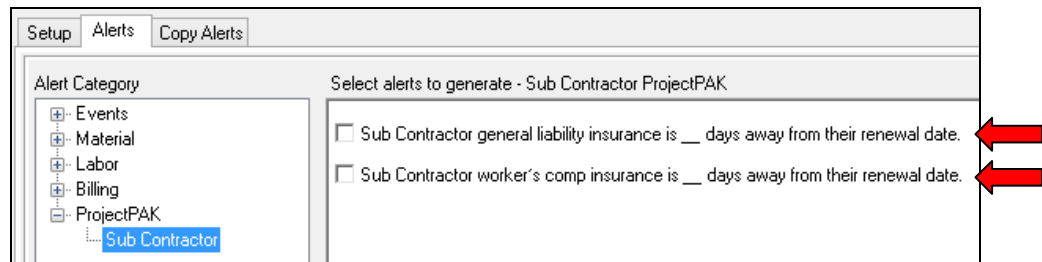


ShopPAK Version 4.11 Release Notes

Enhancements

1. Added 4 new ShopPAK alerts:

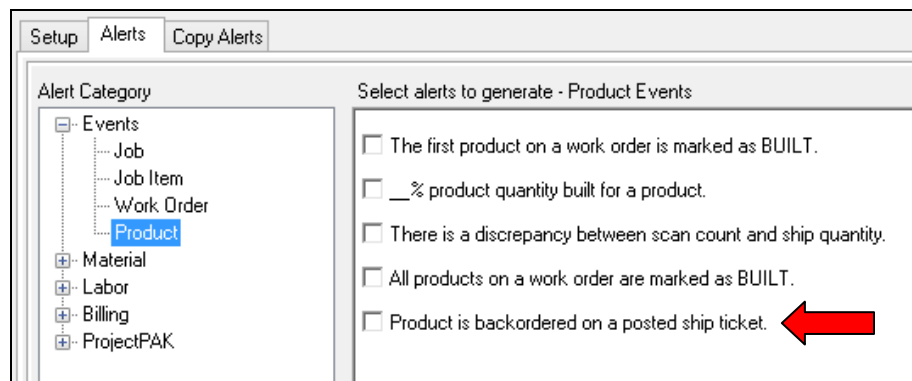
Alert users when either a sub contractor's General Liability or Worker's Comp insurance is approaching renewal date.



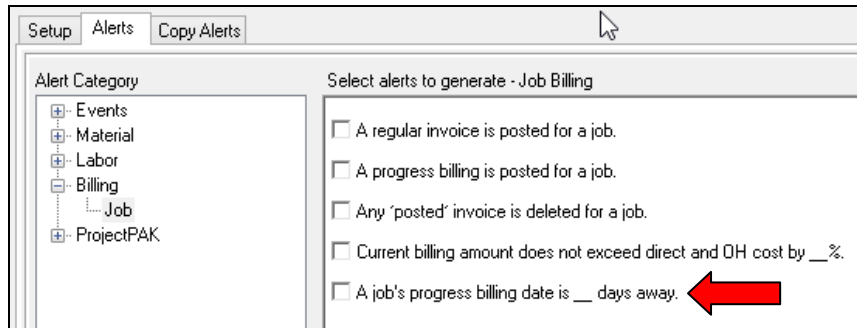
Enter applicable dates into ProjectPAK's Sub Contractor dialog box:

The 'Sub-Contractor' dialog box has two sections. The 'Tax information' section has radio buttons for 'SSN' and 'EIN' (selected), with a text box containing '34-8876567'. The 'Insurance information' section has a 'Carrier name' text box with 'Aetna', a 'WC expiration date' text box with '4/30/19', and a 'GL expiration date' text box with '6/30/20'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

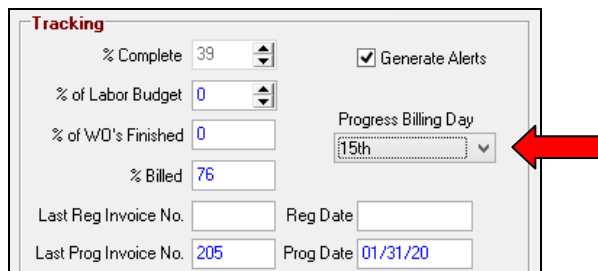
Alert users when a ship ticket item is backordered when posting a ship ticket.



