucher. |
| • AP-2109 | Upgrade sencha codes to be compatible on ExtJS 5.1.2 |
| • AP-2154 | Error ocured when loading voucher and po screen. |
| • AP-2170 | Stop pre-loading of files after login |
| • RM-160 | Program Currency entry screen |
| • RM-199 | Provide export to excel option in futures 360 |
| • RM-215 | M2M entry screen - Don't allow user to type value in column "Cash/Futures" when the item valuation type is "Futures + Basis/differential /premium price". |
| • RM-222 | DPR per calendar month |
| • RM-228 | Coverage Report- Purchase and sales contract quantities should move out of coverage once the sales contract is invoiced. |
| • RM-232 | Rename Customer position inquiry |
| • RM-250 | M2M - Add totals in summary tab and transaction tab for the columns quantity, result, result basis, result futures and result cash |
| • RM-251 | M2M inquiry- Quantity column of Sales in transit and sales contract should show - ve sign quantity |

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| • RM-253 | Match fProvide a message when transaction moves from one tab to another |
| • RM-258 | M2M Entry- Provide a feature to identify the columns where to enter cash and basis |
| • RM-265 | Coverage report- remove number prefix from the labels |
| • RM-292 | Impact of sub currency in Futures module |

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| • AR-2267 | Participate in Global Search |
| • AR-2298 | Provide a stored procedure for invoice screen |

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| • ST-186 | Checkouts |
| • ST-198 | Add Tax Group Id to Book Keeper Tab of Store Screen. |
| • ST-203 | Add Last cost column to the Grid |
| • ST-204 | Add Location to reg product codes |
| • ST-207 | Promotions Screen Development |

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| • TM-1654 | Server Side Code Revamp |
| • TM-1697 | Error building TM Project in master (16.1) |

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| • TF-104 | Method to use on clicking Search multi tabs |

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| • WH-152 | Need Buffered store for Material NMFC |

# New Feature

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| • CF-348 | Networks - Add Items Tab |

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| • CM-901 | Reduce the checking accounts available for selection |

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| • FCOM-997 | Ability to create a new company from the current company |

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| - FCOM-1212 | Support for sub-currencies (US Cent) |
| - FCOM-1219 | Formulated Starting Numbers |
| - FCOM-1221 | Ability to deliberately lock my screen |
| - FCOM-1231 | Ability to register multiple companies |
| - FCOM-1244 | Please add a CRM menu option so that we can start to build out CRM |
| - FCOM-1267 | User defined folders in the Favorites menu |
| - FCOM-1326 | Can we get a button to test help desk email Settings. |
| - FCOM-1333 | For Consistency - remove the Create ticket from the menu |
| - FCOM-1373 | Add "CRM" to Company Configuration screen. |

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| - CT-58 | DP Contract Type |
| - CT-94 | Event Matrix maintenance screen |
| - CT-136 | Replicate button for sequence |
| - CT-279 | Reassign Functionality |
| - CT-340 | Contract Status (Purchase Contract & Sales Contract) |
| - CT-306 | Unlimited Quantity Contracts |
| - CT-348 | Prepaid button |
| - CT-426 | Contract Sequence Futures field - Electronic Pricing |
| - CT-484 | Demand Analysis - Development |
| - CT-512 | Contract Sequence - FX tab - add new field (FX price UOM) |
| - CT-515 | Clean Costs & Weights - populate on Clean Weights field from Inventory Receipt |

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| • CT-527 | Impact due to sub-currencies in Contract, Price Contract screen |
| • CT-532 | Contract Header - Process button |
| • EM-226 | Create Group Entity |
| • EM-428 | Entity Search Detail Grids |
| • EM-540 | Entity Contact: Make the Time zone required |
| • EM-593 | Setup security for customer portal - use Role |
| • EM-620 | Import for Customer Entity Special Prices from CSV/Excel |
| • EM-624 | Ship Via Entity > Add Tariff Type |
| • EM-670 | Move the messages to the entity screen |
| • EM-671 | Clarify verbiage in comments |
| • EM-769 | Can we add the audit log to the EFT information on the Entity |
| • EM-799 | Create Entity Search for customers under CRM Module |
| • EM-802 | Add the custom fields tab to the entity contact. |
| • EM-803 | Add fields to entity contact |
| • EM-804 | Adjust contact screen |
| • EM-809 | We would like to be able to create a list of Contact types for CRM |
| • EM-813 | Contact list does not reference back to the entity thus it is not of much value |
| • EM-843 | add attachments to the entity and the tax exemption tab and the entity |
| • EM-865 | Add a link that would take a twitter account from Entity and send it to the twitter site for that id |
| • EM-872 | Add the following fields to the customer import |

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| • FRM-21 | Global Search |
| • FRM-2491 | Two-Step Verification |
| • FRM-2497 | Recently Viewed |
| • FRM-2554 | Search grid Group By with optional Totals per group |
| • FRM-2646 | Combination sorting on grids search |
| • FRM-2706 | Need Nested Grid Implementation |
| • FRM-2726 | Provide drill down option for check box |
| • FRM-2792 | Add functionality for search filter value or grid filter value to get value from a store or static store |
| • FRM-2903 | Create User Portal to replace e-commerce module |
| • FRM-2905 | Two Step Verification by email as an alternate to SMS |
| • FRM-2909 | User-defined keyboard shortcuts |
| • FRM-2912 | Add Calendar Control to Common Info to display system events |
| • FRM-2915 | Custom JS Chart control working with i21 |
| • FRM-2925 | Add "Before Today" to the Grid Layout Filter list |
| • FRM-2926 | Drag Cell in Search grid to automatically add a Filter |
| • FRM-2941 | Provide SP to insert records to Reminders List |
| • FRD-680 | Fill down feature |
| • FRD-705 | Create a Trial Balance by Primary Template |
| • FRD-706 | Create Balance Sheet by Primary Template |
| • FRD-707 | Create Income Statement by Primary |

