

The EthoSeries™ Release Notes

Requirements

Microsoft Dynamics GP 2016 R2 build 16.00.0864 (2020 Year End Update) or later 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 2016 R2 build 16.00.0864 (2020 Year End Update).

If SmartSort is installed, SmartSort build 16.00.010 or later is required.

Build 16.00.201 Release Date March 30, 2021

Problem Reports

Customer Service Collection – when a sales document line's quantity was changed in the Sales Transaction Entry window and then the Print Shipping Labels window was opened without first tabbing through the document line, the document was saved in an invalid state (the document Subtotal did not match the summation of the Extended Prices for the document lines).

Build 16.00.200 Release Date January 7, 2021

Problem Reports

General – when using the EthoSeries alternate Vendor Maintenance window in Dynamics GP 2016 R2 build 16.00.0864 (2020 Year End Update) or later, a vendor could not be saved.

Build 16.00.150 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 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.

Commission Plan – added existing commission rate info to function CommLineOverrideCommRate of form ETI_CP_CommRateOverrideSetup for integrating applications.

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 adding a salesperson to an override setup in the Commission Plan Rate Override Setup window, the override’s end date was not added to the salesperson’s override setup.

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.

Commission Plan – some Additional menu items appeared multiple times.

Build 16.00.109 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 copying an existing date range setup to a new Start Date in the Commission Plan Rate Override Setup window, the copy failed if the new End Date was not blank.

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 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 16.00.108 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 16.00.107 Release Date May 8, 2017

Problem Reports

Commission Plan – inserts of new item records into the Dynamics GP Item Master table (IV0010) via the Item Maintenance window or direct SQL inserts (SmartConnect, eConnect, etc) failed because SQL trigger ASI28040TriggerIV00101 on table IV0010 failed to insert companion data into table ASI28040. This issue only affected clients running EthoSeries builds 16.00.009, 16.00.010, 16.00.105, and 16.00.106. After you've updated from one of these builds, please use the following instructions to resolve the issue:

1. Make a backup of each Dynamics GP company database.
2. Launch Dynamics GP and log in as a user with system administrator privileges ('sa').
3. At the Company Login window, choose the first company.
4. Open the EthoSeries SQL Utilities window (Tools > Utilities > System > EthoSeries SQL Utilities) and click the Rebuild Company Views, Triggers, Etc. button.
5. Repeat steps 3 and 4 for each remaining company.

Build 16.00.106 Release Date May 2, 2017

Feature Changes

Commission Plan – added column SOPTYPE to SQL view ETI_CP_QuotaSalespersonCommRunPeriodDocs.

Commission Plan – added columns Comm Rate Override ID, Comm Rate Override Start Date, & Comm Rate Override Record ID to SQL view ETI_CP_SOPLINEComm.

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 16.00.105 Release Date April 28, 2017

Feature Changes

Commission Plan – added Commission Rate Overrides functionality.

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.

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.

Commission Plan – when KEY2ACT (WennSoft) Job Cost build 16.00b02g214 or later was installed, users received the following message when logging into a Dynamics GP company: “An unexpected error was encountered trying to register The EthoSeries trigger: Save of form JC_Job_Maintenance.”.

Build 16.00.101 Release Date December 8, 2016

Dynamics GP 2016 R2 release.

Build 16.00.004 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.

Commission Plan – when viewing an existing salesperson record the alternate Salesperson Maintenance window, the Commission Payable and Expense account data was not displayed.

Build 16.00.001 Release Date June 6, 2016

Initial Dynamics GP 2016 RTM release.