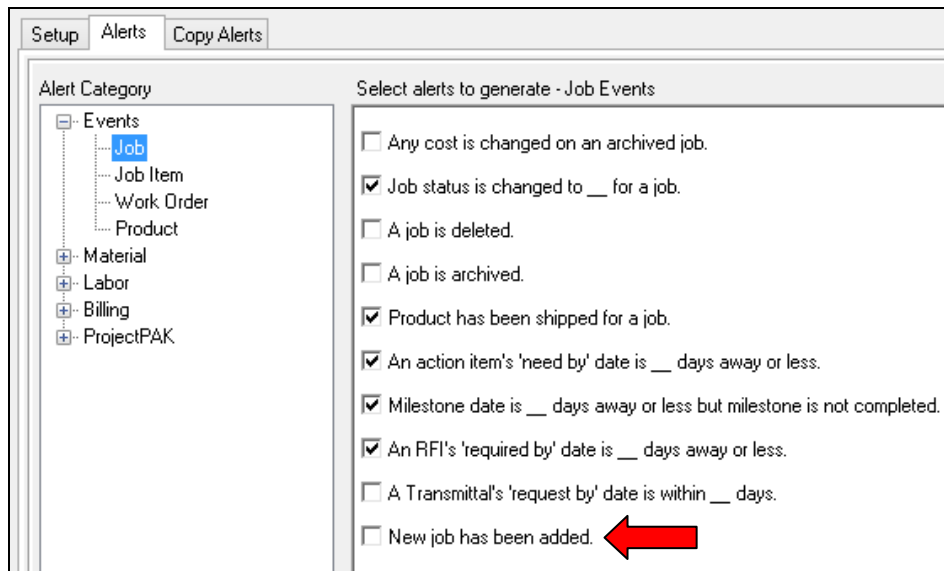
Alert users when a job's AIA billing day is approaching for a given month.



Identify the actual billing date via the Jobs tab's Tracking panel:



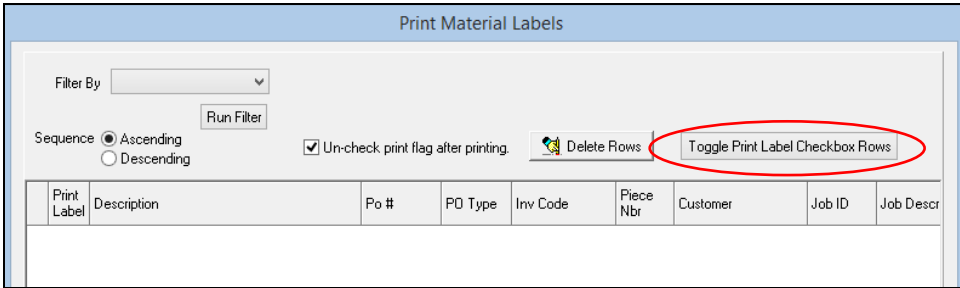
Alert users when a new ShopPAK job has been created either manually via ShopPAK, or via ProjectPAK estimate conversion.



