What's new with the Macola Progression software?
(Versions 7.6.200, 7.6.300 (service packs A, B & C) & 7.6.400

(updated 11-9-06)

This document was prepared for Leahy Consulting customers and friends by editing published Macola documents. Several customers have requested a single document outlining recent enhancements. Version 7.6.300 contained significant order entry enhancements that were purchased Peak Data Systems, which sold popular add-on software to the Macola software.

Please call us before attempting to install this software, as you will likely need assistance. For example, there are required update patches that first need to be downloaded.

Upon request, Macola mails software updates at no charge to customers that have paid their annual software maintenance. To determine what version of the software you are using, from the Macola main menu, go to > Help > Progression Information. The software release dates are:

- Version 7.6.200 - January 2003
- Version 7.6.300 - June 2004, service pack "C" - October 2005
- Version 7.6.400 - May 2006

It is Leahy Consulting's policy to NOT install new software updates until Macola issues the first service pack of corrections. This will minimize possible disruptions to your organization.

Technical assistance and advice regarding upgrading to the newest version of the software should be directed to Gary Fredensborg. Support questions about using the Macola software and any of the new features should be directed to Bonnie LaFollette.

Thank you, Leahy Consulting Support Desk (513) 723-8090

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Accounts Payable

A/P - Reapply option for credit memos – V7.6.300

In previous versions of Progression, in Accounts Payable there was no way to remove a credit memo from a voucher and reapply it to another voucher. You also could not remove a credit memo that was open on an account (applied to zero) and apply it to a voucher. Instead, you had to cancel the Credit Memo, and then re-enter it with the correct apply-to information. In this version of Progression, a new Reapply option has been added that allows you to remove a credit memo from a voucher and apply it to a different voucher, or remove an open credit memo from an account (applied to zero) and apply it to a voucher. Only credit memos can be reapplied in Accounts Payable.

Notes: The following restrictions apply:

- a credit memo applied to a fully paid invoice cannot be reapplied.
- a credit memo can only be reapplied to another existing invoice for the same vendor or to zero.
- a credit memo that is fully paid cannot be reapplied.
- Credit memos can be partially or fully reapplied.
- the reapplied amount cannot exceed the amount for the credit memo applied to the selected invoice.
- the available discount will be automatically reapplied based on the percent of the reapplied amount versus the total amount available to reapply.

The new application is located under the Accounts Payable processing menu. When you open the application, you are prompted for a vendor number and the credit memo voucher number to be reapplied. Once selected, Progression displays the first invoice that the credit memo is currently applied to and the amount applied to this invoice. You will be prompted if this is the "correct record" until the correct entry is selected or no more entries are found for the credit memo. You are then prompted for the new invoice to be applied and the amount of the credit memo to be applied. You can reapply any amount up to the total amount of the selected credit memo. Once save, Progression posts the appropriate reapply records to the AP Open Item file (APOPNFIL) and the AP History file (APOPNHST).

A/P - How does the new reapply feature affect the AP Open File? – V7.6.300

If the total amount is reapplied, the existing entry for the credit memo is deleted from the open item file and replaced with the new entry. If a partial reapply is performed, the amount on the existing open item entry is adjusted and a new entry is added to the open item file for the new apply record. In addition to the changed amount field, the following fields will be changed to reflect the new applied to invoice – Ap-Open-Inv-Apply-To-No, Ap-Open-Inv-Apply-To-No-1, and Ap-Open-Inv-Apply-To-No-5. Also, the discount available is adjusted based on the percent of the amount reapplied versus the amount available to reapply. If part of this credit memo is already applied to an invoice and an additional amount needs to be applied to the same invoice, two records are written to the open item file.

A/P - How does this affect the AP Open History File (APOPNHST) – V7.6.300

The reapply creates records in the APOPNHST file similar to those created in the AROPNHST record by the existing A/R Reapply option. An adjustment record ("A" type) is created to reflect the reduction of the existing open item entry and a second adjustment record is created to reflect the addition of the new reapplied entry. If a full reapply is performed resulting in the deletion of the existing open item entry, then the reference field on the history entry is "Deleted". If a partial reapply is performed, the reference field on the reduction entry will be "Re-applied to Inv: _____" and the standard reference of "Venxxxxxxxxxxxx Cm:99999999" is added to the new entry. The journal number field in the history file will be marked as "APRAPL" on all entries created by the reapply option.

A/P – How to run the reapply process? – V7.6.300

1. Select Processes, Reapply Transactions. Progression displays the Reapply Transactions screen.

2. Enter the vendor number associated with the credit memo you are reapplying. Progression automatically displays the vendor's name.

3. Enter the Voucher No. you want to reapply. Progression displays the Original Voucher Information in the Original Voucher Fields.

4. You are prompted with the question: "Right Open Item?" Select "Yes" when the correct open item information appears in the Original Voucher Fields group box. This takes you to the Changed Voucher Fields group box.

5. Enter the new apply to number (New Apply To No.).

6. In the Amount field, enter the new amount you want to apply. This field defaults to the amount entered in Amount 1 field in the Open Item file.

7. Select Save.

The next time you print an aging report, the credit memo or the unapplied payment will appear in the same aging period as the voucher to which it now applies. If the amount of the credit memo equals the amount still owed on the voucher, Progression clears both from the file the next time the Open Item file is purged.

A/P - Void Check After Posting Screen Display to show Vendor Name associated with check being voided – (V7.6.400)

The Vendor Name Field has been added to show beside the Check Number Fields in the Void Check After Posting Screen Display. If the Check Number is not found in the Open Item File, a message, "Check Not Found" appears in the Text Box next to the Check Number. If a valid record is found, but the vendor is not found in the Vendor File, the message, "Vendor Not Found" appears in the Text Box next to the Check Number. If the vendor is found, the Vendor Name appears in the Text Box.

A/P - The generation of Discount and Due Dates for Recurring A/P Vouchers has been enabled – (V7.6.400)

The code has been enabled that calculated the Discount Date and the Due Date for A/P Vouchers generated by the posting of Recurring A/P Vouchers.

A/P - Fill Field Logic has been added for A/P Vendor Number Fields in Maintenance, View, Transaction Entry and Payment Selection – (V7.6.400)

A code has been added to enable Fill Field (F6) Functionality for the Vendor Number Fields in Maintenance, View, Transaction Entry and Payment Selection. The Vendor Number on each screen had the prompt "Fill Field (F6)" added and "Allow Additional Input" turned on. Fill Field Logic was added to the following screensets/fields:

A/P Vendor Maintenance - Vendor Field

A/P Account Info View - Vendor Field

A/P Enter Vouchers - Vendor Field

A/P Payment Prep - Payment Selection - Vendor Field

Upon entry to the Vendor Field, hitting F6 prepares the field for Fill Field Search Sensitivity. Once the user has hit F6, the field will then begin to display a list of A/P Vendors equal to or greater than the criteria entered into the field thus far. As with the normal search, double-clicking on any one of the vendors presented will fill the field accordingly.

