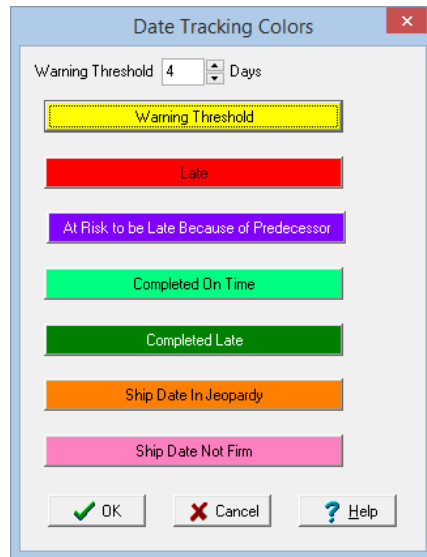


ShopPAK Version 4.10 Release Notes

Enhancements

- Added color highlighting to certain Job, Job Item, Work Order, Department, Operation, Action Item, RFI and PO dates that can be tracked. Colors are user definable and represent if a date is on time, in jeopardy of being late, late, completed on time or completed late. Colors are defined via the **Define | Date Tracking Colors** menu item, the same dialog that defines milestone date colors....



Date controls *and* grid dates are automatically colored as pertinent and related information changes.

Ship Date 07/04/19 Not Firm

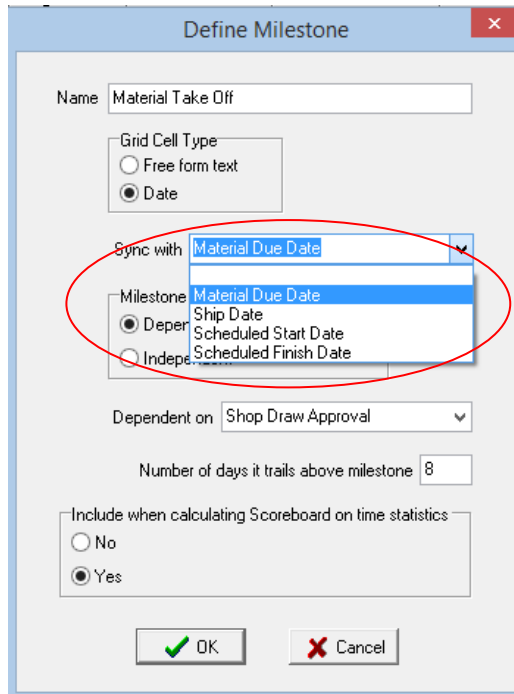
Scheduled Start 03/22/19

Scheduled Finish 10/05/18

Action Items Filter By Nothing

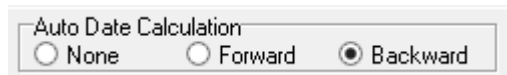
Ref No	Status	Priority	Description	Need By	Assigned To
1	Closed	Low	field measure	02/21/19	Byrne, Ciaran

- Added synchronization between certain Job Item and Work Order level dates and corresponding milestones. 4 dates can be synchronized: Material Due Date, Ship Date, Scheduled Start, and Scheduled Finish. When defining milestones, we've added a drop down list to link a milestone with a Job Item or Work Order date:

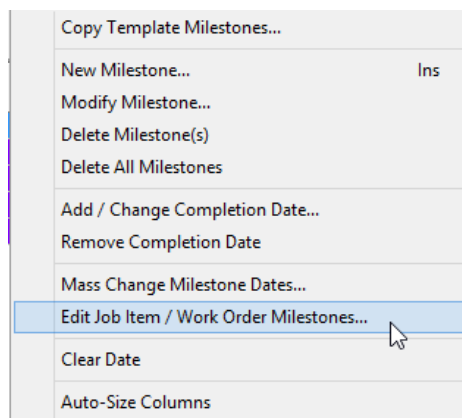


If a milestone correlates to a particular Job Item or Work Order date, ShopPAK will keep both in sync regardless of if a change is made via the milestone grid or the actual date control.

- Added a 'backward' option for creating milestone date dependencies. In the prior release, we only offered 'forward' date calculation. With 'backward' dependencies, you can edit a milestone that takes place towards the end of a job and ShopPAK automatically re-calculates milestone dates that *precede* and lead up to the edited milestone.

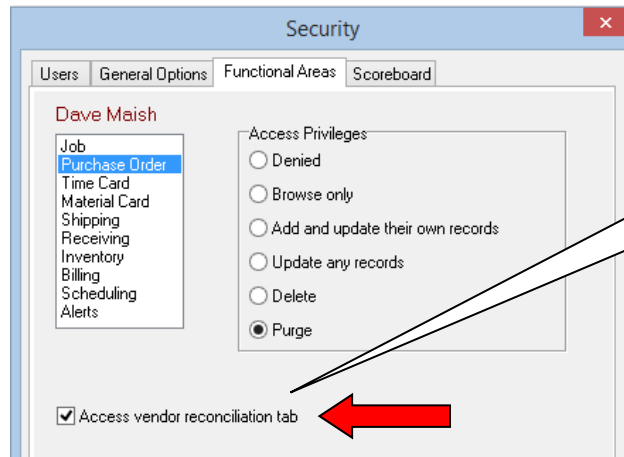


Moreover, for both 'forward' and 'backward' date calculation, we have expanded when ShopPAK re-calculate dates. In the prior release, this only happened when the user launched the "Edit Job Item / Work Order Milestone" dialog...