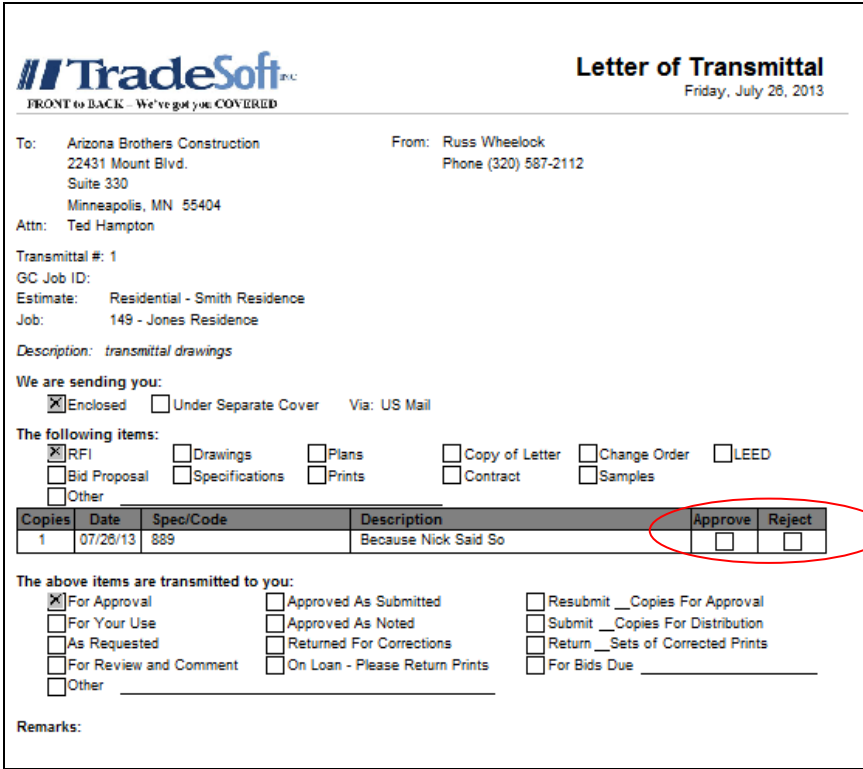
2. Added QuickBooks service item error reporting to the QuickBooks integrated accounting interface.
3. In the QuickBooks integrated accounting interface, we no longer create an invoice if the value is zero. It must be greater than zero. Also, if the amount is negative, we now create a 'credit memo' instead of an invoice.
4. Changed Purchasing tab behavior. In the past we only allowed a negative quantity on a PO Item if the purchase order was a credit, return to vendor type of PO. Starting in this release,

we will allow a negative quantity regardless of PO type. The reason for doing this is to allow a user to create a discount line when generating a PO.

5. Redesigned database logic associated with filling the PO Builder material tree. We've achieved a 30-80% speed improvement when a user has non ProjectPAK library vendors that supply material, in addition to, ProjectPAK vendors linked to ProjectPAK library items.
6. Added new feature to automatically create a material on the target work order's material requisition when doing a manual inventory reservation and the inventory item wasn't already on the work order's requisition grid.
7. Added a 'project manager' filter to the purchase order job oriented report dialog box.
8. Added a new menu item to the Print Material Labels dialog box to make it easier to toggle multiple rows off or on when selecting a group of labels for printing.