Accounts Receivable

Customer requesting that if reverse view is checked from customer account info view and the history customer orders button is pushed, that the OE screen that displays automatically also display in reverse view. Service pack C.

A/R - Adjust or Remove the Payment Record from the A/R Commissions Due Table when doing an A/R Check Reversal – (V7.6.400)

When doing an A/R Check Reversal, before deleting the AROPNFIL Payment Record, code was added to check the A/R Commissions Due File (ARCOMDUE) for a Payment Record. If none is found, it continues processing. If a Payment Record is found, all associated records for that Apply To Number in ARCOMDUE will be marked NOT Fully Paid, and the amount of any Payment Record will be adjusted in ARCOMDUE totaling the amount of the reversal.

When doing an A/R Check Reversal on a Debit Memo, before deleting the AROPNFIL Payment Record, code was added to check the A/R Commissions Due File (ARCOMDUE) for a Debit Memo Payment Record. If none is found, we continue processing. If a Debit Memo Payment Record is found, all associated records for that Apply To Number in ARCOMDUE will be marked NOT Fully Paid, and the amount of any Payment Record will be adjusted in ARCOMDUE, totaling the amount of the reversal; if any Debit Memo Payment Record Amount becomes zero, then that Debit Memo Payment Record will be deleted.

A/R - Develop a report that includes both sales persons and a list of companies that they are selling to – (V7.6.400)

Added an Include Customer Information Option to A/R - Reports/Graphs/List/Salesperson Report. When checked, this will add the Customer Number, Customer Name and Customer Type to the report.

A/R - Fill Field Logic has been added for A/R Customer Number Fields in Maintenance, View and Sales Processing – (7.6.400)

A code has been added to enable Fill Field (F6) Functionality for the Customer Number Fields in Maintenance, View and Sales Processing. The Customer Number for each screen had the prompt "Fill Field (F6)" added and "Allow Additional Input" turned on. Fill Field Logic was added to the following screensets/fields:

Customer Maintenance - Customer Field

Customer Account Info View - Customer Field

Enter Sales - Customer Field

Cash Receipts - Customer Field

Upon entry to the Customer Field, hitting F6 prepares the field for Fill Field Search Sensitivity. Once the user has hit F6, the field will then begin to display a list of A/R Customers equal to or greater than the criteria entered into the field thus far. As with the normal search, double-clicking on any one of the customers presented will fill the field accordingly.

A/R (O/E) - When a customer is placed on Credit Hold, provide an option to place all Current Orders on Credit Hold also – (V7.6.400)

When you go into Customer Maintenance to place a customer on Credit Hold, there is now an option to place all of that Customer's Open Orders on hold, also. That way, the user does not have to go into each Individual Order for that customer and place it on hold. In Customer Maintenance, when a change in the Credit Hold Checkbox is detected during the save of a Customer Maintenance Record, the user will be prompted to put all Booked Orders for that customer on Credit Hold, or to release all Booked Orders for that customer from Credit Hold.

General Ledger

G/L - Develop a report that will read the G/L Transaction File and list transactions that are not marked as consolidated thru a selected Cutoff Date – (V7.6.400)

Added a checkbox to the G/L Trial Balance By Account Order Report to access the G/L Transaction File with a User Defined Date Range to pull only those transactions that do not have the Consolidation Flag set to "Y" (Yes). All data in the Date Range that is not flagged as consolidated will be displayed. An Unconsolidated Accounts Only Checkbox was added to the screen after the Show Statistical Account Checkbox and before the Major Accounts Only Checkbox. When the Unconsolidated Accounts Only Checkbox is checked, it sets the Show Detail and Show Active Only Checkboxes to Yes (Checked) while clearing the Entity and Profit Center Fields; the Subtotal Option is set to "N" (No Subtotal). Only Account Numbers that have an Unconsolidated Record in GLTRXFIL will be printed.

NOTE: The G/L Transaction File Consolidation Flag is set to "Y" by running the G/L Post Company Consolidation Process to consolidate Sub-Company (Companies) Ledger Accounts into a Parent Company Consolidation Account.

Order Entry

Purging OE Comment History File (V7.6.200)

In previous versions there was no way to purge the OE order comment history file. (It did not purge when the OE order were purged from history.) In 7.6.200 the order comments are purged when the order is purged.

OE Copy from History (V7.6.200)

In OE Entry Add mode, the criteria option "Get Current Price/Cost?" with a dropdown list box containing the values "B=Both; C=Cost; N=Neither; P=Price" has been added to the History Order Copy popup form. This allows users to copy an order from the Order History files, while still having the ability to use the current prices from the Item Master. The default for this option is Neither.

OE to PO Held Order (V7.6.200)

Orders that are created on hold no longer create a purchase order. A message prompts the user to create a purchase order if the customer is on hold.

Creating O Type Orders for Master Orders (V7.6.200)

A new field, "Default Ship Date" has been added to the Master Copy function. This field allows the entry of a ship date (default is the system date), and that that date is used to populate the line items date information. Previously the system date was used as the default in the order line items ship date field, and the line item dates had to be changed manually after the order was placed.

OE to PO (V7.6.200)

A flag has been added to prevent OE Orders that have Printed PO's linked to them. The OE Order cannot be deleted until the linked PO is cancelled. If the PO has not been printed, the user is prompted to either delete or cancel the PO.

Header Comments Copies with History Copy (V7.6.200)
When performing a history copy in OE, if the Copy from History selection box is checked, both the line and header comments are copied.

Packing Slips Do Not Print for Orders on Hold (V7.6.200)
A checkbox to Exclude Orders on Hold from printing has been added to the Print Packing Slip screen. When this checkbox is selected, Packing lists are not printed for orders that are on Hold due to the customer being over the credit limit or terms. This is not due to a customer being on credit hold.

Printing OE Order Number on the Receiver in OE to PO (V7.6.200)
The OE Order Number in now printed on the OE to PO Receiver document .

Order Entry - V7.6.300 Enhancements - Progression 7.6.300 Order Entry has many enhancements. These focus on immediate printing of various documents; immediate purchase order generation; order entry changes; viewing orders; and maintaining price code information. This is a list of enhancements:

- O/E Setup -- additional fields to support the OE enhancements
- Alternative method for generating purchase orders during Order Entry or as a separate process
- Direct access to Available to Promise information from Order Entry
- Sales history lookup from Order Entry
- Item location change from Order Entry
- Recalculate order prices during Order Entry
- Enter billing information during Order Entry
- Print Immediate Pick Tickets
- Print Immediate Quotes
- Print Immediate Acknowledgements
- Print Immediate Shipping Labels
- Print Batch Shipping Labels
- Power Inquiry by Order Number
- Power Inquiry to Customer P/O
- Power Inquiry by Ship-To
- Power Price Inquiry
- Order Booking Report
- Mass Price Change
- Power Price Code Maintenance

- Price Code Copy
- Price Code Reset Ending Sales Date
- Mass Price Code End Date Change
- Billing in Picking Sequence
- Immediate Invoice Printing from Select for Billing
- Credit Card Processing

Order Entry Setup (V7.6.300)

Order Entry Setup has two additional screens. These allow you to set defaults for immediate document printing, which includes quotes, acknowledgements, shipping labels, and pick tickets. There are defaults for generating immediate purchase orders. There are also several special processing options, which include the number of decimals for rounding in mass price change and copy; recalculation for whole order pricing; display default for power inquiry; defaulting the order line quantity shipped to the quantity ordered; and entering billing information during order entry.