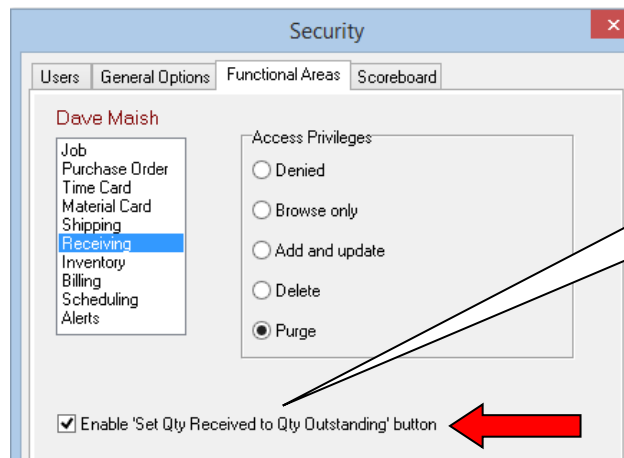
Starting in this release, ShopPAK re-calculates any dependent milestone dates when editing a milestone date via the milestone grid.

- Added an explicit 'clear date' function to the milestone grid to make it easier to remove a milestone date.
- Added a new Purchasing security checkbox that specifies whether or not a user can access the vendor invoice reconciliation tab on the purchasing tab.



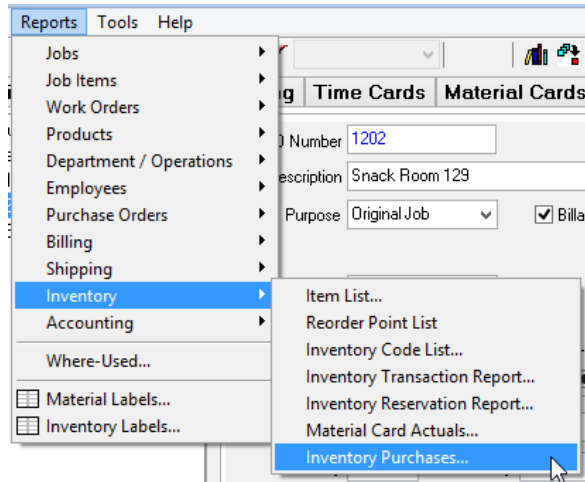
After upgrading to 4.10, make sure you open security and turn on vendor reconciliation tab for employees who are authorized to reconcile vendor invoices.

- Added a new Receiving security checkbox that specifies whether or not the "Set Qty Received to Qty Outstanding" button on the receiving tab is enabled. If you feel a particular user isn't paying close enough attention to actual receive counts, disabling the button forces the user to enter received quantity for each receiver item.

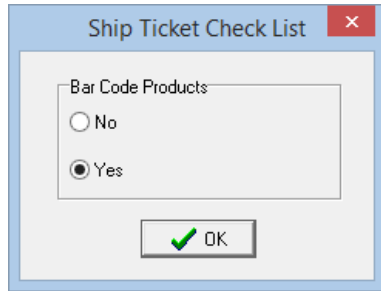


After upgrading to 4.10, all employees will have this checked. If you don't want somebody to use the button, open security and uncheck checkbox.

- When printing the vendor copy of a purchase order, we now check if there are duplicate line items (a duplicate line item has the same description and unit cost as another item). If this is the case, we aggregate quantity and calculate aggregate extended cost.
- Added a new inventory report that lists purchases for a particular inventory item. You can filter by vendor and/or purchase date range.



- Added option of printing, or not printing, product level bar codes on the Ship Ticket Check List report.



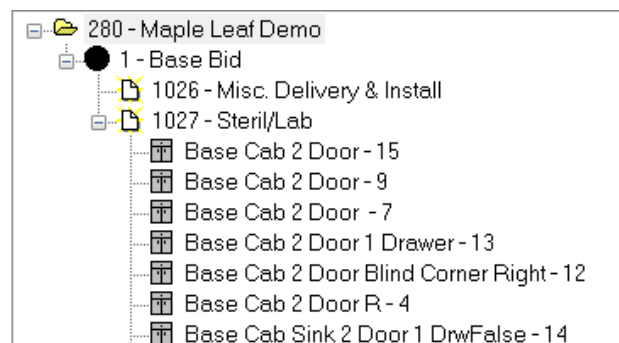
- Added option of printing work order notes on Job and Job Item level work order list documents.

