



What's New - IS Tech Support Update 10/11/10

Manufacturing

- Rebuild Work Order costs hanging on End of File fixed
- PO-A not properly pulling in Location address if Default Location is not the first on the list - Fixed
- DC programs can now enter Scrap Codes (Based on default setting)
- PO-C PPV calculation for Make From parts was looking at the total standard cost rather than the This Level Processing cost (Standard Costing method only)
- PO-C label printing can now include Lot/Serial info for parts received
- Most PO programs update to GUI Versions (Evo-ERP only)
- Default to disable Delete PO button in PO-A

Items

- Bin Location in IN-A screen and WC tables synchronized to display Default Bin from Default Location
- BM-A Temp Memory Error fixed
- IN-A Forecast changed to include all item types and parents one level up on the BOM
- Most IN programs update to GUI Versions (Evo-ERP only)

Sales

- New Default setting to control calculation method for Days to Pay calculation
- SO-D now has option to include or exclude backorder quantities when printing 1 label per item
- New Extended Commissions system enables multiple reps per line item per order, item or item class specific commission rates, and Accrual transaction processing, posting the commission to the GL at invoice posting but posting the Commission available to be paid upon customer payment.

Accounting

- AP-F ePay receipt was pulling the address from the next vendor in the file. Fixed.
- New default setting to require vendor to be approved before checks can be printed.
- New Fixed Asset Tracking module.

System Manager

- UT-K-D was not recalculating properly when run for a single GL Account. Fixed
- New Fix Binary Zero utility (Evo-ERP only)
- SM-J-O has option to specify method used to recalculate Days to Pay
- ED-B (Import EDI Order) has new option to use Imported pricing even if it is \$0
- New Data Check Utility (T7DDCHECK at UT-A; Evo-ERP only)

Settings

- New setting to enable automatic reminders
- New US-F program to enter reminders

What's New - IS Tech Support Update 7/5/10

Manufacturing

- WO-D Bin printing corrected
- WO-F Scrap quantity was backflushing even when answering No
- WO-G can now be controlled by default setting to prevent negative on-hand
- WO-I Scrapped Lot Controlled items were adding to the Lot On Hand quantity
- WO-I can now assign Serial Numbers by range rather than entering one at a time
- New program (Evo only) WO-K-I that updates work orders within a Work Order or parent item range with changes to BOM/Routing master and generate exception list of WO that could not be updated because materials or labor had already been applied
- New default setting to apply full overhead rate to labor for all members of a team
- Employees (such as temporary employees) can be exempted from overhead when charging labor to work orders
- PO-A tax defaults fixed
- PO-A bug mixing lines on different POs fixed
- PO-A Due Date changing fixed
- T6POA error 88 fixed
- PO Digital Signature was not recognizing password
- PO-C occasionally going into a loop fixed
- PO-C can (based on default) issue materials for components tied to Outside Processing Sequence when Service pO is received
- PO-C call to PO-J A was printing travelers for all receipts of the PO rather than limiting to the current receipt
- PO-I-F report not properly extending value for LOT UM
- PO-J-B was excluding parts in QC as of a prior date if the PO had since been closed
- JC-O was always adding Setup time to Run time when calculating Standard Hours
- JC-S excluded Overhead unless both Fixed and Variable Overhead had values
- MR-F new option to include or exclude reorder levels
- MR-J New field for Pricing method now defaults to C which is standard vendor contract pricing/Last Cost logic
- DC-A (GUI version) clocking out of multiple jobs was not closing them all together

Items

- IN-A drill to Where Used not returning properly
- IN-B saves changes to subsidiary company
- T7IN-B was creating blank vendor records when creating anew item
- New program (Evo Only) IN-M Summarized Reorder Report
- RO-A new Operation Time Type - F, L, C for Flat Time per Part, Time based on number of lines on the BOM or Time based on number of components being processed
- RO-A new Seq Type - R or S means this sequence is always Run or always Setup and labor entry will not prompt for labor type
- RO-I new Operation Time Type - F, L, C for Flat Time per Part, Time based on number of lines on the BOM or Time based on number of components being processed
- BM-A allow quantity of 0 when editing existing record
- BM-G option to disable Inventory Change audit tracking for cost rollup
- BM-G excluding cost for Type T parts if "Check Item Type" default was enabled
- SC-G new program to set parameters to allow WO-I to automatically generate Serial Numbers when parts are completed

Sales

- SO-A fix to date being saved to change record when a line is deleted
- SO-A option added to price Kit Components separately
- New default setting so that when Sales Order Dates update Work Order Finish dates, the Work Order