The option to Generate Immediate P/O During Order Entry and the options for printing immediate quotes, acknowledgements, and pick tickets are mutually exclusive. This means that if you choose to use any of the print immediate options (Print Immediate Quotes/Acknowledgements/Pick Tickets), you cannot use the option to Generate Immediate P/O During Order Entry. Conversely, if you choose to use the option to Generate Immediate P/O During Order Entry, you cannot use any of the print immediate options (Print Immediate Quotes/Acknowledgements/Pick Tickets).

Generate Purchase Orders from O/E (V7.6.300)

When you enter an order in O/E with a vendor number, you have the option to generate a purchase order. You can generate a purchase order by running a separate process or by immediately generating one when you complete order entry. The system creates purchase orders based on individual customer orders. One customer order can create one or more purchase orders, depending on the line item vendor numbers. This does not combine multiple customer orders into a single vendor purchase order. Each order has its own matching purchase order. Defaults for the purchase order generation come from O/E Setup, and are used during the process of generating a purchase order.

When you generate a purchase order from O/E, you can make the following changes to the purchase order:

- Cost to use -- defaults from O/E Setup
- Request date to use -- defaults from O/E Setup
- PO type
- Drop shop location
- Line item comments are copied based on the setting in O/E Setup
- Landed cost components are attached as defined by the vendor record, I/M Setup, and P/O Setup

Conditions for P/O Generation (V7.6.300)

When the system generates purchase orders, the following conditions always apply:

- Only I type, O type, selected, and unselected orders can generate purchase orders. Invoiced or posted orders will not.

- If a customer order or a line item on a customer order successfully generates a purchase order, you will not be able to generate another for that customer order. This prevents duplication.

- Changes to a customer order that generated a purchase order are not transferred to the purchase order.

- Changing the customer order line item quantity will update the purchase order line quantity as long as the purchase order has not been printed.

- When entering a customer order, you can enter only a valid vendor number to generate a purchase order. (The vendor number will default from the item's inventory location.) You can leave the vendor number blank or enter a miscellaneous vendor number, but customer orders with a blank or miscellaneous vendor number will not generate a purchase order. To exclude a line on a customer order from generating a purchase order, purposely leave the vendor number blank or use a miscellaneous vendor.

- Comments on the customer order line items are copied to the purchase order. (The note types copied are based on the settings in O/E Setup.)

- Line items with a quantity ordered of less than one will not generate a purchase order.

Assigned P/O Numbers (V7.6.300)

When the system generates a purchase order number it uses the O/E order number-xx as the purchase order number. For example, customer order number 301 is in O/E. If you generate a purchase order from this, the purchase order number becomes 301-01. If the purchase order number already exists (in the example 301-01), then the P/O number comes from the next available purchase order number defined in P/O Setup. If a customer order has two or more line items from multiple vendors, the purchase orders are numbered sequentially. For example, customer order 302 has three line items from different vendors. The generated purchase orders become 302-01, 302-02, and 302-03.

The purchase order number consisting of an O/E order number and purchase order combination allows you to easily cross-reference P/O to O/E information.

Based on the way the system numbers purchase orders, you should have your purchasing department use a P/O number sequence that is distinctly different from the O/E number sequence. This will allow the system to create purchase order numbers based on customer order numbers.

Enhancements to Entering Orders (V7.6.300)

There are several enhancements to Order Entry:

1. Direct access to Available to Promise information -- A button, ATP, on the Enter Orders screen allows you to check the availability of an item without having to exit from Order Entry.

2. Sales history lookup -- Pressing F4 from the item number field on the Order Entry screen allows you to look up the sales history of the customer, if you have not entered an item number, or look up the sales history of an item, if you have entered an item.

3. Item location change -- This allows you to change the location on an order during order entry. However, this does not include Feature Items or Kit Items, and the order type cannot be an Invoice or Credit Memo type.

4. Recalculate order prices -- This enhancement allows you to recalculate order prices based on whole order totals or product category totals rather than single line item quantity. You can recalculate order prices when adding or changing an order. You have the option to exclude line items from the re-calculation process. This prevents specific line items from being re-calculated when a price has been manually entered. The option to re-calculate order prices comes from O/E Setup (no re-calculation, product category, or whole order). The option to exclude line items from re-calculation is on Order Entry. The option to re-calculate the order prices is also on Order Entry.

5. Enter billing information during order entry -- This enhancement allows you to enter billing information when adding or changing any type of order. This is controlled by the Enter Billing Information During Order Entry field on O/E Setup.

Print Immediate Pick Tickets, Quotes, Acknowledgements, and Shipping Labels (V7.6.300)

Immediate printing options allow you to print pick tickets, acknowledgements, quotes, and shipping labels when you complete order entry. You can also save shipping labels and print them in a batch.

1. Pick Tickets -- You can print a pick ticket for regular orders or invoice type orders. The system will print one pick ticket with its corresponding items for each of the line item locations on the order.

2. Quotes -- You can print a quote for quote type orders. This opens the Print Quotes screen with the starting and ending order numbers entered.

3. Acknowledgements -- You can print an acknowledgement for regular orders or invoice type orders. This opens the Print Acknowledgements screen with the starting and ending order numbers entered.

4. Shipping Labels -- You can print a shipping label for regular orders or invoice type orders. This opens the Print Labels screen with the starting order number entered.

5. Batch Shipping Labels -- You can store shipping labels to print them later. This also allows you to select a form for them.

Power Inquiry (V7.6.300)

The power inquiries are additional views that offer a drill-down and side-by-side display of an order summary and line item details. There are power inquiries by order number, customer purchase order number, and ship-to locations.

1. Power Inquiry by Order Number -- This allows you to select all orders or only open orders. From this screen you can drill down to Order Entry View or Order Entry History View.

2. Power Inquiry by Customer P/O -- This is similar to the Power Inquiry by Order Number. However, you view information by the customer purchase order number.

3. Power Inquiry by Ship-To -- This is similar to the Power Inquiry by Order Number. However, you view information by the ship to number for a customer.

4. Power Price Inquiry -- This allows you to look up sales and purchase history with general information about a customer and item. From this view, you can access the Item Period History View, which shows the quantity sold, quantity used, sales, and cost for the item for the previous periods.

Order Booking Report (V7.6.300)

The Order Booking Report shows booked sales, which represent orders taken over a given time. These orders are typically open orders that are partially or fully shipped. This report combines open invoices and posted orders on one report. It lists items, quantity ordered, shipping information, P/O number, invoice or order number, invoice date, and sales dollars with overall date range booking totals.