WO	Description	Est. Hours	Sched Start	Sched Finish	Quantity		Status	% Cmp
					Order	Prod.		
1201	Conference Room	56.1	03/22/19	10/05/18	1	1	Purchasi	0
Instructions: dddd								
Notes: Need to double check field measurements in east elevation.								
1202	Snack Room 129	21.9	03/22/19	10/05/18	1	1	Engineeri	0
Notes: Acme says they cannot make deliver by dates for specialty laminates.								
1203	Break Room	45.7	03/22/19	10/05/18	1	1	Pending	0

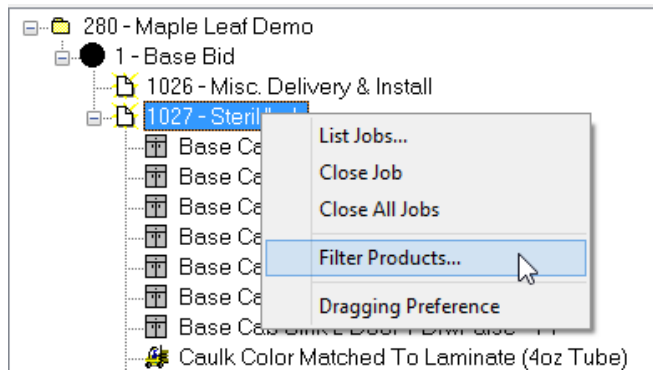
- Expanded inventory code from 15 characters to 30 characters. Updated all screens, reports and documents to accommodate an inventory code of 30 characters.
- Made replacing materials easier and more intuitive on the work order material grid. Regardless of how a row was entered (by hand, via the ProjectPAK library, or ShopPAK inventory), you can replace it with a manually entered item, a ProjectPAK library item, or a ShopPAK inventory item.
- Added a new checkbox column to work order material grid that explicitly identifies whether or not material is based on a ProjectPAK library item.

14. When changing a Job Item ID on the Job details tab, we now check if the altered Job ID is unique. If not, an error message is displayed.
15. Enhanced Australian version of progress billing document. Instead of hard-coding payment terms by customer, we now link it to the billing customer's payment terms field. This makes it much easier to create individual payment terms and/or change them when needed. Also added 2 new 'dynamic' progress billing document fields: ABN and Year For Payments Act.
16. Added new option for exporting payroll transactions to QuickBooks when driving the export from labor actuals (as opposed to time and attendance transactions). If you wish, you can now export associated labor operation code. You'll need to create associated QuickBooks service items in order to take advantage of this new option.
17. Added product display and sorting options when populating the Ship Ticket Job tree. In the prior release, we simply printed product description. Now you can add product reference # and/or product location to the description. To expand product description, choose how you want to format product name and how you want products sorted. This is found on the ShopPAK Options' Shipping tab.

Below is an example of adding a product reference number to description and sorting on description:

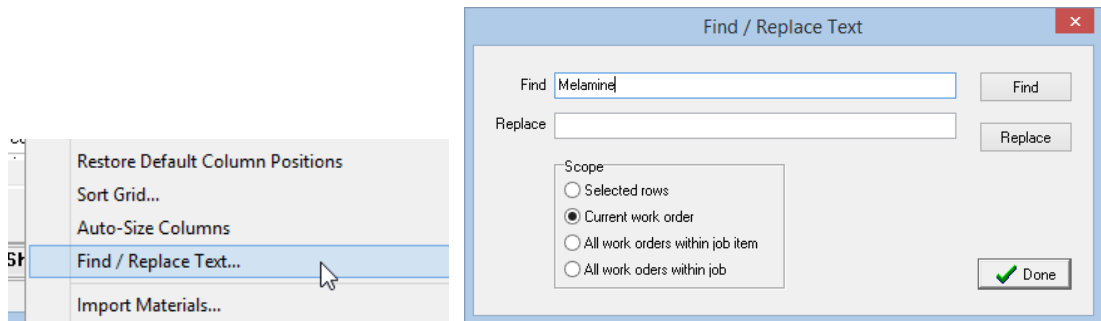


18. Improved how ship ticket product filtering works. In the past, we displayed a message box every time a user dragged ship items from the job tree over to the ship ticket grid. Starting with this release, we've added a menu item called "Filter Products" to the job tree pop up menu.

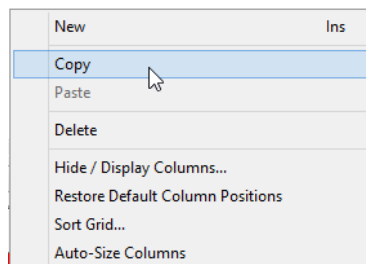


This displays the filter dialog box where you enter in filtering criteria.....prior to dragging and dropping a tree node on to ship ticket grid. With this new work flow, you can filter different nodes in different ways, and if you are not interested in filtering products, you don't have to say No every time you drag something over to ship ticket grid.