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| - FRD-749 | Create a rolling 12 month column per below |
| - FRD-759 | Can the COA remember where it was when it comes up |
| - FRD-763 | There is no more option on drill down - it just happens |
| - FRD-765 | When you have a beginning balance in the column you should hard code bot to the start date |
| - FRD-775 | Add tabs for rows and columns to the report builder |
| - FRD-778 | Create account type column and default based upon account type. |
| - FRD-779 | Validation for sum functions |
| - FRD-799 | Cant duplicate reports in report builder |
| - FRD-800 | Add a tab for Rows and columns |
| - GL-2106 | Temporary inactivate accounts for historic import |
| - GL-2169 | Add a reconciliation table |
| - GL-2403 | Should not be able to close a month with unposted transactions outstanding |
| - GL-2472 | Add Reallocation Detail |
| - GRN-237 | Scale Operator entry on main scale screen... |
| - GRN-238 | calling uspRKGetElectonricPricignURL updates |
| - GRN-268 | Add monthly type storage charge type to storage calculations |
| - GRN-271 | add "recalculate" function to storage stored procedure |
| - GRN-277 | Use new print function changed by framework team in 15.4 |
| - GRN-279 | QC Scale Items require update |
| - GRN-294 | Storage type needs to be reconfigured for messaging under save, updates for offsite |

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| • GRN-295 | updates for getting real ticket number still has issues... |
| • HD-986 | Create an activity screen from the help ticket screen |
| • HD-987 | Add a new ticket search screen for "Activities" crm actions |
| • HD-989 | Add due date and completed date to "activity" screen |
| • HD-990 | Customer should not be a menu item it should be a hyperlink |
| • HD-991 | Contact should be a hyperlink on project screen |
| • HD-992 | Auto fill for customer not working in project screen |
| • HD-993 | Rename project to opportunity and replicate in CRM menu |
| • HD-994 | We need to be able to link quotes to opportunities and projects |
| • HD-995 | Add Opportunity fields |
| • HD-998 | Add hyperlinks to drill down on functional setup |
| • HD-1000 | Way to assign Agents to various Products. |
| • HD-1002 | Create a List of Sales Process status for the opportunity |
| • HD-1004 | Add the Overview tab to the opportunity |
| • HD-1007 | Rename Ticket to Activity in Opportunity screen |
| • HD-1009 | Items to add to opportunity search |
| • HD-1044 | Email Setup for HelpDesk and System should be consolidated with system manager email setup |
| • HD-1045 | Email Overrides for help desk |
| • HD-1053 | Change the "Project" to Opportunity in the search screen |
| • HD-1054 | Change internal sales person heading on the opportunity and project to sales person |

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| • HD-1055 | Fix Link to customer screen on opportunity |
| • HD-1056 | Changes to the opportunity screen |
| • HD-1063 | Please link the Sales Pipe Status to the maintenance screen |
| • HD-1064 | In Activities add email options |
| • HD-1065 | Create Configuration panel for CRM |
| • HD-1066 | Create link on contact in opportunity search to contact info |
| • HD-1067 | Opportunity Validations |
| • HD-1068 | Due Date should be a Calendar control for selection |
| • HD-1069 | Activity Screen |
| • HD-1075 | Create an Line of Business For CRM |
| • HD-1076 | Add line of business to actity |
| • HD-1117 | Add a new entity from the entity search screen on activity, |
| • HD-1123 | Graphs and charts - Activity Summary by Sales Rep |
| • HD-1124 | Be able to add quote from opportunity |
| • HD-1140 | Pipeline forecast Chid (Chart +Grid) |

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| • IC-627 | Receipt - Receive against transfer order |
| • IC-657 | Bill Entry - Adjust the inventory costing when user change the cost of the item when billing. |
| • IC-1393 | Bill of Lading Print - print from Shipment screen |
| • IC-1396 | Inv Transfer - Detail tab for Search, include hyperlink to maintenance |

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| - IC-1397 | Inv Adjustment - Detail tab for Search, include hyperlink to maintenance |
| - IC-1637 | After Changing the Lot's Item, application is not allowing to perform any transaction on that lot |
| - IC-1660 | Inventory receipt - other charges & invoice tab: Need to provide a column for selecting currency |
| - IC-1661 | Inventory Shipment - Allow user to select tracking # and containers in a popup screen. System should auto populate weight unit and warehouse selected in inbound shipment screen. |
| - IC-1662 | Show a static message on entering the received weight, if there is an underweight in inventory receipt screen |
| - IC-1701 | Impact due to sub-currencies in Receipt screen |
| - IC-1715 | Provide Long UPC,Vendor Number and Vendor Name in 'BufferedItemPricingView' Store |
| - IC-1808 | Add Export flag and Exported date fields in tblICInventoryReceiptItem table for ERP integration |

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| - LG-218 | Email Dispatch Info to Driver |
| - LG-240 | Add Logistics module into Preference settings |
| - LG-260 | Inventory Lots view - Afloat stock + Spot |
| - LG-267 | Logistic Loads for Fuel customers needs to support multiple Items/Customers |
| - LG-280 | Load information to present on Load schedule |
| - LG-281 | Adjust the Carrier shipment Order to include Load Directions and Load Scheduling messages |
| - LG-315 | Add reference to new Transport Load table in Logistics load table |

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| - MFG-26 | Blend Requirement - Check MRP |
| - MFG-51 | Blend Production - Auto Refresh of screen |
| - MFG-350 | Inventory View - Add buttons to open inventory transaction screens |

