

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
3617	7/8/11 7:33 AM	Work Orders	Work Orders Without Invoice	Remove: -1 invoice#, Invoiced By, and Date Invoiced when changing the status of an invoiced zero amt work order.		Bill Baur	Complete	Important	Bill Baur	
3611	7/7/11 6:32 AM	Work Orders	Status Selection	If a work order has an amount, it should not be able to be marked "Invoiced/Cert Written" without an invoice or certificate.		Bill Baur	Complete	Important	Bill Baur	Mark
3603	6/23/11 6:55 AM	Invoicing	TERMS NET & BALANCE DUE	Update Invoice program to take into account the work order payment type. The display should not need to look at customer, or work order. The Invoice.Terms2 field should contain all information necessary: "COD" if cash or credit card; the NET# of days if being billed.		Bill Baur	Complete	Important	Bill Baur	Mark
3602	6/22/11 9:03 AM	Work Orders	Deleting Work Order	Do not delete work order comments when deleting work order.		Bill Baur	Complete	Important	Bill Baur	
3596	6/17/11 8:52 AM	Work Orders	Invoicing SS Work Order	If you say Yes to cancelling certificate, leave the WO status as "Invoiced/certificate written". If you say No to cancelling the certificate, then: leave the WO status "Open" if there are no active future time-slots; and "Scheduled" if there are.		Bill Baur	Complete	Important	Bill Baur	Mark
3595	6/17/11 6:51 AM	Schedule Board	Auto Refresh	Do not load series.		Bill Baur	Complete	Important	Bill Baur	Mark
3594	6/17/11 6:46 AM	Schedule Board	Time Concern	Load series upon Form_Load but do not load series upon refresh unless a change has been made to a series, the schedule bd layout, or if a series overlap is involved. Reload series with F5 and menu refresh.		Bill Baur	Complete	Important	Bill Baur	Mark
3593	6/17/11 6:39 AM	Certificates	Invoicing SS Work Order	If an SS work order is invoiced and if the certificate has not been started, we should ask if the certificate should be cancelled. If yes, then make the certificate inactive (AKA Cancel Certificate).		Bill Baur	Complete	Important	Bill Baur	Mark
3587	6/15/11 6:47 AM	Schedule Board	Drag-Drop	Leave appointments, occurrences, and WOTS marked as appointments unremoved, only move work orders.		Bill Baur	Complete	Important	Bill Baur	
3584	6/13/11 1:07 PM	Schedule Board	Time Concern	When adding a time-slot to a work order, draw the new slot without a refresh.		Bill Baur	Complete	Important	Bill Baur	
3583	6/13/11 6:59 AM	Schedule Board	Move Full Day	Redraw instead of refresh.		Bill Baur	Complete	Important	Bill Baur	
3580	6/9/11 3:32 PM	Time Concern	Schedule Board	Have drag-drop redraw the cell rather than do a screen refresh.		Bill Baur	Complete	Very Important	Bill Baur	
3579	6/9/11 7:09 AM	Scheduling Tool	PS, SS or Both	When over 20 FXs, allow the selection of SS only. I.e. the selection should override the "PS must be included" rule, not the other way around.		Bill Baur	Complete	Important	Bill Baur	
3578	6/9/11 6:55 AM	Jobs	Support Doc Tab	Implement the "Permit Letter" button.		Bill Baur	Complete	Important	Bill Baur	Carl M
3577	6/8/11 1:22 PM	SumHours	By PayCode/Job/Proj	Add full last name to display.		Bill Baur	Complete	Important	Bill Baur	Gary
3569	6/6/11 1:27 PM	View	Left Buttons	Pressing Invoice on left should open customer and continue on to the invoice.		Bill Baur	Complete	Important	Bill Baur	Carl M
3565	6/2/11 12:40 PM	Quotes	Pending Status	Enforce a rule that date sent cannot be blank when saving a quote with pending status.		Bill Baur	Complete	Important	Bill Baur	Mark
3553	5/24/11 2:01 PM	View	Locations Grid	Remove horizontal scroll bar, it covers the fourth row and is not needed.		Bill Baur	Complete	When you get to it	Bill Baur	
3549	5/23/11 1:47 PM	Maintenance	Changing Cust#	Include file name in the WO comment.		Bill Baur	Complete	Important	Bill Baur	
3548	5/23/11 11:26 AM	Certificates	Initial Actions	Answers from the initial action and final actions from the first cert sheet should default to following cert sheets.	Possible extension to FXF dat section. Discuss with Mark first.	Bill Baur	Complete	Important	Brett Straten	
3544	5/20/11 6:56 AM	Recent Activity	View Customer	Add ability to open in current window.		Bill Baur	Complete	Important	Bill Baur	Quicker
3540	5/18/11 8:44 AM	Certificates	Adding devices to the device list	When adding devices to the device list do not resort after you change device type. This causes the user to lose there place and refine where they were. Save, but do not do a resort.		Bill Baur	Complete	Important	Brett Straten	
3536	5/13/11 10:44 AM	Certificates	Batch Printing	If the location does not have a certificate contact reference =(i.e. scertcontact = 0), do not print the certificate during batch printing.	Fire official email/mailling will not be affected by this change.	Bill Baur	Complete	Important	Mark Birchmeier	Modification attached.
3532	5/11/11 8:59 AM	Quotes	When writing a quote from a certificate	show a popup window (non-modal) that has a flexgrid with details about the cert (cust#, Cust name, Loc#, Loc name, Cert #).	Then show in a flexgrid the details of any systems for which there are active deficiencies and/or recommendations (system #, system name, system type). Include info from cert body that pertain to the quotation: # of hours (question # 115), # of techs (question # 116), Ceiling height (question # 118), material required (question # 117), special equip required (question # 122), & site visit required (question # 101).	Bill Baur	Complete	Very Important	Mark Birchmeier	Also include a button in the quote that can bring up that window.
3528	5/9/11 11:29 AM	Comment	Track in logging table	changes to the follow-up date (including adding, modifying and deleting the follow-up date).		Bill Baur	Complete	Important	Mark Birchmeier	
3526	5/9/11 7:24 AM	Work Orders	SSSheet Mismatch Msg	Add system# and WO# to Email msg.		Bill Baur	Complete	Important	Bill Baur	
3525	5/6/11 1:19 PM	Work Orders	SS Print Ck Marks	Change print column selection from "Check All" to "Check All Systems Marked Due".		Bill Baur	Complete	Important	Bill Baur	
3513	5/4/11 12:10 PM	Contacts	Autobill & Location	Enable and disable contact menu selections as appropriate.		Bill Baur	Complete	Important	Bill Baur	
3508	5/3/11 9:59 AM	SumHours	Name	Reverse First Name and Last Name.		Bill Baur	Complete	Important	Bill Baur	Gary
3506	4/29/11 7:10 AM	View	Time Concern	Load only 5 records beyond the number of grid rows for each grid. Fully load only the specific grid being scrolled or sorted. If being sorted, then resort after load.		Bill Baur	Complete	Important	Bill Baur	Mark
3502	4/27/11 1:58 PM	Work Orders	Blank SC Work Order	Fill half blank page with lines.		Bill Baur	Complete	Important	Bill Baur	
3500	4/27/11 1:51 PM	Work Orders	Signature	Make all work order signatures uncondensed print.		Bill Baur	Complete	Important	Bill Baur	

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3499	4/27/11 1:49 PM	Tech Box	Display	Straighten buttons, add words "(Dot Matrix)" to print button.		Bill Baur	Complete	When you get to it	Bill Baur	
3493	4/21/11 6:56 AM	View	Time Concern	Put comments sort into SQL call instead of flexgrid - use autoinc desc.		Bill Baur	Complete	Important	Bill Baur	Mark
3492	4/21/11 6:51 AM	Work Orders	Dialog Messages	Remove unnecessary messages creating and editing work orders.		Bill Baur	Complete	Important	Bill Baur	Mark
3491	4/21/11 6:46 AM	Invoicing	PC Work Orders	Display message that PC work orders do not bring in FX statuses.		Bill Baur	Complete	Important	Bill Baur	User might think it's a bug.
3490	4/20/11 10:47 AM	Certificates	Repair Certificate From Quote	There is a new document variable for this type of quote - see attached Email.		Bill Baur	Complete	Important	Bill Baur	Mark
3486	4/18/11 11:36 AM	Certificates	SystemNumber	Restore .Sn to Fillins and QuesData tables.		Bill Baur	Complete	When you get to it	Bill Baur	
3484	4/14/11 3:59 PM	Maintenance	Fillins & Quesdata	Update data to make Fillins.sn and Quesdata.sn match CertSheet.sn. Put this update into MoveLoc.exe.		Bill Baur	Complete	Important	Bill Baur	The CertSheet link to Fillins & Quesdata is SheetNum. Sn would be useful for display.
3483	4/14/11 2:32 PM	Work Orders	SS Work Order	Add header popup menu on first and third columns to "Check All" and "Uncheck All".		Bill Baur	Complete	Important	Bill Baur	Nadine
3476	4/14/11 6:47 AM	View	Time Concern	Limit number of records when opening a customer.		Bill Baur	Complete	Important	Bill Baur	Mark
3474	4/12/11 8:48 AM	Customer	Structure	Remove Type "DateStruct" from Billadr.cls		Bill Baur	Complete	When you get to it	Bill Baur	Unused format (from DOS program).
3471	4/8/11 6:38 AM	Timesheet Wizard	Lock File	Wizard should check secure date for every update (lock changes out as soon as secure date is set).		Bill Baur	Complete	Important	Bill Baur	Gary
3470	4/8/11 6:29 AM	Work Orders	SC Work Order	Do not show "View Devices" or "Print Devices" in pop-up menu and give tool-tip explaining that multiple certificates are possible so that the user needs to see devices from the specified certificate.		Bill Baur	Complete	Important	Bill Baur	
3469	4/7/11 3:55 PM	Certificates	Repair Certificates	Give warning when adding or removing a system that corresponding work orders need to be manually updated.		Bill Baur	Complete	Important	Bill Baur	
3468	4/7/11 11:48 AM	Work Orders	System On SC WO	When there's an existing SC work order give possible conflict warning.		Bill Baur	Complete	Important	Bill Baur	Mark, Nadine, Gerry
3464	4/7/11 6:49 AM	Work Orders	Changing System on an SC Work Order	Allow SC work orders to have more than one system. When repair certificate is first created, include the same systems but	when user changes a system, give warning that for any corresponding certificates the systems will have to be manually updated. The reason is there may be multiple repair certificates as well as a regular certificate. The warning only has to be given once certificates for the work order exist.	Bill Baur	Complete	Important	Bill Baur	
3462	4/5/11 12:16 PM	Work Orders	SS Work Orders	Systems should be checked regardless of current SC work orders.		Bill Baur	Complete	Important	Bill Baur	Nadine
3461	4/5/11 10:12 AM	Reports	PS Budget Projection	Improve user interface.		Bill Baur	Complete	Important	Bill Baur	Mark
3460	4/4/11 3:35 PM	Vehicles	Secure Date	Have Time-sheet re-lookup the secure date for each update. (I.e. lock TimeDetail file as soon as secure date changes.)		Bill Baur	Complete	Important	Bill Baur	Gary
3459	4/4/11 1:13 PM	Work Orders	Signature Lines	See attached Email.		Bill Baur	Complete	Important	Bill Baur	Mark
3458	4/1/11 4:02 PM	Invoicing	PopUp Menu	Add selection "View Certificate" to invoices that show a certificate#.		Bill Baur	Complete	Important	Bill Baur	Mark
3457	4/1/11 2:27 PM	List Selected Work Orders	Add 3 Options	Add selection "Date Shipped/Complete"	Add "Last Month" button Add Checkbox for "Shipped/Complete & Invoiced"	Bill Baur	Complete	Important	Bill Baur	
3456	4/1/11 11:45 AM	Credit Card	CVV2 Field	Restrict to 4 digits for American Express.	Restrict to 3 digits for all others.	Bill Baur	Complete	Important	Bill Baur	Mark
3455	4/1/11 11:10 AM	Maintenance	Edit Invoice	Make all labels the same background color.		Bill Baur	Complete	When you get to it	Bill Baur	
3453	4/1/11 10:55 AM	Sales Book	"Other"	Give details when an invalid product code (Other) is encountered.		Bill Baur	Complete	Important	Bill Baur	
3452	4/1/11 7:39 AM	Sales Book	"Sales By Deliveryman"	Change heading to:	"Sales By Deliveryman / Job Engineer"	Bill Baur	Complete	Important	Bill Baur	Invoice.DelMan is also used for Job.Engineer
3447	3/30/11 12:05 PM	Contacts	Selecting Letter	Have check mark respond when you click in the white space next to it.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
3439	3/29/11 12:27 PM	Invoicing	Without Work Order	Clarify that inventory changes must be on a work order.		Bill Baur	Complete	Important	Bill Baur	
3433	3/25/11 6:38 AM	Invoicing	Credit Balance	Put the appropriate product codes into a dropdown for user to pick from.		Bill Baur	Complete	Important	Bill Baur	Mark
3429	3/24/11 7:07 AM	Certificates	Time Concern	When adding devices to certificate sheets, do not redisplay entire grid, just append.		Bill Baur	Complete	Important	Bill Baur	Rosa
3428	3/24/11 7:04 AM	General	DateChanged / ChangedBy	Add DateChanged and ChangedBy to all SQL update statements.		Bill Baur	Complete	Important	Bill Baur	Mark
3427	3/23/11 7:06 AM	Work Orders	Data Integrity Check	Include WO# and Invoice# in Email.		Bill Baur	Complete	Important	Bill Baur	
3425	3/22/11 8:05 AM	Popup Menu	Tech Box / Schedule Board	Put "View Customer" as top choice.		Bill Baur	Complete	When you get to it	Bill Baur	Tom W
3422	3/22/11 6:46 AM	Tech Box	Map Point	If address is not found, use latitude and longitude.		Bill Baur	Complete	Important	Bill Baur	
3421	3/18/11 4:03 PM	Tech Box	Appt Timeslots	Give user option to continue when multiple Appt slots exist with problematic warning.		Bill Baur	Complete	When you get to it	Bill Baur	

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3420	3/18/11 4:02 PM	Tech Box	Appt Timeslots	Give clear message that start time will be adjusted.		Bill Baur	Complete	Important	Bill Baur	
3419	3/18/11 3:59 PM	Tech Box	Appt Timeslots	Give message that it will be necessary to reimport travel times after renumbering rte numbers.		Bill Baur	Complete	Important	Bill Baur	
3418	3/18/11 11:21 AM	Maintenance	System Service Sheets	Indicate that data for sensors and indicators now come from the SysDevice file and disable their text boxes.		Bill Baur	Complete	Important	Bill Baur	
3417	3/18/11 11:18 AM	Maintenance	Certificate Sheet	Indicate to user the description on the certificate sheet comes from the sys svc sheet. Trim description spaces. Add "Test Data" to caption.		Bill Baur	Complete	Important	Bill Baur	
3415	3/17/11 3:41 PM	Recent Activity	Sort Order	Show in date-time descending order regardless of emp#.		Bill Baur	Complete	When you get to it	Bill Baur	
3414	3/17/11 3:39 PM	Recent Activity	Customer Activity	Automatically show activity upon form load.		Bill Baur	Complete	When you get to it	Bill Baur	
3409	3/16/11 1:41 PM	Work Orders	Credit Override	When the reason for a credit override is due to being on "Credit Hold" and the balance is under the limit, reiterate that the reason is "Credit Hold".		Bill Baur	Complete	When you get to it	Bill Baur	
3406	3/16/11 7:14 AM	Work Orders	SC Work Order Grid	Do not show the Due, Print, and Type columns.		Bill Baur	Complete	Important	Bill Baur	Mark
3405	3/15/11 7:47 AM	View	Comments	Add tooltips when mouse is dragged over support doc column.		Bill Baur	Complete	When you get to it	Bill Baur	
3404	3/15/11 7:38 AM	View	Recent Activity	Include schedule board changes. Add shortcuts Alt-F4 (close pgm) and Ct-D (reset forms to left corner).		Bill Baur	Complete	When you get to it	Bill Baur	
3402	3/14/11 8:32 AM	Jobs	Credit Extension Request	Add Booked Price to Email message.		Bill Baur	Complete	When you get to it	Bill Baur	
3401	3/14/11 7:34 AM	Quotes	Work Order Quote	Use option buttons instead of check box to cancel.		Bill Baur	Complete	When you get to it	Bill Baur	
3399	3/11/11 7:49 AM	Work Orders	Add Cancelled Label	For emphasis to cancelled WOs & WO Quotes.		Bill Baur	Complete	When you get to it	Bill Baur	
3398	3/11/11 3:54 AM	View	Hit List	See attachment.		Bill Baur	Complete	Important	Bill Baur	Mark
3397	3/10/11 6:47 AM	Quotes	Work Order Quote	Add prompt to cancel WO quote, and then add comment "WO Quote cancelled".		Bill Baur	Complete	Important	Bill Baur	
3396	3/10/11 5:47 AM	Work Orders	Work Order Quote	Add ability to cancel.		Bill Baur	Complete	Important	Bill Baur	Mark
3390	3/9/11 7:34 AM	Equipment	Active / Inactive Email	Add AB Scenario# and price allocation.		Bill Baur	Complete	Important	Bill Baur	Mark
3388	3/8/11 7:39 AM	View	Customer Activity	Remove from menu and add button to customer screen.		Bill Baur	Complete	Important	Bill Baur	Mark
3387	3/8/11 7:24 AM	Invoicing	Credit Balance	Indicate credit card charges.		Bill Baur	Complete	Important	Bill Baur	
3386	3/7/11 11:20 AM	View	Email Recipients	Read in recipients & codes from Dat file.		Bill Baur	Complete	Important	Bill Baur	
3385	3/4/11 2:58 PM	Jobs	Automated Email	At one point we enabled a feature that sends an email whenever an installation job has a work order added. Disable that feature (but keep the feature that sends an email when the job is first added).		Bill Baur	Complete	Important	Bill Baur	Mark
3382	3/1/11 1:12 PM	Maintenance	Move Location	Renumber FX#s.		Bill Baur	Complete	Important	Bill Baur	Mark
3381	3/1/11 1:04 PM	Equipment	Price Allocation	Allow for there to be a price allocation without an AB Scenario.		Bill Baur	Complete	Important	Bill Baur	Mark
3380	2/28/11 8:02 AM	View	Comment - Supporting Docs	Change drop window to a common dialog box and do not show box after the drag-drop. Add highlighting to drop row.		Bill Baur	Complete	Important	Bill Baur	Mark
3379	2/28/11 7:44 AM	Maintenance	Move Location	Create folders & move support docs for comments that are moved. (Comments are not linked to location, they are linked to work orders, quotes, invoices, and jobs so not all comments are moved).		Bill Baur	Complete	Very Important	Bill Baur	
3374	2/24/11 10:44 AM	Equipment	Email when equip inactivated/reactivated	When a piece of equipment that is on an active MA is made inactive, then email ma with details about the change.	When a piece of equipment is made active (except portables), then email ma with details about the change.	Bill Baur	Complete	Important	Mark Birchmeier	
3373	2/23/11 11:14 AM	Certificates	Cert Batch Printing	Add new column to indicate if there is a comment for that certificate. These will be saved in the comment table as Comment Type "CE" and saved with reference number of the certificate number. These will only be visible in the certificate batch printing for now (maybe in the certcover in the future...but let's hold off on that one).	To view comments or add comments, bring up a flexgrid with the datetime, comment, user's name (no follow-up date). Allow editing and individual comment deletion.	Bill Baur	Complete	Important	Mark Birchmeier	
3372	2/23/11 9:21 AM	View	List of who has looked at a customer lately	Just like the Recent Activity, but this is for a specific customer. Basically, it'll tell the user who has looked at the customer or the customer's stuff (invoices, jobs, certs, wos, etc.) within the last X # of days. The display will be the same as the recent activity but will be limited to that customer		Bill Baur	Complete	Important	Mark Birchmeier	

