

The EthoSeries™ Release Notes

Requirements

Microsoft Dynamics GP 2013 R2 must be installed.

Registration Keys

If updating from a previous EthoSeries build, you will need to obtain new registration keys from your Microsoft Partner or EthoTech. This product is fully functional in the Dynamics GP sample company.

Installation Instructions

Please refer to the EthoSeries Installation Guide for detailed installation and update instructions.

Compatibility

This EthoSeries build should be used with Dynamics GP 2013 R2.

If SmartSort is installed, SmartSort build 12.00.350 or later is required.

Mismatching the Dynamics GP service pack and EthoSeries build will cause errors in some cases. The following table lists resources that are known to cause errors, along with the EthoSeries build(s) that must be used to prevent the errors when a given Dynamics GP service pack is installed.

EthoSeries Alternate Resource	Dynamics GP Service Pack	Required EthoSeries Build
Customer Maintenance window	No Service Pack or Service Pack 1	12.00.4 – 12.00.06, 12.00.8, 12.00.15 – 12.00.29
Customer Maintenance window	Service Pack 2 or R2	12.00.7, 12.00.10 – 12.00.14, 12.00.30 or later
Item Maintenance window	No Service Pack or Service Pack 1	12.00.4 – 12.00.06, 12.00.8, 12.00.15 – 12.00.29
Item Maintenance window	Service Pack 2	12.00.7, 12.00.10 – 12.00.14, 12.00.30 - 12.00.49
Item Maintenance window	R2	12.00.50 or later
Sales Order Fulfillment window	No Service Pack or Service Pack 1	12.00.4 – 12.00.06, 12.00.8, 12.00.15 – 12.00.29
Sales Order Fulfillment window	Service Pack 2 or R2	12.00.7, 12.00.10 – 12.00.14, 12.00.30 or later
Sales Transaction Entry window	No Service Pack or Service Pack 1	12.00.4 – 12.00.06, 12.00.8, 12.00.15 – 12.00.29
Sales Transaction Entry window	Service Pack 2	12.00.7, 12.00.10 – 12.00.14, 12.00.30 - 12.00.49
Sales Transaction Entry window	R2	12.00.50 or later
Sales Transaction Inquiry Zoom window	No Service Pack or Service Pack 1	12.00.4 – 12.00.06, 12.00.8, 12.00.15 – 12.00.29
Sales Transaction Inquiry Zoom window	Service Pack 2 or R2	12.00.7, 12.00.10 – 12.00.14, 12.00.30 or later
Vendor Maintenance window	No Service Pack or Service Pack 1	12.00.4 – 12.00.06, 12.00.8, 12.00.15 – 12.00.29
Vendor Maintenance window	Service Pack 2 or R2	12.00.7, 12.00.10 – 12.00.14, 12.00.30 or later

Build 12.00.150 Release Date December 11, 2020

Feature Changes

Commission Plan – when a Dynamics GP inventory item is created via the Copy functionality, the associated commission setup is also copied.

Commission Plan – added a new tier type: List Price % from Commissionable Sale Amount.

Commission Plan – added global function ETI_CP_OverrideCustomerPlan, which allows integrating applications to override the Customer Plan when a commission header record is created.

Problem Reports

Commission Plan – when sales documents were posted via Dynamics Process Server (DPS), the associated commissions were not updated.

Commission Plan – when making changes to salesperson > user defined value assignments in the User-Defined 1 Commission Plan Info window, the check that determined if the current index value was in use always returned false.

Commission Plan – when commissions were updated, message “An error 30 was encountered while trying to save table ASI Commission Work” was occasionally encountered.

Commission Plan – when the Require Salesperson Plans, Require Item Plans, Require Customer Plans, or Require CP User Defined Assignments checkbox was marked in the Commission Plan Setup window, Integration Manager failed when importing the master records corresponding to the marked checkbox.

Commission Plan – when an item appeared on an invoice with negative quantity and zero extended price, the resulting commission wasn't negative if the commissionable sale amount was based on the list price.

Commission Plan – when the last commission was processed for a sales document, the All Processed flag wasn't always set in table ETI_SOP_HDR_Indexes (ETI28910).

