What's New in Elliott V7.5

Work Order Plus

Work Order Plus represents a rewrite of all Elliott manufacturing modules and consolidates them into BOMP. We have simplified the collection of manufacturing data by providing a time clock interface that can be used with a scanner. Labor and machine operation hours can be collected by the system without using the keyboard. In addition, management now has a real-time view of shop activities.

The ATP (Available To Promise) function makes it much easier for planners to purchase materials and schedule productions. Rough cut capacity reports can show capacity bottlenecks so a planner can adjust beforehand. Various labor related reports will help management to evaluate labor performance.

We believe Work Order Plus is a much better solution than the legacy manufacturing modules, although they will continue to be supported. For more details, read the WO Plus Getting Started document in the \Elliott7\DOC directory. You will also find other WO Plus documents in the same directory.

CSV Import and Export

There are many CSV import functions in Elliott and our main objective is to allow users to create data in a spreadsheet and let the CSV import validate the data before it becomes a part of the permanent Elliott data. Since editing data in a spreadsheet is extremely flexible, these CSV import functions expand the Elliott data editing capability. We have added or improved many of the CSV import features in Elliott 7.5.

Attribute CSV Import

This function allows you to either create a new attribute or update an existing attribute through a CSV file. The function will import attributes for Customers, Vendors, Items, Sales Orders, Purchase Orders, Work Orders, Shop Orders, Employees, Salesmen and Ship-To's. The utility will validate the information provided in the CSV against the master record. In addition, it supports enhancement attributes and validates the data in each attribute field. Attributes are a great way to expand the Elliott database, to store specific data unique to your business. Often the data is already available in electronic format and can be imported into the Elliott attribute database.

eContact Update Import

This function reads a straight text file with a single column of e-mail addresses. You can use this function to mass update eContacts to:

    Delete eContacts
    Terminate eContacts
    Flag No Email for eContacts
    Flag No Web Access for eContacts
    Update the number of bouncebacks in eContacts

General Journal Transactions CSV Import
This function allows you to import General Journal Transactions through a CSV file. A controller or CFO may make a spreadsheet of additional journal transactions to the general ledger at month end. The import will save you time by avoiding manual data entry. The function can also be used to import distributions from a third-party application (i.e. Payroll).

AR Cash Receipt Transaction CSV Import Improvements
This feature was available prior to Elliott 7.5, but we have made two improvements. If the CSV file contained an invoice number, it was validated against COP Invoice History only. In 7.5, it will be validated against A/R Open Items. Also, you can optionally provide an Order Number instead of the Invoice Number for validation. This may happen if your EDI trading partner pays based on the order number instead of the invoice number.

AR Sales/Cr/Dr Memo Transaction CSV Import
If you perform billing through a third party application, the billing information could be transferred to Elliott through this CSV import. The function could also be used to transfer customer AR detail if you are converting from another ERP application.

IM Physical Count CSV Import to Support Serial Number
In Elliott 7.5, we added the ability to interface physical count tags for serialized items. You have the option of providing serial numbers in the CSV file. If serial numbers are not provided, it is assumed to be a "quick physical count" where the item quantity matches the number of serial numbers. If the quantity does not match, serial numbers must be provided so system can determine the inconsistent serial numbers.

IM Inventory Transaction CSV Import
If inventory transactions are collected through a third party application, the data can be imported into Elliott through this CSV import. It can also be used to import item serial numbers when converting from another ERP application.

IM Item Mass Change CSV Import
Most item master fields can now be mass updated through this CSV import utility. Certain fields are not allowed to be updated, like Item Quantity on Hand and Quantity Allocated. Also, item statistics are not allowed to be updated. For a complete list of item fields that can be updated, go to I/M -> Util-Setup -> Change Existing Item Import -> Layout.

COP Mass Billing CSV Import
This function allows you to collect shipping information through a third party application and feed the order number, item number and quantity shipped back to Elliott through a CSV file and perform billing selection.