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3368	2/17/11 9:51 AM	View	Comment - Supporting Docs	1. Add column with paperclip icon in header in the comments section of the view screen (and in jobs)	2. Make comment grid a drop zone for supporting docs. 3. If item is dropped onto a comment, then create a supporting doc folder and copy that file to that supporting doc. Then add a paperclip icon to that comment's row. Do not create folder for that comment unless they have a supporting doc dropped into it. 4. Be careful of the amount of time spend checking for supporting docs. Only check to see if the folder exists for that comment. 5. If comment has supporting doc, then add right click menu item to view supporting docs and if double clicked on the paperclip icon, view the supporting docs. 6. When a comment's supporting doc view is closed, then check if it's empty. If so, then delete the folder.	Bill Baur	Complete	Very Important	Mark Birchmeier	
3367	2/17/11 9:44 AM	View	New Right Click Option	*Add Follow-Up*Add new comment with follow-up date 1 week from today for the correct type with the right clicked reference number.	Focus on Comment field in comment flexgrid.	Bill Baur	Complete	Important	Mark Birchmeier	
3364	2/17/11 4:37 AM	Work Orders	SS WO Grid	Show weekend warnings. Save FX & Hose count on SSSheet.	Show system removal warning re losing fill-ins. Show initiated, changedby tooltips if activated. Don't resize unless option is selected.	Bill Baur	Complete	Important	Bill Baur	
3363	2/16/11 7:17 AM	Scheduling Tool	Shortcut	Have doubleclick on service due go directly to customer.		Bill Baur	Complete	Important	Bill Baur	Mark
3361	2/15/11 6:49 AM	SumHours	Live/Test Data Reminder	Add		Bill Baur	Complete	Important	Bill Baur	
3359	2/15/11 6:17 AM	SumHours	Marketing Paycodes	Use only the following: 49, 50, 52, 53, 59, 67.		Bill Baur	Complete	Important	Bill Baur	Gary
3358	2/14/11 5:36 PM	Maintenance	Customer From Location	Renumber the systems.		Bill Baur	Complete	Important	Bill Baur	
3356	2/11/11 12:34 PM	Employee	Rename label of Beeper to Alternate	nobody uses pagers anymore, but many have alternate telephone numbers (personal cell, second home number, etc.).	Just rename the label (don't rename the field in the database) and rename any flexgrid headers accordingly. Also, the field doesn't save the hyphens like the rest of the telephone number fields.	Bill Baur	Complete	Important	Mark Birchmeier	NOTE: I tried to do this, but you introduced new dependency in the vbdirectories basic module that prevents a quick change.
3349	2/7/11 2:14 AM	AB Scenario	Tax Exempt	Send Email indicating AB needs exempt# and/or exempt date.		Bill Baur	Complete	Important	Bill Baur	
3342	2/2/11 8:06 AM	Maintenance	Create Cust From Loc	include moving files: PSEquip, SysDevice, and SysData.		Bill Baur	Complete	important	Bill Baur	
3341	2/2/11 8:04 AM	Work Orders	SS Work Order	Redesign systems display.		Bill Baur	Complete	Important	Bill Baur	Mark
3340	2/1/11 6:53 AM	Quotes	WO Quote	Save a pdf of the wo quote to the supporting docs when a WO Quote is converted to an actual quote.		Bill Baur	Complete	Important	Bill Baur	Mark
3336	1/28/11 9:23 AM	Quotes	Tracking via Quote/Sales Comment	Manual changes to: Date Sent, Date Sold, Date Requested.	Do not track when those fields are automatically populated for the first time (i.e. going from blank to today's date).	Bill Baur	Complete	Very Important	Mark Birchmeier	
3335	1/28/11 8:56 AM	Jobs	Unneeded Email Notification	Please only add the JobAdded email alert when the job is created. Right now it appears that when you add a second	quote to an existing job and mark that second quote sold, it is sending out the JobAdded email again. They only need to get an email about jobs created, not jobs amended.	Bill Baur	Cancelled	Important	Bill Baur	Brian P.
3334	1/27/11 10:35 AM	Location Address	Create customer from location	Create new customer and new location (do not move the location) with the address information from the location.Copy the systems for that location to the new location. Mark the previous location's comment as See Customer #####. Add comment to old and new customer detailing what was done. Inactivate the old location's systems.		Bill Baur	Complete	important	Mark Birchmeier	
3332	1/26/11 11:42 AM	View	Live/Test Data Reminder	Have the suppress msg flag span instances.	Add option to modify the suppress time.	Bill Baur	Complete	Important	Bill Baur	Mark
3329	1/25/11 12:03 PM	View	Live/Test Data Reminder	Add button to suppress msg for 5 minutes. Show msg after all data is retrieved.		Bill Baur	Complete	Important	Bill Baur	Mark
3322	1/21/11 4:06 PM	Schedule Board	Drag Drop	Add ability to move all the time-slots for a given day.		Bill Baur	Complete	Important	Bill Baur	Mike F.
3316	1/17/11 10:28 AM	Jobs	If Engineer for a job is changed	if the engineer is a person other than the person who made the change (this only happens when the engineer is changed or when the job is first saved), then send an email to the engineer with info about the job. Job Info: Job#, Cust#, Cust Coname, Loc#, Loc Coname, Loc City, Loc State, Job Brief Descip.	Also, when the "JobAdded" email is sent out, the "Job Info" above should also be included in that email too.	Bill Baur	Complete	Important	Mark Birchmeier	
3312	1/13/11 7:03 AM	Tech Box	Calculate Route	Readjust time slots to place an appointed time slot at its appointed time.		Bill Baur	Complete	important	Bill Baur	
3311	1/12/11 10:44 AM	FX Menu	View Recently viewed customers	List of FX comments that indicate which customers (or work orders or certificates) have been viewed recently by a specific person. All to go to that customer/wo/cert/etc. directly.		Bill Baur	Complete	Important	Mark Birchmeier	
3310	1/12/11 8:44 AM	Equipment	Cylinders	Highlight on left click as well as right click, same as devices.		Bill Baur	Complete	When you get to it	Bill Baur	Tom W.
3307	1/10/11 11:40 AM	Reports	SS Projection	Put test data indicator in header.		Bill Baur	Complete	Important	Bill Baur	Mark

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3305	1/10/11 7:00 AM	View	Programmer Flag	Add Employee. Programmer flag and warn programmers when in live data; warn non-programmers when in test data.		Bill Baur	Complete	Important	Bill Baur	Mark
3303	1/7/11 9:46 AM	Certificates	List Certificates	List by cert# instead of by svcdte. New certificates do not have a svcdte.		Bill Baur	Complete	When you get to it	Bill Baur	
3302	1/6/11 4:02 PM	Schedule Board	Out & Alt Schedule Appts	The administrative supervisor should be given the message that these appts should be changed from the Time Sheet.		Bill Baur	Complete	Important	Bill Baur	Mark
3299	1/5/11 3:05 PM	Equipment	Device Grid	Have left mouse click as well as right mouse click highlight row.		Bill Baur	Complete	Important	Bill Baur	Tom W.
3297	1/5/11 10:29 AM	Location Address	Overwrite Question	Reimplement warning of a simultaneous edit by someone else.		Bill Baur	Complete	Important	Bill Baur	
3293	1/4/11 6:39 AM	Employee	Employee Holidays	Subcontractors do not get holiday pay.	Instead of just entering the time, we should get a list of active employees so we can uncheck the ones for which we don't want to add holiday pay (some people are part-time and don't get holiday pay). That same list could also indicate if they already have holiday pay entered.	Bill Baur	Complete	Important	Bill Baur	Mark
3292	12/23/10 10:19 AM	View	Trac Opening of Certificates and WO's	Just like opening of customers in the 'FX' comment type.		Bill Baur	Complete	Very Important	Mark Birchmeier	
3289	12/21/10 7:03 AM	Scheduling Tool	Service Due Revenue	Show revenue without auto-bill amount.		Bill Baur	Complete	Important	Bill Baur	Tom W
3288	12/20/10 8:08 AM	Scheduling Tool	Service Due Revenue	Show PS NFPA test and repair revenue.		Bill Baur	Complete	Important	Bill Baur	Tom W.
3284	12/16/10 7:15 AM	Work Orders	Payment Charge Type	Include in charge total.		Bill Baur	Complete	Important	Bill Baur	
3282	12/15/10 7:20 AM	Invoicing	Payment Charge Type	Show as part of charges paid on green frame.		Bill Baur	Complete	Important	Bill Baur	
3280	12/14/10 2:55 PM	Invoicing	Payment Charge Type	Recompile Invoice.exe.		Bill Baur	Complete	Important	Bill Baur	
3278	12/14/10 6:29 AM	Reports	PS Budget	Remove contract revenue (autobill total) from Sales Book Style display.		Bill Baur	Complete	Important	Bill Baur	Tom W
3277	12/13/10 6:42 AM	Invoicing	New Charge Type	Another payment charge type is needed for when an invoice is paid partly by check or cash and partly by credit card.		Bill Baur	Complete	Important	Bill Baur	Mark
3275	12/10/10 10:27 AM	Certificates	When marking a certificate closed	When marking a certificate closed	flag all followuprequired checkboxes as checked if the system is partially or non-operation or there are any unresolved deficiencies or recommendations (even if those are from a previous certificate).	Bill Baur	Complete	Very Important	Mark Birchmeier	
3271	12/8/10 7:13 AM	Reports	System Service	Add ability to generate revenue projections for future dates.		Bill Baur	Complete	Important	Bill Baur	Brett and Mark
3261	12/1/10 6:55 AM	Employee	Effective Charge Rates	Add additional warning to the calculate ECR function when the date is on or before the secured date.		Bill Baur	Complete	Important	Bill Baur	Gary
3260	11/29/10 3:12 PM	Scheduling Tool	Systems Box	Have Esc close systems box.		Bill Baur	Complete	When you get to it	Bill Baur	
3258	11/22/10 12:39 PM	Work Orders	Adding/Removing System	Do not warn about system being added or removed from certificate (this always happens now).		Bill Baur	Complete	Important	Bill Baur	
3256	11/22/10 11:02 AM	Work Orders	SS Work Orders	Create certificate when work order is created. Do not wait for scheduling.		Bill Baur	Complete	Important	Bill Baur	Mark
3254	11/17/10 10:36 AM	Certificates	Logging Batch Print	Add "LO" comments to batch printing and Emailing.		Bill Baur	Complete	Important	Bill Baur	Mark
3252	11/15/10 2:33 PM	Schedule Board	Inactive Employees	Stop displaying employees once they become inactive.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
3249	11/12/10 6:39 AM	Scheduling Tool	SC Work Orders	Systems on an open SC work order should also be excluded from service due.		Bill Baur	Complete	Important	Bill Baur	
3243	11/8/10 2:55 PM	Time Sheet	Holiday Automation	This feature will add the selected holiday (select from available future and recently passed holidays in the DAT) to all active employees. - Timedetail records for that day - ApptOccurrence records for that day	Make sure that the holiday isn't already entered. This feature should only be available to a couple of people. Maybe it's best to keep it in the employee program and only allow people with security to view social sec numbers to use it.	Bill Baur	Complete	Important	Mark Birchmeier	
3240	11/1/10 8:08 AM	Comments	Type "NE"	Remove blank "Ne" comments when frmJob and frmQteDisp unload.		Bill Baur	Complete	When you get to it	Bill Baur	
3239	11/1/10 6:49 AM	Scheduling Tool	Dedicated Service	Add ability to dedicate service to a tech without scheduling it.		Bill Baur	Hold	Important	Bill Baur	Mark
3237	10/28/10 2:51 PM	Location Address	Listing	Add Billadr.Coname field.		Bill Baur	Complete	Important	Bill Baur	Mike V
3236	10/28/10 11:13 AM	Fire Officials	Zipcode	Add MapPoint zipcode lookup.		Bill Baur	Complete	When you get to it	Bill Baur	
3235	10/28/10 11:12 AM	Fire Department	Zipcode	Add MapPoint zipcode lookup.		Bill Baur	Complete	When you get to it	Bill Baur	
3232	10/27/10 11:36 AM	New Cust/WO Wizard	WO Quote	Have WO Quote type come from the type of work order option.		Bill Baur	Complete	Important	Bill Baur	
3231	10/27/10 11:32 AM	New Cust/WO Wizard	Type Of Work Order	Associate product code choices with type of work order selected.		Bill Baur	Complete	Important	Bill Baur	