9. Added 'Approve' and 'Reject' columns with checkboxes at the transmittal item level when generating a new transmittal.

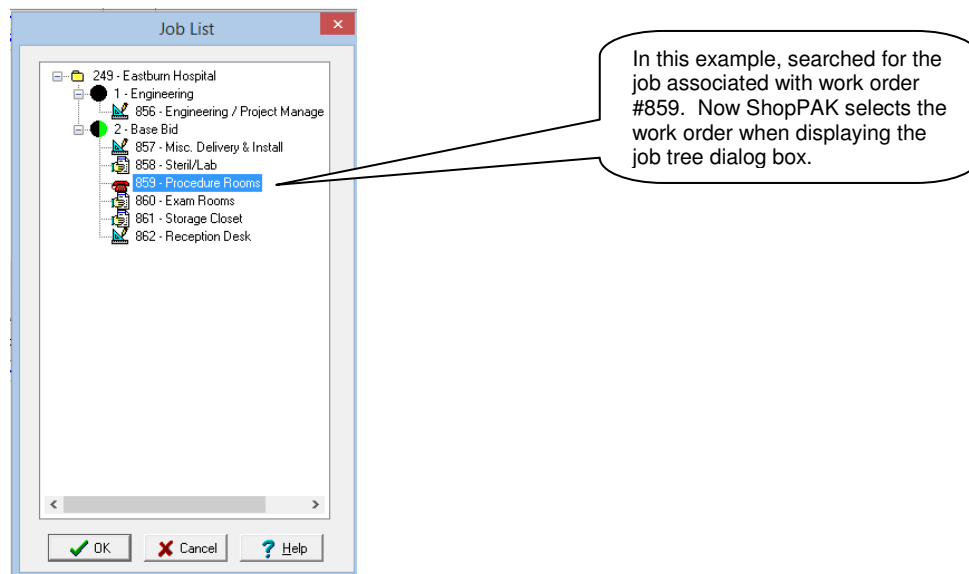


10. Added new inventory transaction: Reservation Satisfied. When a pick satisfies the total reserved quantity, ShopPAK generates the new transaction.
11. When exporting AP bills via the QuickBooks integrated accounting interface, we now truncate vendor invoice number to 20 characters since this is the maximum size QuickBooks allows.
12. Improved accuracy of how PO Builder determines purchase quantity when handling an inventory item. It now checks approved inventory picks for the work order / material and subtracts them from the purchase quantity.
13. Added a new filter option, 'Resolution', to the action item grid sort pull down.

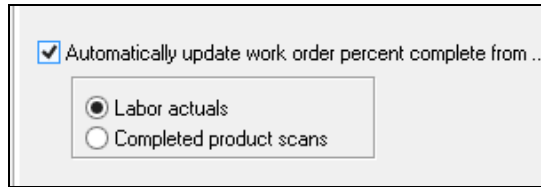
Action Items							
Ref No	Status	Priority	Description	Need By	Assigned To	Resolution	Job Item
1	Open	High	field measurement	11/22/19	Whe Rus		
2	Closed	Med	color match	04/09/15	Whe Rus		
3	Open	Low	Test 1	11/20/19	Boyl		
5	Open		Test 3	10/29/19	Boyl		
4	Open	Low	Test 2	10/25/19	Coy Kath		

Sort Grid	
Ref No	
Status	
Priority	
Need By	
Assigned To	
Resolution	
Job Item	
Work Order	
Create Date	
Finished	
Created By	

14. Added new menu item to work order product grid so users can select and toggle multiple 'Work Order Item' checkboxes on several rows at one time.
15. Since product reference number can have nonnumeric characters, sorting by product reference number may not always sequence properly when product reference number only contains numeric characters. Fixed.
16. There are many places in ShopPAK where we present the Job List dialog box when locating a job, job item, or work order. When searching by a particular work order, we now automatically highlight and select the target work order so user can just click the OK button.

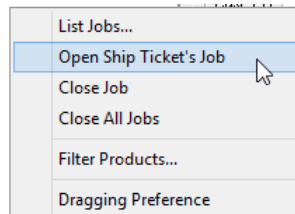


17. In prior releases ShopPAK *always* uploaded percent complete to a job, job item, work order, department and operation when a user provided percent complete when reporting actuals. Starting with this release, we've added a new option to turn off (or on) uploading percent complete throughout the job tree hierarchy. The default is to leave it turned on.