Mass Price Change (V7.6.300)

There are three changes that affect the process of mass price change.

1. You can specify the number of decimals for rounding. The system makes no rounding changes if you make an amount change.

2. You can specify a positive or negative amount change. (This is similar to the existing percent change.)

3. You can specify to update the inventory location record with the changes.

Power Price Code Maintenance (V7.6.300)

The Power Price Code Maintenance is a new application that allows you quickly enter price codes for many items without having to re-enter redundant information. This enhancement allows you to maintain only price code types 1, 3, and 6, which are price codes involving item numbers. It assumes there are no quantity breaks. You can also use this enhancement to delete the displayed price codes.

Price Code Copy (V7.6.300)

Price Code Copy allows you to easily copy a price code scheme to another price code of the same type. You can copy only price code types 1, 3, and 6, which are price codes involving item numbers. Price code types can be copied only to like price code types: type 1 to type 1; type 3 to type 3; and type 6 to type 6. When copying price codes, you can also change the prices of the new price code records. You can change prices by an amount or percent. If you change the prices by percent, you can enter a percent rounding number, and round the result from zero to six decimal places. You can see the results of rounding on the Price Code Maintenance screen when you enter the affected price code and range information.

Price Code Reset Ending Sales Date (V7.6.300)

Price Code Reset Ending Sales Date allows you to change the end date on price code records. This allows you to extend the ending period without having to enter a whole new price code record.

Mass Price Code End Date Change (V7.6.300)

Mass Price Code End Date Change allows you to make mass changes to the end date of price code records. Using this enhancement changes the selected price code records that match the old end date to the new end date that you enter. Running this for a price code type of 0, which are all types and all ranges, changes the range fields on the screen to All and disables the fields. Running this for other price code types (1 through 8), enables the range fields, and affects only the records within the range for the selected price code.

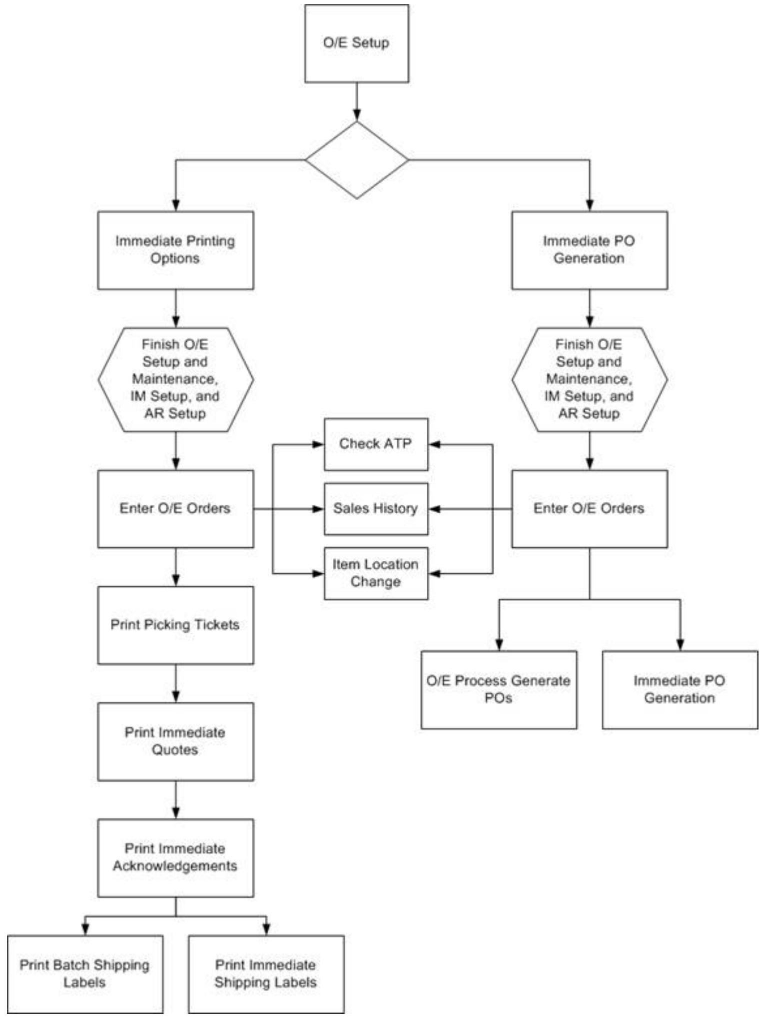
Billing in Picking Sequence (V7.6.300)

Billing in Picking Sequence allows billing in pick sequence order, which matches the sequence on pick tickets. The picking sequence is established in Item Location Maintenance in Inventory Management.

Immediate Invoice Printing from Select for Billing (V7.6.300)

Immediate Invoice Printing from Select for Billing allows you to print an invoice directly from the Order Billing screen. When you complete the billing selection, the system prompts you to print an invoice. If you choose to print an invoice, the system opens the Print Invoices screen with the starting and ending order number filled with the order you just billed. To use immediate invoice printing, you must activate the Print Immediate Invoices check box in O/E Setup.

Process Flow of Order Entry with Enhancements (V7.6.300)



Credit Card Processing (V7.6.300)

In this version of Progression, when you enter an order, you now have the option to use a credit card for partial or full payment of the order. Many customers allow payments by credit card; this enhancement allows the payment to occur during the order entry process instead of using external software.

This enhancement allows online credit card authorization and approval during order entry. Once you have completed a sales order, the credit limit on the card and accuracy of information are verified. Further, once authorization is returned it is then stored with the card. A flag in OE Setup control allows you to authorize for the amount or the order or for a user defined amount. If the CC authorization fails then the order remains on hold until the order is edited and the authorization is attempted again. In OE Setup, if you opt to authorize for the amount of the order and the order is modified, then you are prompted to reauthorize so that the new amount is authorized. You can also bill a partial amount on the credit card (a deposit) that updates the OE Cash information in the sales order.

During order billing, credit card orders are automatically settled for the balance of the invoice.

Other Order Entry Enhancements

Implement additional O/E Commissions options. (V7.6.300 service pack A)

Enhancement - Add range option to the Product Category selection in Mass Price Change. Currently, only a single product category selection is allowed. (V7.6.300 service pack A)

Enhancement - Add credit memo transaction processing capability to the O/E Credit card process. Business rules: The sales order that the credit memo is applied to must have been a credit card order. Multiple credit memos can be applied to the same sales order as long as the accumulated total of the credit memos does not go over the original credit card sale amount. The same credit card account that was used for the sale will be used for the credit transaction. As with the sale billing process with a credit card, the credit memo will invoice immediately after the transaction is completed. If the apply to order is a credit card order and the customer does not want the credit memo to use credit card processing, they only need to change the terms code to a non credit card terms. (V7.6.300 service pack A)

On the order entry line item screen instead of having to use F5 to open the Customer Item screen and then F7 to search, the customer would like to have the customer-item search added to the item number field so that they can select it from the list of item number searches by hitting F7 only. The user objects to the additional step of opening the Customer Item screen (OE0111L) before they can search for the customer item number. Service pack C.