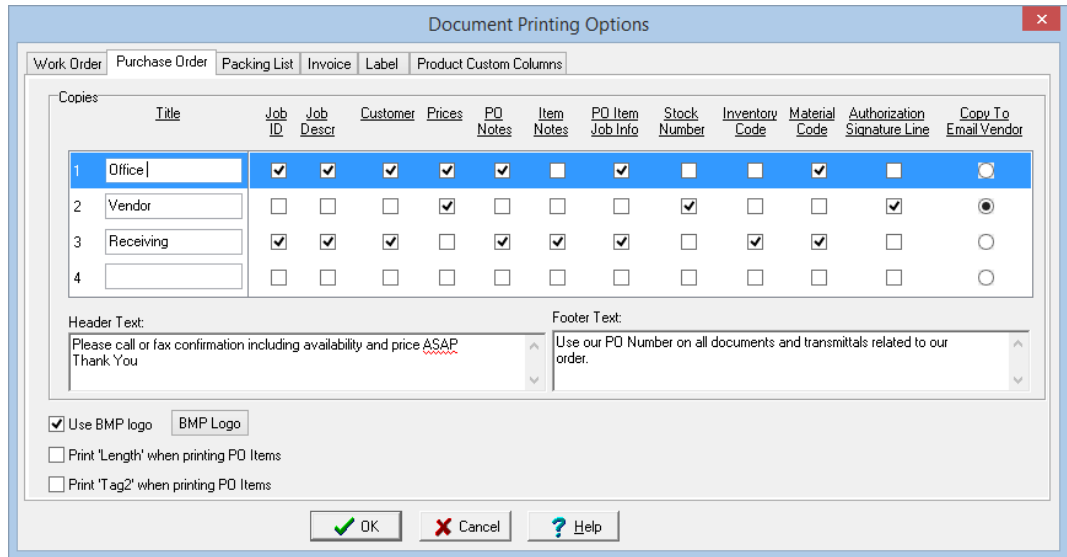
19. Added a new function to the work order materials sub tab to find and/or replace material description using partial strings. User can target the current work order's materials, all materials under the current job item, or all materials under the job. Selecting "Find / Replace Text" from the material grid's popup menu displays the "Find / Replace Text" dialog.



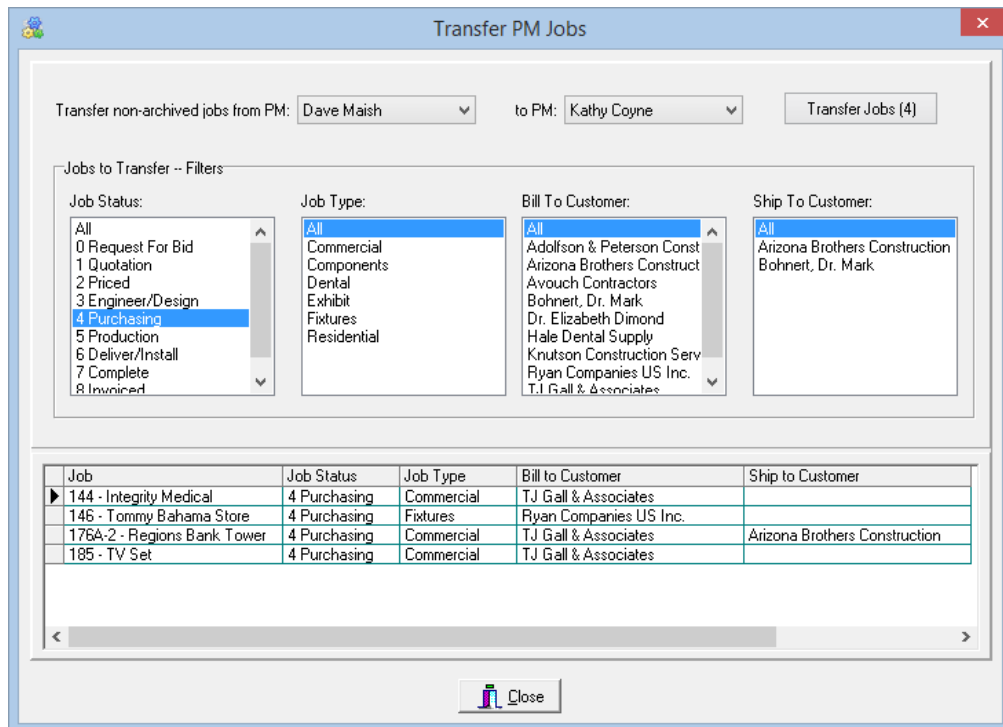
20. Added option of including products when exporting a work order production schedule report as a CSV file. We include both product description and quantity when exporting.
21. Added a copy and paste option in the Action Item grid so users can quickly create new action items from an existing action item.



22. Redesigned purchase order document setup. We've added some new printing options, and most importantly, all printing options can now be tailored at the document 'copy' level to give users greater flexibility in laying out how individual purchase order copies look.



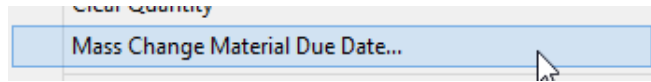
23. Added gross margin to the following reports: Job Margin Summary, Job Department Percent of Price, and Job Cost Total reports.
24. Added ability to automatically transfer jobs from one project manager to another. Selecting **Tools | Transfer PM Jobs** from the menu displays the new 'Transfer PM Jobs' dialog...