Commission Plan – when commissions were placed on hold or removed from hold in the Commission Plan Adjustment Entry window, the new hold status was not displayed correctly until the adjustment document was redisplayed.

Commission Plan – If the Allow Account Entry checkbox was not marked for a GL account, it could not be entered in any Commission Plan window.

Commission Plan – after a salesperson was displayed in the EthoSeries alternate Salesperson Maintenance window, the user was prompted to save the record even if no changes were made.

Build 12.00.63 Release Date August 28, 2018

Problem Reports

Commission Plan – when salespeople were set to pay commissions on fully relieved invoices and posted returns, commissions for invoices that were not fully relieved were set to Ready for Processing in some instances. To set the proper commission status for existing unprocessed commissions, run Commission Plan Utilities with Posting Status = History and the Update Existing Commissions checkbox marked.

Commission Plan – when a commission split percentage was set in table ETI_SOP_LINE_Integration (ETI28316), the resulting commission line split percentage was incorrectly overridden by the commission header split percentage when the following conditions were met:

- The Roll Down Header Splits to Commission Lines checkbox was marked in the Comm Amt's tab of the Commission Plan Setup window.
- The Determine Additional Salespeople Using option was set to Sales Document Header Info in the Salespeople tab of the Commission Plan Setup window.
- The value of column ETI_CP_RolldownHdrSplit was set to 0 in the associated entry in table ETI_SOP_HDR_Integration (ETI28305).
- The commission header split percentage was not manually overridden in the Commission Plan Entry window.

Commission Plan – the From and To fields on the Mass Update Customers, Mass Update Items, and Mass Update Salespeople windows did not allow all characters to be entered for some range selection options.

Commission Plan – in the Mass Update Salespeople window, selecting a range based on Last Name or Sales Territory ID didn't always update the expected set of salespeople.

Build 12.00.61 Release Date May 2, 2017

Feature Changes

Commission Plan – added column SOP Type to SQL view ETI_CP_QuotaSalespersonCommRunPeriodDocs.

Problem Reports

Commission Plan – when Commission Plan was set up to enable commission processing when sales documents were paid off and returns were considered paid off when they were posted and a Date Document Paid range was entered in the Commission Plan Report window for a Commission Status of Ready for Processing, commissions whose GL Posting Date fell outside the Date Document Paid range still appeared on the report.

Build 12.00.60 Release Date December 8, 2016

Problem Reports

Commission Plan – when attempting to change the Commission Type from Sale to Margin or from Margin to Sale in the Commission Plan Quotas window and quota levels existed for the plan combination and year, the commission type did not actually change.

Build 12.00.58 Release Date June 6, 2016

Feature Changes

Commission Plan – added eConnect SQL stored procedures for integration tables. See the Commission Plan Integration guide for details.

Customer Service Collection – added Customer Item Data functionality for Sales Order Processing.

Problem Reports

Commission Plan – when the commissionable sale amount was manually edited in the Commission Plan Detail Entry window, in some cases the commissionable cost amount was reduced for discounts twice.

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Commission Plan – if the Process Commissions window was closed after a processing run was initiated, an error was returned each time the processing run attempted to update the progress bar on the window.

Next Numeric Collection – when using the EthoSeries alternate Receivables Batch Entry window with the Window Command Display user preference set to Menu Bar, the New button action was invoked when the user clicked the Post button, preventing the batch from posting. The New button was hidden behind the Post button.

Next Numeric Collection – when using the EthoSeries alternate Payables Batch Entry window with the Window Command Display user preference set to Menu Bar, the New button action was invoked when the user clicked the Post button, preventing the batch from posting. The New button was hidden behind the Post button.

Build 12.00.56 Release Date May 6, 2015

Feature Changes

Commission Plan – added a new tier type: List Price %.

Commission Plan – when a tab is selected in the Commission Plan Setup window, fields are moved on and off the visible area of the window. This causes radio buttons to become invisible / non-clickable within the Dynamics GP web client. All radio button options were changed to drop down lists to support the web client.

Commission Plan – added support for Enhanced Intrastat's sales document transfer process.

Problem Reports

Commission Plan – when the Enable Commission Processing When option was changed in the Salesperson Commission Plan Info window, the commission status was not updated for existing unprocessed commissions.

