

The EthoSeries™ Release Notes

Requirements

Microsoft Dynamics GP 18.7 build 18.6.1756 (2024) or later must be installed.

Registration Keys

If updating from an earlier 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

!!!EthoTech's Installation methodology has changed!!! Please refer to the EthoSeries Installation Guide for detailed installation and update instructions. The new methodology is critical for a successful update if you have modified EthoSeries forms and/or reports.

Compatibility

This EthoSeries build should be used with Dynamics GP 18.7 build 18.6.1756 (2024) or later.

If SmartSort is installed, SmartSort build 18.00.020 or later is required.

Note: when updating from a previous version, the SQL Object Initialization may fail for 3 Embedded Freight tables. If this occurs, just exit Dynamics GP (or switch GP companies), log back into the GP company in question as 'sa' and choose Yes when prompted to initialize the EthoSeries – the 3 tables will be created. This issue typically occurs when you have alternate EthoSeries forms and/or reports.

Build 18.07.001 Release Date November 12, 2024

Feature Changes

Commission Plan – the Commissionable List Price may now be determined from the Price List / Price Sheet used to set the sales document line unit price for an item.

Problem Reports

Commission Plan – The SQL stored procedures used to retrieve the next Customer Salesperson Index / Item Salesperson Index checked the next index against the max index for any customer / item rather than the current customer / item, creating gaps in the salesperson assignment indexes for a given customer / item when these assignments were updated outside of the Dynamics GP user interface.

Commission Plan – when an Override Setup with an amount-based Commission Type was used for a commission line, the commission rate amount of the commission line was set to zero.

Commission Plan – when the Sale Amount From option was set to Based on Item in the Commission Plan Setup window, the commission line Sale Amount Multiplier was set to zero when commissions were calculated for a non-inventoried item.

Commission Plan – when the Cost Amount From option was set to Based on Item in the Commission Plan Setup window, the commission line Cost Amount Multiplier was set to zero when commissions were calculated for a non-inventoried item.

Next Numeric Collection – when a Next Master Number was saved for a Master Record Type in the Next Numeric Setup window and then the Master Record Type setup was re-saved with a blank Next Master Number, error "A get/change operation on table 'ASI_Next_Numeric_Setup' failed. A record was already locked." Was returned when attempting to retrieve the next master record for that master record type.

Build 18.06.003 Release Date May 15, 2024

Problem Reports

Commission Plan – When quantities were backordered a fulfillment order, commission data was incorrect until the fulfillment order became an invoice.

Commission Plan – Integration Manager (IM) sales document integrations failed when using EthoSeries build 18.06.001 or later. This occurred because the integrations click the Commission button, and Commission Plan functionality either opened the Commission Plan Entry window or asked whether to open the Commission Plan Entry window or the Dynamics GP Sales Commission Entry window. IM cannot handle either scenario, so the integration failed. This Commission Plan functionality is now suppressed during IM integrations, allowing the Dynamics GP Sales Commission Entry window to open.

Build 18.06.002 Release Date January 2, 2024

Feature Changes

Next Numeric Collection – when the Customer Maintenance window opens, the Customer Number field may now be disabled and/or auto populated.

Problem Reports

Commission Plan – When emailing commission reports, message "Error in pass-through sanScript while sending MS Graph email" is displayed and emails are not sent.

Build 18.06.001 Release Date October 23, 2023

Initial Dynamics GP 18.6 release

Feature Changes

Commission Plan – when the salesperson, customer, or item plan is overridden in Commission Plan Entry, new Edited fields in the ASI Commission Work (ASI28301) and/or ASI Commission Line (ASI28311) table(s) are set to true (1).

Commission Plan – when the Commissions button is clicked in the Sale Transaction Entry and Sales Transaction Inquiry Zoom windows, the Commission Entry / Inquiry window opens if Dynamics GP commission are disabled; otherwise, the user is asked if they'd like to open the Commission Plan or the Dynamics GP version of the commission entry/inquiry window.

Commission Plan – when Commission Plan utilities are run for posted sales documents, documents for which all commissions have been processed (ETI_CP_All_Processed = 1 in table ETI28910) are excluded when setting the range on table Sales Transaction History (SOP30200). This will improve performance by limiting the data set.

Commission Plan – added the ability for integrating Dexterity applications to create custom commission line reductions.

