The EthoSeries™ Release Notes

Requirements
Microsoft Dynamics GP 2015 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 2015 R2.

If SmartSort is installed, SmartSort build 14.00.008 or later is required.

Build 14.00.150 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 – default plans and or/ class update options now update salesperson, customer, and item commission setups whether Commission Plan SQL triggers are enabled or disabled. Previously this functionality was only active when triggers were enabled.

Commission Plan – added the following functionality to the Salesperson Commission Plan Info, alternate Salesperson Maintenance, Salesperson Class Setup, and Mass Update Salespeople windows:
- Commission Accrual Account
- Option to use vendor / payables setup AP account rather than commission payable account when creating Payables transactions
- Option to include taxes when creating Payables transactions

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 the Sales Multiple Order to Invoice Transfer window was used to transfer sales documents, error "An error occurred executing SQL statements…" was displayed, and the associated commissions were not transferred.

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 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 – when previewing commissions to be processed in EthoSeries 14.00.120, report ETI_CP_SalespersonProcessRunSummary displayed a zero commission amount for each salesperson.

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 14.00.119 Release Date September 17, 2019

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

Problem Reports
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.

Build 14.00.118 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 negative commissionable sale and/or commissionable cost amount override was set in table ETI_SOP_LINE_Integration (ETI28316), the resulting commission line commissionable sale amount and/or commissionable cost amount was positive.

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 Amts 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 14.00.117 Release Date December 21, 2017

Feature Changes
Commission Plan – in the Commission Plan Report window, the Commissions with a zero commission amount and Commission lines with a zero commission amount options now function independently. Previously, if you unmarked the Commissions with a zero commission amount option, the Commission lines with a zero commission amount option was also unmarked and disabled.

Problem Reports
Commission Plan – when manually entering a salesperson in the Commission Plan Entry window for a sales document for which no commissions existed, users were unable to open the Detail Entry window until the document was redisplayed.

Commission Plan – when a new line item was inserted into a sales document for which commissions already existed, the commissions for the existing line item that immediately followed the new line were recalculated, removing any manual edits.

Commission Plan – when entering a non-existing Salesperson Plan in the Commission Plan Salesperson Class Setup window and choosing Yes when prompted to add the Salesperson Plan, the GL Account Maintenance window opened rather than the Salesperson Commission Plan Setup window.

Commission Plan – if the Enable Commission Processing When option on the Processing tab of the Commission Plan Setup window was set to Document is Paid, the Returns Considered Paid When option was disabled.

Build 14.00.116 Release Date May 9, 2017

Problem Reports
Commission Plan – changes made to a customer class setup in the Commission Plan Customer Class Setup window were not rolled down to customers assigned to that class**.**

Build 14.00.115 Release Date May 2, 2017

Feature Changes
Commission Plan – added column SOPTYPE 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 14.00.114 Release Date April 28, 2017

Feature Changes

Commission Plan – added a new Reduce Commissions How option: Reduce Commissionable Cost Amount.

Problem Reports
Commission Plan – when the Salesperson Commission Quota Inquiry window opened after quota-based commissions were calculated in the Process Commissions window, no records were displayed.

Commission Plan – when attempting to display a sales document in the Commission Plan Override Dates window, error "Unhandled script exception: illegal address for field 'SOP Number'…" was displayed if commissions existed for the document.

Commission Plan – when the sales document lookup button was clicked in the Commission Plan Override Dates window and a record was selected in the Sales Document Numbers window, message "This document does not exist" was returned and the selected record was not displayed.

Commission Plan – when the Reset button was clicked in the Commission Plan Sales Document Info window to reset overridden entries, the List Price and Standard Cost were not reset if commissions existed for the sales document.

Build 14.00.112 Release Date January 10, 2017

Problem Reports
Commission Plan – when the Reset button was clicked in the Commission Plan Sales Document Info window to reset overridden entries, the List Price and Standard Cost were not reset if commissions existed for the sales document.

Build 14.00.111 Release Date December 8, 2016

Feature Changes

Commission Plan – the Commission Plan Sales Document Info window may now be opened from the Sales Transaction Entry window.

Customer Service Collection – added window Unallocated Item Inquiry, which displays the sales documents with allocated quantities for an inventory item.

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.

Commission Plan – when attempting to delete a commission setup in the Commission Plan Customer Class Setup window or the Commission Plan Item Class Setup window, error "A delete operation is not allowed on a nonexclusive table" was returned and the setup was not deleted.

Commission Plan – when the A/P Voucher # link was clicked in the Salesperson Commission Run Inquiry, the voucher was not displayed in the Payables Transaction Entry Zoom window once it was posted.

