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Accounting

- **FTM-4253 / Reverse Changes** – Changes originally made to print the correct check number assigned to the correct payee when paying AP Bills sorted by name (if similar names are being paid) were reversed due to additional issues identified when printing AP checks.
- **FTM-4138 / Inactive GL Accounts** – When editing a GL Account, an option is now available to mark the account as *Inactive*. The *Select a G/L Account* window gives the option to filter for *Active* vs. *Inactive* GL Accounts (this filter is only enabled for reporting). More information regarding inactivating GL Accounts can be found **here**.

  Note: GL Accounts cannot be marked as *Inactive* if:
  - It is used on a Journal Entry in the current year.
  - It is used to subtotal to another GL Account.
  - There is a balance.
  - It is used in any setup area (including Load/Save Sets).

Inventory

- **FTM-3824 / Bayer B2B Haulback Message** – A new haulback message has been added to Purchase Receipt returns. When adding a return at *Inventory / Purchase Receipts*, a checkbox for *Send Product Haulback Message* is available and provides a drop-down to choose *None*, *Product Return*, or *Product Haulback*. These were requested by Bayer to specifically include Spot price and Lot Number. The Spot Price is also saved to the Agvance database.
- **FTM-3748 / Include PO Number in BOL List** – When importing Warehouse app transactions (Mobile Inventory) to a Purchase Receipt, if a PO was selected in Warehouse, that information will be populated and used when creating the Purchase Receipt.
- **FTM-3899 / Estimated Average Cost ICT** – When making an ICT and the *Before* quantity is 0, the cost calculation will take the pre-transaction Amount On Hand + unprocessed loaded Delivery Tickets + unprocessed loaded Blend Tickets as documented **here**.
- **FTM-4016 / Shipping Order Manager** – The *Select Shipping Order Manager* window remembers the column selected to sort by and the sort order (ascending/descending) while editing Shipping Orders as long as the *Select Shipping Order Manager* window is not closed. If the window is closed and then re-opened, the column selected to sort by will be remembered if *Make This Layout My Default* is selected; however, the sort order is

not remembered.

- **FTM-3978 / Record Delivery Tickets as Loaded** – The Record Delivery Tickets as Loaded utility at *Accounting / Inventory* now checks the Loaded status of the ticket when saving to prevent double posting. If the ticket was posted after the list was loaded, a message displays indicating the ticket was already loaded. This prevents a duplicate record from being saved.
- **FTM-3259 / Dealer Order Update & Response Message** – An **Increase Dealer Order** button has been added to the *Dealer Order* window at *Accounting / Inventory / Manage Seed Orders / Dealer Order*. This button gives the ability to select multiple short position rows and send multiple fill short requests without having to also populate the *Requested Qty* column. Additionally, this button uses a new B2B message that allows the Dealer Order quantities to be updated without the use of Grower Orders and Bookings.
  Note: This should only be used for Bayer Dealer Orders.

A/R

- **FTM-4176 / Financing Tool Security** – The *Financing* menu and its submenu items found under the *A/R* menu in Accounting can now be restricted per User.

G/L

- **FTM-3821 / Deposit Date Range** – A *Date Range* filter is now available when adding a deposit at *G/L / Bank Deposit*. This gives the ability to **Tag All** or **Untag All** line items based on the date range entered.

End of Periods

- **FTM-4158 / Canada T4A Forms** – A *Payer-offered dental benefits* field was added to the *T4A* tab of the *Canadian Tax Form* setup window at *Accounting / End of Periods / Print EOY Tax Forms / Canadian Tax Forms*. This defaults to a value of 1. Values 1-5 can be entered and the setup remembers the last-used value. This value is added into the T4A file.
- **FTM-4182 / Mag-Filer** – Mag-Filer 2024 is now available when navigating to *End of Periods / Print EOY Tax Forms / Setup*.

Setup

- **FTM-3915 / GST and PST Taxes** – A new preference is available at *Setup / Location Preferences* on the *Invoice Printout* tab to *Print GST/PST Taxes* on the Invoice. Up to two state/adjustment codes will print on the Invoice as GST/PST. If more than two tax rates are used on an Invoice, it will revert to standard sales tax printing.
  Note: The GST/PST are Canadian taxes for Provinces when applicable. GST is the Goods and Service Tax and PST is the Provincial Sales Tax.

Transfers

- **FTM-3844 / PMR Export** – The *ShipFrom* information on the PMR export now comes from the Location

setup and not the Company.

- **FTM-3913 / PMR Export Products** – The PMR Export at *Transfers / Export / PMR* correctly tracks what line items have been exported to the PMR reporting so that when changes to setup happen, it is known what lines were exported.
- **FTM-3987 / PMR Export 100% to Grower** – The PMR Export at *Accounting / Transfers / Export / PMR* now has a *100% to Grower* checkbox. When this option is checked, the entire sale quantity and dollars on split Invoices will be attributed to the Grower(s) on the billing split. If there are multiple Growers, the amounts are split according to those Growers' shares. If there is only one Grower, they will have the full amount of the Invoice reported to them. If no one is marked as a Grower, the sale is reported under the first Customer on the Invoice.
- **FTM-4077 / PMR Export AgvAgent** – When running the PMR Export at *Transfers / Exports / PMR Export* using Agvance Agent, the Product Classifications saved with the **Load Set** are honored.
- **FTM-4171 / Voyager Import** – The Voyager import at *Accounting / Transfers / Import* will now use the quantity and extended dollars in the file when imported to calculate the unit price.