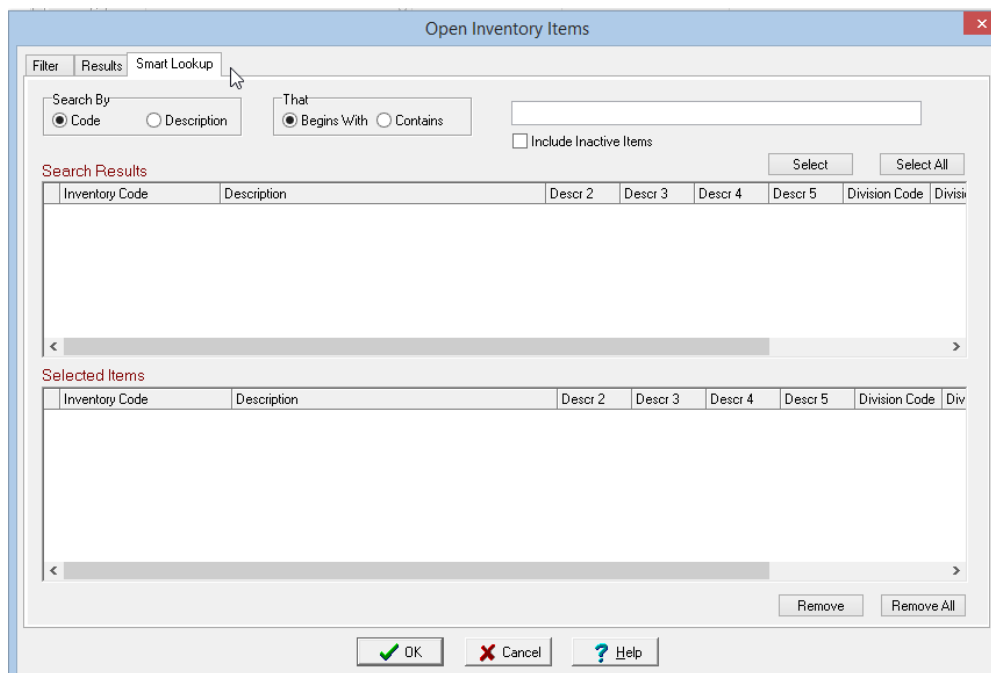


If you want to upload percent complete throughout the job tree, then you select how you want percent complete calculated: by labor actuals or by completed product scans.

18. Added new menu option to the Ship Ticket Job Tree area in the Shipping tab to automatically open the job associated with the currently opened and selected ship ticket.



19. Added a new way of locating an inventory item in the Open Inventory dialog box. We've added a Smart Lookup tab that shows the list of partial matches as user types characters. As more characters are typed, the potential list of matching inventory items adjusts accordingly.



If a user has lots of inventory items that have similar codes or descriptions, the new smart lookup tab will make finding inventory items faster.

- 20. In the QuickBooks integrated accounting time and attendance export routine, we've added seconds to hours and minutes to make time accuracy better match ShopPAK side.
- 21. Added option of transferring work order material notes to a newly created PO Item on the PO Builder tab:

Purchase Order

Number: 597 Request By Date: 12/09/19

Vendor: Aetna Plywood Vendor: 1 of 1

Pass work order material notes to PO Items

Type	Inventory Code	Material Code	Description	Length	Qt
▶ Job			Melamine White 3/4" x 5' x 8' NAUF/FSC	34.5	

- 22. Significantly increased the amount of text users can enter for a PO footer. Increased characters from a 2,000 limit up to 16,000 characters.
- 23. Added new option to AIA Progress Billing to automatically copy a prior application for payment's notes to a new payment application. To turn on this feature, open ShopPAK Options, click the Billing subtab, and place a check into the following checkbox.

Copy progress billing notes to next application's notes

Note, this is a global option. If you turn it on, it will apply to all jobs.

- 24. Updated the 'Current Users Logged On' dialog box to include if a user is logged on to Scoreboard. Also added a button to bump users from Scoreboard.

Current Users Logged On

User Id	First Name	Last Name	Time Logged On	PPak	SPak	Scoreboard
▶ Russ	Russ	Wheelock	Thu Dec 12 11:51am	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Current ProjectPAK Users Logged In: 0 Max Number of ProjectPAK Seats: 3

Current ShopPAK Users Logged In: 1 Max Number of ShopPAK Seats: 5

Current Scoreboard Users Logged In: 0 Max Number of Scoreboard Seats: 5

Log User Off ProjectPAK Log User Off ShopPAK Log User Off Scoreboard Close

25. Added option of editing Work Order or Job Item sell price from the Job Item / Work Order list tab under a job. In prior releases, sell price was visible but protected.

Job Items		Work Orders		Change Orders		Sort	
Work Order	Item Nbr	Description	Price	% Comp	% of Budget	Status	
	338	1 Kitchens 201	\$25,398.75	44	96	Ready	
	339	1 Vanities Room 205	\$7,176.89	100	96	Installation	
	926	1 Template Work Order -	\$25,398.75	2	96	Released	
T O T A L			\$57,974.39	33	275		

To make price editable on the above grid, make sure you place a check into the new security checkbox circled below for each user who needs update access.