You can filter which jobs are transferred by job status, job type, bill to customer, and ship to customer. **IMPORTANT:** To transfer jobs, a user must be given the privilege via the Security dialog box's General Options tab:

Mass transfer jobs from one PM to another

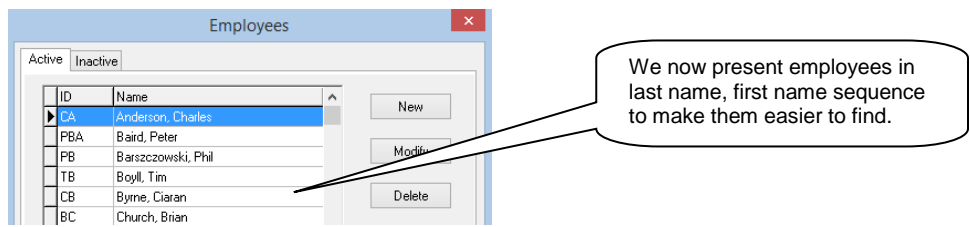
- 25. In the prior release, if you marked a ShopPAK user as 'Inactive' on the Employee setup dialog, their name was excluded in the Project Manager drop down list on the Job Details tab. We've changed this so on jobs where the employee used to be the project manager, their name is still listed as the project manager for audit purposes. Note: inactive employees will **not** be listed in jobs unless they used to be the PM.
- 26. Added a new menu item to the work order material popup menu that will mass change material due date:



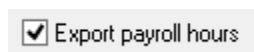
- 27. Added new feature when adding time to an operation that isn't already predefined via estimate conversion. In the prior version, ShopPAK simply added the new time punch as a new operation in the work order operation's grid. Estimated hours were left blank. Starting in this release, if the person also supplies a percent complete along with their time, we'll extrapolate what the estimated hours should be and update the work order, job item, and job level estimated hours.
- 28. In PO Builder, added logic to populate vendor name and stock number in the Job Grid at the Job and Job Item levels. In prior version, we only did this at the work order level. Note, ALL 'like' work order materials for a given job item and/or Job must have the SAME vendor assignment in order to be displayed on the PO Builder job grid.

Work Order Materials		Job ID	Job Description	Scheduled Start	Schedule d Finish	Target Finish	Work Order Vendor	Stock Number
Cherry 4/4 x 10" x 4' +	272 - Miller Woodworking Demo	272	Miller Woodworking				Aetna Plywood	
	276 - Maple Leaf Demo	276	Maple Leaf Demo				Aetna Plywood	
	Total							

- 29. Improved underlying logic for keeping PO Items in sync with corresponding materials on the work order materials grid. In the past, if a user edited the PO Item description or the work order material description, work order material status stopped working because the link between PO Item and work order material was broken when the descriptions no longer matched. In this version, we have added a unique number to tie work order materials to corresponding PO Item line items. Thus, even if description no longer matches, work order material status keeps working.
- 30. Instead of listing employees by first and last name in the Employee setup dialog, changed presentation to last, first name...since that is how employees are sorted.

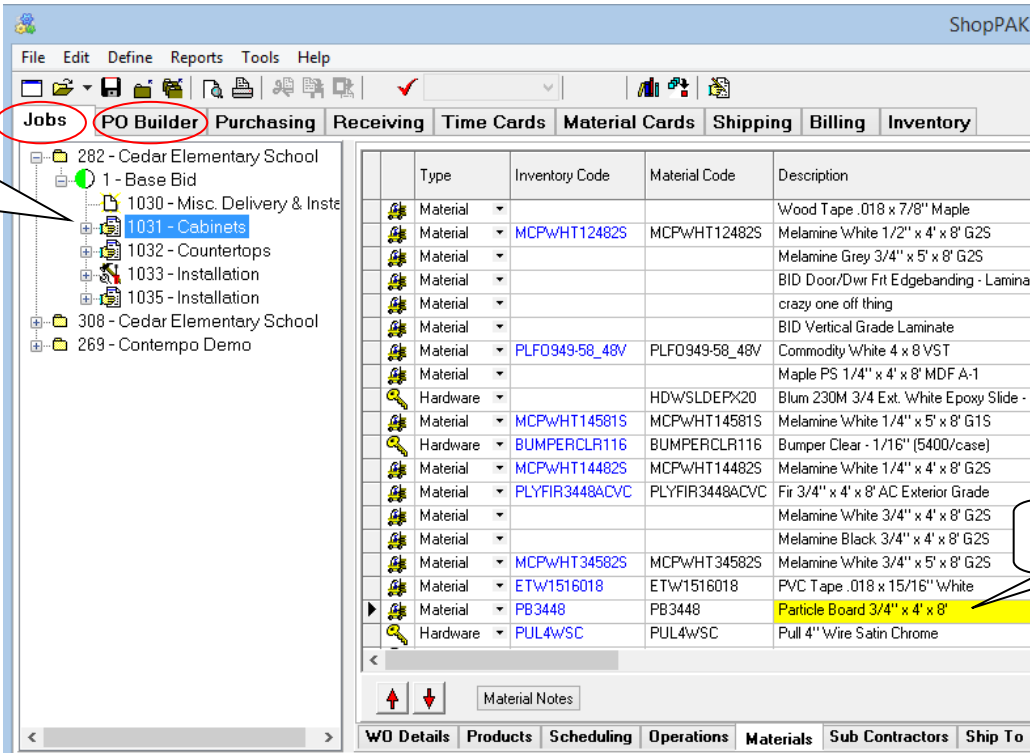


- 31. On the Employee setup dialog box, added a distinct checkbox for whether or not you want the employee's time included when exporting to a 3rd party payroll system.



Please note that only hourly employees were defaulted to have this new box checked. If you export salaried employees as well, you will need to go into the Employee setup for each of those salaried employees and check this box for them to be included in your Time & Attendance export file.