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| • MFG-809 | Contamination Group - Development |
| • MFG-810 | Item Contamination - Development |
| • MFG-969 | Master Blend Sheet Report - Development |
| • MFG-970 | Master Blend Sheet Report with Price - Development |
| • MFG-971 | Blend Consolidation View - Development |
| • MFG-972 | Material Consumption Report - Development |
| • MFG-975 | production Summary View - Development |
| • MFG-976 | Downtime view - Development |
| • MFG-977 | Wastage Summary View - Development |
| • MFG-978 | Un-allocated Lots View - Development |
| • MFG-979 | Production Summary by Line View - Development |
| • MFG-980 | Production Summary by Date View - Development |
| • MFG-1014 | Process Movement - Development |
| • MFG-1015 | Efficiency Downtime Entry - Development |
| • MFG-1016 | Efficiency Shift Activity - Development |
| • MFG-1205 | Option to view Lot Reservation from Inventory View. |
| • MFG-1274 | Schedule Maintenance - Development |
| • MFG-1279 | Build cross contamination and backward scheduling for work orders |
| • MFG-1295 | Material Requirement - Development |
| • MFG-1323 | Finished Goods Forecast - Development |

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| • MFG-1324 | Yield Configuration - Development |
| • MFG-1325 | Yield View - Development |
| • MFG-1361 | Item Substitution View |
| • MFG-1368 | Parent Lot Reservation |
| • MFG-1383 | Simple Blend Production (Lot & Item Based) |
| • MFG-1429 | Traceability for Contract, Inbound Shipment and Container |
| • MFG-1442 | HDTN-176937 Add a total in Recipes |
| • MFG-1451 | Forecast Buying Group - Development |
| • MFG-1484 | Auto Blend Sheet Using Quality |
| • PR-371 | Modifications for Time Off |
| • AP-1692 | Add approvals to the purchase order screen. |
| • AP-1709 | Add 1099 configurations |
| • AP-1718 | 1099 electronic filing |
| • AP-1787 | Import Credit Card Reconciliation Posted transactions into AP Bills |
| • AP-1948 | Can we add the post date to the AP detail grid search - |
| • AP-1955 | User should be able to capture the actual amount and system should calculate miscellaneous cost by subtracting contract cost and actual amount. |
| • AP-1956 | Add a field to capture FX rate in voucher screen |
| • AP-1963 | Prepayment should be allowed for a sequence. Currently it applies to the contract |

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| • AP-1980 | Impact due to sub-currencies in Voucher screen |
| • QC-60 | Need fields like container number, ICO Marks, Warehouse in sample screen even before logistics information are captured |
| • QC-99 | QualityTemplate: Display only control points for which ever the sample type is created |
| • RPT-847 | Invalid column error when previewing a report using an XML as a datasource |
| • RM-130 | Program Basis Position Report |
| • RM-190 | Match Futures Purchase and Sale – Show selected total lots in the bottom of the grid |
| • RM-237 | Futures 360- Show commissions with -ve sign |
| • RM-239 | Futures options transactions screen- Add 2 new fields first notice day and last trading date. They should be part of the grid and values should populate automatically when user selects the futures month |
| • AR-1113 | Sales Accruals |
| • AR-1185 | Customer Budget |
| • AR-1277 | SO - Pull from Recipe |
| • AR-1278 | Invoice - Recipe items |
| • AR-1515 | Import from Digital Dispatcher into i21 A/R Invoice |
| • AR-1517 | Item Tank Required Option |
| • AR-1570 | Add type "Debit Memo" |
| • AR-1831 | Duplicating Invoice |
| • AR-1854 | Limit Location Selections based on User Role Company Locations |
| • AR-1933 | Need Statement Comment Type |
| • AR-2161 | Implement Payment tab in Invoice Screen |

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| - AR-2174 | Implement Payment tab in Sales Order Screen |
| - AR-2228 | Invoice amount has to be calculated based on net weight |
| - AR-2277 | Need ability to edit comments in sales documents |
| - AR-2367 | SO - Add Pick Ticket button to print pick ticket |
| - AR-2399 | HDTN-176900 - Need Customer Aging Report with detail, ie invoice and payments to balance to AR as of date |
| - ST-193 | Retail Price adjustments Cab Feed Back |
| - TM-1309 | Add Attachments to Work Order screen |
| - TM-1586 | Energy Trac View for Tank Data |
| - TR-248 | Itemize Freight Surcharge on Customer Invoice |
| - TR-323 | Integration Modules changes to new Transport Loads |
| - WH-104 | Warehouse Lite - new function to stage lots for kit pick list |

# Improvement

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|---|---|
| - CF-339 | Import Accounts from CSV |
| - CF-394 | Add Tax Rate to Transaction Tax Grid as second column |
| - CF-454 | Add Remote Site record automatically when importing from CFN or PacPride |
| - CF-456 | Move Tax Group to the Site Record in the Location Section |
| - CM-294 | Next Check Number did not update after wasting a check |
| - CM-709 | No drill down for Paycheck transactions |
| - CM-722 | Deactivated Bank Account is still showing on the list |
| - CM-839 | Modify generic error message when generating ACH file with incomplete EFT Information |