The Header and Line Comment Buttons need to be added to the RMA History View similar to the RMA View screen. Service pack C.

Order Entry Setup/Additional OE Setup/Tab 2 Add two fields: oeccctl_sql. preauth_amt_fg (OE-CC-CTL-PREAUTH-AMT-FLAG) oeccctl_sql.limit_amt (OE-CC-CTL-LIMIT-AMT) Logic: Defaults: oeccctl_sql.preauth_amt_fg unchecked oeccctl_sql.limit_amt 0.0 These two fields are interdependant. When the preauth_amt_fg is unchecked, the limit_amt should be changed to zero and the field should be disabled (no entry). When the preauth_amt_fg is checked, the limit_amt field should be enabled for entry. A zero amount is valid. Please write the values to the oeccctl_sql table. Service pack C.

Provide the ability to enter a round to amount (nearest dollar, nearest nickel) during O/E Mass Price Change. Example would be .05, .10, .25, 1.00 etc…. The Mass Price Changes application allows you to modify the prices for a range of items. Progression requests a range of item numbers a range of locations, a specific product category, the percentage of increase or decrease, and whether you wish to update price codes in the Price Code file. Progression updates the prices for all items in the Item Master file within the item range that also belong to the entered product category. Service pack C.

A new order created by RMA does not check to see if the customer is over terms or credit limit and give the user the option to put the order on credit hold when OE Setup is set to warn. Nor does it put the order on credit hold if it is set to prevent. The new order should use the same logic as other OE orders to determine if the order should go on hold. Service pack C.

Client requests that when changing the required ship date on a OE line that has an Unreleased Shop Order linked to it that the system provide a message indicating that the date is being changed on the shop order and the user is required to manually schedule the shop order. Currently the date is changed on the Shop Order, but the user is not notified to reschedule the shop order. Service pack C.

<u>Order Entry - V7.6.400 Enhancements:</u>

O/E - Mask all displays of the Credit Card Number on screens and reports so that only the last four digits are visible – (V7.6.400)

Changed all displays of the Credit Card Number to show only the last four digits of the card number and populate the rest with X’s. This applies to all screens and reports. A mask will not be used on the screens since that could be changed by the user using Screen Designer. If the user enters a Credit Card Number, allow the numbers to be entered as shown on the card. When the Enter Key is pressed, convert the number to the above (masked) format for display. This change affects the O/E Cash Application, A/R Customer Maintenance and the A/R Customer Audit Trail Report.

O/E - Add Password Protection Logic to all views of the full Credit Card Number – (V7.6.400)

There are occasions when the user needs to view the full Credit Card Number rather than the mask. Certain screens will be adjusted to allow the user, with proper security, to be able to view the full Credit Card Number. The PF Key Functionality (F2) will trigger the process to check security. Password Protection Options (N=Neither, W=Warn, P=Prevent) will be used to determine Display Options. No reports or display only screens will be adjusted. Only those Credit Card Fields which are editable will be changed. A coded was added for PF Key Functionality (F2) on the Credit Card Account Number Field. A code was added to check the Password File for the password and options. Options are as follows:

- Option “N” (Neither) will display the Credit Card Number without the mask. No password will be required.

- Option “W” (Warn) will warn with a question. If the answer is Yes, the Credit Card Number will be displayed without the mask. If the answer is No, the Credit Card Number will be masked.

- Option “P” (Prevent) will ask for a password. If the password matches the password in the Password File, the Credit Card Number will be displayed without the mask. If the password does not match the password in the Password File, the Credit Card Number will be masked.

- For all options, once the user leaves the Credit Card Number Field, the data will revert to being masked again. If the user enters the field again and wants to see the full display, the F2 Key Process will need to be repeated.

The O/E Cash Application as well as all reports in Crystal or COBOL will have the Credit Card Number Field masked, since these fields are display only.

O/E - Populate the Street Number and Zip Code in the Credit Card Data being passed to ESCharge.dll in order to use the AVS (Address Verification Service). Additionally, populate CVV2, the Card Verification Value (CVV2 for Visa, CVC2 for MasterCard, CID for AMEX and Discover) (CVV2 is a 3 or 4 digit number that is embossed in the Signature Panel for Visa, MasterCard, and Discover and on the front of the card for AMEX) in the Credit Card Data being passed to ESCharge.dll for security purposes (Fraud Detection) – (V7.6.400)

The Street Number and Zip Code in the Credit Card Data being passed to ESCharge.dll in order to use the AVS (Address Verification Service) are now being populated. Additionally, populate CVV2, the Card Verification Value (CVV2 for Visa, CVC2 for MasterCard, CID for AMEX and Discover) (CVV2 is a 3 or 4 digit number that is embossed in the Signature Panel for Visa, MasterCard, and Discover and on the front of the card for AMEX) in the Credit Card Data being passed to ESCharge.dll for security purposes (Fraud Detection).

O/E - When the Price Code Information is displayed during entry of the Quantity Ordered on the O/E Order Line, the Price Code Type will also be displayed to avoid confusion – (V7.6.400)

When the Price Code Information is displayed during entry of the Quantity Ordered on the O/E Order Line, the Price Code Type will also be displayed. Currently, when the user hits the F4 key, the screen displays the Price Code being used, but not the Price Code Type.

O/E - Add a Date Range Option to the O/E Fill Backorders/Fill All Backorders Process – (V7.6.400)

A Date Range Option has been added to the O/E Fill Backorders/Fill All Backorders Process. This allows the user to not fill backorders for Future Dated Orders before filling Current Orders.

O/E - Allow an option in the new Best Of O/E Generate Purchase Orders to generate the Purchase Order Number using the Next PO Number in the PO Control File, or using the same number for the Purchase Order as the O/E Order Number – (V7.6.400)

A flag has been added on the Generate PO’s Order Selection Screen to allow the user to Generate Purchase Orders using the same number for the Purchase Order as the generating O/E Order Number. If users have PO Blanket Orders, where they do not want the possibility of PO Number Duplication using the O/E Order Number as the PO Number, they can choose not to activate this option.

Purchase Order and Receiving

Deleting PO Attached to Customer Order (V7.6.200)

When deleting a Purchase Order that is linked to an OE line item, a warning message is displayed, prompting the user to continue or cancel the deletion.

P/O – Master Order Copy (V7.6.300)

In this version of Progression, in Purchase Order and Receiving you can copy a set standard order with a new order type of “M” to an active “O” type order. The new Master type order line item entry validates items like regular purchase orders.

Rules for Master Order:

- the order will have a status of unreleased and will not be printed
- the status can be changed to closed
- the order will not be available to link to a Shop Order
- the order cannot be entered as a drop ship

During the Master Order Copy, Progression validates line item activity dates and codes. Also, Progression validates whether an approved vendor is required for the item. Further, any landed costs associated with the Master order are copied to the newly created order. The Request and Promise Dates default to the system date.