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3225	10/22/10 3:34 PM	Invoicing	Process Charges	Make left click copy field to clipboard.		Bill Baur	Complete	Important	Bill Baur	Mark
3224	10/22/10 2:59 PM	View	Tracking Customers	Add a type "FX" comment whenever someone looks at a customer.		Bill Baur	Complete	Important	Bill Baur	Mark
3223	10/22/10 12:19 PM	View	Time Concern	Optimize Company and Street text searches.		Bill Baur	Complete	Important	Bill Baur	
3221	10/21/10 3:10 PM	Equipment	Add New System	When more than one AB Scenario exists go directly to allocation grid scenario selection box.		Bill Baur	Complete	Important	Bill Baur	
3220	10/21/10 10:55 AM	Certificates	Batch Email	Itemize certificate Email format to be like the Invoice format.		Bill Baur	Complete	Important	Bill Baur	
3216	10/19/10 1:45 PM	Equipment	Adding New System	Remind user to setup the correct schedule time when the ship location indicates weekends or evenings.		Bill Baur	Complete	Important	Bill Baur	Mark
3214	10/19/10 11:01 AM	Maintenance	Work Order / Invoice	Log a work order comment when either customer# or location# is changed.		Bill Baur	Complete	Important	Bill Baur	Mark
3211	10/18/10 11:36 AM	View	Billing Address Look-Up	Add "Service Due" column.		Bill Baur	Complete	Important	Bill Baur	Mark
3209	10/15/10 9:39 AM	Jobs	Automated Email	to "JobAdded" whenever a new IN work order is created for a job OR a quote with a job number in it is marked as Sold.		Bill Baur	Complete	Important	Mark Birchmeier	
3208	10/14/10 3:17 PM	Quotes	Email Assigned Engineer	Email Assigned Engineer when changed.		Bill Baur	Complete	Important	Bill Baur	Mark
3207	10/14/10 1:27 PM	Work Orders	Tracking	Create a work order comment whenever user changes a system's type of service.		Bill Baur	Complete	Important	Bill Baur	
3206	10/13/10 8:37 AM	Maintenance	NearBy Invoice Utility	Add ability to enter different route points via an address vs latitude and longitude.		Bill Baur	Complete	Important	Bill Baur	Mark
3204	10/12/10 12:01 PM	Certificates	Certificates Start Screen	Add "Fire Depts" button under "Fire Officials" button.		Bill Baur	Complete	When you get to it	Bill Baur	
3198	10/8/10 1:09 PM	Quotes	Add "View Customer" button	that opens new session directly to that customer/location of the quote. (just like the one in the WO)		Bill Baur	Complete	When you get to it	Mark Birchmeier	
3186	10/6/10 7:25 AM	Equipment	AB Scenario #	Do not allow the adding of a system with a price allocation without an AB Scenario#.		Bill Baur	Complete	Important	Bill Baur	
3185	10/6/10 7:18 AM	Equipment	AB Scenario #	When text box is zero, the zero should disappear when got focus (to avoid 1 becoming 10).		Bill Baur	Complete	Important	Bill Baur	
3183	10/5/10 11:42 AM	Work Orders	when entering a work order line with a part number	if you erase the part number and switch fields, the part number reappears. There is no way to remove the part number without saving the work order, then editing the work order, then remembering which part number you wanted to delete, then right clicking on that part number, then selecting delete, and then confirming the deletion of that line. That's way too many steps to remove a simple little line.		Bill Baur	Complete	When you get to it	Mark Birchmeier	You could right delete.
3182	10/5/10 10:29 AM	Equipment	double click certificates	to open the certificate		Bill Baur	Complete	When you get to it	Mark Birchmeier	
3181	10/5/10 10:06 AM	Time Sheet	Sick "Out" Day	if a day is saved as an 8 hour sick day, automatically set the "Note" in the top flexgrid to "Out"		Bill Baur	Complete	Very Important	Mark Birchmeier	
3179	10/4/10 1:21 PM	Maintenance	Near By Invoice Utility	Incorporate office location.		Bill Baur	Complete	When you get to it	Bill Baur	
3178	10/4/10 9:56 AM	New Cust/WO Wizard	Total	Make subtotal work independently of tax.		Bill Baur	Complete	Important	Bill Baur	Mark
3177	9/30/10 7:38 AM	Scheduling Tool	Time Concern	Utilize Joins to reduce record set calls.		Bill Baur	Complete	Important	Bill Baur	
3175	9/29/10 6:42 AM	View	Time Concern	Make grids invisible while loading.		Bill Baur	Complete	Important	Bill Baur	
3173	9/28/10 6:57 AM	Customer	Time Concern	Combine queries into one recordset call.		Bill Baur	Complete	Important	Bill Baur	It took 95 seconds from Manalapan for typing "G" F4 to get a listing of all the companies that start with "G".
3171	9/24/10 2:53 PM	Scheduling Tool	Start Date	Change default service due start date to go back 10 years instead of 14 months.		Bill Baur	Complete	Important	Bill Baur	Mark
3170	9/24/10 2:25 PM	New Cust/WO Wizard	Radio Button	Add radio button to WO type that says "Do Not Create WO" This will disable all but the create customer and create customer & Quote buttons. This is redundant, but is there to help the user out to clarify what's happening.		Bill Baur	Complete	Important	Bill Baur	Mark
3169	9/24/10 2:23 PM	New Cust/WO Wizard	WO Line Menu	Add the right click drop down menu that you have in the regular WO lines. (such as inventory search).		Bill Baur	Complete	Important	Bill Baur	Mark
3167	9/24/10 3:47 AM	Location Address	Time Concern	Combine queries into one record set call.		Bill Baur	Complete	Important	Bill Baur	Mark
3161	9/22/10 6:54 AM	View	Time Concern	Add menu option not to show service techs on WO tab.		Bill Baur	Complete	Important	Bill Baur	
3160	9/21/10 2:49 PM	View	Time Concern	Add check box on location listing to bypass service due date and sales contact.		Bill Baur	Complete	Important	Bill Baur	It takes 77 seconds typing "Verizon" F9 from Manalapan with it checked and it takes 3 seconds without it.
3157	9/20/10 7:04 AM	New Cust/WO Wizard	Zip Code From MapPoint	Move zip code look-up option to the form that lists the zip codes.		Bill Baur	Complete	Important	Bill Baur	Mark
3156	9/20/10 7:02 AM	New Cust/WO Wizard	Add Button	Add creating WO Quote with Quote.		Bill Baur	Complete	Important	Bill Baur	Mark
3152	9/16/10 7:23 AM	New Cust/WO Wizard	Type of WO	Add selection: Sys Svc Call-In.		Bill Baur	Complete	Important	Bill Baur	Brett
3151	9/16/10 7:14 AM	New Cust/WO Wizard	Add Two Options	Create work order without invoice.	Create customer without WO or invoice.	Bill Baur	Complete	Important	Bill Baur	Brett
3149	9/16/10 6:40 AM	Zip Codes	New York City	Do not show list of zip codes when entering NYC (too many), it is easier for the user to simply enter the zip code.		Bill Baur	Complete	When you get to it	Bill Baur	Brett
3147	9/14/10 7:23 AM	Invoicing	NFPA Status	If user enters prod code "6" for "NFPA Tested", automatically change it to an "H".		Bill Baur	Complete	Important	Bill Baur	Mark

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3141	9/14/10 7:01 AM	Customer	Auto Bill Scenario	If Scenario# 1 does not exist, show the first active scenario instead of showing Scenario# 1 crossed out.		Bill Baur	Complete	important	Bill Baur	Mark
3140	9/10/10 3:06 PM	Maintenance	NearBy	Add hose count and icon.		Bill Baur	Complete	When you get to it	Bill Baur	
3139	9/10/10 2:27 PM	Sales Book	Invoice Grid	Add row highlighting on right click.		Bill Baur	Complete	When you get to it	Bill Baur	
3137	9/10/10 12:15 PM	Sales Book	Invoice Grid	Make grid width resize with form.		Bill Baur	Complete	When you get to it	Bill Baur	
3136	9/10/10 11:36 AM	Sales Book	Invoice Listing	Add Job#.		Bill Baur	Complete	important	Bill Baur	Gary
3134	9/10/10 8:44 AM	Certificates	Inserting Quote Id	Have button by Quote Id change to "Save" regardless if certificate is "Open" or "Complete".		Bill Baur	Complete	important	Bill Baur	Phil
3133	9/10/10 7:16 AM	Location Address	F9 Listing	Make grid width resize with form.		Bill Baur	Complete	When you get to it	Bill Baur	
3132	9/9/10 2:49 PM	Certificates	Follow-Ups	Add county to list.		Bill Baur	Complete	important	Bill Baur	Padraic
3131	9/9/10 1:11 PM	Location Address	F9 Listing	Add Sales Contact.		Bill Baur	Complete	important	Bill Baur	Tom W.
3128	9/8/10 9:12 AM	Certificates	Cylinder Device Grid	Cylinder Tare Weight shows in 2 columns, have one column update the other.		Bill Baur	Complete	When you get to it	Bill Baur	
3126	9/7/10 12:00 PM	Jobs	Progress Payment Button	Would create invoice based on the first invoice. Ask for amount of progress payment. List previous progress payments and their payment status. List balance as balance of all previous invoice?		Bill Baur	Hold	important	Mark Birchmeier	
3122	9/3/10 7:10 AM	FX Menu	Ship Location Shortcut	Change from Ctrl-L to F9.		Bill Baur	Complete	important	Bill Baur	Carl M.
3121	9/3/10 7:05 AM	Ship Location Listing	Add Column	Add next system service due date (already shows on FXView).		Bill Baur	Complete	important	Bill Baur	Carl M. - This is in order to see which systems are active.
3120	9/3/10 7:00 AM	Scheduling Tool	Show Systems	Auto populate upon check-box click and do not refresh once data is present.		Bill Baur	Complete	important	Bill Baur	
3119	9/2/10 1:36 PM	Invoicing	PC Work Order	Allow the manual resetting of FX statuses on PC work orders.		Bill Baur	Complete	important	Bill Baur	Normally FX statuses only apply to PS work orders.
3118	9/2/10 12:00 PM	Work Orders	button to update prices and costs	based on the PO for each line that has a part number in the po that references the work order number. Use internal markup for cost and work order markup for price.		Bill Baur	Complete	Very Important	Mark Birchmeier	
3117	9/2/10 10:42 AM	Jobs	Add Gross Profit & Net Profit	based on actual numbers in the jobs screen.		Bill Baur	Complete	important	Mark Birchmeier	
3116	9/2/10 9:50 AM	Work Orders	Qte Techs	Add tooltip indicating origin of tech names.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
3114	9/2/10 6:50 AM	Maintenance	Edit Invoice	Recompile to catch invoice updates.		Bill Baur	Complete	important	Bill Baur	Mark
3113	9/2/10 6:43 AM	Credit Card	Charges Display	Have grid resize with form.		Bill Baur	Complete	When you get to it	Bill Baur	
3109	8/31/10 11:21 AM	Certificates	In Cert Cover	New Right Click Option: "Update to Current System Price Allocation" This will be available for open certificates only and update the price allocation in the certsheets to the current price allocation.	Question for Bill: Do we also need to change the SSSheet's price allocation at the same time in the Work Order?	Bill Baur	Complete	Very Important	Mark Birchmeier	The allocation update routine updates both CertSheets and SSSheets linked to open certificates.
3107	8/31/10 6:58 AM	Invoicing	Pop-up Menu	Add Pop-up Menu: Email invoice, view WO, view Cust		Bill Baur	Complete	important	Bill Baur	
3106	8/30/10 12:47 PM	Work Orders	WO List	Add Total \$ to list.	Add Export to Excel functionality.	Bill Baur	Complete	important	Mark Birchmeier	
3105	8/30/10 7:28 AM	New Cust/WO Wizard	Line Item	Auto resize part description height.		Bill Baur	Complete	important	Bill Baur	Tom W.
3103	8/27/10 8:48 AM	View	Certificate Tab	Display quantity of systems rather than repeating each one.		Bill Baur	Complete	important	Bill Baur	Mark
3102	8/27/10 7:14 AM	Scheduling Tool	System Types	Option to show systems on service due grid.		Bill Baur	Complete	important	Bill Baur	Gerry
3100	8/26/10 8:17 AM	New Cust/WO Wizard	Customer Source	When we get a counter customer, can we please ask them how they heard about us and use the drop down box and select the appropriate customer source.		Bill Baur	Complete	important	Bill Baur	Brett
3098	8/25/10 11:10 AM	Work Orders	PS Printout Header	Remove second underline under header and put one on top.		Bill Baur	Complete	When you get to it	Bill Baur	
3097	8/25/10 11:08 AM	Reports	PS Projection	Do not show page breaks or print lines between FXs.		Bill Baur	Complete	important	Bill Baur	
3095	8/25/10 11:04 AM	Work Orders	Portables	Create 3 blank lines for "FXs Picked Up;" instead of 1.		Bill Baur	Complete	important	Bill Baur	Gene M.
3090	8/24/10 7:15 AM	Reports	PS Projection	Include discounts when using base-line pricing.		Bill Baur	Complete	important	Bill Baur	
3087	8/23/10 8:27 AM	New Cust/WO Wizard	F3 Shortcut	Do not trigger "Please enter state" when pressing F3 before entering address.		Bill Baur	Complete	important	Bill Baur	
3086	8/23/10 7:03 AM	Maintenance	Move Location	When more than one location is involved, duplicate customer's credit card.		Bill Baur	Complete	important	Bill Baur	Mark
3074	8/19/10 6:43 AM	Maintenance	NearBy	Utility to list invoices by date and distance.		Bill Baur	Complete	When you get to it	Bill Baur	
3072	8/17/10 2:11 PM	New Cust/WO Wizard	Order of Events	Check credit card processing before marking shipped/complete.		Bill Baur	Complete	When you get to it	Bill Baur	
3071	8/17/10 2:09 PM	Sales Book	From Invoice Program	Add "View Work Order" to pop-up menu.		Bill Baur	Complete	When you get to it	Bill Baur	

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3070	8/17/10 2:05 PM	FX / Invoice	Customer, Credit Card, Process Charges, Work Order	Make credit card background red if expired.		Bill Baur	Complete	Important	Bill Baur	
3068	8/17/10 7:56 AM	Inventory	Remove REPLACE statements in FX4	change to direct update statements		Bill Baur	Complete	Mission Critical	Mark Birchmeier	
3062	8/16/10 6:46 AM	Invoicing	Highlight & Go To	Add highlight and then go to ability to Invoice header for customer# and WO#; and to Invoice# for applicable work orders.		Bill Baur	Complete	When you get to it	Bill Baur	
3061	8/13/10 8:36 AM	Credit Card	Credit Card Processing	Right Click copy option for all fields in drop down menu		Bill Baur	Complete	Important	Mark Birchmeier	
3060	8/13/10 8:26 AM	Customer	New Cust/WO Wizard	When asked if you should wait for credit card processing and you click Yes, then the WO's status should be set to Open instead of Shipped.		Bill Baur	Complete	Very Important	Mark Birchmeier	
3058	8/12/10 12:22 PM	Equipment	Add 5 year inspection type to hydrants	ensure that the routine that determines inspection type properly account for > annual inspection intervals.		Bill Baur	Complete	Important	Mark Birchmeier	
3057	8/12/10 6:42 AM	Invoicing	PC Work Orders	If the FX status being corrected is in the PSEquip file, then update (clear) that status.		Bill Baur	Complete	Important	Bill Baur	Mark
3056	8/11/10 12:13 PM	Scheduling Tool	Systems Pop-Up	Show Total Man Hours.		Bill Baur	Complete	Important	Bill Baur	
3052	8/9/10 5:47 PM	Work Orders	Changing Payment Type	When changing from credit card to another payment type, inform the user if there are existing charges (processed and unprocessed) and what to do about them.		Bill Baur	Complete	Important	Bill Baur	
3051	8/9/10 10:41 AM	Certificates	Cert. Follow-up screen	It reloads whenever you view a certificate and then go back to the grid. This is an issue when you have custom sorted the grid. The sort is lost each time. Can we just refresh the one certificate line without refreshing the whole grid?		Bill Baur	Complete	Important	Mark Birchmeier	
3048	8/6/10 1:24 PM	Credit Card	Processing Screen	Disable Escape key closing. It can make you lose data.		Bill Baur	Complete	Very Important	Mark Birchmeier	
3047	8/6/10 1:00 PM	Schedule Board	Installation	Do not enable Revenue Tool-Tip for Installation view (it does not apply).		Bill Baur	Complete	When you get to it	Bill Baur	
3046	8/6/10 11:48 AM	Work Orders	PS Scheduled WOs	When cancelling new work order, ask if the FX statuses should also be cleared.		Bill Baur	Complete	Important	Bill Baur	
3040	8/4/10 7:47 AM	Certificates	Deficiency & Recommendation Count	Have tab caption display the number resolved instead of total number.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
3030	7/30/10 3:02 PM	Utility	Credited Invoice#	Create utility to copy credit Inv# from line items.		Bill Baur	Complete	Important	Bill Baur	
3026	7/29/10 11:51 AM	Sales Book	Discrepancy	Put a star in the Total row if any of the line items have a star.		Bill Baur	Complete	Important	Bill Baur	
3022	7/27/10 9:28 AM	Customer	New Customer	Default non NJ, NY customers to Tax Exempt with reason being "Out of State".		Bill Baur	Complete	Important	Bill Baur	
3021	7/26/10 1:31 PM	Invoicing	Process Charges	Show date processed when exists instead of date held. Do not show autoinc.		Bill Baur	Complete	Important	Bill Baur	
3020	7/26/10 9:28 AM	FX Entry	Up / Down	Make up and down arrows function on text boxes.		Bill Baur	Complete	When you get to it	Bill Baur	
3019	7/26/10 8:42 AM	Invoicing	Minimum Amount	For non-autobill customers, query the user when the subtotal is below minimum and recommend that the minimum be used.		Bill Baur	Complete	Very Important	Bill Baur	Only for PC, PS, and SC WOs. Does not apply to the new customer wizard.
3017	7/23/10 10:07 AM	Contacts	Follow-Up Report	Add righth click options for (when appropriate): View Quote, View WO, View Invoice, View Job	Also, open customer for which the item is opened.	Bill Baur	Complete	Important	Mark Birchmeier	
3012	7/14/10 7:12 AM	Invoicing	Payment By Credit Card	A more serious prompt needs to happen when saving an invoice that's not charged yet: "Create Credit Card Charge Now". If they say No, then remind them that the credit card will not be charged if a charge is not created, and ask again.	If they say no, then send them an email reminder that an invoice has been created but the credit card has not been charged. That way they know it 3 times that they missed a step (if it was an accident).	Bill Baur	Complete	Important	Bill Baur	Mark
3005	7/8/10 10:22 AM	Certificates	Close Certificate	When repairs are filled out (fillin 100) only ask user if they want to invoice the work order if it is not already invoiced.		Bill Baur	Complete	Important	Bill Baur	Nadine
3001	6/30/10 12:33 PM	Credit Card	Loading	Skip over inactive cards when first loading.		Bill Baur	Complete	Important	Bill Baur	
2998	6/30/10 6:48 AM	Work Orders	PS WO	Have Work Order Details begin on a new page apart from FX details.		Bill Baur	Complete	When you get to it	Bill Baur	
2997	6/30/10 6:45 AM	Work Orders	PS WO	Sum FX Total. and Line item total. to be Grand Total.		Bill Baur	Complete	Important	Bill Baur	
2991	6/22/10 6:48 AM	Tech Box	Message Box	Add scroll bar and exit button.		Bill Baur	Complete	When you get to it	Bill Baur	
2989	6/21/10 2:07 PM	Jobs	Move Job Utility	1. This would move a job and all associated items to a new customer and/or location (it could be moved to a different location within the same customer). The following will need to be moved accordingly: Job, Quotes, WO, WOTS, Inv, Pos, Comments	2. Make a comment in the old and new job about the move. 3. Inform the user that they will need to move the system(s), if applicable, manually. 4. This feature would be a selection from within the job itself.	Bill Baur	Complete	Very Important	Mark Birchmeier	This was previously done in File Maintenance, the only change is now you can access this from the Jobs screen in FX4. POs do not contain customer or location #s and so do not apply.