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| • CM-908 | Improvement on Undeposited Payments screen |
| • CM-910 | Add a record number column |
| • CM-972 | Add link to the vendor payee (hyper link) |
| • CM-987 | Remove hyperlink (payee) in Miscellaneous Checks |
| • CM-1035 | Make the Identity type in Trailer Record tab working and count the check entry detail |
| • CM-1037 | Add Employee SS # field in Check Record tab of Bank File Format |
| • CM-1040 | Check Digit field should get the nine-digit of bank routing number |
| • CM-1041 | Add format for Type field in Bank File format |
| • CM-1052 | CM - Stop pre-loading of files after login |
| • CM-1067 | Add Check Date to Be Used in Bank File Format for PayRoll NACHA Files |
| • CM-1074 | Expose some fields in ACH Bank Format |
| • CM-1075 | Add Transaction Code type in ACH Check Record Tab |

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|---|---|
| • FCOM-1105 | Budget - menu name change, remove maintenance word |
| • FCOM-818 | Remove Tax Master Group |
| • FCOM-903 | Add date and time in tblSMActiveScreen for better idea of when the active screen becomes runaway sessions |
| • FCOM-959 | Extend the Latitude and Longtitude: field decimal places to match the Consumption site screen. |
| • FCOM-1007 | Licensing: Notification on expiration |
| • FCOM-1056 | Warn user if browser is not Chrome |
| • FCOM-1083 | Approver without email. |
| • FCOM-1084 | Sales Tax Account and Purchase Tax Account should be mandatory fields in Tax Code screen |

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| - FCOM-1145 | Enhance User Role to cater for Contacts |
| - FCOM-1192 | Warning message is missing |
| - FCOM-1234 | Add Location No in Company Location maintenance screen |
| - FCOM-1213 | Add Scale on list of modules for licensing |
| - FCOM-1232 | Add Field "Store Tax No. to Tax Code Screen |
| - FCOM-1249 | Login screen - Backspace key on Company field throws you out |
| - FCOM-1266 | Modify openScreen function or create a new method to open a search screen with filtered result. |
| - FCOM-1269 | Additional System Manager Module |
| - FCOM-1274 | Additional Statrting Number for CRM |
| - FCOM-1288 | Add phone number masking to the Country screen |
| - FCOM-1313 | CRM menu changes |
| - FCOM-1321 | Active Origin Screens panel should only require single click |
| - FCOM-1332 | Remove "Project Lists" menu under Help Desk |
| - FCOM-1351 | Remove "Email Setup" menu under Help Desk folder. |
| - FCOM-1359 | Additional CRM sub-menu - "Lines of Business". |
| - FCOM-1368 | Company Registration: Load the license details on load |
| - FCOM-1438 | CLONE - Need a way for default filters to be hidden on search screen |
| - FCOM-1454 | Add all CRM menus to Portal Access |
| - FCOM-1455 | Menus to remove from Help Desk Portal Access (admin) |
| - FCOM-1517 | Show User Role name on User Role drill down screen |

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|---|---|
| • CT-304 | Load Contracts Integration |
| • CT-305 | Sequence Copy - Costs Tab |
| • CT-315 | Farm ID |
| • CT-325 | Duplicate button in contract header should copy sequence as well |
| • CT-358 | Contract header buttons/hyperlinks |
| • CT-438 | Association and Crop Year buttons |
| • CT-448 | Easy Email from Contract |
| • CT-473 | There need to be an attribute which will make Bag mark optional or mandatory. |
| • CT-502 | Contract History - Hyperlink to transactions. |
| • CT-507 | DP contract - add DP storage schedule |
| • CT-541 | Contract Search Screen Hyperlink |
| • CT-542 | Contract Grid - Add Applied column |
| • CT-545 | Inventory Receipt - could not save or post transaction due to qty issue in Contract |
| • CT-554 | Contract - Documentation tab |
| • CT-560 | Cost Type - List Ship Via vendors for items marked with cost type freight. |
| • CT-571 | Need fields like Contract Item Origin Id, Name & Item Origin Id, Name |
| • CT-579 | Contract Management - Portal Access |

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| • IG-1501 | View button is replaced by arrow down. |
| • IG-1570 | Remove Connection and version from Canned Panel search |
| • IG-1638 | Dashboard - Stop pre-loading of files after login. |

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| • EM-299 | Add Payment Detail link in Vendor Maintenance History tab |
| • EM-444 | Add Entity Origination Date |
| • EM-567 | Consolidate the user preferences into the user profile |
| • EM-537 | We need to add the tax id and the year to date activity for the vendor to this screen |
| • EM-574 | Change naming on the vendor screen |
| • EM-662 | Items that should be shown on vendor search |
| • EM-756 | Add More information to Customer Group Search Grid |
| • EM-717 | Search screen for vendor |
| • EM-752 | Move some entity information off the customer and vendor screen and to the entity screen |
| • EM-735 | Employee Last Hire Date field should be required |
| • EM-737 | Current load Employee should not display in the Supervisors list |
| • EM-739 | Add the Employee Title, Pay Period and Active column in Employee Entity Search screen |
| • EM-750 | Vendor History - Change Bill No to Voucher No |
| • EM-760 | If the Entity is a user, require email address on the default contact. |
| • EM-790 | Update TM Budget Update to SP for Entity to Update Audit Trail |
| • EM-806 | When you go to the entity screen you should have an export file as well as an import |
| • EM-833 | Need additional field for CustomerBuffered store that will determine if the customer has budget setup |
| • EM-838 | Include the approver in the result of emvendorcombo. |
| • EM-842 | Additional columns for tblARCustomerBudget |
| • EM-855 | Add fields on emvendorcombo |

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| • EM-863 | Add hyperlink on label |
| • EM-868 | Add 'Purchase Order' in Approvals |
| • EM-885 | Create stored procedure to create vendor. |
| • EM-887 | Split creation - split number is unique by entity, not system wide |
| • EM-938 | Show System Manager options on Preferences tab on load |
| • EM-1002 | Add Template button |