Master orders can be copied to a different vendor. If the vendor is changed the header information is pulled from the vendor record you entered and Progression will use the “Get Current Cost” rule is enforced. The Get Current Cost check box will have each line item run through the same process that defaults the expected cost when the item is entered manually taking into account the vendor, currency dates, etc.

Other P/O enhancements

Provide the option of purging the IMRECHST when closed purchase orders are purged. This should be added as an option to the PO History Report and the Order History Report and the Inspect History Report. Doc #01.534.512. (V7.6.300 service pack A)

Allow vendor information to be changed on unreleased Purchase Orders including delivery address and location. Doc 07.078.115. (V7.6.300 service pack A)

Reset On Order is reducing the on order quantity at the item location record for items on a closed PO. The inventory transaction history file still shows the items with a status of O = On Order. The On Order at the item location should not be reduced until the closed order is purged to history. Refer to document # 3.648.539 - this enhancement will add a new status that will allow users an option that will work with either method. (V7.6.300 service pack A)

Provide P/O View functionality like the O/E History View. Currently when you purge closed purchase orders it moves to the POHDRHST and POLINHST but the user cannot view this. They can only print reports. Service pack C.

Customers would like a setting added to the Purchase Order so that a Purchase Order that has been received cannot be cancelled. Service pack C.

A warning message will be generated when attempting to inspect a receiver that has already been inspected. Service pack C.

Payroll

P/R – Mass Update for Deduction Upper Limits (V7.6.300)

In Payroll, you now have the ability to update the upper deduction upper limits for all employees associated with the specific deduction.

A new check box has been added to the Directory Update application, called Deduction Limits? If selected, Progression checks to see if the Deduction upper limit has been changed for any deduction codes. If so, Progression will update the employee records of all employees associated with the deduction code.

Error message - "No Local Number Description Match in Directory Table LOCL-CD" I had CLEV setup as a local code and then entered an Employee Tax adjustment using LOCL for the Local description field The local tax accumulators showed both CLEV and LOCL for this employee and I rec'd the above message when attempting to print payroll checks. If the client enters a tax code that does not exist it is creating it and not validating it against the tax code maintenance. This is causing problems when printing their checks, because it splits the total taxes between the 2 local codes, and will not print the checks because of the error message. If the local tax code is validated during the employee adjustment, this problem will not occur. Service pack C.

When doing an employee tax adjustment the field for the Local tax code can be populated with anything, even though it may not be a valid tax code. If it is left blank, it will use LOCL and this causes a problem in the payroll run. Would like for the field to have to validate the tax code when entering the employee tax adjustment so there is no error in the payroll run. Service pack C.

EDI

Streamline EDI 856 creation (V7.6.300)

In previous versions of Progression, the ASN Shipment Level Maintenance screen appears with details about the ASN you are creating. You could use this screen to overwrite any of the defaults Progression automatically fills in during the creation process, to add miscellaneous information to the screen, or to view all Progression sales orders referenced under the ASN.

To streamline the outbound creation process, Progression now allows you to skip the ASN Shipment Level Maintenance screen as part of the creation process. To use this enhancement, when you are creating outbound documents via the Trx/Outbound/Create application, and you have selected document 856, Progression enables the field “Do Not Display ASN Shipment Information”. If you activate this check box, Progression will not display the ASN Shipment Level Maintenance screen when you are creating 856s.

Support for Bill of Lading- 17 character VICS number (V7.6.300)

EDI now supports the VICS Bill of Lading number for both the 856 ASN and 810 invoice documents. If you are using the Progression WMS shipping system the Progression out bound creation process pulls the VICS BOL# from the Warehouse Management System (WMS) entry and no additional entry will be required in Progression, though you will be given the option to do so. If you are not using the Progression WMS shipping system you are now given the option to enter the Bill Of Lading number for both 810s and 856s.

The system has been designed to read the map used by Macola EDI during the outbound creation. The format specifies exactly what information should be included and how the outbound EDI document is to be formatted into to the flat file. If the 810 format specifies a requirement to have the VICS BOL number, Progression detects this requirement and an additional screen is available during the outbound creation process in Progression EDI. This screen is similar to the ASN Shipment Level Maintenance screen page 2 that appears during the 856 document creation. When this screen is appears, you will see the BOL # literal next to the last field. Enter your bill of lading number in this field. If you are entering the 17-digit BOL number the system is designed to calculate the check digit for you as the 17 position of that data. The calculation occurs when you exit the screen. If the format does not include this requirement the screen does not come up to streamline the 810 outbound creation process. The 856 ASN

Shipment Level Maintenance screen page 2 will accommodate the BOL entry as well. Additional code has been added for Progression to calculate the check digit for the 856 VICS BOL number. The 810 outbound miscellaneous screen will also show the number 10 BOL # field. The Exact EDI Mapping team can now specify in a format the option to give the user the ability to enter specific elements of data that standard Progression does not accommodate. This additional feature is designed to help eliminate the need to enter 810 data in Gentran data entry. This does not imply that Gentran data entry has been eliminated.

Warning messages for obsolete items

A warning should be generated when an obsolete item or hold item is integrated. Service pack C.

Labor Performance

Consolidation of L/P transactions into Payroll (V7.6.300)

Two consolidation options have been added to allow L/P information to be passed into Payroll without exceeding the 50 transactions per employee limit in Payroll.

A new field, “Consolidation”, in the Update Earnings process allows you to consolidate payroll transactions without exceeding the 50 transactions per employee limit in Payroll. Three selections are available from the Consolidation field:

- **None** – select this option if you do not want to consolidate like transactions when passing LP information to PR.
- **By day** – If you select this option, Progression takes like transactions for an employee and compresses them into one day. Multiple transactions for a week are compressed into one transaction. For example, if you have 5 like transaction entries for the week, Progression will compress them into one entry.
- **By period** – If you select this option, Progression takes like transactions for an employee and compresses them into one period. Multiple transactions for a period are compressed into one transaction. For example, if you have 20 like transaction entries for a period, Progression will compress them into one entry.

Unable to import labor transactions and have it report time as special or over time. The Hours Type field needs to be added to the import file. (V7.6.300 service pack B)

Barcode

Add Out-Of-Tolerance override flag to Barcode Receiving import file. (V7.6.300)

An override flag has been added to the import file to allow out of tolerance receiving without generating a message that requires user intervention. This streamlines the Quick Receipt Import process.

The following is an explanation of the ASCII file layout:

Field	Bytes	Start	End	Values	Required?	Comments
Tolerance Master Flag	1	301	301	1 or blank	N	Setting this field to “Y” will ignore all tolerance codes in the item vendor master or PO Setup

Quick Receipt Exception (V7.6.200)

Bar Code Quick Receipts that are processed outside of PO receipt tolerances create an exception. When Quick Receipts are Edited or Reprocessed, the user is prompted whether or not to allow the tolerance exceptions to pass.