COP Invoice Header Mass Change CSV Import
This function allows you to update a few fields in the COP Invoice Header table (CPINVHDR) that do not impact any historical statistics. This includes the accumulated total fields that contains the order actual freight amount from the carrier. This can be used to compare the actual freight and charged freight for management analysis.

PO Item Vendor CSV Import
This function allows you to update the Purchase Order Item Vendor table through a CSV import.

PO Line Item Change CSV Import
This function allows you to update certain Purchase Order Line Item fields, like Quantity, Unit Price and Promise Date through a CSV import. It can facilitate the Change PO process if your vendor provides feedback on your purchase order in electronic format.

BOMP Work Order CSV Import
This function can be used to create a new work order or change an existing work order. The quantity or work order start and due date can be changed on existing work orders. This allows a shop manager to schedule work orders outside of Elliott (i.e. in a spreadsheet) and import the changes into Elliott.

BOMP Routing CSV Import
Routing is part of the Work Order Plus feature. In Elliott 7.5, users can create and maintain a routing in a spreadsheet and import into Elliott through this CSV import. In addition, we provide a CSV export function in "Standard Product Routing" which produces an identical CSV format. Therefore, this function can also be used for migrating Standard Product Routing data to BOMP Work Order Plus.

BOMP Production Transaction CSV Import
Currently, we only provide a BOMP Production Transaction CSV import function for Legacy and Material Work Orders. We intend to provide the same capability for Work Order Plus in the near future. If you collect production data through a third party application, the data can be imported into Elliott through this CSV import.

CSV Export
Many CSV export options have been added in Elliott 7.5. Most are part of a report function, which we will discuss later, but provide them here as a quick list for your reference:
- SM User Security Printing with CSV Option
- AR Aging Report with CSV Option
- AP Aging Report with CSV Option
- IM Inventory Aging with CSV Option
- IM Physical Count Export Tag CSV Export Function
- IM Location History Support with CSV Option
- IM Linkage Processing CSV Export
- IM ATP Summary with CSV Option

- COP Invoice Printing with CSV Log Option
- COP Manifest Orders Status Report with CSV Option
- PO New Schedule Receiving Report with CSV Option
- PO Item Vendor CSV Export Function
- BOMP Work Order Report with CSV Option
- BOMP Work Center Rough Cut with CSV Option
- BOMP Labor Performance Report with CSV Option
- BOMP Product Routing Edit List with CSV Option
- BOMP Cost Master Edit List with CSV Option
- SPR Routing CSV Export Function

With most of these export functions, the system will prompt to launch the CSV file after exporting. If you choose to view the exported CSV, Excel is started by default and you are viewing the equivalent of the Elliott report in a spreadsheet, which makes it extremely flexible.

Payware PC Credit Card Payment Gateway Support

Prior versions of Elliott only supported on-line credit card processing through the Viawarp Payment Gateway software. Viawarp is proprietary software for credit card processor Elavon (formerly known as Nova) and a merchant account was required through Elavon.

Now we are supporting both Viawarp and Payware PC. Payware PC is a generic payment gateway that supports all major credit card processors. Therefore, you can stay with your current credit card processor or shop for the best credit card merchant rate since you are no longer tied to any one credit card processor.

Payware PC also offers more advanced features that allow Elliott to process a credit card transaction by using a previous processed transaction ID. For example, if you wish to credit back a customer's credit card, the credit card number is not needed. By specifying the previous transaction ID assigned by Payware PC, you can credit, void or charge the card if the previous transaction took place in the last 6 months. This implies that you may not need to store the credit card number in Elliott, provided you do not bill recurring charges. By eliminating the credit card number from the Elliott database, you are able to be certified for PCI compliance.

In addition, the Payware PC interface allows Elliott to support credit card swiping in a retail environment to qualify for the "Card Present" best rate. Systems can also collect a consumer's signature on supported terminal devices and print it on the invoice, so you no longer need to keep a hard copy.