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| • FRM-2141 | Cannot add Control Permission when codes are minified |
| • FRM-2164 | Save Screen Size and Position |
| • FRM-2382 | Sunset Old Search and add the floating ability to the New Search |
| • FRM-2383 | User wants to be able to filter the grid only by records that are selected |
| • FRM-2670 | Able to use gridcombobox as the filter value in search screen |
| • FRM-2701 | We should be able to format totals with commas and to the number of decimals we want |
| • FRM-2714 | Loading Performance Improvement on Search |
| • FRM-2753 | Open a multi-tab search screen with a chosen active tab |
| • FRM-2811 | Fix Delete Layout Validation Message |
| • FRM-2824 | Automatically update unread comments/messages to "read" upon scrolling to that particular comment/message |
| • FRM-2871 | Comments - Automatically add commenter as watcher |
| • FRM-2872 | Alert Box - Should be able to move it around the screen |
| • FRM-2936 | Open a multi-tab search screen with a chosen active tab via script |
| • FRM-2992 | Way to add button to Floating Search |

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| • FRM-3009 | Need a way for default filters to be hidden on search screen |
| • FRM-3056 | Add Link Function |
| • FRM-3092 | Change Global Search Results to show as docked |
| • FRD-587 | Focus the cursor in the start date when Custom Filter Type is selected |
| • FRD-621 | Add offset columns to assign dates - should be easier than current method. |
| • FRD-664 | Add the row and column associated with the report to the search screen |
| • FRD-683 | Print Each Account should be handled during conversion |
| • FRD-701 | Implement Offset Date for Balance Sheet, Income Statement and Cash Flow Template |
| • FRD-704 | PerTrial Balance Detail template Filter Types |
| • FRD-724 | Hidden option |
| • FRD-725 | Retained Earnings row with RE account drilldown numbers should match of TB and BS reports |
| • FRD-730 | Add a link to the row and column from the report builder search |
| • FRD-794 | Format mask for Income Statement and Balance Sheet |
| • FRD-808 | When you delete a budget all the lines must be deleted |
| • FRD-818 | Row Designer - fill down feature not working on Account Type |
| • FRD-839 | Change order of types in Filter Account Selection |
| • FRD-840 | Types should default the appropriate sign when selected in filter |
| • FRD-841 | Should be able to type column offset in lower or upper case and still select the item |
| • FRD-867 | Highlight Rows not included in the formula not working right on Sum formula |
| • FRD-878 | make Supress Zero work on Row Calculation row type |

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| - FRD-889 | Report Template - GL Trends > RE Account type for Retained Earnings account |
| - FRD-895 | Report Template - Automatically set RE primary account with Account type = RE |
| - FRD-914 | add router for drill through screen |
| - GL-1427 | To display Irely Suite Cross Reference |
| - GL-1815 | Add beginning and ending balance Dollars and Units, if applicable in account id total section and report total of GL Account detail by ID Report |
| - GL-1939 | Change glactmst conversion from origin to i21 |
| - GL-2067 | Adjustments to the recalc routine |
| - GL-2094 | Remove column from tblGLAccount Table |
| - GL-2116 | Make fiscal year creation easy |
| - GL-2132 | Audit Adjustment created in Foreign currency |
| - GL-2165 | Ensure that a multi currency transaction balances |
| - GL-2167 | You should be able to edit non-financial data on posted transactions |
| - GL-2170 | Add searches and maintenance screens |
| - GL-2171 | Link up the GL transaction entry screen |
| - GL-2189 | When closing a period I would like details on what data fields do |
| - GL-2321 | GL Account Detail Is not Zeroing Balances of Expense and Revenue Accounts at New Fiscal Year |
| - GL-2323 | HDTN-173218 - In balance GJ entry cannot be posted -- says "out of balance" - decimal place issue |

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| • GL-2345 | Create Drill down link on Account ID in GL Journal Detail |
| • GL-2349 | Open Fiscal Year using Post Date Label in General Journal |
| • GL-2363 | Retained Earnings Account in GL Account Detail screen |
| • GL-2485 | Allow account ids except from AR, AP and Cash Account categories |
| • GL-2527 | Should not be able to close a month with unposted transactions outstanding - AR, AP, CM and Payroll |
| • GL-2541 | When you enter a transaction in foreign currency the exchange rate recovered is inaccurate |

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| • GRN-20 | Background Program - Get Weight |
| • GRN-91 | Add Direct Shipments to i21 Scale |
| • GRN-133 | add testing window to storage schedule maintenance for testing a schedule. |
| • GRN-176 | add framework audit to scale ticket, ticket pool and scale station settings screens |
| • GRN-194 | Unlimited Contracts - Scale |
| • GRN-213 | Transfer Out ticket needs to create in-transit inventory shipment |
| • GRN-227 | Buy DP storage and apply to open Purchase Contract, offsite dp to open sales contract |
| • GRN-242 | additional reversal abilities in storage maintenance... |
| • GRN-263 | Process Grain Storage |
| • GRN-278 | storage transfers use currency, handle properly |
| • GRN-280 | Unlimited Contracts - Storage |
| • GRN-283 | scale should issue temp ticket number before the drop list seelction |
| • GRN-284 | delete/void of tickets needs control |