Commission Plan – when an invalid Commissions Payable Acct was entered in the Salesperson Commission Plan Info window, the Commissions Expense Acct was cleared rather than the Commissions Payable Acct.

Commission Plan – when the commissionable sale amount for a commission line was set from an integration table entry, the Commission Line Trace window now displays the integration table unit commissionable amount and the line item selling quantity in the Commissionable Sale Amt From section.

Commission Plan – when the commissionable cost amount for a commission line was set from an integration table entry, the Commission Line Trace window now displays the integration table unit commissionable amount and the line item selling quantity in the Commissionable Cost Amt From section.

General – when using EthoTech's alternate Payables Batch Entry window, entering a batch number with an origin of Computer Check and clicking the Transactions button resulted in a blank Go To window.

Build 12.00.53 Release Date November 19, 2014

Problem Reports

Commission Plan – when saving a new inventory item in the EthoSeries alternate Item Maintenance window and the Sale Amount From option in the Commission Plan Setup window was set to Based on Item, the Sale Amount Multiplier for the item was set to 0%, resulting in a zero dollar commissionable sale amount for each sales document line item for that item. Likewise, if the Cost Amount From option in the Commission Plan Setup window was set to Based on Item, the Cost Amount Multiplier for the item was set to 0%, resulting in a zero dollar commissionable cost amount for each sales document line item for that item.

Commission Plan – when determining additional salespeople for a sales document line item, salespeople attached to the line item sales territory (Territory CP Info) without an item plan restriction were not commissioned if the item did not have an item plan assigned.

Commission Plan – when determining additional salespeople for a non-inventory sales document line item, salespeople attached to the customer (Customer Commission Plan Info), sales territory (Territory CP Info), or user-defined value (Udef CP Info) with an item plan restriction equal to Commission Plan's default item plan for non-inventory items were not commissioned.

Commission Plan – when the only Commission Status selected in the Commission Plan Report window was Posted Documents – Not Ready for Processing and a report was printed for a salesperson whose Enable Commission Processing When option was set to Document is Posted, unexpected results could occur. Now, no report is generated because Posted – Not Ready for Processing is not a valid commission status for a salesperson whose Enable Commission Processing When option is set to Document is Posted.

Customer Service Collection – the From and To fields were reversed for the Document Type range on the Move Sales Documents window.

Build 12.00.52 Release Date June 6, 2014

Feature Changes

Customer Service Collection – when printing shipping labels with the Do Not Display System Print Dialog checkbox for the workstation unmarked in the Dynamics GP Named Printer Options window, Print Shipping Labels will now use the printer and printer settings set in the Customer Service Collection Setup window or the Print Shipping Label window; previously, the system Print Dialog window would open each time a label was printed, requiring the user to select the label printer and options even though they were previously set up within Customer Service Collection.

Customer Service Collection – Print Shipping Labels no longer uses ctree table ASI29000, and the Path to Setup File field has been removed from the Customer Service Collection Setup window.

Problem Reports

Customer Service Collection – when a Print Shipping Labels printer was selected in the Customer Service Collection Setup window and the setup was saved, the selected printer was not displayed when the Customer Service Collection Setup window was re-opened.

Build 12.00.51 Release Date June 4, 2014

Feature Changes

Added support for Dynamics GP R2.

Problem Reports

Commission Plan – when the Enable Commission Processing When option on the Commission Plan Setup window was set to Based on Salesperson and the Enable Commission Processing When option was set to Document is Paid for a salesperson, a commission status of Ready was displayed in the Commission Plan Entry window when viewing commission records for posted, unrelieved sales documents for that salesperson. A status of Not Ready should have been displayed in this scenario. This was a display issue only - the salesperson's commissions for unrelieved sales documents were not released for processing, and the Commission Plan reports and inquiries displayed the correct status.

Build 12.00.12 Release Date June 3, 2014

Problem Reports

Commission Plan – the Edit > Delete Row functionality of the Commission Plan Quotas window allowed quota ranges for a commission period with processed commissions to be deleted.

Build 12.00.11 Release Date March 20, 2014

Feature Changes

Commission Plan – added new commission quota reporting options and reports and updated existing quota reports. If you have modified the ETI_CP_QuotaCommissionPeriodReportDocs report, you will need to delete the modified report and re-modify, due to table relationship changes.