VICS BOL

VICS BOL (Bill of Lading) is a standard Bill of Lading format specified by the VICS organization (www.vics.org) that has the support of many major trading organizations,

especially those engaged in EDI transactions. This feature was introduced in Elliott 7.4 as an add-on solution, but in Elliott 7.5 we are releasing it to all Elliott users.

With this feature, Elliott introduces a comprehensive shipping process that integrates the printing of the VICS BOL and the UCC-128 label, confirmation and adjustment of the ship data, and information for the EDI advanced ship notice. It is an alternative solution to the Elliott Shipping Verification function, which is more suitable for pick and pack scenarios. The Elliott VICS BOL process is optimized for standard pack.

We have enhanced the picking ticket to be able to print the item case size, weight and volume. These are crucial fields for an accurate bill of lading and may be required by the trading partner on the advanced ship notice.

EDI Improvements

There are many improvements in Elliott 7.5 to facilitate better EDI integration. In addition to the VICS BOL feature, we also introduced:
- A sales order change export to support EDI 855 and 865 transactions (Order Changes).
- An invoice consolidation option for the invoice export. This can be selected by trading partner and can be grouped by ship-to.
- Sales Order Import support for item substitutes if the requested item is obsolete or contains a restrictive attribute.
- Case Size and Inner Pack Size support to the Order Line Item table. Each value can be verified against the Item file or custom values in the Customer Item file during Sales Order Import. The values are available in the order and invoice exports for EDI mapping.
- Verification of the UPC and Customer Item during Sales Order Import. It will report if the value is missing or inconsistent. An additional flag will allow Customer Items to be automatically added to Elliott if missing. These can be tuned by trading partner.
- Transportation Method to the Ship Via, which is exported with the ship data.
- Population of the BOL number during ship data export, regardless if a bill of lading was created. This insures a unique shipment ID for every ASN.
- Pre-check of the ship data and invoice data before it is exported.
- Events to the Sales Order Import, which makes automating the import through Deferred Processing possible.
- The ability to tell if an order is EDI through the Sales Order Inquiry.
- The option to require the ship-to cross reference or to turn off verification of the field.

Other minor changes were made to the Elliott 7.5 EDI capabilities to make a smooth EDI integration environment between you and your trading partners.

System Manager

Password Setup - User Lists Improvement
The User List has been greatly enhanced from its original format. We now offer three different formats, Summary Report, Detail by User, and Detail by Function. The Summary Report retains the original format. Detail by User will print access for each user to each menu item with a clear description, including Global Security settings. Detail by Function will print who has access to each menu item, including Global Security settings.

Password Setup - Copy User Improvement
The copy user function in Password Setup has been improved to do the following: (1) Allows you to copy a user setting from one company to another; (2) Delete a security setting for one company without deleting the entire user entry; (3) Allows you to copy to a target user that already exists, overriding the settings.

eContact Termination
A "Termination Date" was introduced in eContacts to indicate when an eContact is no longer working with an organization without deleting the eContact record. A terminated eContact will show up as grayed out and can be filtered out if you do not wish to see it.

Accounts Receivable

Expanded A/R Aging Report with CSV Option
A new A/R aging report is now available to print up to 7 columns of user definable aging periods. In addition, the report can be exported to a CSV file. This not only improves the analysis ability of the A/R aging report, but this type of spreadsheet is often required by banks to finance receivables.

Customer Salesman Re-Assign
With this feature enabled through Global Setup, changing a customer's salesman can optionally perform the following:
- Change the salesman on the customer's outstanding orders.
- Change the salesman in the customer's ship-to records.
- Change the Create User for the customer's attributes.
- Change the customer's wish list email address.

Customer City Sales Tax Code Auto Assign
Although Elliott is able to automatically assign sales tax codes when a customer is added based on the state and county defined in the tax codes, certain cities also impose sales tax. In the past, these needed to be manually added. This feature assigns tax codes at the city level so city sales tax can be automatically determined when adding a customer.