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| • GRN-286 | scale search must include status of the ticket |
| • GRN-287 | ship via giving error when blank... sql error |
| • GRN-290 | cannot allow monthly selection for storage calculations in 15.4 |
| • GRN-291 | storage effective/termation date needs better use |
| • GRN-297 | track sub-location with storage tickets... |
| • GRN-301 | scale must create storage records with new fields in sp |
| • GRN-306 | rework how reference, truck and driver work |
| • GRN-310 | distribution screen updates for 15.4 |
| • GRN-313 | update scale for new logistics detail records |
| • GRN-320 | Scale should use the SP from inventory to convert... |
| • GRN-323 | transfer in/out needs no distribution... should be removed for this type |
| • GRN-324 | eliminate duplicate entries in drop lists... |
| • GRN-325 | scales label should include the description |
| • GRN-332 | Scale - Update Receipt & Shipment Quality (Discount) Schedule field |
| • GRN-337 | contract "add" in manual distribution |
| • GRN-338 | storage schedules are returning all storage schedules to scale |
| • GRN-339 | auto assign and auto distribution must follow these rules |
| • GRN-340 | setting defaults in scale for discount schedule |
| • GRN-355 | GR - Stop pre-loading of files after login |
| • HD-1003 | Create Screen for Sales Pipe Status |

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| • HD-1018 | Show Description in Module drop down on tickets |
| • HD-1019 | Rearrange Default Order of Module Drop Down, do not show app code |
| • HD-1023 | Ticket: Put the subject of the ticket on the screen header |
| • HD-1027 | Ticket: Reduce some buttons that can be removed |
| • HD-1030 | Default tab on Ticket Search |
| • HD-1046 | Ticket Search: Add a column 'Last comment by' |
| • HD-1105 | Ticket Search: Use display company name not the company code |
| • HD-1109 | Should be able to highlight and copy ticket responses |
| • HD-1118 | Include Product in the Tickets Grid |
| • HD-1153 | Helpdesk Users Have My Tickets Showing by Default, Should be Open Tickets |

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| • IC-1544 | Second receipt is a little difficult |
| • IC-1197 | Load Contracts - Inventory Receipt & Inventory Shipment |
| • IC-1284 | Receipt -> Other Charges - Add "Open Maintenance" option to the Context Menu |
| • IC-1339 | Add document type in the Contract documents configuration |
| • IC-1376 | Transfer - Audit, Comment & Attachment |
| • IC-1377 | Adjustment - Audit, Comment & Attachment |
| • IC-1407 | Inv Receipt - Should be able to receive PO or Contract from any location |
| • IC-1408 | Inv Shipment - Should be able to ship against SO/Contract from any location |
| • IC-1411 | INv Transfer - Add all header fields to search screen, include hyperlink to maintenance |
| • IC-1412 | Inv Adjustment - Add all header fields to search screen, include hyperlink to maintenance |

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| - IC-1507 | Inv Transfer - Add Ownership type to transfer own or storage inventory |
| - IC-1511 | Inventory Receipt screen should bill by Quantity or Net |
| - IC-1571 | Rename 'Auto Negative' Account Category to 'Auto Variance' |
| - IC-1588 | Inventory Count Group > Remove Inventory Type Drop down. |
| - IC-1596 | Storage Measurement Reading - Add field 'Quality Schedule' |
| - IC-1597 | Receipt - Add field 'Quality Schedule' |
| - IC-1598 | Shipment - Add field 'Quality Schedule' |
| - IC-1603 | INv Count - Blank lines should not be posted |
| - IC-1639 | Create hyperlinks to Maintenance screens from all screens |
| - IC-1644 | Inv Receipt - Add No of pallets and unit.pallet in tblICLot table |
| - IC-1651 | Inv Receipt - Save Tax group, Tax Class, Tax Code, Rate, and calculated tax |
| - IC-1672 | Setup Items that are available to calculate per Unit Discounts in AR |
| - IC-1678 | Item -> Pricing - Show 6 decimal places for all price, amount or rate fields |
| - IC-1688 | Reports - Add hyperlinks to go to transaction screens |
| - IC-1695 | Receipt - Add 'Add Orders' button |
| - IC-1696 | Shipment - Add 'Add Orders' button |
| - IC-1697 | Receipt - Add button 'Replicate Balance Lots' |
| - IC-1707 | Inventory Shipment - Pick Lot is only for Sales Contract Order Type |
| - IC-1710 | Receipt -> Other Charges - Show Vendor Name instead of number |
| - IC-1719 | Menu and hyperlinks |

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| • IC-1720 | Receipts - Should be able to receive in existing lots |
| • IC-1726 | Item -> Duplicating item should set costs to zero |
| • IC-1728 | Inv Adjustment - Rename label 'Quantity' to 'Available Qty' |
| • IC-1761 | Inv Receipt - Tax Details popup - Show 6 decimal for Tax rate |
| • IC-1764 | Inv Shipment - Allow direct entry of items for all order types |
| • IC-1769 | Receipt Search - Add Voucher tab |
| • IC-1774 | Category GL Accounts - Add Required Button Maintenance Sales for Software Type |
| • IC-1784 | Inv Receipt - Warn the user if cost is zero for a non Contract receipt |
| • IC-1787 | Receipt - Source Type should display for receipts created by Scale |
| • IC-1794 | Item Search - Add 4 tabs Location, Stock, Price and Lots |
| • IC-1802 | Inventory Shipment - other charges & invoice tab: Need to provide a column for selecting currency |
| • IC-1810 | Item -> Setup -> Manufacturing - Add 'Max Wgt per pack' field |
| • IC-1818 | Item & Category - Implement new Account No. control |
| • IC-1821 | Add Buying Group and Account Manager in Item configuration under Manufacturing additional set up |
| • IC-1831 | Do not show direct shipment containers in Inventory Receipt - Add Orders |
| • IC-1914 | Need Item's Origin Id and Name fields in BufferedCompactItem store |
| • LG-167 | Stock Sales Improvements |
| • LG-184 | Load Contract Functionality |
| • LG-200 | Default values for Commodity, direct shipment in Inbound Shipments |
| • LG-278 | Adding inbound shipment on 'Add Receipt' screen. |