Commission Plan – added the following SQL views to the company database:

- ETI_CP_SalespersonSetup – displays the salesperson setup information from the Salesperson Commission Plan Info window
- ETI_CP_CommRunSummary – displays the summary information for each commission process run
- ETI_CP_SalespersonCommRunSummary – displays the commission summary information for each salesperson and commission process run
- ETI_CP_QuotaSetupYear – displays the quota summary setup information for each quota year and plan combination

- ETI_CP_QuotaSetupPeriodHdr – displays the quota summary setup information for each quota period and plan combination
- ETI_CP_QuotaSetupPeriodLine – displays the quota level detail setup information for each quota period and plan combination
- ETI_CP_QuotaSalespersonSetupPeriod – displays the quota level detail setup information for each salesperson, quota period, and plan combination
- ETI_CP_ETI_CP_QuotaSalespersonCommRunSummaryAdjustments – displays the commission adjustment amount for summary adjustments for each salesperson and commission process run
- ETI_CP_QuotaSalespersonCommRunPeriodHdr – displays the commission summary information for each salesperson, commission process run, and quota period
- ETI_CP_QuotaSalespersonCommRunPeriodLine – displays the commission calculation details for each salesperson, commission process run, and quota period
- ETI_CP_QuotaSalespersonCommRunPeriodDocs – displays the sales document information for each salesperson, commission process run, and quota period

Problem Reports

Commission Plan – when the Enable Commission Processing When or Returns Considered Paid when options on the Commission Plan Setup window, unprocessed commission adjustment records not linked to sales documents were set to Not Ready. Run the following SQL script against the company database(s) to update the commission status for affected commission adjustment records:

```
UPDATE ASI28301 SET ASIDTIPD = DOCDATE, ASICOMMST = 3
WHERE ASICOMMST < 4 AND SOPTYPE = 50
AND SOPNUMBE IN (SELECT ETI_CP_AdjustmentNumber FROM ETI28920 WHERE ETI_CP_LinkToSopDoc = 0)
```

Build 12.00.10 Release Date November 6, 2013

Feature Changes

Commission Plan – added a section to the EthoSeries User Guide, with instructions for using the new Dynamics GP Customer Combiner & Modifier functionality. See the Commission Plan > Troubleshooting > Dynamics GP Customer Combiner & Modifier section of the EthoSeries User Guide.PDF for details.

Problem Reports

Commission Plan – when updating from Dynamics GP version 10 or earlier, under certain circumstances commissions were deleted when anything caused them to be updated (saving, posting, or applying payments to sales documents, running Commission Plan Utilities, etc).

Build 12.00.7 Release Date October 1, 2013

Added support for Dynamics GP 2013 Service Pack 2.

Feature Changes

Commission Plan – added commission note, created user & date, and modified user, date, & time to the Commission Plan Entry window. Added created user & date and modified user, date, & time to the Commission Plan Inquiry Zoom window.

Problem Reports

Commission Plan – when a sales document line was deleted and re-entered with a different item number and commissions already existed for the sales document, the commission records did not reflect the new item number, price, and cost.

Build 12.00.6 Release Date September 16, 2013

Feature Changes

Commission Plan – added new document date options to the Process Commissions window, used when creating Dynamics GP transactions.

Commission Plan – added a Do not create Dynamics GP transactions option to the Process Commissions window.

Commission Plan – modified the range selection navigation in the Process Commissions window, which reduced the window size.

Commission Plan – added support for Blue Moon's SOP Auto Invoice sales document transfer process.

Quick Track – added drill-back functionality to the Freight field when using the EthoSeries alternate Sales Transaction Inquiry Zoom window.

Problem Reports

General – resolved display issues for the following EthoSeries alternate windows: Customer Maintenance, Item Quantities Maintenance, and Sales Transaction Entry.

Commission Plan – when a salesperson was manually entered in the Commission Plan Entry window, the SOP Type column was blank for the commission record in the Commission Plan SmartList.

Commission Plan – commissions were not reduced for terms discounts taken on unposted invoices.

Commission Plan – window Commission Plan Quota Periods Setup is now included in security task ETI_CP_SETUP_001.