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2988	6/21/10 1:57 PM	Counter Customer Wizard	Add a new wizard to FX4 that allows quick entry of Counter Customers	1. The purpose of this is to quickly process a one-time customer at the counter. 2. Use the WO screen as a basis for this screen. 3. From this single form you will be able to enter: a. Customer info: Company Name, address, Phone, fax b. Contact info: Firstname, lastname, cell phone, email c. Payment Info (do not include Bill Client) including charge records for the credit card. d. Tax exempt data e. Tax Rate f. AFP Part #'s g. F3 functions	4. A single button at the bottom will say "Create Customer, WO & Invoice" 1. This button will create the customer, location, contact, work order, and invoice associated with the work order. 2. Then the customer will be opened FX4view and the invoice will be displayed on the screen (ready to print).	Bill Baur	Complete	Very Important	Mark Birchmeier	
2986	6/21/10 1:49 PM	Invoicing	Add Credited Invoice #	This new field in the invoice table will show the number of the invoice that is being credited.	This number will automatically be added to the invoice when you click on the "Create a Credit Invoice from an Existing Invoice" button	Bill Baur	Complete	Important	Mark Birchmeier	
2983	6/10/10 10:01 AM	FO List & FD List	Inactive Records	Indicate by grey background instead of the word "Inactive".		Bill Baur	Complete	When you get to it	Bill Baur	
2980	6/9/10 11:27 AM	Certificates	Extra Quotes	Create function to replace non-comma delimiters with commas.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
2978	6/9/10 10:04 AM	Fire Department	Menu	Add "E-Mail" to selection list.		Bill Baur	Complete	When you get to it	Bill Baur	
2977	6/9/10 9:21 AM	FX Menu	Fire Officials & Fire Depts	When "Always go to list" check box is checked, bypass form and go directly to listing.		Bill Baur	Complete	When you get to it	Bill Baur	
2975	6/9/10 6:52 AM	Customer	SS & EQ Discounts	Remove (make invisible) as these discounts are unused.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
2974	6/9/10 6:50 AM	Invoicing	PS Discount	Apply discount last, after minimum billing function.		Bill Baur	Complete	Important	Bill Baur	Tom W
2973	6/9/10 6:48 AM	Invoicing	Minimum Charge	When customer is auto billed, give warning that minimum charges do not apply.		Bill Baur	Complete	Important	Bill Baur	
2972	6/8/10 2:17 PM	Customer	When adding a new customer	(in case I didn't mention this before...here it is):	Default the rating to "none" if no rating is selected (don't automatically select it, but if the person doesn't select one, then just set it as none.)	Bill Baur	Complete	When you get to it	Mark Birchmeier	
2971	6/8/10 6:32 AM	Certificates	Portables	Suppress status field for portable systems.		Bill Baur	Complete	Important	Bill Baur	Mark
2968	6/7/10 9:05 AM	Fire Department	Comments	Add F2 Shortcuts.		Bill Baur	Complete	When you get to it	Bill Baur	
2967	6/6/10 8:46 AM	Fire Officials	Comments	Add ability to delete, print grid, and log comment changes.		Bill Baur	Complete	Important	Bill Baur	
2966	6/6/10 8:44 AM	Fire Department	Comments	Add ability to delete, print grid, and log comment changes.		Bill Baur	Complete	Important	Bill Baur	
2965	6/4/10 1:46 PM	Maintenance	File Maintenance	Remove unneeded utilities from menu.		Bill Baur	Complete	Important	Bill Baur	
2964	6/4/10 9:44 AM	Employee	Extensions Report	Add to Options menu.		Bill Baur	Complete	When you get to it	Bill Baur	
2963	6/4/10 9:31 AM	Maintenance	Move Location	Account for new field: Shipadr.FDNum.		Bill Baur	Complete	Important	Bill Baur	
2959	6/3/10 6:56 AM	Work Orders	Portables	Separate out discount from in each line item and put by the sub-total.		Bill Baur	Complete	Important	Bill Baur	Mark
2958	6/3/10 6:48 AM	Reports	PS Budget / Projection	Remove minimum billing from auto bills.		Bill Baur	Complete	Important	Bill Baur	Mark
2955	5/28/10 9:11 PM	View	Change Customer West Paterson Mailing Addresses	West Paterson is now Woodland Park. Change all West Paterson addresses to Woodland Park		Bill Baur	Complete	Important	Susan Straten	
2950	5/28/10 6:59 AM	Fire Department	Listing	Change FirstName LastName to FireDeptName in list and in sort selection.		Bill Baur	Complete	Important	Bill Baur	Mark
2944	5/25/10 7:14 AM	Fire Officials	List	Change from a "Start" entry to a "Find" entry.		Bill Baur	Complete	Important	Bill Baur	
2943	5/25/10 7:14 AM	Fire Department	List	Change from a "Start" entry to a "Find" entry.		Bill Baur	Complete	Important	Bill Baur	
2942	5/24/10 6:56 AM	Certificates	Fire Dept	Reroute user to select shipping location fire dept when closing a certificate if it was never selected.		Bill Baur	Complete	Important	Bill Baur	
2935	5/20/10 8:09 AM	Work Orders	PS	Remove the line "Parts" from Totals section and add back:	Loaners left, "FXs Picked Up:", "Pickup confirmed-Cust Inits:___""Pickup confirmed-Cust Inits: " "	Bill Baur	Complete	Important	Bill Baur	Tom W
2932	5/19/10 7:07 AM	Location Address	Add Fire Department	Increase FO selection to include Fire Dept.		Bill Baur	Complete	Important	Bill Baur	Mark
2931	5/19/10 7:05 AM	Fire Department	New Form	Create independent form.		Bill Baur	Complete	Important	Bill Baur	Mark
2930	5/19/10 6:54 AM	Fire Officials	Fire Official Listing	Upgrade FO list from a list box to a vsf grid.		Bill Baur	Complete	Important	Bill Baur	Mark
2929	5/19/10 6:52 AM	Fire Department	List	Create Fire Dept grid.		Bill Baur	Complete	Important	Bill Baur	
2928	5/19/10 6:51 AM	New Tables	FireDept, FDOrms	Create Fire Dept table and Comments Table.		Bill Baur	Complete	Important	Bill Baur	Mark
2927	5/19/10 6:48 AM	Fire Officials	Add Field	Add LEAID field.		Bill Baur	Complete	Important	Bill Baur	Mark
2921	5/14/10 3:04 PM	Certificates	Marking Deficiency Resolved	Use service date on certificate sheet as the Resolved Date instead of Shipped/Complete date of work order (some systems get entered late) otherwise the deficiency will not show for late systems.		Bill Baur	Complete	Important	Bill Baur	Rosa

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2916	5/11/10 11:30 AM	Certificates	Extra Quotes	Apply CnLn validation.		Bill Baur	Complete	Important	Bill Baur	
2914	5/11/10 7:13 AM	Work Orders	Saving WO	Simplify warning when Job# belongs to a different cust#.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
2903	5/6/10 7:14 AM	Invoicing	Adding Fire Extinguisher	Use FX entry form instead of adding blank line to grid.		Bill Baur	Complete	When you get to it	Bill Baur	
2901	5/5/10 2:49 PM	Certificates	Prompt for invoicing of SS work orders	If a certificate is closed and any of the "repairs made to the system" have data entered (other than "none"), prompt the user that they should invoice for that material.	Offer to put all the repairs (1 line per system with repairs) in the WO lines of the WO and mark the WO as shipped complete instead of the certificate written so they can put in pricing and invoice the WO. Then open the WO.	Bill Baur	Complete	Very Important	Mark Birchmeier	
2895	5/3/10 7:06 AM	Work Orders	PS Equipment	Allow comment lines to be saved with FX records (FX entry with blank ExtType - PSEquip file.)		Bill Baur	Complete	When you get to it	Bill Baur	Tom W.
2888	4/28/10 9:57 AM	Reports	PS Projection Report	Reports > Production > Portable Service Currently there is a PS Budget button. This runs an algorithm that assumes all previous work has been completed. This function should remain. We should add a new button that says PS Projection that uses the same algorithm as the right click on the portable equipment.	The difference between the 2 is that the former calculates what will be due in the future. The latter calculates what is due right now (as if you created WO's right now for the specified customer or all customers). A tool tip should be added to each button: PS Projection: Report will show what work is currently due for all locations. PS Budget: Report will show future work that will be due in the date range selected and assumes that all work done before the selected start date has already been completed.	Bill Baur	Complete	Very Important	Mark Birchmeier	
2887	4/28/10 8:45 AM	Invoicing	Clear/Reset	Add Clear/Reset FX Pricing button.		Bill Baur	Complete	When you get to it	Bill Baur	
2883	4/23/10 7:16 AM	View	PS Projection & Work Order	Do not show the Maintained cost when it's less than the minimum service amount.		Bill Baur	Complete	Important	Bill Baur	Mark
2878	4/21/10 11:07 AM	Jobs	POs	1. Make sure that the customer's blanket PO does NOT get added to the job by default. 2. Make sure that the job's PO gets put on every WO created from that job. 3. Make sure that the WO's PO gets pulled from the WO to the invoices.		Bill Baur	Complete	Important	Mark Birchmeier	
2877	4/20/10 2:05 PM	Credit Card	Add to the credit card processing list	1. "Entered By" name (AKA Initiator) after the date entered column. 2. "PO#" from invoice.ponumber if invoice OR wo2.ponumber if WO. 3. Change expires date to MMY instead of MMYY.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2874	4/20/10 7:00 AM	Certificates	Batch Printing	Do not show certificate as "quote ready to print" (green) unless the extra quotes (when existing) are also ready.		Bill Baur	Complete	Important	Bill Baur	Phil
2872	4/19/10 6:41 AM	Reports	Production Projection	Add additional column to show total with sales tax.		Bill Baur	Complete	Important	Bill Baur	Tom W.
2868	4/19/10 6:35 AM	Quotes	PS Quote Projection	Change from production projection (by date) to work order projection.		Bill Baur	Complete	Important	Bill Baur	Mark
2863	4/15/10 12:06 PM	Credit Card	WO Priority	Only automatically change the WO's Priority to "Waiting for Credit Card Processing" for equipment wos.	All other WO's keep their regular priority when adding credit card payment.	Bill Baur	Complete	Very Important	Mark Birchmeier	
2861	4/14/10 3:06 PM	Comment	Add F3 functionality	in separate DAT, have an F3 function in all comment areas (view, jobs, quotes, equip) that looks up codes like WO lines' F3.	Dat.DatType = 'F3 Comment Key'	Bill Baur	Complete	Important	Mark Birchmeier	
2859	4/14/10 9:50 AM	Comments	Delete Follow-up dates	1. in jobs, right click option allowed in all columns if there is a follow-up date to make it easier to delete followup dated.	2. in FX4view, if you click on the comment grid the header's color changes to white. Please leave it as grey.	Bill Baur	Complete	important	Mark Birchmeier	
2856	4/12/10 9:22 AM	View	SS Effective Revenue	Make sure that it does NOT include division "A" invoices.		Bill Baur	Complete	Very Important	Mark Birchmeier	

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2847	4/7/10 3:05 PM	Equipment	AB Post Billed Inspections - Discuss With Mark First	1. Flag AB scenario as requiring inspection first (checkbox by Maint Agreement Type that says "Billed After System Inspections" 2. This will deactivate the billing interval and interval price. 3. We will do inspections as normal. 4. Add LastInvNumber and LastInvDate as fields to sseqip record. If LastInvDate < LastSvc (Date), then an invoice is required. 5. This information will appear on the Equipment record too and you will be able to open the invoice from the equipment screen.	6. Once an inspection is completed and a cert is closed, the LastSvc (date) will be updated in the sseqip record. The AutoBill program will invoice only those system whose inspection has been performed. This means that the AB invoice will only include those systems that were inspection, not necessarily all the systems that are on the AB scenario. 7. The AutoBill program will also update all sseqip LastInvNum and LastInvDate fields when AutoBills are created. 8. Effective revenue on the CertSheet will be the value of the inspected items (as it currently functions). 9. Effective revenue on the Invoice will read zero since A invoices are not included in effective revenue (as it currently functions).	Bill Baur	Cancelled	Very Important	Mark Birchmeier	-ALL systems will be on an AB scenario with a price allocation and will ALL be billed via the AutoBill program.-MB 4/12/2010
2843	4/6/10 2:28 PM	Various	Allow Override of CN/LN validation in certain areas	Certificate -> Quote	This override should still present a warning if the entered info (e.g. quote #) has a different customer # or location # than where you are entering the info (e.g. in a certificate)	Bill Baur	Complete	When you get to it	Mark Birchmeier	
2840	4/5/10 8:16 AM	Scheduling Tool	Right click Export to Excel option	Add option to top & bottom flexgrids. Export grid to Excel, then automatically open Excel.		Bill Baur	Complete	Important	Mark Birchmeier	
2830	3/29/10 10:06 AM	Invoicing	Cancel Invoice	Add To DeleteLog.		Bill Baur	Complete	Important	Bill Baur	Mark
2829	3/29/10 7:00 AM	Certificates	Quote Id	Allow saving -1. Parse and move quote from Extra Quotes field into Quote Id when zero.		Bill Baur	Complete	Important	Bill Baur	Mark
2828	3/26/10 2:25 PM	Schedule Board	Time-Slots	Add selection to popup menu to show schedule boxes for the day.		Bill Baur	Complete	Important	Bill Baur	Mark
2825	3/24/10 9:01 AM	Equipment	Cylinder Equipment & Certificate Changes	See attached Excel spreadsheet for new layout and discuss with Mark.		Bill Baur	Complete	Mission Critical	Mark Birchmeier	
2822	3/24/10 6:34 AM	Credit Card	Add Control Box Exit	Add easy exit without selecting.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
2819	3/18/10 11:02 AM	View	Add Contact Email Address Search	Add this to the drop down Search menu in FX4view.		Bill Baur	Complete	Important	Mark Birchmeier	
2818	3/18/10 9:37 AM	Tech Box	Cryptic Message	Change "Key not found" message to "Work order # not found".		Bill Baur	Complete	When you get to it	Bill Baur	
2812	3/17/10 11:46 AM	Equipment	Device List	Highlight current row for devices and cylinders.		Bill Baur	Complete	Important	Bill Baur	Tom W
2811	3/17/10 10:31 AM	Tech Box	Revenue Calculation	Include labor for quote WOs where Amount = 0.		Bill Baur	Complete	Important	Bill Baur	Mark
2808	3/17/10 9:17 AM	Invoicing	PS Efficiency	see SOW in H:\Computer\Projects\Current Projects\PS Efficiency		Bill Baur	Complete	Mission Critical	Mark Birchmeier	Up'd to Mission Critical 3/24/10 - MB
2806	3/16/10 9:07 AM	Quotes	Over Limit	Only send credit warning emails if a quote is marked SOLD.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
2805	3/15/10 6:53 PM	Quotes	New Instance	Instead of error message "Form already Displayed"; open a new instance.		Bill Baur	Complete	Important	Bill Baur	
2803	3/15/10 1:07 PM	Jobs	1st IN WO on a Job	If you click Create Installation Work Order and this will be the first WO on a job, then add the text and dollar amount from the first quote (if exists) linked to the job in the IN WO lines		Bill Baur	Complete	Important	Mark Birchmeier	
2801	3/12/10 1:28 PM	Fire Officials	Border Style	Show text box borders with white background in edit mode.		Bill Baur	Complete	When you get to it	Bill Baur	
2798	3/12/10 7:06 AM	Tech Box	Revenue Calculation	Calculation should only use wo total and not the quote total.		Bill Baur	Complete	Important	Bill Baur	Mark
2797	3/12/10 7:04 AM	Tech Box	Revenue Calculation	A WO Quote is now defined by LineDesc Like "Quote Id%" instead of by QuoteId > 0.		Bill Baur	Complete	Important	Bill Baur	Mark
2790	3/10/10 12:23 PM	Jobs	Job Limit Change	While a comment should still be entered, if a person lowers the credit limit of a job, then we don't need to send out the automated email.		Bill Baur	Complete	Important	Bill Baur	Mark
2787	3/10/10 10:18 AM	Work Orders	Credit Card Cust# Warning	Add WO# / Invoice# to cust# discrepancy warning.		Bill Baur	Complete	Important	Bill Baur	Mark
2786	3/9/10 1:40 PM	Work Order Time Slot	Hrs Over The Limit	Only give warning when the hours push the override to a new level.		Bill Baur	Complete	Important	Bill Baur	
2784	3/8/10 4:17 PM	Jobs	when adding a quote from a job	add a comment like when adding a quote from FX4view.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2783	3/8/10 10:48 AM	Location Address	indicate on location form if the...	fire official received communications via email (with the envelope graphic, as with other contacts).		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2782	3/3/10 7:34 AM	Work Order Time Slot	Over The Limit Warning	The over the limit calculation should not include labor from Quote WOs i.e. WOs having a "Quote Id ... Amount" line item.		Bill Baur	Complete	Very Important	Bill Baur	Mark