Barcode for manufacturing (service pack C)

Shop Floor Control – Add Support for a reversal of a SFC Activity Transaction, i.e. a negative quantity to be processed to allow the correction of mistakes, etc. Service pack C

Shop Floor Control – Add Support for a Material Return so that any leftover components can be returned to stock utilizing the RF Guns. In addition, this is required to support the SFC Activity Reversal, since back flushed Bin/Serial/Lot components are processed using this same function. Service pack C.

POP – Add support for a reversal of a POP Completion transaction, i.e. a negative quantity to be processed to allow the correction of mistakes, etc. Service pack C.

The flat file for BC for SFC only accepts a start and end time, which only allows for 1 days worth of entry. Add a new field to the end to report hours, instead. If populated this would be used, otherwise fall back to the old times for backwards compatibility with existing applications. Service pack C.

System Manager

Add Maintenance Expiration Date to Help About Progression Display – V7.6.300

The maintenance expiration date for your Progression system has been added to the Progression Help, About screen. When you select Help, About, Progression displays the end date of your maintenance agreement in the **Support Exp:** field.

Allow Sql user to change own password without Administrator Rights. A change password button will be added to the preference screen. (V7.6.300 service pack A)

Other SQL System Manager enhancements

Need to add standard Calendar Control logic to 7.6. Service pack C.

Add ability to attach documents to all notes screens (document aware logic). Service pack C.

Need the ability to block users from logging into Progression so that system updates can be performed. Service pack C.

Allow Sql user to change own password without Administrator Rights. A change password button will be added to the preference screen. Service pack A.

SM - Encrypt the Credit Card Number for internal storage – (V7.6.400)

Sarbanes Oxley Compliancy requires Macola applications to force users to change passwords at regular intervals such as once a month. It further requires a minimum number of characters and dictates the use of caps and symbols for password content. The user is required to provide proof that the password was changed. There should be an audit trail with a date and time that the password was last changed. When the user changes a password, there should be a confirmation message stating that the password was successfully changed. The customer will require that the users change their password every X number of days; the number of days will be controlled by an administrator. Two DLLs have been created that provide password dialogs and encryption support. This will provide encryption/decryption for credit card numbers as well.

SM - Implement Encrypted and Strong User Password Logic – (V7.6.400)

Encrypted and Strong User Passwords have been implemented in Progression 7.6.400. Using the new Encrypted and Strong Passwords, while recommended, is optional. It is possible to continue to use the existing password implementation.

Password Encryption and Strong Passwords can only be controlled by the Progression SUPERVISOR from a single setup and configuration screen. Password Encryption and Strong Passwords are available in both Progression (using PSQL Data) and Progression SQL.

Password Encryption:

Password Encryption in Progression 7.6.400 utilizes new data tables and does not change the structure of the legacy SYSPASS Table. Existing passwords in the SYSPASS Table will be encrypted into the new password table, and then cleared from SYSPASS.

Strong Passwords:

Strong Password Controls are also implemented in Progression 7.6.400. Strong Password Features include:

1. The ability to require certain character types (upper case, lower case, special characters, numeric characters)
2. The ability to control minimum and maximum time duration for password use
3. Maintenance of a password history to prevent frequent password re-use
4. The ability to specify a minimum password length
5. The ability to force a password change at the next login

Note: It is possible to encrypt passwords without implementing Strong Passwords. However, the opposite is not the case; passwords will automatically be encrypted if any Strong Password Features are selected.

NOTES

1. Prior to turning on Encrypted and/or Strong Passwords, Visual Menu Builder should work the same as it always has:

   New Groups may be added or deleted. Users may be added, deleted or moved into and out of Groups.

2. After turning on Encrypted and/or Strong Passwords, Visual Menu Builder can ONLY be used for modifying

   EXISTING Users and Groups; it CANNOT be used to ADD Users nor Groups.

3. After turning on Encrypted and/or Strong Passwords:

   File-->Preferences-->System Setup Screen-->Maintain Strong Passwords
   Will now be the ONLY acceptable method for ADDING NEW USERS and establishing NEW GROUPS

SM - Allow color change from grey on grey for Display Only Screen Fields – (V7.6.400)

There is difficulty viewing the grey on grey color combination used in Display Only Fields; the dark grey on light grey in Display Only Fields is hard to read. The user will now be allowed to select a different color scheme in Display Only Screen Fields.

SM - Convert the ES Pre-Update Wizard into a stand-alone Progression Data Validation Tool – (V7.6.400)

Converted the ES Pre-Update Wizard into a stand-alone Progression Data Validation Tool. Certain Standard ES Files/Tables are not compatible with Progression. Users will now have a stand-alone File Validation Tool available anytime in Progression.

Bill of Material

Phantom Items when Printing Costed Bill of Material (V7.6.200)

When printing a costed bill for a parent that contains a phantom, and selecting the “Blow Through Phantom Items” checkbox, the report now prints the description of the phantom item.

BOM - Add an option to the B/M Mass Delete to allow mass delete of a Feature Item with all of its Components, Dependencies and Exclusions – (7.6.400)

An option has been added to the B/M Mass Delete to allow mass delete of a Feature Item with all of its Components, Dependencies and Exclusions.

BOM - Fill Field Logic added for B/M Item Number Fields in Maintenance and View – (7.6.400)

A code has been added to enable Fill Field (F6) Functionality for the B/M Parent Item Number Fields in Maintenance and View. The Parent Item Number for each screen had the prompt "Fill Field (F6)" added and "Allow Additional Input" turned on. Fill Field Logic was added to the following screensets/fields:

BM - Maintain Product Structure - Parent Item Number and Component Item Number

BM - View - Bill Of Material View - Parent Item Number

Upon entry to the B/M Parent Item Number Field, hitting F6 prepares the field for Fill Field Search Sensitivity. Once the user has hit F6, the field will then begin to display a list of I/M Item Numbers equal to or greater than the criteria entered into the field thus far. As with the normal search, double-clicking on any one of the item numbers presented will fill the field accordingly.

Inventory Management

Deleting Item Notes when Item is deleted (V7.6.200)

When deleting an item in I/M, any existing item notes attached to that item are also deleted.

Status of Lotted Items on the Serial/Lot Expiration Report (V7.6.200)

In the Serial/Lot Expiration Report, the status of a lotted item is now printed.

Enhancement - see doc # 01.163.590 - When entering a receipt transaction for a lotted item, allow the lot number to be selected from the existing lots. (V7.6.300 service pack A)

Display credit hold status on Multi-level item view. (V7.6.300 service pack A)

Cycle counting - User would like to be able to create a cycle count batch by bin number range. In a large warehouse they need to count sections on the floor that are sectioned by using the multi bin feature. They need to be able to select a range of bins to do a cycle count for. 01.271.547 (V7.6.300 service pack A)

Add the ability to print an acknowledgement for a blanket order. 01.263.959 (V7.6.300 service pack A)

Would like to have the ability to have reminders pop on to the screen based on the item number entered. Such as "Do you need any oil to go with this part?" or "This accessory would go well with this part." One way to accomplish this would be to add an additional item note classification and activate the monitoring of that classification through an on/off check box in IM setup. Service pack C.

