



# **Horizons International**

## **CFG/IPM Changes Documentation**

**Latest code compatible with GP 18 (2018)**

# CFG18 85 RTM 1.1 & CFG16 84 sp1

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CFG 84 RTM & SP1 is compatible with Dynamics GP 2016

CFG 85 RTM is compatible with Dynamics GP 2018 RTM

## New in this version:

**The job number on Configurator now updates the Job Number on Horizon Manufacturing work orders-** The Job Number for the Configurator is on the Go To - SOP Item Options window, and on the Process window when creating a work order. 8/12/2017 - PED 8839

**Added an option to the Configurator window to stop the 'Update Price' message every time the quantity of a Selected Item is changed.** 3/24/2017 - PED 8910.

**When work orders are created from the Configurator, the quantity can be split to create multiple work orders.** 8/1/2017 - PED 8956

**When creating work orders, Configurator will now use the BoM WIP Setup tables (Work Center Sequencing window) to create the components on the work order.** 9/27/2017 - PED 8969

## Resolutions

Small costs less than 1 dollar are not showing for items on the Selected Items list. 2/23/2017 - PED 8896

SOP notes going to a work order will now come directly fro the Sales Order, rather than depending on the Configurator to get them. 1/20/2017 - PED 8837

Getting a multi-currency error when trying to link a PO to a sales order using the Configurator PO Create utility. 4/24/2017 - PED 8920

Configurator Selected Item values changing when creating multiple orders from a SOP Quote. Triggers from Configurator were responsible for changing the information. 5/1/2017 - PED 8931

The Calculation Error report that prints after a work order is created from a Configuration giving an error - Error Accessing SQL Data. The report had an invalid field on it - Account Number - that is not in the table for the report. 11/16/2017 - PED 8995

# CFG 14 83 sp1 to 16 84 sp0 Issued 08-05-2016

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CFG 84 RTM is compatible with Dynamics GP 2016 RTM

CFG 83 RTM is compatible with Dynamics GP 2015 RTM

## New in this version:

**Added Do Not Ask option for messages to Configurator window** - Add option for "This Item has already been selected..." (Always Add) and "Do you want to remove all previously selected items?" in the Option ID field (Never). These have to be re-selected when the window is closed and opened again. Applies to CFG for 2015 & 2016.

**Added an option to CFG Setup to use the site from the SOP Line of the Configurator Item for the Selected Items list.** This does not apply to 'Item List' type Configurations. Applies to CFG for 2015 & 2016.

**Added a trigger to stop Items in GP Item Maintenance from being deleted if they are a part of a Configurator Option Setup.** Applies to CFG for 2015 & 2016.

**Added an Item Scrap Entry window to the Configurator Setup menu.** When an item is added to the Selected Items list, a scrap quantity will be added to the quantity entered for the item based on the percent entered in the setup window. Thus, if the quantity entered is 100 and the scrap percent is 5 then the quantity will be set to 105. Applies to CFG for 2015 & 2016.

**Added an Optional Items window to CFG that is accessible from the Configurator window Go To.** This is an alternate window to the Option tree on the Configurator window. The function of the new window is to list all of the items under the Option selected on the Configurator window and then allow a search to be done on those items. If the items in GP have a separator between segments of the item number, then the separator can be designated to default from CFG Setup and the find can be by segment.

## Resolutions

**Some dependency items not getting a quantity in the Configurator Selected List.** This was happening when more than one of the same item was selected from different Options. The code was to combine the quantity of the items, but this does not allow for the automatic deletion of

separate quantities when a linked item is deleted from the Configurator Selected List. The items will no longer be combined. Applies to CFG for 2015 & 2016. PED 8729.

# IPM 11 81 sp2-4 to 16 84 sp0 Issued 08-05-2016

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IPM 84 RTM is compatible with Dynamics GP 2016 RTM  
IPM 83 RTM is compatible with Dynamics GP 2015 RTM  
IPM 82 sp3 is compatible with Dynamics GP 2013 service pack 3 (R2)  
IPM 81 sp2-4 is Compatible with Dynamics GP 2010 service packs 2 to 4

## New in this version:

**Added Sales Territory as an option under Customer Class in IPM Setup** - The field Sales Territory in Customer Maintenance can now be used for pricing. It replaces the Customer Class in IPM pricing. Applies to IPM for 2015 & 2016.