Customer Average Days Pay YTD by Due Date
Fields 74, Avg Days Pay Ytd, and 75, Avg Days Pay Last Yr, in the Customer file were calculated based on the invoice date, but this release is improved with a Global Setup flag to define it based on invoice or due date. We also provided a recalculation utility in

Global Setup -> Utilities -> Generate Statistic Info -> Recalc Customer Avg Days Pay. The recalculated number may be different than the original, but is more accurate since the original number was not updated when open payments were reapplied or when payments were created in COP.

Open Item Edit List Improvements
The following parameters have been added to the A/R Open Item Edit List:
- Cut-Off Date
- Starting/Ending Collector
- Print Debit Balance Customer
- Print Credit Balance Customer
- Print Zero Balance Customer
- Record Type
- Un-Applied Record Only

This makes the parameters similar to the A/R Aging report, but more options are available so you can more finely tune the results. For example, you may answer "N" to Print Debit Balance Customer" and "Print Customer Balance Customer", and "Y" to "Print Zero Balance Customer" and "Un-Applied Record Only". This will produce a small list of customer accounts with a balance of zero and their un-applied records. This is an ideal worksheet to use to re-apply credits.

Cash Receipt Payment Type
You can now indicate the payment type during cash receipt. The possible transaction types are:

CK = Check
CS = Cash
GC = Gift Certificate
CC = Credit/Debit Card
WR = Wired/ACH

The entered payment type will be displayed in A/R Account Inquiry and printed on the Cash Receipt Edit List, A/R Aging Report, and Open Item Edit List. Payments from A/R Credit Card Trx Processing and the COP Payment Window will have the proper payment type updated automatically.

Accounts Payable

Expanded A/P Aging Report with CSV Option
Like the Expanded A/R Aging Report, the Expanded A/P Aging Report offers up to 7 user definable aging columns. Unlike the A/P Open Item Report, the A/P Aging Report offers aging information on individual vouchers. In addition, the report can be exported to a CSV file for further analysis as a spreadsheet.

Inventory Management

Component Drill Down
The Component Drill Down window (F2 Key) in the stock status inquiry screen has been improved to provide information on (1) The cost to buy or build; (2) The option to substitute component items; (3) The shortage information for both parent and components, including weight, cost and lead time. This give users a better idea on whether the needed parent item should be bought or built; (4) The drill down to ATP for each component.

Location History Inquiry Improvement
Location History Inquiry (drill down from Stock Status Inquiry) now supports both Calendar and Fiscal Year. You may further drill down each period to show the breakdown by customer type.

Location History Summary Report with CSV Options
You can print a 12 month column report based on data in IMLOCHST (the same data in Location History when drilled down from Stock Status). This can be sales quantity, amount, cost or margin. We also added information to IMLOCHST, including quantity received and days out of stock. Days out of stock requires daily recalculation through Global Setup -> Utility -> Generate Statistic Info. We recommend you automate the recalculation with Deferred Processing.

Serial History Maintenance
Serial history could only be inquired in the past and mistakes made through invoicing could only be corrected by issuing a credit memo and invoicing again. The corrections would appear in Serial History, which some customers find undesirable. In this release we allow you to make changes to Serial History, including the deletion and modification of serial history records. The changes are saved in an audit file and can be easily retrieved to show the original data before adjustment. There are global security flags to determine who can perform the adjustments.

I/M Distribution Report
New selection parameters of Item Number and Product Category have been added to this report. Be aware that starting with Elliott 7.5 the BOMP work order distributions are written to the B/M Distribution file now and will no longer show up in I/M Distribution.

Inventory Aging Report Improvement
The Inventory Aging Report now supports a CSV file export so you can view it in a spreadsheet. An additional parameter was added to select Purchased, Manufactured or All items. Selecting "All" or a range of locations will allow you to specify "Netable Locations Only".