- 32. On the Jobs and PO Builder tab, we've overridden standard MS Windows behavior with regard to the tree control. In prior versions, when you select a tree node, it had a prominent blue highlight but when navigating to a different control on the form, the highlight turned to a very light grey, which was difficult to see. Starting in this version, we keep the selected tree node highlighted with a prominent blue highlight...even when focus shifts to a different window control.

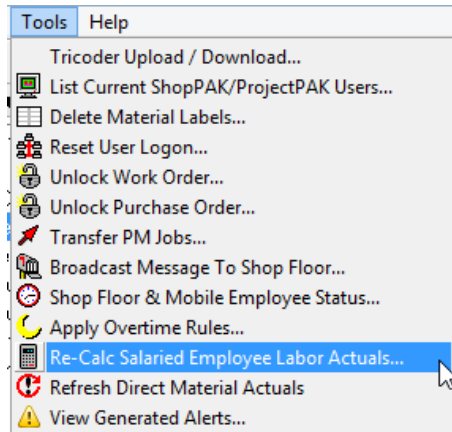


Selected tree node remains highlighted even when focus shifts to another control making it easier to see current selection.

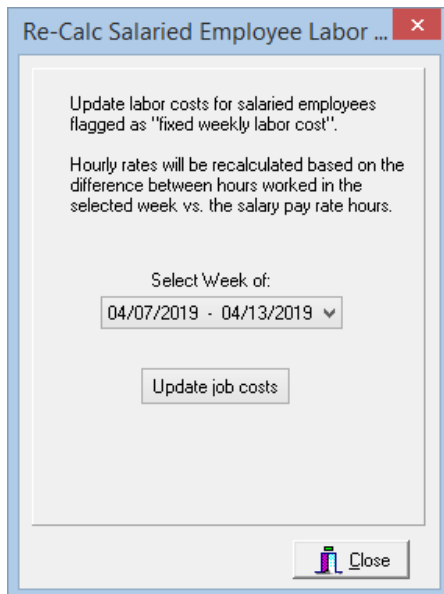
Type	Inventory Code	Material Code	Description
Material			Wood Tape .018 x 7/8" Maple
Material	MCPWHT12482S	MCPWHT12482S	Melamine White 1/2" x 4' x 8' G2S
Material			Melamine Grey 3/4" x 5' x 8' G2S
Material			BID Door/Dwr Frit Edgebanding - Laminat
Material			crazy one off thing
Material			BID Vertical Grade Laminate
Material	PLF0949-58_48V	PLF0949-58_48V	Commodity White 4 x 8 VST
Material			Maple PS 1/4" x 4' x 8' MDF A-1
Hardware		HDW/SLDEPX20	Blum 230M 3/4 Ext. White Epoxy Slide - :
Material	MCPWHT14581S	MCPWHT14581S	Melamine White 1/4" x 5' x 8' G1S
Hardware	BUMPERCLR116	BUMPERCLR116	Bumper Clear - 1/16" (5400/case)
Material	MCPWHT14482S	MCPWHT14482S	Melamine White 1/4" x 4' x 8' G2S
Material	PLYFIR3448ACVC	PLYFIR3448ACVC	Fir 3/4" x 4' x 8' AC Exterior Grade
Material			Melamine White 3/4" x 4' x 8' G2S
Material			Melamine Black 3/4" x 4' x 8' G2S
Material	MCPWHT34582S	MCPWHT34582S	Melamine White 3/4" x 5' x 8' G2S
Material	ETW1516018	ETW1516018	PVC Tape .018 x 15/16" White
Material	PB3448	PB3448	Particle Board 3/4" x 4' x 8'
Hardware	PUL4WSC	PUL4WSC	Pull 4" Wire Satin Chrome

Current Focus

- 33. We've added a new utility that keeps salaried employee labor costs in sync with their true direct cost...regardless of how many hours they work in a given week. We've added a new menu item in the tools menu:

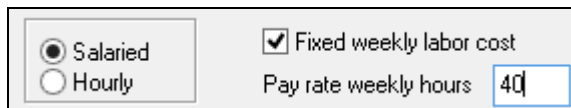


Selecting the re-calc utility launches the Re-calc dialog box:



When you run the utility for a given week, ShopPAK looks at all the labor actuals for a salaried employee and re-adjusts the hourly rate on each transaction so the total labor cost for the salaried employee for the week matches what their **actual** weekly labor cost is. Note, the hours they work is not changed. Just the incremental hourly rate.

In order for a salaried employee to be included in the weekly re-calc run, make sure in the Employee setup dialog you mark them as salaried, you place a check in 'Fixed weekly labor cost' and you supply the number of hours that constitute their actual weekly pay.