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| • LG-354 | Add 3 fields on vyuLGDeliveryOpenPickLotDetails Add Order popup screen on Shipment |
| • MFG-1164 | Application should validate the Reserved Qty in Inventory transaction |
| • MFG-1206 | Changes in Lot Label |
| • MFG-1208 | FG Release should be based on Parent Lot |
| • MFG-1209 | Traceability based on Parent lot |
| • MFG-1210 | Handle Bulk items while kitting |
| • MFG-1211 | Create a new attribute in process configuration to capture default transfer location |
| • MFG-1213 | Show total required quantity and total picked quantity in pick list screen and report |
| • MFG-1214 | Pick list - Show item which has quantity shortage in the pick list grid |
| • MFG-1215 | Add version number in recipe tab of FG production screen |
| • MFG-1225 | Show comments tab in Blend Management screen |
| • MFG-1226 | Provide hyperlink for manufacturing cell and machine configuration in Blend management screen |
| • MFG-1229 | Provide hyperlink for Process, Shift, Pull From (storage location) and Transfer to (storage location) configurations from Bag off screen |
| • MFG-1232 | Provide hyperlink for Line, Calendar and work order from work order schedule screen |
| • MFG-1246 | provide audit log tab for manufacturing process screen |
| • MFG-1247 | Provide comments tab for recipe screen |
| • MFG-1248 | Provide audit log tab for recipe screen |
| • MFG-1249 | Provide hyperlink for item and process in recipe screen |
| • MFG-1252 | Provide comments tab for manufacturing cell screen |
| • MFG-1253 | Provide audit log tab for manufacturing cell screen |

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| • MFG-1261 | Provide comments tab in holiday calendar screen |
| • MFG-1262 | Provide audit log tab in holiday calendar screen |
| • MFG-1277 | Recipe - Need user entered recipe names |
| • MFG-1304 | Blend Requirement: Item ID look up should display only blend items but i21 it is displayed all the items. It is intentional? |
| • MFG-1307 | Blend Management: Blender Fill |
| • MFG-1347 | Work Order Mangement - Provide hyperlink for Process, Item and Production line |
| • MFG-1352 | Blend Demand - Provide hyperlink for Item Number in both demand and recipe grid |
| • MFG-1353 | Blend Management - Provide hyperlink for Item Number |
| • MFG-1354 | Blend Production - Provide hyperlink for Item number and production line |
| • MFG-1355 | Kit Manager - Provide hyperlink for Item number, production line and pick number |
| • MFG-1356 | Blend Sheet Approval - Provide hyperlink to Item Number and Production Line |
| • MFG-1358 | Budget - Provide hyperlink for item |
| • MFG-1381 | Use Max weight from item congfiuration (item->setup->Manufacturing) during consumption of packaging material |
| • MFG-1439 | Drag & Drop, Reschedule in Schedule Chart |
| • NR-112 | NR - Stop pre-loading of files after login |
| • PAT-111 | Posting & Recap GL entries for Stock Issue, Retire and Void Retire |
| • PR-391 | Implement Audit log on company preferences (PR only) |
| • PR-427 | Add 'Update Employee Hours' toolbar button in Time Off Type screen |
| • PR-445 | Show on Timecard if User is Logging In or Out |
| • PR-449 | Display the Rate on Process Pay Group and allow editing |

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| • PR-461 | we need to add totals at the bottom of the paycheck screen so they can verify check run |
| • PR-469 | 941a Quarterly Federal Tax report |
| • PR-470 | State Quarterly Wage and Tax Report |
| • PR-471 | Quarterly SUI tax report |
| • PR-472 | Quarterly FUI report |
| • PR-476 | Add the Deduct From field in Deduction Types screen |
| • PR-500 | Add masking on Bank Account Number displayed in ACH Remittance Advise report |
| • PR-503 | Add Save Button to Process Pay Groups |
| • PR-508 | Add Hour total per employee on Process Pay Group Screen |
| • AP-1530 | Load Contracts - Purchase Order |
| • AP-1595 | Recurring Bill not post-able in Recurring transaction Batch Posting screen. |
| • AP-1731 | Contract Prepaid |
| • AP-1848 | When a user is setup with require approvals - restict the purchase order and bill screen |
| • AP-1774 | Add field to the bill entry screen |
| • AP-1775 | Payables has to go off the 'Add Receipt' list on saving of bill. |
| • AP-1807 | Voucher screen should bill by Quantity or Net |
| • AP-1832 | Add the unit of measure to the voucher line detail |
| • AP-1833 | Change the name on vendor prepayment detail from contract qty to contract bal |
| • AP-1846 | Changes on "Open Payables Detail" report. |
| • AP-1901 | Add the restricted flag from the prepaid credit to the detailed voucher search. |

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| • AP-1915 | Order top to bottom for clarity of function |
| • AP-1920 | Can you add commas and decimals to financial amounts |
| • AP-1952 | We need to be able to print the 1099 form background so customers do not need preprinted forms |
| • AP-1968 | Remove message after posting voucher. |
| • AP-1997 | Add drill down links on vouchers screen. |
| • AP-2014 | Purchase Order - Move Contract Qty Before Ordered Column |
| • AP-2017 | Can you add the DTM Date - posting date to the selection Criteria on the Detailed payables report? |
| • AP-2023 | messages needs modification |
| • AP-2024 | Create server side validation to disable deleting processed PO. |
| • AP-2025 | Once the requires approval has been checked on a bill it should be allowed to uncheck |
| • AP-2028 | Add audit log on Pay Voucher Details. |
| • AP-2046 | Voucher - Prevent cost edit if attached to a contract. |
| • AP-2061 | Include GL account as option in filter criteria |
| • AP-2081 | Create Form 1096 |
| • AP-2121 | PO - Detail Search tab - unable to filter by location |
| • AP-2158 | Disable unposting when ACH payment is committed. |
| • QC-64 | Origin in sampling screen should populate from item and not contract origin |
| • QC-119 | Provide hyperlink for sample type, contract number, contract item, inventory item, container number, shipment number and lot number, |
| • RPT-892 | Ability to set current user on "printed by" control |
| • RPT-900 | Apply cache functionality to improve the speed of report printing |