**Added additional information fields to the Edit Currency Amounts window** - Added From and To Promo Dates, Base Price ID and Find fields at the top of the window. Applies to all versions.

## Resolutions

### Pricing

Override record not deleted when SOP line deleted - Resolved 3/8/2016 - Applies to all versions - PED 8777

Extended Price zeroing out when there is no IPM price and using Threshold Calculate - Applies to all versions - Resolved 5/1/2015 - PED 8730

Kits not pricing correctly with Threshold Pricing - Applies to all versions - Resolved 11/10/2015 - PED 8761

Promo records in Price List not using IPM price - Applies to all versions - Resolved 7/15/2015 - PED 8741

SOP Batch Update not working when not using Threshold Pricing - Applies to all versions - Resolved 6/4/2015 - PED 8737

# CFG 11 81 sp2-4 to 14 83 sp0 Issued 02-01-2015

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83 RTM is compatible with Dynamics GP 2015 RTM

82 sp3 is compatible with Dynamics GP 2013 service pack 3 (R2)

81 sp2-4 is Compatible with Dynamics GP 2010 service packs 2 to 4

## New in this version:

When a Configuration is a Kit type, more than 1 of the same component can now be added. PED 8703

Changed the question that asks a user if they want to add an item again when selecting from an option so that it is only asked if the item is added again from the same option. PED 8703

The Parent Option and Top Level Option are now tracked in the CFG SOP Deatil table (Selected Items). PED 8717

## Resolutions

New Configurator option for backordering is always BO even when No is selected - Resolved 11/4/2014 - PED 8688

# IPM 11 81 sp2-4 to 14 83 sp0 Issued 02-01-2015

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83 RTM is compatible with Dynamics GP 2015 RTM  
82 sp3 is compatible with Dynamics GP 2013 service pack 3 (R2)  
81 sp2-4 is Compatible with Dynamics GP 2010 service packs 2 to 4

## New in this version:

**Added new Price Break - Percent Discount** - This will multiply the percent entered on the Price Break times the result of the IPM pricing calculation, whether the pricing is from IPM or from GP. This will be a discount as - Unit Price minus (Unit Price times Percent Discount). The Assignment records are entered as Promotions with a date range and also are marked as In Addition To. These promotions are separate from other promotions, so that other promotions will still apply before the Percent Discount is applied. PED 8682

## Resolutions

If you have code dated after the Resolved Date then the fix is included in that code.

### Utilities

Bind Defaults window was not closing after completion of the process - Resolved 1/27/2014 - Applies to all versions - PED 8705

### Pricing

Markdown not staying when changing the quantity on an SOP line - Resolved 1/14/2015 - Applies to all versions - PED 8691

IPM In Addition To Promotions not working when there is only GP pricing - Resolved 9/19/2014 - PED 8672

SOP Total doubled when the Calculate button (for Threshold Pricing) is clicked more than once on the alternate SOP window - Resolved 8/1/2014 - Applies to all versions - PED 8664

Kit items not getting the IPM price. The option to base the Kit price on the components appears to not be used by the GP script IPM uses. We have discontinued using that option. The price will come only from GP pricing - Resolved 1/2/2015 - Applies to all versions - PED 8697

# CFG 11 81 sp2-4 and 12 82 sp3 Issued 07-01-2014

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## Resolutions

### Some of SOP Comment Missing from Work Orders- PED 8630

A user can type in a comment on a sales order line that is up to 500 characters. Only the first 160 characters were transferring to a work order.

# IPM 11 81 sp2-4 and 12 82 sp3 Issued 07-01-2014

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## Resolutions

IPM Threshold Pricing not showing correct amount with multi-currency - PED 8637

Threshold pricing was not included in past multi-currency updates. It is now included.

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# CFG 11 81 sp2-4 and 12 82 sp2 Issued 04/28/2014

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## New In This Version

**Backorder All Option in CFG Setup.** When a Configuration is saved the user will be asked to 'Backorder All' or 'Invoice Available'. Previous to this there was only the option to Invoice Available, but it was presented as Backorder All. There is also an option in CFG Setup to 'Always Backorder All Item Quantity', which will avoid the question when saving the Configuration. Backorder All now means exactly that - the Qty To Backorder field on the Sales Order line will be set to the quantity being ordered.