- Start Date is adjusted the same amount
- SO-C was pulling Shipper number from the wrong file
- SO-C Reprint posted was not pulling Ship Date
- SO-N has an option to combine lines on a Sales Order for different items into a single Multi-Yield Work Order
- SO-Q-A saved changes to Base Price to subsidiary companies
- SO-Q-D, F & H now have date controlled pricing allowing for promotional pricing and entering pricing in advance to take effect on a specified date
- SA-A endless loop if Y to include Service/Repair fixed
- SA-M can now filter by item type
- AR-A saves changes to customer master to subsidiary companies
- AR-A fix for saving Credit Hold info
- AR-A/CM-A no longer can store customer credit card information due to changes in regulations. Programs have been changed to clear existing information and store only the last four digits of the card number, expiration date and address information. If you are not using X-Charge, then you will no longer have access to the credit card information in the DBA/Evo database and will have to store the information in the database of your credit card processing software or some other approved method. We will provide a one time export tool to extract the current credit card database information to a CSV file for transfer to your processor software, assuming they support importing. New AR-A allows for multiple credit cards per customer
- AR-C If the Bank account numbers and sort order numbers were not the same, the incorrect default bank was being used.
- AR-C & AR-N (Evo only) updated for new X-Charge credit card integration

Accounting

- AP-A saves changes to subsidiary companies
- AP-A fix for saving Contact information
- AP-B fix for GL debit and 00/00/00 dates
- AP-B fix for pulling in wrong account description when departments are used and have different descriptions
- AP-C would give a message that an invoice had been created as a voucher & couldn't be reversed if the invoice number existed as a voucher for a different vendor
- AP-F now has Electronic Payment option to enable processing electronic payments without going through the extra steps of printing dummy checks
- AP-H Evo fix for check format 2
- GL-B fixes to make navigation more intuitive
- GL-B fix for out of balance message for entry that is actually in balance
- GL-N Esc key was causing Internal Stack Error
- New program AM-R Out of Balance Report can be run on posted or unposted transactions

System Manager

- SD-B & SD-M (Evo only) Increment WO Suffix would not allow a value greater than 3
- SM-N-C Synchronize Classic Notes to Evo can now include Purchase Order, GL Journal notes and can selectively choose which type of notes to convert so you can convert the notes to coincide with starting to use the GUI version of a given program

Evo-ERP System

- Change to the way the Grid drill downs are tracked to eliminate Invalid Pointer errors and Access Violations

Hand Held

- LIFO/FIFO file not being opened; fixed
- New Paperless Shop Floor program designed for multiple users rather than dedicated workstation per user

What's New - IS Tech Support Update January 2010

Manufacturing

Work Orders

- GUI version of WO-D Pick List available (Evo-ERP only)
- Added Stock UM as reference to WO-G screen
- WO-C Traveler can include parent part Bin Location (Evo-ERP only)
- Multi-Yield Work Orders with lot controlled assembly can now properly create the Lot records for the assemblies
- WO-D now suggests the Work Order Location

Job Cost

- New JC-S Work Order Detail report

Purchasing

- Electronic Signature available for PO Approval (Evo-ERP only) (New PO-T Program and optional in PO-A & PO-B based on Default Setting)
- PO-I-A/E/F report fix for negative receipt of UM=LOT adding to the total rather than subtracting
- PO-I-A has option to print Allocations when sorted by Item
- PO-I-A & PO-I-E Allocation list can filter by WO Due Date

MRP

- MR-J Bug creating blank POs fixed
- MR-K Bug creating blank RFQs fixed

Scheduling

- New SH-K Work Center Load program displays work orders currently active in a Work Center and lists pending Work Orders for the Work Center waiting to be started (Evo-ERP only).

Data Collection

- Data Collection can suggest the Work Order or Sequence Start Quantity as the quantity to report when reporting labor.

Items

- Cycle Code field increased from 1 to 4 characters
- When Costing Method is set to Standard, Type N parts can (by part number) be set to be received at the PO price rather than the standard case, for items such as Shop Supplies that are purchased under generic part numbers and have no standard
- IN-C suggests the Default Warehouse Location for Adjustments
- IN-C can now allow a positive adjustment for a Serial controlled item that was previously manufactured on a work order provided the on hand is not already 1
- IN-A can optionally include Forecasted Quantities in the calculation of Net Available (Evo-ERP only)
- Total number of allowable warehouse locations increased to 250 from 200
- PI-G was not updating the Bin Location if Warehouse Control was not enabled
- IN-A on Sales Order/Back Order excludes RMA and Service/Repair
- Evo-ERP IN-A has buttons to drill down to RMA & Service/Repair detail

Sales

- Order entry can optionally check for Alternate Part numbers (User Defined, Customer Cross Reference, UPC)
- New program to automatically place customers on Credit hold if they have any invoices more than a specified number of days past due per terms
- New setting in AR-F to call the new Update Credit Hold Status program
- Multi-Currency Commission posting and reporting errors resolved
- Total Sales Order Discount can be itemized on a separate SO line rather than calculated to a net price for each line.
- SO-N Bug Fixes related to Features and Options
- New default to treat a 99.99% discount as 100%

Accounting

Accounts Payable

- AP-C now has an option to enter a Misc charge (such as fuel surcharge, cert fee, etc.) when entering a vendor invoice
- AP-B (Evo-ERP) Bug fix for occasional out of balance (all Debit) GL Posting
- AP-B was pulling in the incorrect description for a Vendor's default account if the account had a department assigned
- AP-H Invoice Description was being truncated (DBA Classic)

General Ledger

- Number of available Checking Accounts increased from 9 to 99
- Checking accounts can be suppressed from selection list based on module
- Display order of checking accounts can be modified

System Manager

- New default to control whether SO-A checks the item number entered on an order for alternates (User Defined, Customer Cross Reference, UPC)
- New PS-I screen to enter approved signers, password and approval limit for electronic approval signatures of PO
- SM-J-C can optionally exclude the Stock Status corrections from the report
- New setting to define Parent and Subsidiary companies. If this is enabled, parts, customers and vendors can only be created or modified in the parent company and the data will be saved to all subsidiaries.