34. Added labor actuals transaction notes to the Time Card Labor Actuals report.

Corrections:

1. Fixed problem when generating a Job, Job Item, or Work Order direct material cost report. In the prior release, we did not take into account date range filtering when processing a RTV (return to vendor) PO.
2. In the prior release on the work order materials grid, if you replaced a material that had a duplicate row, although the database was correctly updated, we didn't update the duplicate row in the grid. Corrected.
3. Fixed a rare timing problem on the Ship Ticket tab. In the prior release, if you dragged an inventory item on to ship ticket, and then subsequently deleted or used up all of the inventory item's location quantity, when printing the ship ticket an error message occurred. Now, we double check that all inventory items have appropriate location quantity prior to printing, and if there's a problem, we display an error message to user.
4. Fixed a database problem when merging several work orders into one target work order. In the prior release, we sometimes failed to remove inventory reservations from the merged work orders prior to deleting them.
5. Fixed several ShopPAK reports so regardless of the length of Job ID and Job Description, we no longer truncate the concatenation of Job ID + Job Description when printing.
6. Changed how we determine who can print an Employee Time and Attendance report. In prior releases, we used an employee's job cost privilege. Starting in the release, we key off the Time Card settings. If user has a setting of 'Supervisor' or higher, they can run the report. Note, if user wants to see costs on the report, they must have employee level job cost permission.
7. Fixed an intermittent problem that sometimes occurred when exporting out a CSV file from the Employee Labor Actuals that contained labor actuals notes. The error complained about "BDE BLOB handle record buffer." dialog box.
8. Fixed problem when printing an RFI or Transmittal that was created in ShopPAK, and NO ProjectPAK RFIs or Transmittals exist. In the prior version, the ShopPAK only RFIs and Transmittals were not printed.
9. Fixed problem on the Milestone tab when auto filling all rows with a changed milestone. In the prior release, if you said skip milestones that already have dates, ShopPAK changed them anyway. Corrected in this release.
10. In the prior version, we were not checking for proper authority to add, change, or delete RFIs or Transmittals. Corrected in this release.
11. Fixed problem when adding a new location to an inventory item. In the prior release, we allowed a duplicate location to be added. Corrected in this release.

Shop Floor Data Collection - Controller and Workstation (4.10)

Enhancements

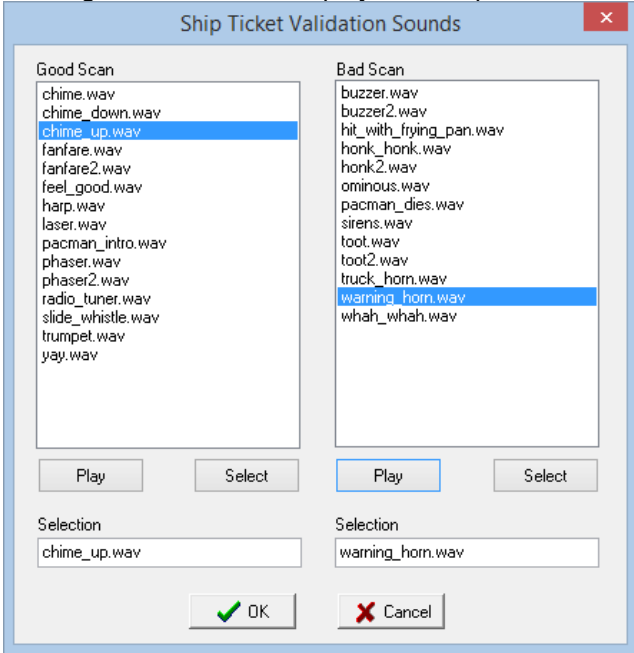
1. When validating ship ticket products, we've added an option of playing a sound clip that indicates whether a product scan is good or not. Since users who use wireless scanners can be some distance away from the computer screen, hearing an audible sound helps users

know if they have a good or bad scan. In order to use this new feature, you need to have speakers out in the shop that are loud and can be accessed from one or more shop floor data collection workstation computers.

We've added a new button to the ShopPAK PC Data Collection setup dialog called 'Scan Sounds'.

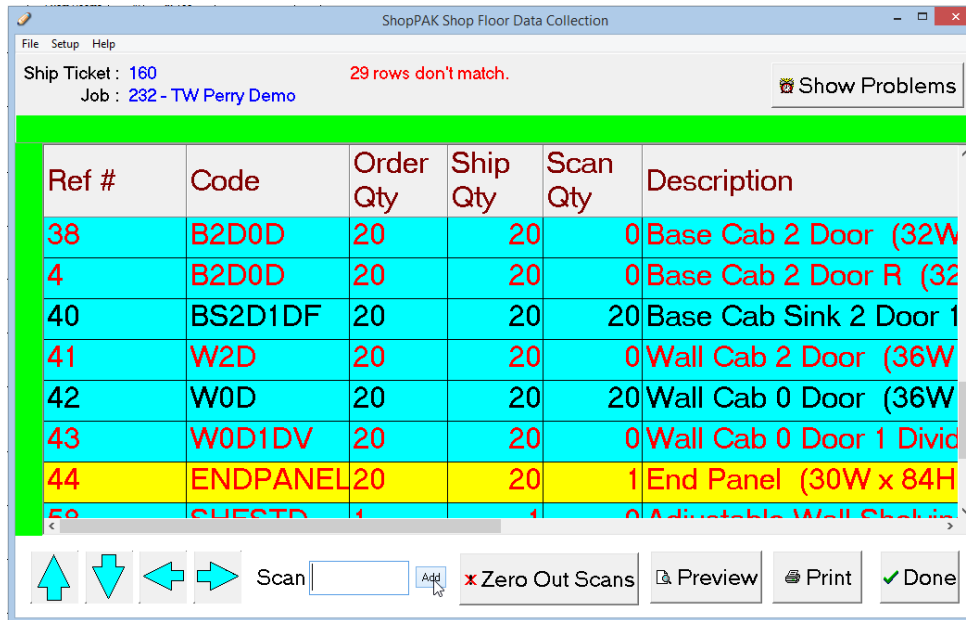


Clicking "Scan Sounds" displays the Ship Ticket Validation Sounds dialog...