**Use HMS Component Sequence Number When Adding Components To Work Orders.** Components added to a work order from a Bill of Materials will now use the Component Sequence Number to sort the components. This happens when a Configuration is Processed and a HMS work order is the result.

## Resolutions

### Missing Messages error - PED 8604

Errors were coming up in CFG Router and other places that a message that should be shown was missing.

### CFG Router ID not copied to work order - PED 8592

When a different router is selected in the CFG Router window, the router ID is not copied to the work order created from CFG.

### Duplicate Master Numbers being created with some GP sales orders - PED 8623

This was happening if a user opened a different sales order than was linked on a Configuration and then the Configuration was saved.

### Router Time Entry Method not correct on work orders created from CFG - PED 8603

The method was not being copied from the CFG Router during the creation of an HMS work order.

Insert not working correctly with CFG Router - PED 8557

When another router is inserted into an existing CFG router the steps are reversed for the existing router that come after the inserted router.

# IPM 11 81 sp2-4 and 12 82 sp2 Issued 04/28/2014

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## New In This Version

**Auto Pricing for SQL.** This new module is designed to make it easy for any program that can call a SQL Procedure to get the IPM pricing or automatically recalculate a sales order in order to bring in the IPM pricing. This can be used by cash register or EDI programs. See the documentation under [IPM Auto Pricing](#).

**Threshold Pricing based on Selectable UofM.** Threshold pricing originally only used the Item Master Unit of Measure schedule to group items on a sales order. Now a Unit of Measure common to items can be used. Either the Selling Unit of Measure for items or the Unit of Measure on the sales order can be selected in [IPM Setup](#).

## Resolutions

### Incorrect Base Price Percent being used when using the IPM Price List on the SOP window

The Base Price percent is coming from the first record processed rather than the one that is selected for the price list record.

# CFG 11 81 sp2-3 and 12 82 spRTM

## Issued 03/28/2013

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### New In This Version

**Horizons code will now be distributed as a dictionary.** A chunk file will be included for new installations that has only the minimum code necessary to add info to the Dynamics set file. It will not contain any code to run the Horizons product. For new installations, load the CFIPInst.cnk chunk file, then copy the HZCFG-IP.DIC that is in the installation package to the GP directory and overwrite the install dictionary.

**Added 'Use SOP Price' to the Configurator window Price Method list** - When this is selected the price that is on the sales order line will be used as the price on the Configurator window.

**The '<<Add>>' button has been put back on the Configurator window for GP 12 (2013)** - This is necessary when using the Web Client because the double click feature of the Option Tree window does not work.

### Resolutions

Backorder Quantity allocations incorrect - PED 8378

The allocations were not correct when processing from the Configurator back to SOP

A manual change of the Configurator price was not being saved back to the sales order line - PED 8400

The SOP window was opening to a blank record after processing a Configuration to a work order - PED 8401

Selecting an option is changing the Create Type - PED 8418

An option can be set up to use a specified Create Type, but this should not overwrite the one on the Configurator window after the Configuration has been saved.

# IPM 11 81 sp2-3 and 12 82 spRTM

## Issued 03/28/2013

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**Added an option to IPM Setup to use the Requested Ship Date instead of the Document Date as the basis for setting the price.** - The Requested Ship Date on the SOP Line will be used instead of the Document Date on the SOP header.

**Added 'Distribute In-Addition Promotions To SOP Markdown' to IPM Setup** - This applies to In Addition promotions only. See help for the [IPM Setup window](#) for more information.

**Promotion records can now be marked to show only in the SOP Price List window** - This option is in the IPM Price Assignment windows. Mark the option 'Price List Only' when you want a promotion to be selected only from the IPM SOP Price List window, and not be automatically used by the IPM processes.

### Resolutions

#### Getting 'Price less than Cost' error only on SOP Returns - PED 8410

This was happening because Returns do not default a 1 for the quantity and thus a price was not being calculated until the user entered the quantity.