Accounting Reports

- **FTM-4203 / Combo Statement PDFs** – A new option is available for the Combo Statement (*Accounting Reports / Accounts Receivable / A/R Status*) called *Do Not Merge PDFs*. When enabled and using a *Print Job Size* other than *All*, these PDFs will not be merged into one PDF and instead will create multiple PDFs based on the *Print Job Size* selected.
- **FTM-3837 / AP 1099 Detail Report** – *Gross* was added as an option under the *1099 Type* drop-down for the AP 1099 Detail report at *Accounting Reports / Accounts Payable / A/P Status*.
- **FTM-3840 / Booking Usage Report** – In the Custom Export for the Booking Usage report (*Accounting Reports / Accounts Receivable / Bookings*), columns have been added to indicate if the Booking line is paid or not and to what level it is paid:
  - **B** – Booked
  - **D** – Down Payment
  - **P** – Paid
- **FTM-4015 / Product Reference List** – The Reference List report at *Accounting Reports / Inventory / Products* now includes the Product's GTIN in the Custom Export for the *Basic* style.
- **FTM-4055 / GST/PST Combo Statement** – The standard Combo Statement (French and English versions) now displays the GST/PST in the same manner as the Invoice document.
- **FTM-4082, 4083, 4084, 4086 / Show Costs** – A *Show Costs* option has been added to the Purchase Order Detail Processed, Purchase Order Request Summary, and Purchase Receipts reports at *Accounting Reports / Inventory / Purchase* that defaults as unchecked. This preference was also added to Role level security. The following columns are not displayed on the reports listed below unless *Show Costs* is checked:

    - **Purchase Order Detail Processed** – *$/Unit*
    - **Purchase Order Request Summary** – *UnitPrice*
    - **Purchase Receipts** – *Unit$, Freight/Add'l$*
    - **Freight Reconciliation Summary** – *Frt/Unit Rate, Estimated $, Actual $*
    - **Intercompany Transfers** – *Est Avg Cost, Freight/Add'l$, Total*
- **FTM-3762 / Sales Analysis Report** – When the *Show Ingredients* option is checked on the Sales Analysis report at *Accounting Reports / Accounts Receivable / Sales*, a new drop-down (*Raw Ingredient Price*) is available to choose a Price Level for the ingredient Products. The report will show the selected cost and price of the ingredients at the time the Invoice was added. This information will only show for Invoices created with the ability to save the new manufactured Product information to the database.

Agronomy

- **FTM-3693 / FieldView/Climate API Keys** – The default credentials for FieldView/Climate have been set to the ones provided to SSI rather than the one used by Mapshots. Additionally, all various override keys were queried in provided by Climate for those running ADS.

CRM

- **FTM-3800 / Document History Time** – Customers in time zones to the WEST of CST have the correct *Date* and *Time* displayed on the *Document History* tab for those records returned from CRM.

Energy

Transfers

- **FTM-3711 / Import Tank File with Tank GUID** – When the EF Tank import at *Transfers / Import / Energy Force / Daily Tank* includes the column for *Tank GUID*, that will be used to identify if updating or adding a specific Tank. The Attributes will still be saved, but they will no longer be the source with which an existing or new Tank is identified.
  Note: Current customers need to complete setup in order to begin using this feature.
- **FTM-3938 / Daily Clear Import** – The Energy Force Daily Clear Import report in Agvance will now include information about Invoices from the file that were not able to be voided.
- **FTM-3745 / Energy Force Interface Split Tank File** – Tank GUID information will now be included in the Tank Split file from Energy Force. Agvance will be able to use the Tank GUID when importing the Daily Tank at *Energy / Transfers / Import / Energy Force* (if the Tank GUID is present/correct) to identify the Tank and update the splits.

- **FTM-4119 / Energy Force Export Contract Booking GUID** – When including *Contracts* in the Energy Force export at *Energy / Transfers / Export / Energy Force*, the file now includes the Customer GUID and Booking GUID.

Grain

- **FTM-3996 / Grain Locations** – Only Grain Locations will be saved to the database when posting the DPR at *End of Periods / DPR Posting* or *Grain Reports / Daily Position Reports / Combined DPR/TPR* and using the *Update DPR* option.

Operations

- **FTM-3945 / Obligations** – In STLM, Obligations are now available under the *Operations* menu. Additional details regarding this feature and its setup are available **here**.
- **FTM-4026 / Edit Advance** – When an Advance is tied to a Purchase Contract, the Settlement Advance can now be edited and saved.
- **FTM-4162 / IL Priced Later** – The IL PLBF source reference numbers have been trimmed to 250 characters for Settlements.
- **FTM-3715 / Batch Print Purchase Contracts and Settlement Contracts** – A utility has been added under the *Operations* menu to *Batch Print Purchase Contracts and Settlement Contracts*. For more information, see **here**.