Security

Users | General Options | Functional Areas | Scoreboard

Russ Wheelock

Job

Purchase Order
Time Card
Material Card
Shipping
Receiving
Inventory
Billing
Scheduling
Alerts

Access Privileges

Denied
 Browse only
 Add and update their own records
 Update any records
 Delete
 Purge

Create a new ShopPAK job
 Convert ProjectPAK estimates
 Edit progress billing header information
 Edit work order percent billed & GL Account Codes after billing started
 Edit scheduled start and finish dates
 Edit Job ID
 Edit archived jobs
 Export job related information
 Delete work orders you created
 Un-reserve inventory
 Edit sell price on the Job Item/Work Order tab

OK Help

26. Starting with this release, we save the filter and sort choices between sessions to make it faster to bring up results when users tend to search by the same criteria.
27. Added two more PO Item columns that can be edited on the Purchasing tab when a purchase order is beyond the status of Open: Product Label checkbox and Product Label Quantity.
28. On the Purchasing tab, we'll now show the last employee that was identified as either the 'buyer' or the 'requestor', even if these employees are now marked as inactive or no longer a ShopPAK user.

29. Added general purpose 'internal notes' to the Progress Billing subtab so users can save any helpful information relevant to any AIA Progress billing:

Owner Name & Address:
 Bill To Customer
 Ship To Customer

Internal Notes: Email AIA applications to MyFavoriteGC@gmail.com and Accounting@gmail.com

Project Numbers: 149
 Architect:
 Construction Mgr:

30. Added option to automatically break out a change order's tax as its own application billing item. To turn on this behavior, set the global default via ShopPAK Options according to how you want to handle change order tax on a progress billing application:

ShopPAK Options

Job Estimate Conversion Purchasing Job Costing Actuals Shipping Billing Accounting Misc

Billing

Next Invoice No. 207

Billing Method: Progress Billings

Progress Billing Item: Work Order

Mark new Items or Work Orders as progress billing items

Show change order tax on a separate application payment row

You can override on a job by job basis if you wish by using the following Job tab checkbox:

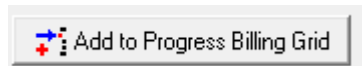
Break out Change Order tax on separate Progress Billing rows

If you opt to break out change order sales tax onto a separate application item, ShopPAK automatically calculates amounts and backs out applicable amount from the overall tax application billing item.

Item Nbr	Work Order	Description	Amount	Tax	Total Amount	Approved
2	1255	Change Order Kitchen #1	\$25,000.00	\$1,250.00	\$26,250.00	12/04/19

Ref. No.	Job Item Nbr	Work Order	Description of Work	Scheduled Value	Prev. Application	This Period	% Billed	Change to Materials Stored	Materials Presently Stored	Completed and Stored To Date	Balance To Finish	Percent Complete
1			ITEM ONE	10000.00	20000.00	0.00	20	0.00	0.00	20000.00	80000.00	
2			ITEM TWO	60000.00	15000.00	0.00	25	0.00	0.00	15000.00	45000.00	
3			Tax	2750.00	1750.00	312.50	75	0.00	0.00	2062.50	687.50	
4			ITEM THREE	10000.00	0.00	0.00	0	0.00	0.00	0.00	10000.00	
5	1255		Change Order Kitchen #1	25000.00	0.00	6250.00	25	0.00	0.00	6250.00	18750.00	
6	1255		Change Order Kitchen #1 Tax	1250.00	0.00	312.50	25	0.00	0.00	312.50	937.50	
TOTAL				199000.00	36750.00	6875.00		0.00	0.00	43625.00	155375.00	

31. Added ability to copy a change order into an AIA application and create a new application item via the new 'Add to Progress Billing Grid' button.



Corrections:

1. Fixed problem we inadvertently caused in version 4.10 -- lost the authorization signature line when generating a backordered PO document. Corrected in this release.
2. Fixed problem that caused the Action Item report to not print when filtering by the employee that created the action item, as well as, the employee that is assigned to the action item.
3. Fixed problem in PO documents when printing one PO Item with an aggregate total when a PO has duplicate materials. In the prior version, it only worked if there were 2 duplicate PO Items. Corrected so we now properly combine any number of duplicate PO Items when printing the vendor copy of a PO.
4. Fixed intermittent problem in PO Builder tab that sometimes caused a processed material to not be colored red in the 'in bound' material grid...even though it was reserved or placed on to a new purchase order.
5. Fixed problem on the Export Time and Attendance employee filters that didn't always differentiate between salaried and hourly employees.
6. Fixed problem with the QuickBooks integrated export that sometimes caused issues when exporting an AIA Progress billing invoice that has retainage, versus exporting a 'retainage only' progress billing.
7. Standardized all of the QuickBooks integrated accounting export routines to always look for a corresponding ProjectPAK vendor or customer record 'short name' custom field. If a short name is not supplied, ShopPAK now formats business name [First Name] Company Name to consistently match how business names are set up in QuickBooks.
8. Fixed problem that sometimes failed to create a matching work order material when doing an inventory pick against a material that was not identified on the target work order's material requisition grid.
9. Fixed problem when merging work order product information into another work order. In a prior release we mistakenly used product order quantity when aggregating and populating the merged work order's product scan quantity.
10. Fixed the inventory reservation detail report to properly show quantity on hand counts. In the prior release, it was incorrectly showing a quantity of zero.
11. Fixed a rare problem when placing inventory reservations from PO Builder when the work order material uses a 'purchasing' UOM, the inventory item has different stock and purchase UOMs, and there is insufficient 'available' stock quantity to satisfy the reservation. The problem caused ShopPAK to incorrectly update the work order material's quantity in 'stock' UOM instead of 'purchase' UOM.

12. Corrected an intermittent problem when ShopPAK checked for duplicate inventory item locations when doing an auto receive of new inventory materials via the Receiving tab. In the prior release, ShopPAK sometimes incorrectly processed the receipt as if the inventory item has more than one location, even though it only had one location specified.
13. Added grid date edits throughout ShopPAK to guard against a user inadvertently creating an invalid date that then causes error messages when saving grid data.
14. Fixed several bar code labels and reports so they can accommodate the maximum inventory code that is now 30 characters.
15. Fixed the inventory transaction report when printing PO Received transactions. In the prior release, if the inventory item has a UOM conversion formula the report was showing incorrect stock quantity, stock UOM, order quantity and order UOM. Corrected in this release.
16. Fixed problem on the Work Order job cost subtab. When changing work order unit price, failed to update the window's WIP calculations. Corrected in this release.
17. Fixed intermittent problem that sometimes caused the PO Quote Request document to print the title 4 times.

Shop Floor Data Collection - Controller and Workstation (4.11)

Enhancements

1. Added bigger and more visible highlight borders to the 'Built Product' screen, as well as, option of playing both good and bad scan WAV files to make it easier for shop floor personnel to detect good and bad product bar code scans when working with a mobile scanner some distance away from the PC that is running the Shop Floor Data Collection workstation software.

Corrections

1. Fixed problem when validating ship ticket products and product ship quantity. In the prior release, we added option of playing a WAV file that indicates a good scan, as well as, playing a WAV file that identifies a bad scan. However, once a user scanned product labels more than 47 times, subsequent product scans wouldn't play a WAV file anymore. Corrected in this release.

Scheduler (3.4.5)

Enhancements

1. Changed how we detect prior schema changes when installing the Scheduler on a different PC. In the past, our method sometimes failed and caused extra work to finish the install. Corrected in this release.

Alerts Generator (4.11)

Enhancements

1. Updated so it works with ShopPAK version 4.11

ShopPAK Mobile Controller (2.2.4)

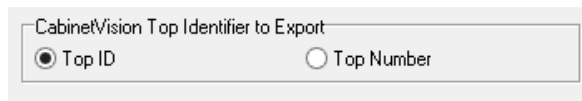
Enhancements

1. Updated so it works with ShopPAK version 4.11

CvLink 9 (1.4)

Enhancements

1. Discovered some ambiguities with regard to where CabinetVision stores countertop reference numbers. There are two very similar column names: Top ID and Top Number. To ensure our users pull countertop reference numbers in a consistent manner, we've added a new CvLink option to explicitly tell CvLink what database column contains the correct countertop reference number.



MvLink 2 (3.2)

Corrections

1. Fixed problem that sometimes caused the product subtab to not show the product's reference number. Now we properly show the correct grid columns based on the 'Show Item' setup directive.
2. Changed how we look for a match between a Microvellum material and corresponding ProjectPAK library item material on the ShopPAK work order material requisition sheet. In prior releases, we were looking at custom column like height, width, and depth when determining a match. This can be too restrictive at times. So we now simply compare the underlying ProjectPAK library item tokens.