Relax the record locking that occurs with multiple users entering physical inventory tags and the read-next to get the next number - when opening the program for the first time, change it to eliminate the feature of auto displaying the lowest tag number not keyed. This feature was really never needed as the operator will always have the tags in front of them and will always know the tag number to be keyed. This feature is what is causing the file-locking problem. Leave the tag number blank and force the user to key in the first tag number in their batch. - When they press the Enter key to save their first tag, auto display the last tag number plus one so they do not have to key in the tag number each time. For example, let's say that they start with tag number 415. When they press Enter, the program will auto display tag number 416. Service pack C.

Buyer/planner code mass change feature - Need to change the Buyer Planner Code in thousands of records in the Item Master and Item Location files. Would like to have a utility that would allow them to enter the code for the old buyer planner and the code for the new buyer planner and have the program make the change in all records for the old buyer planner. Service pack C.

Clear accumulators safeguard - needs safeguard to prevent clearing accumulators again for same period or year. If the program would tell the user "You are going to clear accumulators for period X. Are you sure you wish to do this? Yes or No, the user would see which period is the current period in IM Setup and have the opportunity to back out if this is not the correct period. Or if there was an Accumulators Last Cleared Date on the IM1400 screen, the user would be able to see when someone had last run the process to clear accumulators. This also might prevent them from running the process again for the same period. As there is no good way to correct the IMINVHST if the process is run more than once for the same period or the same year. Service pack C.

Data entry friendliness – Make the document date remain the same on the inv trx entry screen until the user exits out of the screen or changes it manually. If “08/24/04” were typed in for the first trx, they would like to have that date stay for every trx entered until the screen is exited. Service pack C.

I/M - Allow I/M Bin-To-Bin Product Transfer when using OE to POP/SFC with Forced Demand and Binned Items – (V7.6.400)

Added code to allow an I/M Bin-To-Bin Transfer Transaction between bins in the same location for a POP/SFC Binned Item using Forced Demand. The order number must match the Original O/E Order Number, and the Quantity Transferred cannot exceed the Total Quantity for the Original O/E Order.

I/M - Fill Field Logic added for I/M Item Number Fields in Maintenance, View and Transaction Entry – (V7.6.400)

Added code to enable Fill Field (F6) Functionality for the I/M Item Number Fields in Maintenance, View and Transaction Entry. The Item Number for each screen had the prompt "Fill Field (F6)" added and "Allow Additional Input" turned on. Fill Field Logic was added to the following screensets/fields:

Maintain - Item Master - Item Number

Maintain - Item Location - Item Number

Maintain - Bin Master - Item Number

Maintain - Kit Master - Item Number

Maintain - Substitute Item - Item Number

Maintain - Serial/Lot Master - Item Number

View - Serial/Lot History - Item Number

View - Multi-level Item - Item Number

View - Inventory Trx History - Item Number

View - Item Master - Item Number

View - Item Location - Item Number

View - Bin Master- Item Number

View - Kit Master - Item Number

View - Substitute Item -Item Number

View - Serial/Lot Master - Item Number

Trx – Transaction – Item Number

Upon entry to the I/M Item Number Field, hitting F6 prepares the field for Fill Field Search Sensitivity. Once the user has hit F6, the field will then begin to display a list of I/M Item Numbers equal to or greater than the criteria entered into the field thus far. As with the normal search, double-clicking on any one of the item numbers presented will fill the field accordingly.

Master Scheduling

Entering Zero Revised Quantity for Forecast Orders (V7.6.200)

It is now permissible to enter a Zero (0) revised quantity for Forecast orders.

Return Material Authorization

Viewing comments in RMA View Screen (V7.6.200)

RMA comments fields are now available on the RMA view screen. Push Buttons have been added for Header and Line Comments.

RMA - When the RMA Receipt Screen clears, default the RMA Number Field to the Last RMA Number Used – (V7.6.400)

When the RMA Receipt Screen clears, the RMA Number Field will now default to the Last RMA Number Used as had been done in previous versions of Progression.

MRP

Enhancement - Add vendor contract price display to MRP visual planner and MRP generate unreleased P/Os. (V7.6.300 service pack A)

When you Generate Unreleased Purchased Orders, check the contract date on the item/vendor record and if the date is not current, do not display the F4. Only display if there is a current valid contract. If there is not contract at all on file in the item/vendor table, the f4 message does not pop up, however if there is a contract record, even though it has expired the f4 message will still pop up. Service pack C.

When generating Purchase Orders from MRP, if item vendor records exist identifying approved / disapproved vendors for the item MRP should use this information when creating the PO to determine the vendor to be used. Service pack C.

Enhancement - Add vendor contract price display to MRP visual planner and MRP generate unreleased P/Os. Service pack A.

Manufacturing Cost Accounting

MCA - In the MCA Report: Summary Cost Analysis By Job, change the Detail Level: Consolidate Dependent Orders to include the Actual Cost and remove the Standard Cost of the Dependent Orders when deriving the Job Cost – (V7.6.400)

In the MCA Report: Summary Cost Analysis By Job, the Detail Level: Consolidate Dependent Orders currently includes the Standard, Last or Average Cost of the subassemblies that were issued to a Work Order twice, rather than including the Actual Cost to make those subassemblies. That is backward. It should include the Actual Cost to make the subassemblies, and not include the Standard, Last or Average Cost of the Issued Parts.

Production Order Processing

See Document # 01.663.511 - When you have an On-hold credit situation with an order, Macola still generates the shop order for the pulled items inside of the customer order, this should not happen due to the suspended credit situation of the order, the ideal functionality should be that you don't pulled any item, until the order has the release of the credit hold. Create a work order, but do not release it. (V7.6.300 service pack A)

When you have an On-hold credit situation with an order, Macola still generates the shop order for the pulled items inside of the customer order, this should not happen due to the suspended credit situation of the order, the ideal functionality should be that you don't pulled any item, until the order has the release of the credit hold. Create a work order, but do not release it. Service pack A.

Shop Floor Control

SFC - Added a field called "Backflush Scrap?" at the bottom of the Activity Trx By Shop Order Screen – (V7.6.400)

When using the Scrap Factor for a Component on the B/M Product Structure Screen and the Item is set to Backflush, Shop Floor is issuing out the Planned Quantity and the Scrap Quantity (as calculated based on the Scrap Factor). A field has been added called "Backflush Scrap?" at the bottom of the Activity Trx By Shop Order Screen. This field controls whether the Scrap Factor is backflushed during a Shop Floor Issue.

Standard Costing

Request that the legend on the Standard Cost Indented and Summary explosion reports include in the legend the Print Component Totals checkbox option and whether it is checked when the report is run. Service pack C.

This document was prepared by editing several Macola published documents.

We encourage your questions and comments regarding ways in which Leahy Consulting can further simplify your Macola processing. For more information on the Macola Progression version 7.6.400 software or any other Macola software, please call our technical support desk at (513) 723-8090 or e-mail us at Support@LeahyConsulting.com.