Commission Plan – when using the Mass Update Items window, if an item plan > item assignment doesn't exist for an item in the selected range, the Update Item Plan checkbox must be marked for a new record to be created in table ASI28040. The new record will be created the using default commissionable amount values (displayed in the mass update window) unless the associated Update checkbox is marked:

- If the Update Commissionable Sale Amount From checkbox is not marked, the Commissionable Sale Amount From will be set to the Commission Plan Setup default.
- If the Update Commissionable Sale Amount Multiplier checkbox is not marked, the Commissionable Sale Amount Multiplier will be set to the Commission Plan Setup default.
- If the Update Commissionable Cost Amount From checkbox is not marked, the Commissionable Cost Amount From will be set to the Commission Plan Setup default.
- If the Update Commissionable Cost Amount Multiplier checkbox is not marked, the Commissionable Cost Amount Multiplier will be set to the Commission Plan Setup default.

Problem Reports

Commission Plan – when the Salesperson Plan and/or Customer Plan was manually edited in the Commission Plan Entry window, the commission header / line plan(s) were not updated appropriately in some cases.

Commission Plan – when a salesperson record was removed from the following windows, the Redisplay button had to be clicked to view salesperson records that appear before the removed record.

- Customer Commission Plan Info
- Item Commission Plan Info
- Sales Territory Commission Plan Info
- User-Defined 1 Commission Plan Info

Build 18.5.005 Release Date October 21, 2022

Initial Dynamics GP 18.5 release

General – Added support for Dynamics GP 18.5 updates for Office 365 multifactor authentication when emailing reports.

Problem Reports

Commission Plan – when the Item Class was changed for an existing item for which no ASI IV Item MSTR Commission (ASI28040) record existed, the item master record could not be saved due to an error in trigger ASI28040TriggerIV00101 on the item master table (IV00101). Dynamics GP displayed error "This record has been created since your attempt to create it. Changes won't be saved."

Build 18.04.101 Release Date July 14, 2022

Problem Reports

General – when using EthoSeries build 18.04.011 or earlier with Dynamics GP build 18.4.1461, error “Unhandled script exception: Illegal address for field [Not Found] in script ‘DiscardEmailAddresses’. Script terminated.” was encountered when displaying or saving a customer using the EthoSeries alternate Customer Maintenance window.

Build 18.04.011 Release Date April 4, 2022

Problem Reports

Commission Plan – when printing reports from the Commission Plan Report window using a Date Document Paid range, incorrect commission data was displayed.

Build 18.04.010 Release Date February 16, 2022

Feature Changes

General – Added support for Office 365 multifactor authentication when emailing reports.

Commission Plan – added Posted Date, SOP User Date 1, and SOP User Date 2 to the Commission Recognition Date From options. Commission Recognition Date From may now be set per salesperson; previously, this was a system-only setting. Added Posted Date, SOP User Date 1, and SOP User Date 2, and Commission Recognition Date to the Commission Plan Override Dates window.

Commission Plan – commission reports and processing now have additional range options:

- Posted Date
- SOP User Date 1
- SOP User Date 2
- Commission Recognition Date

Commission Plan – commission accrual processing now has additional range options:

- Posted Date
- SOP User Date 1
- SOP User Date 2

Problem Reports

General – resolved cross-dictionary integration issues with scrolling windows attached to temporary tables.

Commission Plan – when a Salesperson Class was entered in the EthoSeries alternate Salesperson Maintenance window, the Use Vendor / Posting Setup AP Acct for Comm Payable checkbox was not set to the class's value when the Use Vendor / Payables Setup Acct for Comm Payable Option was marked in the Commission Plan Class Update Options window.

Commission Plan – when a salesperson was saved in the EthoSeries alternate Salesperson Maintenance window, the following fields were not saved to table ASI_RM_Salesperson_MSTR_Commission (ASI28060).

- Use Vendor / Posting Setup AP Acct for Comm Payable
- Commission Accrual Account
- Include Taxes
- Use Vendor Tax Schedule
- Tax Schedule ID

Commission Plan – when all commissions were deleted for a sales document by clicking the Delete button on the Commission Plan Entry window, the commissions could not be recreating via the Commission Plan Utilities window. They can now be created via the Commission Plan Utilities window using the Delete & Recreate option or via the Commission Plan Entry window by clicking the Default button.

Commission Plan – when the Delete button was clicked in the Customer Commission Plan Info window and the Require Customer Plans checkbox or the Require CP User Defined 1 checkbox was marked in Commission Plan Setup, the deletion failed.

Commission Plan – when the Delete button was clicked in the Item Commission Plan Info window and the Require Item Plans checkbox was marked in Commission Plan Setup, the deletion failed.

Next Numeric Collection – when Next Numeric was used to default a new Batch ID in the Sales Transaction Entry window, the user was not prompted to save the new Batch ID, and the Batch ID was subsequently removed from the window when a new document number was displayed.