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2781	3/3/10 7:24 AM	Work Orders	Disable Delete	Disable Delete once work order is marked Shipped Complete.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
2779	3/2/10 1:26 PM	Work Orders	WO & Budget #'s for Portables	1. The algorithms for both PS work order (in terms of hydro and 6-year dates) AND the PS projection need to work identically. 2. To be done as soon as possible for both the PS WO and the PS Projection:	For annual inspections: If the hydro or 6-year is due during that calendar year, then mark it as being needed If the service is being performed in the 4th quarter (October, November, & December) then also mark the extinguishers due the first quarter of the following year (January, February, March). For all other inspections: If the hydro/6-year is due during that month, then show that extinguisher as needing to be done.	Bill Baur	Complete	Very Important	Mark Birchmeier	I would like a tutorial on how you are using the algorithm and how it works. Can you please take some time to detail it out, including source code for me. -MB
2772	3/1/10 3:56 PM	Work Orders	Zero Price Message	Turn off after 5 secs.		Bill Baur	Complete	Important	Bill Baur	Mark
2771	3/1/10 3:54 PM	Work Orders	Hrs Over Limit Warning	Add WO comment with warning.		Bill Baur	Complete	Important	Bill Baur	
2770	3/1/10 10:37 AM	Invoicing	It appears as though when you add lines to an invoice	and they get added back to the WO, the inittatetime is zero. Is this intentional?		Bill Baur	Complete	Important	Mark Birchmeier	
2769	3/1/10 10:34 AM	Work Orders	Credit Override	If a WO is invoiced, then time is added/adjusted to the WO, the credit override message is not needed (and it's too late since the WO was already invoiced). Otherwise, we would be counting the invoice total + the WO total against the available credit.		Bill Baur	Complete	Very Important	Mark Birchmeier	
2768	3/1/10 8:59 AM	Certificates	Multiple Quotes	Add comma separated option to quoteid in certcover sheet. That way, if multiple quote #'s need to go with the certificate, they can all be listed manually here (separated by commas).	This also means that the printing routine needs to account for multiple possible attachments for different quotes.	Bill Baur	Complete	Important	Mark Birchmeier	
2763	2/25/10 1:59 PM	Jobs	When secondary job quote is marked sold	this applies only to quotes that already have a job number assigned to them (meaning they are quotes for existing jobs). If the job's booked price is not equal to the sum of all the sold quotes (including the one you just marked as sold), ask the user if the booked price should be updated to include the newly sold quote.	Then, run the routine on available credit versus the job's booked price to see if you should prompt the user to request additional job credit and present them with the same request additional job credit screen as when the job is first saved.	Bill Baur	Complete	Very Important	Mark Birchmeier	
2758	2/23/10 12:16 PM	Certificates	Batch Processing	Highlight row for pop-up menu and prompts.		Bill Baur	Complete	Important	Bill Baur	
2755	2/23/10 6:44 AM	Tech Box	Pop-up Menu	Have pop-up menu work on the duration rows below the work order row as well.		Bill Baur	Complete	When you get to it	Bill Baur	
2751	2/22/10 9:08 AM	Scheduling Tool	Bold Near-By	Add bold feature to tech box.		Bill Baur	Complete	Important	Bill Baur	Roland
2747	2/18/10 11:14 AM	Scheduling Tool	Mouse Wheel	Need a way to reactivate service-due grid scroll wheel after clicking on the schedule board, without re-clicking on the grid. (Re-clicking on grid resets bolded items selected from schedule board.)		Bill Baur	Complete	Important	Bill Baur	Set it up so you can click on either service-due frame or button frame to reactivate scroll wheel.
2746	2/18/10 10:52 AM	Jobs	Credit Request Message - Add New Info	Show the next 3 months worth of anticipated AB invoicing per the AB Scenarios for that customer. Do not include that in the calculation, just display the info in the message box and email message.		Bill Baur	Complete	Very Important	Mark Birchmeier	
2745	2/18/10 9:50 AM	Invoicing	Order & Shipped Dates	Add ability to delete.		Bill Baur	Complete	When you get to it	Bill Baur	
2743	2/18/10 6:52 AM	FX4.4	Release	Update all FX4s and all active VBDirs.ini files.		Bill Baur	Complete	Very Important	Bill Baur	Mark
2739	2/17/10 12:37 PM	Scheduling Tool	Split Screens	Add ability to put the work order window on a different monitor from the service due window.		Bill Baur	Complete	Important	Bill Baur	Bryan L
2738	2/17/10 10:09 AM	Equipment	PS Status Updates - during invoicing	When using Replace New or Replace Spare in the PS or PC invoicing, update both the extinguisher's Last 6-year (if they type of FX gets a 6-year) and Last Hydro to today's date.	PS Invoice ID's: 11, 12	Bill Baur	Complete	Very Important	Mark Birchmeier	
2735	2/10/10 4:06 PM	Schedule Board	Drag-Drop	Add duration to the work order change time-slot comment.		Bill Baur	Complete	Important	Bill Baur	
2732	2/5/10 6:33 AM	Application	Credit Card Charges	Write routine to copy the invoice and work order charges to the Charge file.		Bill Baur	Complete	Very Important	Bill Baur	Mark
2731	2/4/10 8:40 AM	Invoicing	Order Date	Change from Date Time Picker to label.		Bill Baur	Complete	When you get to it	Bill Baur	
2729	2/3/10 9:45 AM	Work Orders	Reset Prices	Create comment whenever mark-up is changed or prices are reset.		Bill Baur	Complete	When you get to it	Bill Baur	
2726	2/2/10 2:07 PM	Equipment	double click on Inspection History item	opens certificate		Bill Baur	Complete	When you get to it	Mark Birchmeier	Added additional pop-up menu item: "View Certificate Devices" and made double click open device sheet instead.
2722	2/1/10 1:01 PM	Reports	Add printer selection box	to the past due reports screen. if "Fax" then give serious warning message because that sucks.		Bill Baur	Complete	Very Important	Mark Birchmeier	

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2715	1/27/10 3:43 PM	View	Add end ellipsis to grids that reference people's names...	so you can tell the difference between Mike Villanova and Mike Vandevander		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2713	1/26/10 4:01 PM	Work Orders	WOTS Comments	Add duration to scheduling comments. Expand grid width with form.		Bill Baur	Complete	Important	Bill Baur	Mark
2712	1/26/10 3:58 PM	Work Orders	Converting WO Quote	Check credit override when quote is converted to work order.		Bill Baur	Complete	Important	Bill Baur	Mark
2709	1/21/10 6:39 AM	Credit Override	Email	Fix spacing to fit Courier New font.		Bill Baur	Complete	When you get to it	Bill Baur	
2706	1/18/10 1:27 PM	Jobs	New Automation Tools	new dropdown menu item: "Create New Final Inspection WO" this will be specially flagged as a final inspection WO (which will be highlighted in the Job WO list). It will really just be a flagged IN work order and will include text lines from a checklist that Chase will provide to us.	Upon saving the above, email the MA department that a final inspection is happening. Prompt user to ask if the email should be sent. Checklist will be added to the WO's supporting docs.	Bill Baur	Hold	Important	Mark Birchmeier	
2704	1/15/10 7:03 AM	Credit Card	Reminder	When going live with next release, change CreditCard that's autoinc 790 back to Cn 973 and make it Inactive. Currently I made it Cn = 999999 so it can not be selected.		Bill Baur	Complete	When you get to it	Bill Baur	
2703	1/14/10 2:01 PM	Work Orders	When marking a WO shipped	check all inventory items. If any have a zero price, then present the user with a warning (mention the part number and line number). This warning is bypassable.		Bill Baur	Complete	When you get to it	Mark Birchmeier	See CCL 2691
2702	1/14/10 2:00 PM	Work Orders	New Button to "Update Prices"	This will get new costs and prices (according to the WO's mark-up) for all inventory items on the work order.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2700	1/14/10 12:29 PM	Credit Card	Add Inactive Field	Add feature to inactivate a credit card instead of deleting.		Bill Baur	Complete	Important	Bill Baur	
2699	1/14/10 6:36 AM	Fire Officials	FO Comments	Update to use vsf grid. Add Initiator and DateTime fields.		Bill Baur	Complete	Important	Bill Baur	
2696	1/12/10 2:31 PM	Work Orders	Tax Exempt Changes	remove "None" as a tax exempt reason.	If the tax exempt reason indicates that it requires a number and the tax exempt number field is blank, then if the user tries to save the work order give them an error message indicating that they must either charge tax or enter a valid tax exempt number in the corresponding field.	Bill Baur	Complete	Very Important	Mark Birchmeier	
2695	1/12/10 2:07 PM	Credit	Modify Job and Customer Credit Usage	see attached SOW and discuss with Mark before starting.		Bill Baur	Complete	Very Important	Mark Birchmeier	
2693	1/7/10 1:40 PM	Certificates	Accidental Deficiency	When changing an answer from 'No' to 'Yes', ask the user if he/she wants to delete the question's deficiency.		Bill Baur	Complete	Important	Bill Baur	Nadine
2691	1/5/10 9:14 AM	Work Orders	zero price items	if a WO has a line with an AFP part number and no/zero price for that line (price, not cost), then indicate somewhere on the work order that a review may be necessary. This is only to draw attention to the fact that one or more lines may have had the price accidentally removed.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2687	12/21/09 9:41 AM	Equipment	New Checkbox to be saved in new SchedulingLimit field	1. Must be done on Saturday 2. Must be done on Sunday (both this and the one above can be checked at the same time which means must be done on Saturday or Sunday) 3. Must be done at night (this can be checked with the above which would mean it must be done on a Saturday or Sunday evening/night).		Bill Baur	Complete	Important	Mark Birchmeier	
2684	12/18/09 11:59 AM	Email comments	make a comment in the appropriate area	when an email is sent to a tech from a WO. Include in the comment the To and Cc addresses as well as what type of email, the subject and the body of the email, where applicable.		Bill Baur	Complete	When you get to it	Mark Birchmeier	low priority item
2683	12/18/09 11:41 AM	Credit card processing screen	Add Comment to Charge Record	Hand enterable in Credit Card Processing screen only.		Bill Baur	Complete	Very Important	Susan Straten	
2676	12/17/09 11:28 AM	Customer	Payment Option Changes	1. Allow customer edit screen to allow entry of a credit card on file at any time (regardless of the default payment method).	2. If bill client (with prefers to pay at time of service). If adding a new work order and there is one credit card on file, then ask if that credit card should be used for that work order (If there are multiple credit cards on file, then select which credit card to use.). If yes, change only that work order to use the credit card on file. If no, leave as bill client with prefers to pay at time of service [the prefers to pay at time of service checkbox is not readable in the WO].	Bill Baur	Complete	Important	Mark Birchmeier	
2675	12/17/09 11:09 AM	Fire Officials	add field for fire department telephone number	Separate from the fire official's phone number	Also, add the fire official for new locations for all locations that have a clearly defined fire official (city name matches the fire official's city name).	Bill Baur	Complete	Important	Mark Birchmeier	
2674	12/17/09 11:08 AM	Work Orders	show fire official contact info	on work orders, show fire official name, fire official municipality, fire office telephone number and fire department telephone number (new field in fire official database...to be added in a different change list item).		Bill Baur	Complete	Important	Mark Birchmeier	

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2673	12/17/09 11:06 AM	Schedule Board	Using the modified estimated effective revenue for that day	show (way of showing to be discussed) on the schedule board the estimated effective revenue per tech per day. Also show sum of all estimated effective revenue per day of all shown techs.		Bill Baur	Complete	Very Important	Mark Birchmeier	
2672	12/17/09 11:02 AM	Tech Box	Modified Estimated Effective Revenue	Modify the estimated effective revenue of an SC work order that if the work order does not have a line from the quoted amount that the estimated effective revenue will be the number of hours scheduled for that work order times that customer's labor rate + all the material on the work order. If the quoted price is on the work order then use the quoted price. The per day/per tech estimated effective revenue for such a work order will still be determined by a percentage of their scheduled time for that day versus all scheduled time.		Bill Baur	Complete	Very Important	Mark Birchmeier	
					This estimated (AKA "Anticipated Revenue") will also be used on a secondary credit limit check. If the scheduled time will put the customer over their credit limit and there is not already a credit override, then show a message informing the user "The scheduled work will put this customer over their credit limit. A credit override will be necessary when the scheduled work is billed. Please review the customer before dispatching technicians or releasing material for this work order."					
2668	12/16/09 8:11 AM	Work Orders	Line Item PopUp	Add part quantity to the listing of popup item: "List Work Orders Needing This Part".		Bill Baur	Complete	When you get to it	Bill Baur	
2665	12/14/09 1:52 PM	Work Orders	Credit Overrides	1. If the "over credit limit" amount decreased or remains the same from the previously saved credit override amount, then do not do a new credit override on the work order. Leave the higher amount of the credit override on the work order.	2. Saving a work order whose status is cancelled or cancelling a work order should not initiate a credit override.	Bill Baur	Complete	Important	Mark Birchmeier	
2663	12/11/09 2:09 PM	View	Add payment terms to main view screen	Add terms under balance and or total credit.		Bill Baur	Complete	Important	Brett Straten	
2662	12/10/09 3:03 PM	PO	Special Pricing (not related to effective cost)	1. Change catalog price to special price.-DONE 12/15/09 MB 2. Add checkbox special flag to indicate that FX should base all work orders on the special price.-DONE 12/15/09 MB 3. check special pricing tiers to make sure that they are doing the math to calc reverse mark-ups -DONE 12/15/09 MB 4. calculate all special pricing tiers so they show 5 levels of special prices-DONE 12/17/09 MB	5. fx4 will use the special flag with reverse mark-up pricing for different pricing tiers EXCEPT material pullsheets which use regular effective cost. 6. Show correct price on the inventory search screen -DONE 12/15/09 MB 7. Show correct price on the inventory in fx4mobile...-DONE 12/15/09 MB	Bill Baur	Complete	Very Important	Mark Birchmeier	
2654	12/4/09 3:59 PM	Equipment	Edit Deficiency	Allow editing of deficiencies linked to closed certificates.		Bill Baur	Complete	Important	Bill Baur	Needed to correct Resolved dates.
2647	12/1/09 7:09 AM	Maintenance	Invoice	When deleting an invoice ask user whether or not to delete associated credit card charges.		Bill Baur	Complete	Important	Bill Baur	
2637	11/16/09 9:53 AM	AB Scenario	Modify AB price change logging to a different comment type	comment.type = "AA" for Autobill Automatic. That'll suppress it from being viewable in FX, but still be viewable in the database when needed.		Bill Baur	Complete	Important	Mark Birchmeier	Also note that the Sales comment reference number used previously is erroneous. All sales reference numbers are for quote ID ONLY. Using the AB scenario # is invalid. But when we change those comments to type AA, then it'll be OK.
2632	11/11/09 11:32 AM	Certificates	Devices	Widen Location field on both sys-devices and cert-devices (e.g. Cust# 18189-1 Sys# 62)		Bill Baur	Complete	When you get to it	Bill Baur	
2631	11/11/09 10:37 AM	Invoicing	InvoiceChange.L	Add project name on log to Invoice, Invcmnt, and Maint changes.		Bill Baur	Complete	Important	Bill Baur	Mark
2620	11/6/09 10:37 AM	Certificates	Short-Cut	Add short-cut to customer button.		Bill Baur	Complete	Important	Bill Baur	Phil
2618	11/6/09 10:31 AM	FX4 Menu	List Consistency	Make Contact, Customer, Ship Address and Monitor Equipment lists have right-click highlight with pop-up menu selections: "Select", "Print Grid", and "Open Grid In Excel" and use Explorer bar with show sorting.		Bill Baur	Complete	Important	Bill Baur	
2614	11/2/09 6:58 AM	Customer	Default Payment Terms	Make all default payment terms "Net 30 Days".		Bill Baur	Complete	important	Bill Baur	Updated 6000+ Billadr records of payment type "Bill Client".
2609	10/27/09 12:38 PM	WO2	Class Module	Do not allow WO2.WOLink field for non "PS" TypeOfWorkorder.		Bill Baur	Complete	Important	Bill Baur	Mark
2604	10/23/09 2:10 PM	Certificates	Deficiencies and Recommendations	if you have text from a previous def or rec and delete all the text, then the def/rec is deleted. This should not be allowed. It should either disallow complete removal of the text or just mark it as resolved if not on the current certificate. The text, in either case, should not be deleted...but the text should still remain editable.		Bill Baur	Complete	important	Mark Birchmeier	
2601	10/23/09 7:04 AM	Invoicing	Process Credit Card	When switching payment method, add comment to work order.		Bill Baur	Complete	Important	Bill Baur	Mark