Queries

- SU-A can now compile a grid into a stand-alone program with optional editing of selected columns so you can customize applications and add to user menus.

Payroll

- All reports can now exclude Terminated Employees based on termination date prior to the start date of the report.
- PR-O checks for 0 YTD totals for employees to prevent being run twice
- PR-L-G 941 now prompts for COBRA offsets. New RTM needed
- 2010 Tax Tables and updated withholding calculations included

Settings

- US-D Change Password added to the menu (same program as TAS-P)
- New program US-E Update PO Digital Signature so a signer can update his/her own PO Approval password and location of the image of the signature.

Evo-ERP System

- New release of EVOERP.EXE introduces improved stability and memory management and faster performance
- Email Settings at Settings, US-A allow SMTP port other than 25

What's New - IS Tech Support Update September 2009

Manufacturing

Work Orders

- WO-F Added Balance logic for backflushing components (SD-Q Default)
- WO-G Fixed message that On Hand would go negative if a component was not on the WO BOM even if there was stock
- WO-I Add Last Cost date and (based on SD-Q setting) Base Price to screen
- WO-I Correct balance Logic backflushing of negative quantity components
- WO-I now allows default Bin to be changed for Serialized items
- WO-K-B add option to view archived work orders
- WO-K-B Edit component, return back to the list on the same component rather than the top of the list
- WO-K-D fixed Actual Start Date when work orders created as Status R

Purchase Orders

- PO-B has option to exclude zero balance lines
- PO-B Save Default RTM Fixed
- PO-C calculates Freight % based on standard cost when costing method is Standard
- PO-C can receive type N parts at PO price rather than Standard Cost when costing method is Standard (SD-Q Default)
- PO-C Items received to Work Order no longer prompt for a Bin Location
- PO-E was pulling lines from a different RFQ if you opened a second without closing the program
- GUI version of PO-I-G (Evo-ERP only)
- PO-J-C Items received to Work Order no longer prompt for a Bin Location

Job Cost

- JC-M Added option to print Dormant Work Orders (Open WO with no transactions since a specified date)

MRP

- MR-G Not all BOM Components were printing when "Print BOM Components" was selected
- MR-H Not all BOM Components were printing when "Print BOM Components" was selected

Items

- IN-B has setting for type N item to receive at PO price when costing method is standard
- IN-C Default Location automatically pulls in
- IN-D BOM Components report was not pulling in all subcomponents
- IN-D Rebuild Stock Status was not processing when Print BOM Components was selected
- SM-J-C - See System Manager for description of changes
- PI-G was not updating the Bin Location for items with no change in quantity

Sales

Sales Orders

- SO-A Added Ability to insert a Discount line item to Sales Orders (Evo-ERP only)
- SO-A Added option (SD-Q Default) to use Ship-To for Contract Pricing
- SO-N Fixed problem with Features & Options components not passing to Work Order
- SO-N Fixed problem with combining lines for duplicate items and different ship dates
- SO-O-A suppress 0 lines based on quantity not price
- SO-O-F GUI version (Evo-ERP only)
- Quick Sales Order program (T7QSOA.RWN) (Evo-ERP only)

Sales Commissions

- CS-A warns when changing between payment methods I & P that pending invoices will have to be processed manually

Sales Analysis

- SA-A GUI version (Evo-ERP only)

Accounting

General Ledger

- GL-B can optionally link journal entry lines to Job Number (Evo-ERP only)

Accounts Payable

- AP-B can optionally link vouchers and voucher lines to Job Number (Evo-ERP only)
- AP-B new GUI version (Evo-ERP only)
- AP-C change to not post price change to type N parts to the PPV account when on Standard Costing
- AP-C change to save PO Change Record when price change is posted
- AP-I option for Listing Report to only list entries between a date range to provide a subledger report to validate GL entries
- AP-G new GUI version (Evo-ERP only)
- AP-H new GUI version (Evo-ERP only)

System Manager

Defaults

- New setting to optionally require Job Number on orders, vouchers and GJ entries
- New setting to use Ship To customer for Price and Discount Code and Contract Pricing
- New setting for Standard Costing to receive Type N parts at PO price
- New setting controlling whether PO Line prices are updated with AP-C price changes
- New setting to show base price in WO-I
- New setting to prevent duplicate Sales Order Line items

Other

- Improvements to SM-J-C
 - Resets transaction and Location entries to Default Location rather than creating new Master Location entries for Invalid Locations
 - Alerts user rather than deleting duplicate part numbers with different descriptions
 - Combines On-Hand quantity and merges duplicate BKICLOC records
- SM-J-L can now merge item numbers