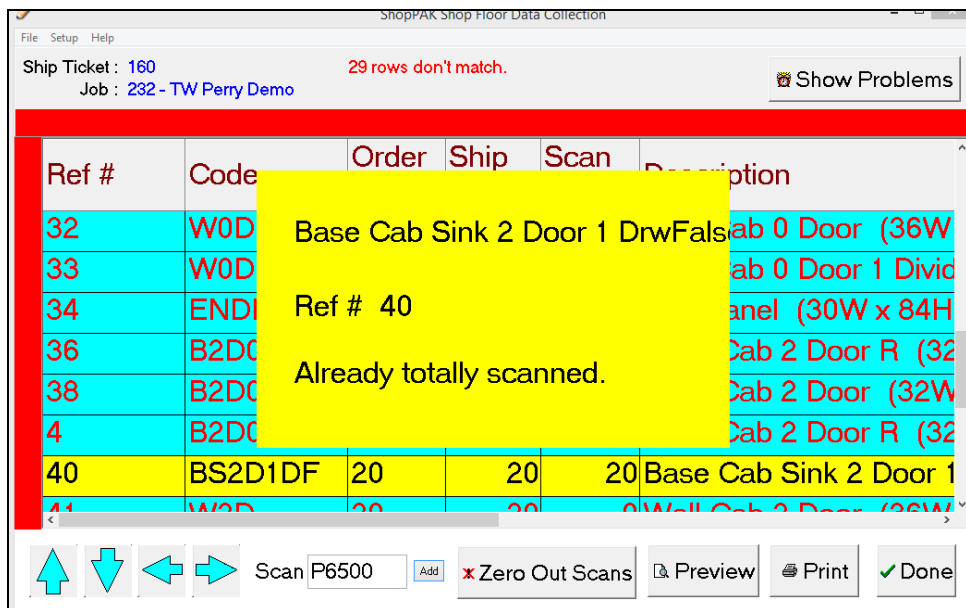


We've supplied several sound clips to choose from. Pick a 'good scan' and 'bad scan' sound clip.

2. Another change we've made to ship ticket validation to make it easier for employees using wireless scanners is adding a border at the top and left side of the ship ticket validation window. A green highlight indicates that the product scan was good.



A red border indicates a problem.



- Added option to display estimated hours on the employee time punch status windows. Use the PC Data Collection Profile dialog to show or not show estimated hours.

Pc Data Collection Profile

Profile Name: Protect Employee List

Capture timeclock transactions Log Transactions

Print Product Labels

Mark Products as 'Built'

Capture labor transactions

'Built' Product Scanning Options:

See products as they get scanned

See all products on work order, then scan status

Labor Transaction Style:

Simple - 1 transaction per task

Feedback - 2 transactions per task

Capture labor percent complete

Capture quantity finished

Op Code Capture:

No

Yes

Default to specific operation

Default Op Code:

Capture Inventory transactions

'By the Piece' transactions

'By the Batch' transactions

Verify Ship Ticket

Work Order Status To Display:

Pending Engineering Purchasing Ready Released

Completed Shipped Installation Invoiced Paid

Show Status Buttons

Include Estimated Hours:

No Yes

Employees To Display:

Corrections

1. Fixed loss of mouse cursor on the work order, operation and product code edit box when the shop floor data collection workstation was covered by another application's window.
2. On the Ship Ticket Validation and Product Completed windows, we now prevent a user from scanning more quantity than is indicated on the ship ticket or work order product screens.

Alerts Generator (4.10)

1. Updated so it works with ShopPAK version 4.10

ShopPAK Mobile Controller (2.2.2)

1. Updated so it works with ShopPAK version 4.10

CV LINK 9 (1.3)

1. Fixed a problem when adding additional materials to a work order on a subsequent transfer in the same session. In the prior release, duplicate materials were created instead of aggregating material quantity.
2. Fixed intermittent problem when sending materials to a ShopPAK work order that sometimes caused an error message complaining about "Field Not Found".

MV LINK 2 (3.1)

1. MV Link allows you to link Microvellum materials 2 ways: by MV material description or by MV material code. On the ProjectPAK library side, you can link to library item code or engineering code. Since Microvellum description is much larger than MV code, when linking by MV description, we now *only* allow linking to a corresponding ProjectPAK library item's engineering code. We increased size to 100 characters to accommodate the largest MV material description.
2. Added option of writing a MV product comment to either a work order product's location or note.
3. Fixed a problem when adding additional materials to a work order on a subsequent transfer in the same session. In the prior release, duplicate materials were created instead of aggregating material quantity.
4. Fixed an intermittent problem that sometimes caused product quantity to have an invalid number.