Quick Track – when using the EthoSeries alternate Sales Transaction Entry window, the Freight drill-back button was visible, preventing the Freight prompt from being displayed.

Build 12.00.5 Release Date March 15, 2013

Problem Reports

General – Commission Plan Keystone could not be registered.

Commission Plan – auto-complete was not enabled for the additional fields on the EthoSeries alternate Customer Maintenance, Salesperson Maintenance, and Item Maintenance windows.

Build 12.00.4 Release Date March 8, 2013

Feature Changes

Commission Plan – added tab-style navigation to the Commission Plan Setup window, which greatly reduced the window size.

Commission Plan – added an option to roll down commission header splits to commission lines. If this option is selected in the Commissionable Amounts section of the Commission Plan Setup window, a split percentage entered for a commission record in the Commission Plan Entry window will appear on all commission lines and the commission lines will be recalculated (the commission header commission amount will no longer be directly reduced for the split); otherwise, a split percentage entered for a commission record in the Commission Plan Entry window will continue to reduce the commission header commission amount without affecting any commission lines.

Commission Plan – added Adjustment Type setup option to the Commission Plan Setup window, and added Adjustment Type drop-down to the Commission Plan Adjustment Entry and Adjustment Inquiry Zoom windows.

Commission Plan – added an Inactive checkbox to the Salesperson Commission Plan Setup, Customer Commission Plan Setup, and Item Commission Plan Setup windows. The plan lookup windows do not display inactive plans by default.

Commission Plan – added Default Commission Type and Rate to the Salesperson Commission Plan Setup window, when the Standard matrix option is used.

Commission Plan – added Default Commission Type and Rate to the Commission Plan Matrix Setup window, when the Standard matrix option is used. When a new customer plan – item plan combination is added to a salesperson plan, the commission type and rate are set to the defaults.

Commission Plan – added a Create Entries for all Plan Combinations options menu to the Commission Plan Matrix Setup window, which creates entries for all customer plan – item plan combinations that do not already exist for the displayed salesperson plan.

Commission Plan – added an option to remove unprocessed commissions to the Commission Plan Utilities window.

Commission Plan – modified the range selection navigation in the Commission Plan Report window, which greatly reduced the window size.

Commission Plan – added the ability to use a salesperson's To, Cc, and Bcc information from the Dynamics GP Internet Information window when emailing commission reports.

Commission Plan – when determining the Date Document Paid for a return and Commission Plan is configured to enable commission processing for paid invoices and posted returns, the Date Document Paid for the return is set to the return's GL Posting Date (unless the GL Posting Date falls before the Document Date, in which case the Date Document Paid is set to the Document Date). This allows the use of only a Date Document Paid range when processing commissions, rather than both a Date Document Paid range and a Document Date range.

Commission Plan – when commissions are processed, the range options selected in the Process Commissions window are now saved in table ETI_CP_Process_Log (ETI28914).

Commission Plan – added 2 new values to table ETI_SOP_HDR_Integration (ETI28305): ASI_Split_Commission_Rat, and ETI_CP_RolldownHdrSplit. See the Commission Plan Integration Guide for details.

Commission Plan – added a new parameter, PreventCommCreation, to the UpdateCommissions method of the ETI_CP.CreateUpdateSOPDocCommissions COM callback object. See the Commission Plan Integration Guide for details.

Problem Reports

Commission Plan – when updating from the EthoSeries build 10.00.28 or earlier, under certain circumstances commissions were deleted when anything caused them to be updated (saving, posting, or applying payments to sales documents, running Commission Plan Utilities, etc).

Commission Plan – when a sales document line was deleted and re-entered with a different item number and commissions already existed for the sales document, the commission records did not reflect the new item number.

Commission Plan – when attempting to transfer a sales document and the document did not transfer, Commission Plan displayed an error prompting the user to review commissions for the original sales document, even though the commissions were not affected by the failed transfer.

Commission Plan – when commissioning multiple salespeople attached to a Commission Plan User-Defined value with an Item Plan restriction, only one of the salespeople received commission.

Commission Plan – when running Commission Plan Check Links, all unprocessed Commission Adjustments were deleted.

Quick Track – when using the EthoSeries alternate Sales Transaction Entry window, the Freight drill-back functionality was not enabled.