Commission Plan – when transferring a sales document for which line item overrides existed in table ETI_SOP_LINE_Info (ETI28913) and no commissions existed in table ASI_SOP_HDR_Comm (ASI28301), the line item overrides were not transferred.

Commission Plan – clicking the Save button on the Commission Plan Sales Document Info window resulted in error "illegal address for field 'ETI_CP_ManualPriceSheetID…" in some cases.

Next Numeric Collection – when using the EthoSeries alternate Vendor Maintenance window with the Window Command Display user preference set to Menu Bar, the Delete button action was invoked when the user clicked the New button, preventing the next Vendor Number from being retrieved. The Delete button was hidden behind the New button.

Build 14.00.106 Release Date June 6, 2016
Feature Changes
Commission Plan – the Document Date and GL Posting Date for a commission record may now be manually edited via the Commission Plan Override Dates window.

Commission Plan – for a given sales document line, the commissionable List Price, Standard Cost, Unit Sale Amount, and Unit Cost Amount for all associated commission lines may now be mass updated via the Commission Plan Sales Document Info window.

Commission Plan – added a Go To button to the Commission Plan Entry window, providing navigation to the Commission Plan Override Dates and Commission Plan Sales Document Info windows.

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.

Next Numeric Collection – when using the job copy feature on the KEY2ACT (WennSoft) Job Maintenance window, Next Numeric can now create the new job number.

Problem Reports
General – when using the EthoSeries alternate Salesperson Maintenance window with Commission Plan not registered, two lookup buttons appeared in the Commission Plan section of the window.

Commission Plan – when displaying a record in the EthoSeries alternate Customer Maintenance window or the Customer Commission Plan Info window, the user was asked if they wished to default commission setup information if no commission setup existed for the customer. Default commission setup information is now automatically displayed when creating a new customer.

Commission Plan – when displaying a record in the EthoSeries alternate Item Maintenance window or the Item Commission Plan Info window, the user was asked if they wished to default commission setup information if no commission setup existed for the item. Default commission setup information is now automatically displayed when creating a new item.

Commission Plan – when displaying a record in the EthoSeries alternate Salesperson Maintenance window or the Salesperson Commission Plan Info window, the user was asked if they wished to default commission setup information if no commission setup existed for the salesperson. Default commission setup information is now automatically displayed when creating a new salesperson.

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.

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

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.

Customer Service Collection – when using the EthoSeries alternate Sales Transaction Entry window, no action occurred when clicking the Labels button or the Restock button. The Print Shipping Labels and Restocking Fees for Returns functionality was still available via the Additional menu.

Next Numeric Collection – in some cases, multiple users could receive the same next master record ID. For example, if user A requested the next customer number and then user B requested the next customer number before user A saved their new customer record, user B could receive the same customer number.

Next Numeric Collection – when attempting to retrieve the next Asset ID when focus was set to the Asset ID field of the Fixed Assets General Information window, Dynamics GP functionality returned error "Enter an asset ID", preventing the next Asset ID from being returned to the field (the same behavior could be encountered by simply tabbing off the empty Asset ID field).

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 14.00.102 Release Date July 23, 2015
Problem Reports
Commission Plan – when a new Class ID was entered in the Commission Plan Salesperson Class Setup window, the Class ID was immediately cleared, preventing the creation of new classes.

Build 14.00.101 Release Date June 10, 2015
Feature Changes

Added support for Dynamics GP 2015 R2.

Build 14.00.14 Release Date June 3, 2015
Feature Changes
Commission Plan – added salesperson, customer, and Item class setups with rolldown options. Added Default Item Sale Amount From, Default Item Cost Amount From, and Default Enable Comm Processing When options to the Commission Plan Setup window.

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

Commission Plan – extended Dynamics GP Document Attach functionality to Salesperson Maintenance.

Commission Plan – added Linked SOP Document and Linked SOP Type to SQL views ETI_CP_SOPHDRComm and ETI_CP_SOPLINEComm, which allows reports based on these views to group commissions for a sales document and commissions for an adjustment record linked to that sales document.

Commission Plan – added support for SmartList Builder Go To Execute Procedure.

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

Commission Plan – added an Enable/Disable SQL Triggers option, which can be used to prevent Commission Plan SQL triggers from firing when Customer Modifier and Combiner or PSTL operations perform mass updates to master records.

Problem Reports
Commission Plan – when the Enable Commission Processing When 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 – Microsoft Enhanced Intrastat prevented Commission Plan and Next Numeric fields from being correctly displayed when using the EthoSeries alternate Customer Maintenance window.

Build 14.00.10 Release Date January 1, 2015

Initial Dynamics GP 2015 release.