Inventory Transactions Processing Improvement
As mentioned earlier, a CSV Import function was introduced in Inventory Transactions Processing to facilitate the creation of transactions. To support this CSV import, we have made the Vessel Number field in Inventory Transaction a batch ID. You can access this

field regardless if the transaction record was put on hold. Printing the edit list or posting inventory transactions allows you to report by Vessel Number.

The Notes (five amigos) function is now supported for inventory transactions to give you a place to document a reason for the adjustment. Notes for the transaction will be printed on the edit list and post journal. Upon post, the Note (and five amigos) records will be removed.

QTYAVAILBYCOMP Attribute
Once this attribute template is configured properly, the system will allow you to see inventory information from the following perspective:
- The total quantity available for all netable locations.
- The maximum quantity available to sell for a kit item.
- The maximum quantity that can be produced for a manufactured item.
- The date the parent or components will be available if both are out of stock. The maximum quantity available at that time will be populated.

This is important to users who sell kits produced through BOMP or Shop Floor. The recent trend for E-Retailers is to work with major internet portals where the inventory needs to be constantly synchronized with the portal. If the E-Retailer stocks all inventory in the final parent item form, keeping the portal updated is relatively easy. Keeping the inventory in component form can be flexible if the final product can be easily assembled or produced, but this makes updating the portal difficult since a component might be used in many different parent items. This function provides valuable information about the item quantity available to produce and sell. The QTYAVAILBYCOMP attribute needs to be configured in order to use this feature and calculated periodically, we recommend daily, to keep the data up to date. The update can be found in Global Setup -> Utilities -> Generate Statistic Info -> Update Qty Avail By Comp Attribute. The Layout menu option displays the layout of the QTYAVAILBYCOMP attribute. We recommend using Deferred Processing to automatically update the attribute.

Item Generic Search Improvement
We have added two quantity columns to the Item search window, Total Available and Location Quantity Available. The location can be set by pressing the F3 key. In addition, you can iterate through each location by pressing F1 (next) or F2 (previous). F4 is available to drill down to stock status inquiry and you can further drill down to other information.

Inventory Transaction History
Drill down to Inventory Transaction History from Stock Status Inquiry is now available. Inventory Transaction History displays all inventory transactions of an item by reverse date sequence (the latest transaction is on top). You can further drill down on each transaction. Inventory Transaction History contains the same information as the Inventory Transaction Audit Trail Report. We are making this information easier to access by providing the drill down in Stock Status Inquiry.

ATP Summary Report with CSV Option
ATP (Available to Promise) has become a comprehensive material requirement planning tool. We now offer an ATP Summary Report that prints a quantity balance for up to 12 periods, item by item. A period that ends with a negative quantity means there is a shortage for that period. A planner may need to order more, request a current order be expedited, or inform the customer of the delay. Since the report prints one line per item, it is a very concise format that is easy to review by a planner or manager. The report can be exported to a CSV file for up to 52 periods. Viewing ATP Summary in a spreadsheet makes it even easier. For example, you can display the negative periods in red to make them easy to find.

ATP Processing Improvement
ATP Processing can now display a default vendor shipment cut-off line. Purchased items without a confirmation before this cut-off indicates the item will not arrive on time and requires a follow-up with the vendor. In addition, a planner can manually create plan records, requisitions and work orders in the ATP Processing screen, making it truly easy to plan materials. Changing a plan record to a requisition or work order may prompt the user to order by Order Multiple, resulting in an increase in quantity. The system now has the intelligence to adjust down the plan quantity due to this kind of increase.

Item Label Printing
Printing item labels required access to the Item Maintenance screen, which was a security concern for some. In this release, Item Labels have been added to the Item Inquiry submenu. The name of the CSV file can now be changed and will be stored user by user as a default for the next time labels are printed. Since different file names can drive different label layouts, this solution allows you to print different types of item labels through the same user interface.

UPC Code Change
This release will allow the same UPC for two or more items, although the system will continue to give a warning if a duplicate UPC is entered. This is potentially confusing, so various safeguards were added. For example, when a UPC for more than one item is entered the system will display the items so one can be selected. In an EDI environment, the Elliott item number can be given and the UPC verified during Sales Order Import. If the Elliott item number is not given, the import will use the first matching non-obsolete item.