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2593	10/21/09 3:46 PM	Employee	Add 2 new checkboxes to employee database	CDL Driver's License and AFP Approved Driver.	Controlled via a VarChar field with flags "C" = CDL Driver, "A" = AFP Approved Driver, "CA" = both.	Bill Baur	Complete	Important	Mark Birchmeier	Both these items will not require secure access to view/change.
2585	10/21/09 7:09 AM	Work Orders	Print Devices	"WO Reprint Device and Cylinder Inspection Sheets" should print blank device sheets if no devices/cylinders exist.		Bill Baur	Complete	Important	Bill Baur	Mark
2581	10/20/09 10:00 AM	Work Orders	Manually entered prices	If the current unit price of an AFP item has been manually changed (i.e. the previous mark-up * the effective price of the item), then do not reget the price from the inventory. i.e. if the work order's "price" is set to Selling Price (2.10) and someone changed the price from 119.62 to 150.00, then if you change the price to kiddie dealer (1.25), then you would only adjust items whose prices were not manually set (i.e. overridden). This should be able to be done mathematically, but needs to account for pennies being off.		Bill Baur	Complete	Important	Mark Birchmeier	
2572	10/15/09 11:56 AM	Quotes	Do not allow saving of a sold quote	unless there is some document/file in the sold quote supporting documentation. Currently there is a warning. This should be replaced with the following statement and the quote cannot be marked sold until it is resolved: "Signed Quote Missing" "The quote can't be marked sold until a signed quote is placed into the Signed Quotes supporting documentation. Please copy the scan/fax/email message to this area and then mark the quote as sold."		Bill Baur	Complete	Very Important	Mark Birchmeier	
2568	10/15/09 10:15 AM	Tech Box	Needed: Import Travel Time w/out Moving WOTS	This is like import travel times, but doesn't condense the wots entries, it just leaves gaps in the schedule. The purpose is to deal with appointments. Namely, if an appointment is for 11 AM and the first job takes 1 hour with 30 minutes of travel time to each job, the current import travel times routine will move the 11 AM job to 10 AM, even though it is an appointment.		Bill Baur	Complete	Very Important	Mark Birchmeier	
2558	10/8/09 3:16 PM	Quotes	Deficiency Text	Add system(s) to the Deficiency Text in the RFQ screen. This will be a list of systems that use that deficiency number.		Bill Baur	Complete	Important	Bill Baur	Mark
2557	10/8/09 7:43 AM	SS Tech Revenue	Product Code	Add product code column.		Bill Baur	Complete	When you get to it	Bill Baur	
2555	10/8/09 6:30 AM	Equipment	Device Display	Equipment device/cylinder layout and certificate device/cylinder layout are different. Make them both look like the certificate (not including the inspection items).		Bill Baur	Complete	When you get to it	Bill Baur	Mark
2554	10/7/09 2:57 PM	Invoicing	Credit Card Processing Screen	Add column for invoice date.	Add right click drop down options for "View Customer", "View Work Order" (if applicable), & "View Invoice"	Bill Baur	Complete	Very Important	Mark Birchmeier	
2550	10/6/09 2:40 PM	Work Orders	Credit Warning Emails	If a customer is on Credit Hold, then modify the email sent to the credit department to say "Credit Override Level Red-CREDIT HOLD: Ace General & Electrical Contractors, Cust#17900-0, WO# 130440" instead of just "Credit Override Level Red: Ace General & Electrical Contractors, Cust#17900-0, WO# 130440"		Bill Baur	Complete	Important	Mark Birchmeier	
2547	10/5/09 8:59 AM	Server	Server Cleanup	Clean up the program directories. They are getting very clogged with unused files and supporting files/programs.		Bill Baur	Hold	When you get to it	Mark Birchmeier	
2545	10/2/09 10:51 AM	Certificates	Deficiency	Add Cust#, Loc#, and Sys# to display (helps to avoid duplicate key).		Bill Baur	Complete	Important	Bill Baur	
2544	10/2/09 9:07 AM	Customer	allow skipping of entering salutation in a new customer	use the Enter Data / Skip Data like the contact.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2543	10/2/09 6:34 AM	Certificates	Batch Print	Display limit criteria in form caption.		Bill Baur	Complete	Important	Bill Baur	Mark
2538	10/1/09 10:00 AM	Invoicing	when printing an invoice	if the last few lines that only consist of the footer message would be printed on a new page (don't fit at the bottom of the regular invoice), suppress printing those to avoid wasting paper.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2535	10/1/09 5:01 AM	Certificates	Last Hydro Date Entry	Allow entering using MM/YY format.		Bill Baur	Complete	Important	Bill Baur	
2533	9/30/09 12:32 PM	Various	When manually entering in a number	validate it to make sure it is for the same customer number and location number as the item into which you are entering the number.		Bill Baur	Complete	Important	Mark Birchmeier	Quote# and Cert# are not editable on the Deficiency form so validation does not apply here, all others complete.
2532	9/30/09 7:03 AM	Invoicing	Installation Work Orders	Do not list work orders with closed jobs.		Bill Baur	Complete	Important	Bill Baur	
2526	9/28/09 10:13 AM	Jobs	Send email for credit change on existing jobs	when an existing job has its credit limit changes, send the same type of email you send when the customer gets their credit limit changed.		Bill Baur	Complete	Important	Mark Birchmeier	
2524	9/28/09 10:08 AM	Work Orders	on SS WO's. allow right click on system to...	select "Print Device Inspection Sheet"	If the cert isn't created, then create it at that time.	Bill Baur	Complete	When you get to it	Mark Birchmeier	
2523	9/28/09 9:42 AM	Equipment	When opening equipment and clicking on the device list	the focus is moved to the Last Service Date field. This is a problem because people assume the focus to move to where they clicked and start typing. We could inadvertently overwrite data by mistake.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2515	9/25/09 7:16 AM	Certificates	Devices	Add to popup menus in certificate cover and work order - option to "Reprint Device & Cylinder Inspections Sheets".		Bill Baur	Complete	Important	Bill Baur	Mark
2510	9/23/09 9:59 AM	Equipment	Add "Export to Excel" Device List and Cylinder List	to right click menu - export to Excel and automatically open the excel file.		Bill Baur	Complete	When you get to it	Mark Birchmeier	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2507	9/23/09 8:50 AM	Invoicing	Global Connection	Declare conAFP global.		Bill Baur	Complete	Important	Bill Baur	Mark
2506	9/23/09 7:43 AM	Maintenance	Global Connection	Declare conAFP Global.		Bill Baur	Complete	Important	Bill Baur	Mark
2504	9/22/09 3:30 PM	Scheduling Tool	Recommend other locations near by	if you click on the schedule board or drag a work order to it, then highlight on the scheduling tool (top and bottom) items that are geographically close to that work order	Maybe also recommend annual inspections 1 months in future...-MB	Bill Baur	Complete	Important	Mark Birchmeier	
2503	9/22/09 11:53 AM	Work Orders	Annual Inspection Interval	if it's been 11 months since the last annual inspection and the system is inspected quarterly, then do an annual inspection service type (don't wait for 12 months since we might have done one inspectino early).		Bill Baur	Complete	Important	Mark Birchmeier	
2502	9/22/09 10:55 AM	Maintenance	Recompile with new Connection Method	Current version take 20 connections just to load.	Other programs that may stay open for a while and take multiple connections should also be recompiled with new connection method: Invoice Maint, sstechrev.	Bill Baur	Complete	Important	Mark Birchmeier	
2499	9/17/09 12:46 PM	Certificates	Readdress the way they are printed/emailed	Specifically as it pertains to supporting docs (fire pumps). Maybe we need supporting docs in certificates section and those fire pump spreadsheets would be saved there...Let's discuss		Bill Baur	Complete	Very Important	Mark Birchmeier	Programming done, remmed out until Excel print issue can be resolved.
2498	9/17/09 11:55 AM	AB Scenario	batch printing with quotes	We are reuoting a lot of old quotes within certificates. Please adjust the certificate batch printing program to also allow the printing/emailing of older quotes (from the old quote folders) or at least copying the quote from the old folder into the current quote folder.		Bill Baur	Complete	Important	Mark Birchmeier	Also, we need to look if we can do a work order quote export to pdf or print if there is no quote file, but there is a work order quote.
2493	9/17/09 7:21 AM	Class Module Programs	Make Connection Global	Recompile all class module programs to use a global connection declaration.		Bill Baur	Complete	Important	Bill Baur	Mark
2492	9/17/09 7:16 AM	View	Database Connections	Remove private class module connections and make connection global.		Bill Baur	Complete	Mission Critical	Bill Baur	Mark
2491	9/17/09 7:13 AM	AB Scenario	Contacts Display	Increase phone# and FAX# widths.		Bill Baur	Complete	When you get to it	Bill Baur	
2490	9/16/09 6:42 AM	FX4	Global Customer Number	Make CustomerNumber modular.		Bill Baur	Complete	Mission Critical	Bill Baur	Mark
2487	9/11/09 11:04 AM	Work Orders	Show visual indication of using per device inspections	On SS work orders and certificate covers, show visually that the system has use per device info checked.		Bill Baur	Complete	Important	Mark Birchmeier	
2486	9/11/09 8:00 AM	Equipment	Delete All Devices Routine	This will be a feature in the equipment window if the equipment has devices. When you click this button you will get a message box: "You are about to delete all devices in this system. Any data associated with those devices will be permanently lost. This routine will also delete all devices in open certificates. To save device inspection data in open certificates, please press cancel, close the certificate and then delete the devices. When new devices are created, historical device data will not match the new devices to the old inspections. Do you wish to delete all devices for this system?" Yes = delete all devices in the sysdevice table for that system, delete all devices in the certdevice table in open certificates for that system.	The device list that is deleted should be saved in a dated subfolder in the supporting doc of the system so that we can retrieve the data if needed (save as an excel export of the device and cylinder flexgrid).	Bill Baur	Complete	Very Important	Mark Birchmeier	The purpose of this is to clear the device list and prepare it for getting new device info that starts with device number 1.
2485	9/11/09 7:26 AM	Quotes	add button to view cert from rfq	put by quote WO button?		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2483	9/8/09 11:17 AM	Time Sheet	Comment and Vacation	Vacation Comment should be editable.		Bill Baur	Complete	Important	Mark Birchmeier	
2482	9/3/09 2:45 PM	AB Scenario	Changing billing interval	When only changing the billing interval (not changing the annual price), do not enter a previous price. However, a sales comment should be added to the customer indicating the AB scenario number and the previous and new billing interval values.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2476	8/27/09 12:23 PM	AB Scenario	Allocation Grid	Have Total update along with Sub-total with each keypress.		Bill Baur	Complete	When you get to it	Bill Baur	
2467	8/25/09 6:36 AM	Quotes	Job Button	Add "Create Job" / "Go To Job" button.		Bill Baur	Complete	Important	Bill Baur	
2464	8/19/09 3:26 PM	Email - BillTo	Contacts, Customer, Location, AB	Add envelope graphic to the BillTo contact in Customer, Location & AB if the contact has an email address and has a communication preference to receive emails for invoices.		Bill Baur	Complete	Important	Bill Baur	Mark
2462	8/14/09 6:56 AM	Work Orders	Resize	Work order resize height is bothersome.		Bill Baur	Complete	When you get to it	Bill Baur	Defaulted to 10 rows and put auto line resize into menu options.
2450	8/11/09 9:22 AM	Certificates	New FXF functionality	The fire pump FXF currently has a special button on it that directs the user to the fire pump test.xls spreadsheet. This same type of functionality should be extended. In the FXF table, the Descrip2 field will reference a table for this special document button. the Descrip3 field will reference the filename for this special button. If the Descrip2 is blank/Null, then the button is invisible on the FXF. Otherwise, open the file as the current fire pump test.xls document or the saved version is opened.	Please talk to me before you start this to make sure the direction here is clear.	Bill Baur	Complete	important	Mark Birchmeier	
2446	8/10/09 7:23 AM	Work Orders	Support Docs File Box	Add tool tip: "These documents will be sent along with the invoice to the customer."		Bill Baur	Complete	When you get to it	Bill Baur	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2445	8/6/09 1:53 PM	AB Scenario	Add right click option to "Print Price Allocation Grid"	in the price allocation grid.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2439	8/5/09 12:50 PM	View	Tax Exempt Number Fields' Length	Lengthen all tax exempt number fields to 250 characters. I have already lengthened the editCustomer.form's maxlength.	Also, please double check the field limitations in the database for each table.	Bill Baur	Complete	Important	Mark Birchmeier	All fields already 255 chars.
2432	7/31/09 11:07 AM	Certificates	Allow repair certs to be closed without time entered	Still force it to verify time with the work order's time slots, but allow no time slots to be OK in the work order and zero to be a valid time in the certificate. This applies to repair certificates ONLY.		Bill Baur	Complete	Important	Mark Birchmeier	
2431	7/31/09 9:06 AM	Work Orders	allow scheduling of quote work orders	this will allow a site inspection to appear on the schedule board.		Bill Baur	Complete	Important	Mark Birchmeier	
2430	7/31/09 7:09 AM	View	Certificate Tab	Add menu option "View Work Order"		Bill Baur	Complete	When you get to it	Bill Baur	
2429	7/30/09 11:12 AM	Work Orders	Closed Jobs	Do not allow saving of work orders to closed jobs. This will prevent the addition of new work orders for closed jobs and prevent editing of work orders for closed jobs.	Also, disable the new work order and new material pullsheets menu buttons in the jobs screen for closed jobs.	Bill Baur	Complete	Important	Mark Birchmeier	
2428	7/30/09 11:11 AM	Time Sheet	Closed Jobs	If a job is marked as closed: 1. Do not allow entry of new time for that job 2. Do not allow changes in number of hours of that job 3. Do not show that job in the paycode drop down list.		Bill Baur	Complete	Important	Mark Birchmeier	
2426	7/29/09 4:03 PM	Invoicing	Batch Print	Add attachment listing to Email.		Bill Baur	Complete	Important	Bill Baur	
2425	7/29/09 4:02 PM	Invoicing	Batch Print	Add "Clear Email Address" button to Redirect Email frame.		Bill Baur	Complete	Important	Bill Baur	
2413	7/17/09 3:31 PM	Quotes	Repair From Certificate Letter	Include textbox recommendations along with grid recommendations.		Bill Baur	Complete	important	Bill Baur	
2411	7/17/09 12:19 PM	Work Orders	Deleted Items	When a shipped/complete work order has inventory items deleted from it OR a shipped/complete work order is marked as cancelled, then send an automated email to the "Inventory" email recipient about it. Include the Cust#, Company Name, Loc#, Location Name, WO#, and a list of part number, the quantity deleted, the size & description of the part numbers, and the location of the inventory item.		Bill Baur	Complete	Important	Mark Birchmeier	The purpose of this is to inform the person in charge of the inventory that they should expect the return of the material.
2408	7/16/09 11:39 AM	Work Orders	Credit Card Processing changes	Needs discussion before we start. 1. CVV2 1. Add new database that is not backed up, not replicated 2. change ini file to account for the difference 3. change all areas where credit cards are 2. Need ability to charge a work order or invoice multiple times for differing amounts with different authorization numbers and different credit card numbers. 3. Need ability to charge an amount different than (including greater than) the total on the work order. This is for downpayments of work to be done, but not yet listed on the work order. 4. Need to see on the work order and invoice screens how much has already been charged to a credit card and be able to see a charge history for that work order/invoice. 5. Need ability to charge an invoice the amount that was not already charged on a work order. Therefore, so of the charge may happen on the work order and the rest on the invoice. 6. Just like EQ work orders, have all non-material pullsheet work orders ask if you should release the work order to credit card processing if pay by credit card selected. 7. Add warning if no charge has been made against a credit card if credit card payment is selected and you attempt to schedule a work order. 8. Need to contend with multiple invoice for a single WO issue. 9. Need ability to put a certain amount "on hold" to the credit card, see that		Bill Baur	Complete	Very Important	Mark Birchmeier	
2407	7/16/09 11:36 AM	Certificates	per Device printout on laser printer	to be printed for work order and on certificates to the laser printout.		Bill Baur	Complete	Important	Mark Birchmeier	
2405	7/16/09 10:57 AM	Invoicing	Add Commission fields to Database	Add the following fields (just like those used for quotes): YCSQcancelled, InsufficientData, DateCommPaid, CommissionPaid	The data entry will be handled in a different program (to be written by Mark in the near future), so	Bill Baur	Complete	Important	Mark Birchmeier	
2401	7/15/09 7:18 AM	Utility	Invoice Orphans	Write utility to find Invlne records without an Invoice record.		Bill Baur	Complete	Important	Bill Baur	WO#134182
2399	7/14/09 3:57 PM	Maintenance	Invoice	Add field Terms2. (Terms is the old string field and is used when Terms2 is blank.)		Bill Baur	Complete	important	Bill Baur	
2396	7/13/09 3:52 PM	Employee	Security Level	Use work instruction rules for access to secure fields.		Bill Baur	Complete	Important	Bill Baur	
2390	7/9/09 11:22 AM	Customer	New Customer Defaults	Default the BillTo contact in the customer and location that are created to the contact that is created.		Bill Baur	Complete	Important	Mark Birchmeier	
2388	7/8/09 1:52 PM	Customer	Add required comment and email notification for terms changes	just like changing credit limits, changes to terms should require notification via email. Can be separate or combined with any other simultaneous email notification to the same recipient "Credit"		Bill Baur	Complete	Important	Mark Birchmeier	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2387	7/8/09 1:47 PM	Contacts	Email is semi-required field	Make it show red (required), give warning if not entered, but allow people to save without it.		Bill Baur	Complete	Important	Mark Birchmeier	
				This applies to new customer, new contact and contact update.						
2384	7/1/09 3:59 PM	Employee	Defaults - set the following defaults for new employees	1. Security Level = 2000 2. Initials = first letter of first name & first 2 letters of last name 3. Sched Board Name = First Name & space & first letter of last name 4. Security level changes using one's digit.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2381	7/1/09 9:22 AM	AB Scenario	Billing Contact	much like the location has a checkbox for using the default billing contact, the ab should have the same checkbox so it changes when the main billing contact changes (if so desired).	default to checked for new ABs. when doing the database transition, default to checked if the current ab billing contact is the same as the customer billing contact.	Bill Baur	Complete	Important	Mark Birchmeier	
2380	6/30/09 7:53 PM	Invoicing	Modify Email	Include quick sales pitch from dat table entry (to be made)	add a line like "To expedite future service requests or inquiries, please reference your customer: xxxxx"	Bill Baur	Complete	When you get to it	Mark Birchmeier	to be discussed further to get it finalized.-mb
2378	6/30/09 2:37 PM	Work Orders	Override Date	When creating SS work order with override date ask: 1. Do you want to use override date on past due systems? 2. Do you want to use override date on not yet due systems? 3. Do you want to use override date on all systems? 4. Do you want to remove override date?		Bill Baur	Cancelled	Important	Bill Baur	Nadine - already working well at time of cert closure.
2377	6/30/09 2:33 PM	Work Orders	SS - PS Linked	Add 3rd option ("Only PS") to "Do you want to include Portables on SS work order?" Options: 1. Only PS 2. Only SS 3. Create Both.		Bill Baur	Complete	Important	Bill Baur	Tom W.
2375	6/30/09 2:20 PM	View	Right Click Additional Options	from invoice tab, right click option "View Work Order" for invoices with work order numbers.	from work order tab, right click option "View Invoice" for work orders with invoice numbers.	Bill Baur	Complete	When you get to it	Mark Birchmeier	
2373	6/30/09 8:21 AM	SumHours	Prevailing Wage	Incorporate TypeSpecial rate into cost amount.		Bill Baur	Complete	Important	Bill Baur	
2371	6/26/09 12:25 PM	Employee	Effective Charge Rate	Clarify and give option not to compute.		Bill Baur	Complete	Important	Bill Baur	
2370	6/26/09 11:46 AM	Employee	FICA Fields	Open FICA fields directly.		Bill Baur	Complete	Important	Bill Baur	Mark
2369	6/26/09 8:48 AM	Work Orders	Credit Card Option Selected	Do not schedule without a credit card.		Bill Baur	Complete	Important	Bill Baur	
2368	6/25/09 4:02 PM	Invoicing	Batch Print	Gray out print ck marks when screen is not refreshed. Give option not to reprint gray marks.		Bill Baur	Complete	Important	Bill Baur	Mark
2367	6/25/09 3:47 PM	Quotes	Repair From Certificate	Only put deficiencies and recommendations into the SOW. Only put Quote Type and Cert# into comment.		Bill Baur	Complete	Important	Bill Baur	
2365	6/25/09 3:40 PM	Certificates	Removing Quote	Ask to cancel quote when removing it, not to delete it.		Bill Baur	Complete	Important	Bill Baur	Mark
2362	6/18/09 1:00 PM	DAT Editor	Change CreditCardProcessing	Change this to use a dat entry called CreditCardProcessing so that we can redirect those emails to a programmer when test data has email enabled. Check for all other distribution group emails that are not represented in the dat table email recipients.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2361	6/18/09 11:42 AM	Jobs	When a new job is added	send email with job descrip, billadr company info, shipadr company info to NewJob email recipient (in dat table)		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2359	6/17/09 10:50 AM	Work Orders	Selected Work Orders	Do not highlight Unprocessed Cr Crd when WO is invoiced or cancelled. Add legend.		Bill Baur	Complete	Important	Bill Baur	
2356	6/15/09 1:22 PM	Maintenance	Invoice Maintenance	Add: Printed, PrintedBy, EmailedTo		Bill Baur	Complete	Important	Bill Baur	
2355	6/15/09 1:18 PM	Invoicing	Class Module	Add fields: ProcessedBy, DateProcessed, Printed, PrintedBy, PrintedDateTime, EmailedTo		Bill Baur	Complete	Important	Bill Baur	
2353	6/12/09 2:31 PM	Work Orders	Credit Card Handling	1. In the work order list, highlight by using red text any EQ work orders which have the credit card payment selected and the credit card has not yet been processed. 2. When saving an EQ work order where credit card payment is selected and that credit card has not yet been processed and the WO priority is not Waiting for credit card processing, give a popup message asking "Would you like to release this work order to credit card processing?" If yes is selected, change the WO priority to Waiting for credit card processing so that it appears on the credit card to process list.	3. When changing the status of an EQ WO to shipped/complete and the credit card payment option is selected and the credit card is not processed, give a warning message "The credit card for this work order has not yet been processed. It must be processed before the material is shipped. Would you like to wait for credit card processing before shipping this material?" If yes, then do not change the status, but make sure that the WO priority is set to Waiting for credit card processing. If No, then change the status to shipped/complete.	Bill Baur	Complete	Important	Mark Birchmeier	
2341	6/8/09 6:52 AM	Certificates	Distribute Time	Move "Distribute Difference Among Cert Sheets" button out from under the "Close Certificate" button.		Bill Baur	Complete	Important	Bill Baur	Mark
2340	6/5/09 1:53 PM	Maintenance	PS Invoices	User given option to keep original pricing rather than recalculating with current FX price matrix pricing.		Bill Baur	Complete	Important	Bill Baur	
2334	6/4/09 6:56 AM	Jobs	Move Job	Create utility to move Job to different location.		Bill Baur	Complete	Important	Bill Baur	Mark
2333	6/3/09 7:00 AM	Quotes	Repair From Certificate	Add ability to view stored deficiency text to copy and paste.		Bill Baur	Complete	Important	Bill Baur	Brett
2330	6/1/09 10:50 AM	Quotes	Add Field	Add Crtnum field.		Bill Baur	Complete	Important	Bill Baur	Needed for certificate quote.
2327	5/26/09 6:57 AM	FX4, Employee	Phone #s	Increase field size to 50 chars.		Bill Baur	Complete	Important	Bill Baur	Roland entered 2 phone #s but the second # was truncated.
2322	5/22/09 6:42 AM	Work Orders	Checking Sys On SS WO	Warn user when system is already on a current work order.		Bill Baur	Complete	Important	Bill Baur	
2318	5/21/09 6:42 AM	View	Comments	Change to use grid combo boxes and grid sort.		Bill Baur	Complete	Important	Bill Baur	
2313	5/20/09 7:07 AM	Invoicing	Print Invoices	Print Supporting Documents colated with list. Do not print a reminder after every customer.		Bill Baur	Complete	Important	Bill Baur	Mark
2307	5/15/09 6:33 AM	FX Import Utility	Dates	Change LocDescrip from 60 chars to 255 chars.		Bill Baur	Complete	Important	Bill Baur	Tom W.