Customer Service Collection – when a duplicate PO Number was entered in Payables Transaction Entry and the user chose the Open Inquiry option from the Duplicate PO warning dialog, no documents were displayed in the Payables Transaction Inquiry – Document window.

Customer Service Collection - when clicking the Unallocated drill-back from the Item Inquiry window or Item Quantities Maintenance window to display the item in the Unallocated Items window, incorrect data was displayed if the Unallocated Items window was already open and previously displayed different Items, Dates, or Customers ranges..

Customer Service Collection - when clicking the Expected Date drill-back from the Item Inquiry window or Item Quantities Maintenance window to display the item in the Purchase Order Processing Item Inquiry window, incorrect data was displayed if the Purchase Order Processing Item Inquiry window was already open and previously displayed different Items or Restrict By ranges.

Build 18.4.002 Release Date November 3, 2021

Initial Dynamics GP 2018.4 release.

Problem Reports

Next Numeric Collection – when Next Numeric was used to default a new Batch ID in the Sales Transaction Entry window, the user was not prompted to save the new Batch ID, and the Batch ID was subsequently removed from the window when a new document number was displayed.

Customer Service Collection – when a duplicate PO Number was entered in Payables Transaction Entry and the user chose the Open Inquiry option from the Duplicate PO warning dialog, no documents were displayed in the Payables Transaction Inquiry – Document window.

Build 18.3.011 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 18.03.10 Release Date December 11, 2020

Initial Dynamics GP 2018.3 release.

Problem Reports

General – when using the EthoSeries builds for Dynamics GP 18.2 or earlier with Dynamics GP 2018.3, a vendor could not be saved when using the EthoSeries alternate Vendor Maintenance window.

Build 18.00.250 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 sales document line embedded freight commission reductions.

Commission Plan – users may now select which reports to print when processing commissions.

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.

Customer Service Collection – added the following functionality to Print Shipping Labels:

- Enable / disable the Windows print dialog

- Track which labels were printed
- Include tracking numbers on labels

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 – in EthoSeries 18.00.203, negative commissions were not always generated for a negative sale document line on an invoice.

Commission Plan – commission reductions for trade discounts were inconsistent if a sales invoice contained a line with a negative extended price.

Commission Plan – when retrieving the next Adjustment Document Number, the number of number increment > check for existing number loops was increased to support integrating applications.

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 commissions were processed in EthoSeries 18.00.203 and later, table ETI_CP_Trx_HIST was not updated to reflect the tax amount calculated for a Payables transaction.

Commission Plan – in EthoSeries 18.00.201 or later, negative commissions were not always generated for a negative sale document line on an invoice.

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 18.00.202 Release Date July 18, 2019

Feature Changes

Commission Plan – when creating commission accruals, sales documents may now be evaluated by GL Posting Date.

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).

Build 18.00.201 Release Date October 24, 2018

Dynamics GP 2018 R2 release.

Feature Changes

Commission Plan – Microsoft added start and end dates to the Employee Pay Code Maintenance window. If a salesperson is set up in Commission Plan to create a Payroll transaction when commissions are processed, the start and end dates of the associated Pay Code will be verified using the Payroll Transaction Date from the Process Commissions window.

Problem Reports

When using EthoSeries build 18.00.101 or earlier with Dynamics GP 2018 R2, message “An unexpected error was encountered trying to register The EthoSeries trigger AFTER – SOP_Create_History_Document” was displayed when logging into a company, as Microsoft added parameters to that global procedure.

Commission Plan – if a user entered a batch number in the Process Commissions window and then marked the Do not create Dynamics GP transactions checkbox, the corresponding batch activity record was not removed from table SY00800 (GL and Payables) or table UPR10304 (Payroll).

Build 18.00.101 Release Date October 9, 2018

Problem Reports

When using the EthoSeries alternate Receivables Batch Entry, Payables Batch Entry, or Vendor Maintenance window, users received error ‘illegal address for field [Not Found]’ when saving a record in the window. This occurred because Microsoft added fields to these windows in the July 2018 Canadian Payroll Tax Update (Dynamics GP build 18.00.0496). EthoSeries build 18.00.101 is functionally equivalent to build 18.00.006, but the above listed alternate windows now support the changes made by Microsoft.

Build 18.00.006 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 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.

Commission Plan – when a sales document was selected in the Receivables Transaction Entry – Document window and the Additional > Commission Plan menu option was invoked, the Commission Plan Inquiry Zoom window did not display the selected document.