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| - RM-257 | Live DPR - Drill down title |
| - AR-1276 | Print logo on reports |
| - AR-1491 | Code for Location Exemptions |
| - AR-1509 | Create Splits for SO |
| - AR-1581 | Check Credit Limit and Past Due when invoicing |
| - AR-1582 | Check Credit Limit in SO |
| - AR-1603 | Add Invoice Type to Special Pricing Hierarchy |
| - AR-1608 | Recurring changes |
| - AR-1714 | Recalculate Tax Based on 15.4 Adjustments |
| - AR-1760 | SO - Add 'Ship' button to process to Inv Shipment. 'Process' button will process to Invoice |
| - AR-1811 | Duplicate button in Invoice |
| - AR-1843 | Add Invoice Date and Post Date on Invoice Search Grid |
| - AR-1866 | Invoice should reduce In Transit Outbound stock if shipment is involved |
| - AR-1886 | Add column to invoice grid for Transport Type and Add Transport # to Document # Field |
| - AR-1887 | Implement Drill From Document # |
| - AR-1903 | BOL and PO need to pull into the invoice from SO |
| - AR-1966 | Sales Order & Quote screen - Display Customer name instead of ID |
| - AR-1967 | Consider Invoice Type when applying special price |
| - AR-1969 | Consider Customer Location when applying special tax |
| - AR-2368 | Pick Ticket Print from SO |

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| • AR-2095 | Still need Aging Report until we have Group By for Grid |
| • AR-2156 | Add Provisional Invoice on comment maintenance \| Invoice Type |
| • AR-2187 | Remove Special Pricing Message |
| • AR-2188 | Add "Current" to Customer Aging Detail Report and Statement Report |
| • AR-2191 | Add Consumption Site # and Description to Sales Analysis Grid as an Optional Field |
| • AR-2200 | Tank Management Tax Group and Sales Tax Override needs to be used for Tax Exemptions |
| • AR-2201 | Add Item and Item Category to the Tax Report |
| • AR-2206 | Discount Available, Discount Taken on Invoice |
| • AR-2212 | Customer Inquiry: link Budget Amount and Budget Month to entity setup |
| • AR-2215 | Tie Receive Payment Detail to Budget |
| • AR-2220 | Batch Posting Needs |
| • AR-2231 | Add Discount Amount field on SO and Quote |
| • AR-2241 | Audit log not invoked when posting or unposting |
| • AR-2247 | HDTN-174718 - 15.4 - Customer Aging Detail Grid |
| • AR-2261 | Get Maintenance Sales setup for software maintenance fees |
| • AR-2285 | Handle necessary fields for shipment items on a single view |
| • AR-2287 | Add back tax report into 15.4 like we had in 15.3 |
| • AR-2314 | Invoice report: Increase size of price and totals |
| • AR-2343 | Combine Quoting into Sales Order |
| • AR-2375 | Maintenance Type implementation |

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| • AR-2412 | When creating a Quote - way to auto populate Customer field based on received config. |
| • AR-2424 | HDTN-177052 BOL number is wrapping when too long on the printed invoice |
| • AR-2470 | Adjust Quote report to match the details on Quote screen |
| • SC-11 | Create Half Sheet Ticket |
| • SC-4 | Scale in DP (Price Later) |
| • SC-16 | Scale - Ability to edit ticket after inventory receipt has been deleted. |
| • SC-6 | distribution should review print requirements in scale station setup and print as indicated |
| • SC-5 | Validation of manual screen in scale distribution needs updated - splits |
| • ST-201 | Add Preview to Purge Promotions |
| • TM-978 | Call Entry Implement i21 Tax Calcs |
| • TM-1289 | Attachments on Consumption Sites |
| • TM-1568 | Origin Conversion needs to put Degree Day Clock Readings into History |
| • TM-1570 | Delivery History in Descending Order By Default |
| • TM-1581 | Device > Add Duplicate Button on to speed up adding a Tanks in Mass |
| • TM-1583 | Assign Call Entry Order# on Save instead of Add |
| • TM-1598 | Generate Orders > Change Label to Generate instead of Search |
| • TM-1644 | Lease > Add Letter for Agreement |
| • TM-1645 | Lease > Add Print Agreement Value Option |
| • TM-1647 | Lease > Add Usage Evaluation Method |
| • TM-1661 | Generate Orders > Add Site Description |

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| • TM-1668 | Update Recalculate Prices to only update Future Dated Transactions |
| • TM-1675 | Change the New Site from + icon to the word Add |
| • TM-1694 | Work Orders Search Grid > Add new fields |
| • TM-1695 | Tank Management Menu Re-Organizations |
| • TM-1723 | Consumption Site > Add Burn Rate to Delivery History Tab |
| • TM-1749 | Lease > Import Leases to have new agreement fields available |
| • TR-230 | Quote Search Grid Details |
| • TR-355 | Impacting changes due to Logistics change |
| • TR-360 | Disable the Post/unpost button so user clicks twice the posting/unposting does not trigger twice |
| • TR-369 | Update Inventory Receipts to automate Freight Cost Allocations |
| • WH-158 | Provide an option for changing the Lot status in Handheld device |