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
				Allow month/year date without day.						
2303	5/13/09 6:57 AM	Schedule Board	MapPoint	Do not open a new map to refresh if not already open.		Bill Baur	Complete	Important	Bill Baur	
2302	5/13/09 6:52 AM	Schedule Board	All Vehicle Maps	Use a red dot when stopped (parked) and a green dot when moving.		Bill Baur	Complete	Important	Bill Baur	Mark
2300	5/12/09 6:34 AM	Schedule Board	MapPoint	Have MapPoint all-tech's view- retain its zoom level and lat / long coordinates when it refreshes.		Bill Baur	Complete	Important	Bill Baur	Mark
2298	5/8/09 6:43 AM	Maintenance	Invoice Lines	Validate product codes, implement VSF flexgrid editing.		Bill Baur	Complete	Important	Bill Baur	
2297	5/7/09 12:29 PM	Work Orders	PS Work Order	There is no need to ask to include the Portables system when creating a portable work order.		Bill Baur	Complete	When you get to it	Bill Baur	
2293	5/7/09 8:22 AM	Sales Book	Product Code	Allow product codes to be either upper case or lower case.		Bill Baur	Complete	When you get to it	Bill Baur	
2289	5/5/09 2:33 PM	Certificates	Deficiency	Have double clicking the grid edit the grid and only have the popup menu edit the form.		Bill Baur	Complete	Important	Bill Baur	Mark
2288	5/5/09 2:20 PM	Equipment	Deficiency	Add ability to edit Resolved Date and Resolved WO#.		Bill Baur	Complete	Important	Bill Baur	Brett
2284	5/5/09 10:36 AM	Certificates	Close	Display missing check box and fill-in messages for only those marked required.		Bill Baur	Complete	Important	Bill Baur	Rich
2281	5/5/09 6:34 AM	Scheduling Tool	Priority	Highlight priorities 2 and 3 along with priority 1 in pink regardless of "Requested By" dates.		Bill Baur	Complete	Important	Bill Baur	Brett
2275	5/1/09 8:09 AM	Work Orders	Signature Lines	All work orders should have the same language underneath the signature line.		Bill Baur	Complete	Important	Brett Straten	
2270	4/29/09 10:25 AM	Equipment	Device List	Allow resizing of columns		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2269	4/29/09 8:05 AM	Schedule Board	Map Point	Default zoom to 100 miles Recenter map around user's office. Ability to map All or Only sched bd techs. Auto refresh map.		Bill Baur	Complete	Important	Bill Baur	Mark
2268	4/29/09 8:01 AM	Schedule Board	Map Point	Add ability to see multiple techs on one map.		Bill Baur	Complete	Important	Bill Baur	Mark
2266	4/28/09 11:17 AM	Supporting Documentation	Add to WO	1. Add section to WO in the Details tab. Steal space from comments to show on work order. 2. Add a checkbox that says "Print Supporting Docs with WO & Invoice" I have this envisioned as applying to the automated invoice printing routine, the wo route sheet printout and the manual wo printing functions. That checkbox defaults to "Yes" and is saved in the WO2 table 1. This would mean that when the WO is printed, the supporting doc(s), if any, are also printed. 2. This would mean that when the invoice is printed, the supporting doc(s), if any, are also printed. 4. Also: there are 2 sections under the comments, but the section section isn't clear what it is. What is this?		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2265	4/28/09 11:14 AM	Location Address	"Building" Field	Move under company name & relabel as "Building/Store ID"	Add as column in FX4view flexgrid next to Company.	Bill Baur	Complete	When you get to it	Mark Birchmeier	
2263	4/24/09 3:47 PM	Customer	New Bill/Address Fields	Add to class module: LastStatement, LastStatementBy, LastPastDueReg, LastPastDueRegBy, LastPastDueAB, LastPastDueABBy		Bill Baur	Complete	Important	Bill Baur	Mark
2262	4/24/09 10:12 AM	Quotes	Write Quote	Customize dialog box to view WO Quote.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
2257	4/23/09 10:55 AM	Quotes	Write Quote	When a work order quote exists, query user before creating Word document.		Bill Baur	Complete	Important	Bill Baur	
2256	4/22/09 3:54 PM	View	Tax Exempt Staus Category change	UEZ-5 Smal Business can be changed to UEZ	Law changed and we are back to businesses who file for exempt status in UEZ zone to not have to pay tax at time of purchase.	Bill Baur	Complete	important	Susan Straten	
2248	4/17/09 2:44 PM	Invoicing	Credit Card Box Not Showing For All	Require Security hundreds digit greater than 1 for card processing and upgrade all employees who has 0 to be 1.		Bill Baur	Complete	Important	Bill Baur	All employees increased from X0XX to X1XX.
2246	4/17/09 8:54 AM	Quotes	Excel Archives	Create the same archive retrieval routine for Excel files as we have for Word files.		Bill Baur	Complete	Important	Bill Baur	Mark
2244	4/16/09 2:55 PM	Certificates	Deficiencies / Recommendations	Add link to Quote from all grids.		Bill Baur	Complete	Important	Bill Baur	
2242	4/16/09 6:36 AM	Quotes	Comment	Add comment when Emailing quote from quote screen.		Bill Baur	Complete	Important	Bill Baur	
2238	4/14/09 1:20 PM	Customer	Tax Exempt	1. Add mini supporting doc section for tax exempt certificate. 2. if marked tax exempt in the customer OR in the location AND that tax exempt reason requires a tax exempt number, then if you try to invoice a work order give an error message that the work order cannot be invoiced without tax because there is not a valid tax exempt number.	3. Email accounting if a work order is invoices as tax exempt without a tax exempt number if that tax exempt reason requires a tax exempt number (this can only happen if the cusotmer/location are marked as normally taxable)	Bill Baur	Complete	important	Mark Birchmeier	
2236	4/14/09 12:37 PM	Certificates	Show Cert# and Quote#	On the dot matrix printout and in all flexgrids where we should deficiencies and recommendations, add columns for cert# and quote#.	The quote# is the quote# linked to the cert# from which that def/rec was created.	Bill Baur	Complete	Important	Mark Birchmeier	
2235	4/14/09 10:44 AM	View	Send Email	Add "Send Email" selection to View Contacts and to Customer Contacts grids.		Bill Baur	Complete	Important	Bill Baur	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2232	4/13/09 4:00 PM	Time Sheet	Add Vacation	When adding a vacation day, if there is an appointment on that date, then allow bypassing. Instead of a message saying it can't be saved, give a message that asks a question: "There an appointment already scheduled for nameoftech on ###/###/####. Would you like to schedule the vacation time over this appointment? NOTE: You will need to manually move the appointment to another day."		Bill Baur	Complete		Mark Birchmeier	
2230	4/10/09 10:19 AM	Work Orders	WO Quote	Add ability to revert work order back to a WO quote.		Bill Baur	Complete	Important	Bill Baur	Mark
2229	4/10/09 9:01 AM	Certificates	Entry Screen	Remove Deficiencies fill-in and Recommendations fill-in.		Bill Baur	Complete	Important	Bill Baur	Mark
2228	4/10/09 8:43 AM	Certificates	Direct Entry on Deficiency	allow adding and direct editing of deficiencies on the grid.		Bill Baur	Complete	Important	Mark Birchmeier	
2224	4/9/09 8:34 AM	Quotes	MAAGREE Maintenance Master	When a new ma is created, pull in site, certificate, sales, scheduling contact from FX (if they exist). This will make a lot faster than the way we are currently typing in all the information or having the customer fill it in. This information should be confirmed with the customer before sending them an MA.		Bill Baur	Complete	Important	Brett Straten	NOTE: This is referring to the contacts in the Maintenance Agreement and MA Addendum quote creation process and filling out those fields in the quote's Word document automatically from data in the quote location's contacts
2222	4/9/09 6:44 AM	Work Orders	Email	Add selection for Email WO to View pop-up menu.		Bill Baur	Complete	When you get to it	Bill Baur	
2215	4/3/09 12:08 PM	Work Order Time Slot	Send Email	Add Send Email buttons to work order and schedule slot by the scheduling contact.		Bill Baur	Complete	Important	Bill Baur	Mark
2214	4/3/09 11:50 AM	Schedule Board	GPS Integration	enhance our ability to see where techs are and where they've been.		Bill Baur	Complete	Important	Mark Birchmeier	Display status on schedule board Show right aligned icon in tech name box [? P or Truck] - sample code X:\Development\Source Code for Programs\FXMySQL\FX4Tools\pictures of flexgrid Hover over tech name to get current (AKA last known) address according to the vehicle database Add right click menu to tech name: Map Current Location -note: use lat lon instead of address for better accuracy. View Tech Box View Appointments Create Appointment Add to WO popup message Tech Arrived @ ###:## AM/PM and Tech Complete @ ###:## AM/PM
2213	4/3/09 7:13 AM	Work Orders	Shipped/Complete Date	Clarify that this is the date the work order is shipped or completed, not the date it was marked Shipped/Complete.		Bill Baur	Complete	Important	Bill Baur	Rosa
2212	4/3/09 7:05 AM	Reports	Accounting	Add "Last Month" button to Purchase Order and Misc. Accounting date ranges.		Bill Baur	Complete	Important	Bill Baur	Gary
2211	4/3/09 7:04 AM	Contacts	Send Email Option	Add "Send Email" option to all contact grid popup menus.		Bill Baur	Complete	Important	Bill Baur	Mark
2210	4/2/09 3:07 PM	View	QV300	CO2 Question Version does not have a Recommendations section.		Bill Baur	Complete	Important	Bill Baur	Added Recommendations section, changed to QV450.
2207	3/30/09 3:46 PM	Certificates	Cut and Paste	Add Cut and Paste-Append to Recommendation popup menu options.		Bill Baur	Complete	Important	Bill Baur	Mark
2200	3/27/09 6:36 AM	Location Address	Latitude / Longitude	Restore original fields. Add button to show on MapPoint. Add button to get from address. Have new locations get automatically. Ask to get with change of address.		Bill Baur	Complete	Important	Bill Baur	Mark
2199	3/26/09 6:38 AM	Quotes	Comment	Autosize comment with height and width.		Bill Baur	Complete	When you get to it	Bill Baur	
2198	3/26/09 6:36 AM	View	Display	Autosize comment with height and width.		Bill Baur	Complete	When you get to it	Bill Baur	
2195	3/25/09 7:57 AM	Certificates	Fire Pump - NFPA System	"Fire Pump Test Results" button needed on entry screen.		Bill Baur	Complete	Important	Bill Baur	Rosa
2191	3/19/09 10:23 AM	Contacts	Expanded Communication Preferences	Add ability to select sending emails (similar to current certificate selection): Service Due Next Month Certificates Invoices New Quotes Pending Quote Reminder Newsletter Welcome Email (get list via dat file and have a letter code for each (like flags))		Bill Baur	Complete	When you get to it	Mark Birchmeier	The section should be a frame called "Communication Preferences" - Send emails for the following items: - Send emails for the following items: - with a checkbox next to each of the above mentioned items. Default new contact to all being checked. Default existing customers with certificate already checked to all being checked.
2190	3/19/09 7:10 AM	View	Jobs Shortcut	Use F6 for Jobs short-cut (same way F3 is used for customer).		Bill Baur	Complete	When you get to it	Bill Baur	Carl M.
2187	3/16/09 2:06 PM	Certificates	Batch Printing	Add "Assigned To" field from Quotes.		Bill Baur	Complete	Important	Bill Baur	Brett
2184	3/12/09 11:17 AM	Maintenance	Certificate Cover	Add fields "CompleteDateTime" and "PrintedDateTime"		Bill Baur	Complete	Important	Bill Baur	