Grain Reports

- **FTM-4254 / Combined DPR/TPR Report** – Running the combined DPR/TPR report with *Commodity/Location* filters whether manually or with Load Sets/AgvAgent works as expected.

Setup

- **FTM-3858 / Grain Settlement Documents** – New options have been added on the *Location* tab at *Setup / Preferences*. These preferences have default values so they can be used from the API before the Grain application is deployed to an end user. To generate the Settlement document, it is part of the Settlement Contract endpoint. The *ToDPR* for this document is *Settlement Document* with anything being filled in for the contract. The API will return the Settlement number in that contract position.

Grain Scale Interface

- **FTM-3818 / RFID Recall Freight Vendor and Charges** – A new RFID preference is available when adding/editing RFID Readers at *Grain Scale Interface / Setup / RFID / Preferences* called *Recall Freight* to recall the Freight Vendor information for a previous RFID ticket. When this is set, the Vendor and rate are pulled in from the previous ticket of the same RFID.

- **FTM-3828 / RFID Auto Start** – When using RFID auto-start (*Auto Start Reader* is checked when adding/editing at *Grain Scale Interface / Setup / RFID / Readers*), the direction of the ticket currently being edited will not change just because a new ticket has been started by RFID auto-start on that same machine.

Hub

Setup

- **FTM-3808 / Sending Emails** – Everywhere that sends an email through API or Agvance Windows will now require the *Mail Host* and *Address* information be fully populated at *Hub / Setup / Company Preferences*. The Email Password on the User setup (adding/editing a User at *Hub / Setup / Users*) and in the *Format 2* area on the *A/P* tab at *Accounting / Setup / Preferences* have been removed. The *Email Address* on the User setup will only be used as a *Reply To* address. The *From* will ALWAYS be the email set up in Company Preferences. For those using Send Grid to send CRM emails (using CRM only), it can still be set up to use *agvancecrm@agvance.net* as the *From* address. As before, if this is not filled out, there is NO emailing inside the application.
  Note: To send any of the below options, the *Mail Host* and *Port* always needs set up for the items below and the User must be set up to send these. With this change, only the full *Mail Host* information at *Hub / Setup / Company Preferences* needs populated. Some will still require a User's email for the Reply To as before:
  - Agvance Reports (using *Send Email* when previewing)
  - AP PO Approver Emails
  - Windows Dispatch (completed job emails)
  - Purchase Orders (emailing to Vendors)
  - AP ACH (email notifications to Vendors)
  - Emails generated from AgvAgent for PDF output
  - Emails to Energy Drivers from Energy Work Order or Call-In option
  - Emails from Mobile Sales through the API
- **FTM-3838 / User Roles During End of Month** – A new feature has been added to the User setup (**Batch Assign Role** at *Setup / Users*). This allows for temporarily changing Users' Roles to one that is restricted, allowing the End of Month process to proceed. Once the month is closed, use this same tool to change the Users back to their original Roles. A specific list of Users can also be locked out so their Roles do not change.
- **FTM-4049 / Purchase Order Role Level Security** – A new preference was added to Role level security to hide Purchase Order costs when selecting a PO on a Purchase Receipt. The PR *Product* grid will also hide the cost of each line item and any cost warnings that should occur upon saving will be suppressed. This will be enforced when adding, editing voiding, returning, transferring in/out, and reprinting a Purchase Receipt.

Reports

- **FTM-3989 / Bar Code/Price Labels Report** – All bar code reports at *Hub / Reports / Product Reports* with a *Label Type* of *Perf Card SL 12X3* now include the bar code.

Utilities

- **FTM-3980 / Transfer to Field History** – The Transfer to Field History utility at *Hub / Utilities* will load in memory the setup information per Location and group like transactions together by ticket to transfer more efficiently.

Mapping

- **FTM-3872 / MapShots Connections Database** – The API Connections database now contains a record to use as the BING Application ID. This value is currently the same as what is hardcoded and will remain until the new values are placed in that database. This gives the ability to publish the code change once the new key is obtained and update in one place to have all applications at or newer than this value pickup use the new key without needing another code change.

Warehouse

- **FTM-3662 / Open Purchase Orders** – Purchase Orders can now be used when adding a Product to an inbound record.
  Note: Including the PO number information in the BOL list in Agvance Accounting will be completed in a near future sprint.
- **FTM-3106 / Splits on Delivery Tickets** – Customer splits can be added to Delivery Tickets created in Warehouse.
- **FTM-3969, 4021, 4022 / Dept ID Search** – When searching for a Product from *Outbound*, *Inbound*, or *Inventory*, the Department ID shows in the Product list.
- **FTM-3070 / Product Search** – Product search has been enhanced to allow special characters including %, $, #, etc.