Customer Order Processing

Order Header Improvement
The following in the Order Header screen have been improved:
- **Ship Date**: The default was always "ASAP" for this field. Now you can configure the default to be the system date.
- **Freight Pay Code**: Various freight pay codes were added to support Starship, Third Party Billing, Receipt Billing, Sending Billing. The corresponding Freight Pay Code field in the Customer file has the same feature.

- **Job Number**: The Job Number can now default to the Sales Order Number, to track progress of an order in BOMP, or to the Customer Number, to track ATP of special orders for a customer. A Global Setup flag can now make Job Number a mandatory field. The literal "Job No" can be user definable.

Order Edit List Improvements & Edit List Summary

Order Edit List Summary prints one line per order. The selection parameters are similar to the prior order edit list with the following improvements:

- You can select records by customer number.
- You can select records by customer PO number.
- You can select records by order terms code.
- You can select records by order ship-via code.
- You can print the report in order number or customer number sequence.
- You can answer "H" to the "Print On Hold Order?" parameter to produce an edit list of held orders only.
- The parameter "Print Picked Order?" was added with the option to specify "P=Picked Orders Only" to produce a list of orders that have a picking ticket printed.
- The parameter "Print Incomplete Order?" was added with the option to specify "I=Incomplete Order Only" to produce a list of incomplete orders.
- You can specify "S=Selected Only" for "Print Selected Order?" to produce a list of billing selected orders.
- You can specify "I=Invoiced Only" for "Print Invoiced Order?" to produce a list invoiced, but not posted, orders.
- You can specify whether to print order document notes, order internal notes, all order notes, or not at all.

The Order Edit List has been changed to match the same parameters as Order Edit List Summary.

Backorder Reports to Show Ready to Fill Items Only

You can now print a backorder report with an additional parameter, "6. Print Item Excess Qty > 0?" Responding "Y" will print only items that have excess quantity to fill backorders. The current excess inventory quantity will be printed in a worksheet format. This is a much smaller report that can be used to allocate inventory to customers with backorders.

Order Status Reports Additional Printing Method

Order Status Reports (Backorders and Open Orders) can now be printed by Ship-To sequence. In addition, the system supports an item subtotal when printed by Customer or Ship-To sequence.

Sales Desk Improvements

Sales Desk now supports backorders if inventory is not available and allocates inventory immediately when entering a confirmed line item. In the past, the inventory allocation did not take place until the order was created. This small delay could prevent Sales Desk

from allocating inventory when completing the order. If inventory is not allocated in Sales Desk, the option to create a quotation is still available.

Sales Order Credit Check
Credit checks would take place when a sales order was entered. Now the system can be configured to check credit during order entry or when the picking ticket is printed or both. The intention is to address backorder requirements. If orders are often placed on backorder, the credit limit check should be when the order is ready to ship (i.e. picking ticket).

Pick Ticket Printing Improvements
You can now print picking tickets by Ship-Via code. In addition, the tickets can be configured to print case quantity and the weight and volume of each line item.

Invoice Printing Improvements
Invoice printing has been improved:
- Supports the printing of salesman name and sales tax percent.
- Allows selected orders to print by ship via code and terms code.
- Allows you to create an invoice log file in a CSV format for auditing.

Print One Invoice
This new feature allows you to print one invoice at a time, so multiple users can use Print One Invoice at the same time. Batch invoice printing only allows one user at a time.

Order Manifest Status Report Improvements
In this release you can print this report by Customer Number and specify whether to use Order or Invoice History data. A CSV file creation option was also added. In Global Setup you can specify which column and location to export to the CSV file. If you specify line item data to export, one CSV record per line item will be exported. If no line item field is specified, one CSV record per tracking number will be exported. One application is to provide required shipping information in the CSV file for major E-Retailers portals.

Open Contract Pricing Support
Contract pricing was assigned to a specific customer or customer type, but we are now supporting Open Contracts which allows you to define a contract without specifying a customer number or type. Customers can be added to this contract at a later time.

Purchase Order

PO Line Item Screen Improvements
In the PO Line Item screen, we added the following features:
- **Close PO Line Item**: You can close a PO line item by indicating "Y" to the close flag. Closing a line item will remove it from ATP and schedule receipt reports without canceling the line item. You can also close a line item in the PO receiving screen.

- **Original Promise Date**: When the promise date is changed, the original promise date is save in the Original Promise Date field. The reason is to keep track of vendor performance by comparing the actual delivery date to the Original Promise Date.
- **Firm Flag**: This indicates whether the new promise date is firm or not. It will display in ATP Inquiry and on the reports to indicate whether the promise date is reliable or not.

PO Printing Improvements
This release provides a template for "Expanded PO Laser Form" which prints the PO in a smaller font, but is a much easier to read line item format. This format allows you to print the extended price field without printing the "Ext Price =" literal.

New PO Schedule Receiving Report
The New PO Schedule Receiving Report has an improved layout that prints the pending receiving information, which is not on the legacy PO Schedule Receiving Report. The new report allows you to export the data to a CSV file so it can be viewed as a spreadsheet.

PO Warehouse Receive Edit List Improvements
A new flag was added to PO Warehouse Receive Edit List, Print Qty Info. The quantity was always printed, but you can now substitute underlines instead. The intention is to give this list to the warehouse personnel and later verify the quantity.

PO Invoice Processing Improvements
You can now create prepaid vouchers in the PO Invoice Processing screen. Before you could only create regular vouchers.

BOMP

In addition to the Plus Work Order features mentioned earlier, we also added the following features for Legacy and Material Work Orders:

Work Order Start Date
The Work Order Start Date was a calculated field based on lead time of the item and used as a reference only. In this release the start date is still calculated by item lead time, but you can override it. The ATP no longer assumes material requirement for the work order based on due date, but uses Work Order Start Date instead.

Component Serial Number Support
We added support for collecting a component's serial number in the production transaction screen for both material work orders and plus work orders.

Production Schedule Report Improvements
In addition to the support of Plus Work Orders, this report added the following features:
- Additional selection parameters of Starting/Ending Product Category.

- Select by Work Order Status – Unallocated, Allocated, Printed, or Partial Posted.
- Print in Brief (one line per WO) or Detail (two lines per WO) format.

Production History Report Improvements
In addition to the support of Plus Work Orders, this report added the following features:
- Additional selection parameters of Starting/Ending Transaction Date.
- The report can sort by item number sequence.
- Print in three different levels – summary, brief or detail.

WIP Detail Report
This is a new report. Even though the WIP Detail Report was introduced primarily to support Plus Work Orders, it supports Legacy Work Orders as well.

Work Order Report
This is a new report. It allows you to print a list of work orders by various parameters. The report can be sorted by Item, Category, Work Order Start Date, Due Date or Work Order Number. The report format can be detail, work order summary or summary. In addition, the report data can be exported to a CSV file to be viewed as a spreadsheet.

Vertex 5.0 Support

Elliott 7.5 supports the Vertex L series 5.0 interface. The main feature of Vertex 5.0 is to use the 9 digit zip code to determine the taxing jurisdiction. This requires a new database table supplied by Vertex, which you should import monthly into Elliott. Elliott can now locate the Geo Code when a 9 digit zip code is entered and uses the old method if the standard 5 digits are given.

Prior to Elliott 7.5 the customer and item taxable flag could be selected for TDM individually. Vertex 5.0 requires both to be determined by Vertex if TDM is used. Vertex users upgrading to Elliott 7.5 must check the following Global Setup flags for Vertex:

      3. Use Item Taxable Flag or TDM
      4. Use Customer Taxable Flag or TDM

The value in field 4 will be set automatically and skipped based on the value in field 3.