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2174	3/2/09 7:48 AM	Work Orders	Job Numbers in IN & MA work orders	When saving an IN work order, please give the user an error message asking them to enter a job number ("The job number is missing and required. Are you sure you want to exit without entered a job number." Yes to save the WO w/out a job number. No to return to the work order in edit mode. Cancel (same as no).)		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2168	2/25/09 8:37 AM	Certificates	Cert Recommendation Project	mostly like the deficiency project, but with recommendations		Bill Baur	Complete	Important	Mark Birchmeier	
2165	2/20/09 7:26 AM	Move Location	Deficiency	Add new Deficiency file.		Bill Baur	Complete	Important	Bill Baur	
2162	2/18/09 8:04 AM	Quotes	Creating WO Quote	When a customer does not have a payment method selected, do not inquire about it when creating a WO Quote. Inquire about it when converting the WO Quote into a work order.		Bill Baur	Complete	Important	Bill Baur	Carl M
2160	2/16/09 10:54 AM	Sales Book	Discrepancy Indicator	Add cross check for InvLine.Amount and InvLinePS.Price totals.		Bill Baur	Complete	Important	Bill Baur	Mark
2159	2/16/09 7:49 AM	Maintenance	ChangedBy and DateChanged	Add updating to: Invoice, Billadr, Prospect, Shipadr, SSSheet, WO2, CertCover, and WOTS.		Bill Baur	Complete	Important	Bill Baur	Mark
2153	2/12/09 6:38 AM	Certificates	Entry	Bring screen cursor back to the top after any of the following messages: "...status required", "...date required", and "...serviceman required".		Bill Baur	Complete	Important	Bill Baur	Mark
2152	2/11/09 3:03 PM	Certificates	A Few Changes	Cert Closing Date: When reclosing a certificate, do not change the CompleteDateTime or CompletedBy in the certcover.	Certificate Follow-Up List: Replace the Dt Initiated with the date of the CompleteDateTime from the CertCover Certificate Batch Printing Flexgrid: Add the date from the CertCover CompleteDateTime as a column.	Bill Baur	Complete	Important	Mark Birchmeier	
2150	2/10/09 1:54 PM	Work Orders	Log Permit Status	as WA comments with datetime & user info		Bill Baur	Complete	Important	Mark Birchmeier	
2145	2/6/09 1:10 PM	Certificates	Closed Certificate Follow-ups Needed (from the cert follow-up list)	Add "View Customer" to the right click menu.		Bill Baur	Complete	When you get to it	Brett Straten	
2142	2/5/09 1:42 PM	Customer	Check Box Comments	Consolidate "Reason for change" comments to be asked upon pressing Save instead of when checked.		Bill Baur	Complete	Important	Bill Baur	Mark
2141	2/5/09 9:24 AM	Certificates	minor color changes	On the certificate. The Certificate Closed label should have a light green background instead of yellow.	On the certificate batch printing screen. Change the background color of the items ready to be printed to light green. That way it is easier to differentiate between the items that are ready to be reviewed (white) and the items that are ready to be printed (light green).	Bill Baur	Complete	When you get to it	Mark Birchmeier	
2139	2/4/09 9:04 AM	Work Orders	Allow to change the inspection type in the right click menu	of SS work orders. This will also change the inspection type in the certificate. If there is any data entered for that certsheets, then you should give a warning that this will erase all the data in the certsheets if the FFX number changes between the inspection types.		Bill Baur	Complete	Important	Mark Birchmeier	
2138	2/4/09 9:03 AM	Certificates	When you update the service type...	example: from quarterly to annual, then you also should change the question version and inspection type in the work order's sssheet database.		Bill Baur	Complete	Important	Mark Birchmeier	
2133	2/2/09 1:48 PM	Invoicing	PS Invoice Line Item	Add additional product code check.		Bill Baur	Complete	When you get to it	Bill Baur	
2128	1/29/09 7:30 AM	Work Orders	SS Work Orders w/ Devices	Put signature after the main FFX section. it is currently after the devices, but that can be many, many pages away from the actual inspection. does this make sense or does the signature line only happen at the end of the whole work order???		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2120	1/23/09 2:09 PM	Scheduling Tool	Sched Date	Change "Sched Date" to "Last Sched Date" on FXView and on Auto Scheduler. Exclude cancelled time-slots.		Bill Baur	Complete	Important	Bill Baur	Mark
2119	1/23/09 9:59 AM	View	Search Text	Add pop-up to print results grid.		Bill Baur	Complete	Important	Bill Baur	Dan H
2117	1/22/09 12:37 PM	Customer	rename COD as COD (Cash/Check)	to correspond to what we say on the work order.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2116	1/22/09 12:29 PM	Work Orders	WO List, show the last sched date	Show the last sched date, excluding cancelled WOTS.	This is the tool you see by FX4menu > Workorder > List Selected Workorders.	Bill Baur	Complete	Important	Mark Birchmeier	
2114	1/19/09 1:27 PM	Sales Book	Extend SSTechRev program for portable service	this will be effective revenue based on a specific month's inspection of portables covered under a maintenance agreement.		Bill Baur	Hold	When you get to it	Mark Birchmeier	
2110	1/19/09 8:52 AM	Certificates	Cert Deficiency & Quotation	SOW attached		Bill Baur	Complete	Important	Mark Birchmeier	
2107	1/16/09 11:26 AM	Reports	PS Projection Report	The "Salesbook Style" report should be the same as the new Salesbook layout (with the "Invoice Maint M" and "AutoBill Maint A") separated out. This report should take the budget for the A's and not included maintenance of the portables covered by an active AB.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2102	1/15/09 9:57 AM	Certificates	Certificate Cover	Show dashes for Total Cost and Profit when zero.		Bill Baur	Complete	Important	Bill Baur	Mark
2100	1/15/09 7:06 AM	Cash Book	Edit	Remove ability to edit.		Bill Baur	Complete	Important	Bill Baur	Mark
2092	1/9/09 1:29 PM	Equipment	Price Allocation	When updated also update SSSheet and CertSheet for the ones that do not have completed certificates.		Bill Baur	Complete	Important	Bill Baur	Mark

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2090	1/9/09 9:50 AM	Reports	PS Projection	Remove sales tax from grid and change columns from "Total" to "SubTotal".		Bill Baur	Complete	Important	Bill Baur	Mark
2087	1/8/09 11:05 AM	Work Orders	Credit Override	Limit level red messages to one per day.		Bill Baur	Complete	Important	Bill Baur	Mark
2085	1/6/09 3:57 PM	Customer	When putting a customer on credit hold	Present a warning with a list of work orders that have active WOTS records for today or the future. The warning should say something like:	"WARNING: The customer you just placed on credit hold has work orders already scheduled. Modify these work orders to prevent service from occurring while the customer is on Credit Hold.	Bill Baur	Complete	Important	Mark Birchmeier	Be sure this happens everywhere a customer can be put on credit hold (in the customer, in the accounting overdue invoice flexgrid, etc.).
2082	1/6/09 1:12 PM	Invoicing	Invoice Printing / Emailing routine enhancement	see attached SOW		Bill Baur	Complete	Important	Mark Birchmeier	
2080	1/6/09 12:07 PM	Customer	Payment Terms	Create Payment Terms Help chart.		Bill Baur	Complete	When you get to it	Bill Baur	
2075	12/30/08 1:28 PM	Sales Book	Split Portable Maintenance	the line that currently says "MAINTENANCE M" should be split into two separate lines "INVOICE MAINT M" and "AB MAINT M" The former will include only Division P invoices and the latter will include only Division A invoices. The total of these two lines should be exactly what the current "MAINTENANCE M" line equals.		Bill Baur	Complete	Important	Mark Birchmeier	
2074	12/30/08 1:26 PM	Reports	PS Projection Flexgrid	This flexgrid needs an additional column added and a column changed. The column that says "Total" should be changed to "Invoice Total" and should exclude the maintenance of portables for portables that are covered by an active AB. The new column will be "Effective Rev. Total" which will be the Invoice Total plus the interval price for portables that are covered by an active AB.		Bill Baur	Complete	Important	Mark Birchmeier	
2073	12/30/08 1:24 PM	Quotes	Portable Service Projection	In the PS projection quote and in the PS Projection report, AB portables should not have a price for maintenance listed. It should show as an asterisk (*). The subtotal section that currently lists the AB amount should not show the AB amount, but should say the following "" Included in Maintenance Contract" The total should exclude the maintenance of the fire extinguishers and exclude the AB amount.		Bill Baur	Complete	Important	Mark Birchmeier	
2070	12/24/08 1:43 PM	Certificates	Override Date	Change override date cleared message to a question.		Bill Baur	Complete	Important	Bill Baur	Mark
2069	12/24/08 10:20 AM	Location Address	Override Date	Add permanent comments when override date is set and when it is cleared.		Bill Baur	Complete	Important	Bill Baur	
2066	12/23/08 3:25 PM	Credit Messages	Add reference to criteria	Add a small button or drop down item within the credit override box that mentions the criteria for a Green, Orange and Red level credit messages.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2063	12/23/08 1:55 PM	Customer	Change to non-30 day terms	from Susan - Changing Terms from 30 days should be harder to do. We sent a past due letter at 30 days with an invoice that said terms were 90 days. The terms were a mistake. The default should be 30 days. If you want to change it a message should come up "Warning. You have selected non-standard payments terms. Would you like to save the non-standard payment terms?" Yes = save the customer as is w/ non-standard payments terms and send an email to the credit department, No = Switch to 30 day payment terms and save the customer, Cancel = don't save the customer and return to customer edit screen.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2062	12/23/08 1:52 PM	Customer	Change from COD to Bill, limit to 1 comment message	from Susan - When changing a customer from COD to "bill" - it is not necessary to force input of 2 comments-one when you change the status from COD to "Bill" and one when you put in the credit amount. When click "Bill client" you should input the credit amount at the same time- 1 step not two		Bill Baur	Complete	When you get to it	Mark Birchmeier	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2059	12/22/08 3:46 PM	Certificates	If tech is changed, then change certcover/certsheet techs	If a tech's timeslot is assigned to another tech, then remove the original tech from the certcover and certsheets if not certsheets have had data entry done.		Bill Baur	Complete	important	Mark Birchmeier	<p>Namely, if Danny is the tech on a WOTS record and the tech is changed to Karl, then remove Danny from and add Karl to the certcover and certsheets if no data entry has been done. No warning message is necessary. If, however, DAnny is scheduled for 2 days in 2 WOTS entries, and only one of them is changed to Karl, then keep Danny on the certsheets/cover and simply add Karl.</p> <p>In essence, check all active WOTS and update the certcover and certsheets as required if no data has been entered.</p> <p>WFB - the process varies slightly from the above: If certificate is closed then no certificate updates take place. If the original timeslot tech has other timeslots then he is not removed. Changing a tech will remove the original, not replace him because the new tech may already be on the certificate creating a double. New techs are already dealt with when certificates are loaded (this routine checks for doubles).</p>
2054	12/18/08 2:07 PM	Scheduling Tool	Results from service meeting	1. Default SS view to have the include accounts with credit problems checked. 1. This should also include do NOT service accounts. 2. Highlight override dates with a yellow background instead of a red background 3. Highlight customers with credit problems in red text (credit hold and do not service) 4. Show flags and codes checkbox is broken		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2053	12/18/08 2:06 PM	Equipment	Results from Service Meeting	1. If user changes the next sched date, then automatically enter a comment in the equipment. Stating what the original date was and the new date. No user intervention on the comment is needed or confirmation message. Just add the comment when the system is saved and the next sched date is modified (does not apply to new systems or system where the next sched date was blank).	2. When inactivating system or reactivating system, check the AB scenario for an update. We need to make sure that the AB is updated correctly.	Bill Baur	Complete	When you get to it	Mark Birchmeier	
2052	12/18/08 11:16 AM	Location Address	Add "BuildingNum" to this database	this will eventually be editable by the customer and used as an optional, personalized nickname of the building for the customer. This can be used for store number, building number, store nickname, etc. It must include non-numeric characters.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2051	12/18/08 7:18 AM	Equipment	Duplicate Device	Insert device as the next route# and renumber.		Bill Baur	Complete	Important	Bill Baur	Mark
2045	12/15/08 1:07 PM	View	Add Quote amount	Please add quote amount on quote flex grid		Bill Baur	Complete	Important	Brett Straten	
2041	12/11/08 3:09 PM	Equipment	changes to devices	1. remember sort order after saving so you don't keep having to change the view.	2. check use per device info, this just activates & opens the device tab (unless you are reactivating). On that tab, add the import from Excel button.	Bill Baur	Complete	Important	Mark Birchmeier	
2038	12/11/08 2:50 PM	Work Orders	Device Printout	Remove description heading when print type is the same.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
2032	12/10/08 10:41 AM	Equipment	Change "Device Address"	NEW ITEM ADDED 12/11/2008 by Mark: Make this column normally visible (not only visible under extended info).	new header name = "Address / Comment"	Bill Baur	Complete	Important	Mark Birchmeier	
2029	12/9/08 8:14 AM	Certificates	Batch printing screen	Add the columns quote ID and quote status to the columns. Also add the ability to print the quotes and the certificates OR email both the quote and the certificates to the batch printing/email routine.		Bill Baur	Complete	Mission Critical	Brett Straten	
2028	12/8/08 1:22 PM	Work Orders	Add Laser Print button to Material Pullsheets	use "AFPMaterialPulsheet.rpt" in the reports directory the same way that equipment work orders use AFPWorkOrder.rpt to laser print, but only hand off the parameter for "wonumber" (not "SuppressTotals").		Bill Baur	Complete	Important	Mark Birchmeier	
2021	12/5/08 8:56 AM	Work Orders	Cancel Certs & Create Cert	If a work order previously had a certificate created for it, then that cert was cancelled. The WO's cert number should be reset to zero. If you then go to the WO and click the create cert button, it should not go to the previously cancelled cert, but instead should create a new cert.		Bill Baur	Complete	important	Mark Birchmeier	
2018	12/4/08 7:13 AM	Equipment	System Type	Use 'EquipmentType' from Dat table instead of 'Question Version' from the FXF table to populate drop-down box.		Bill Baur	Complete	Important	Bill Baur	Mark
2016	12/2/08 10:56 AM	Work Orders	Device Printout w/ long Descriptions/Locations	Wrap the text to the next line (a maximum of 2 lines).		Bill Baur	Complete	When you get to it	Mark Birchmeier	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
2011	12/1/08 8:32 AM	Work Orders	remove "Ind Ins" from device counts	On SS Work Orders, remove the text that specifies if the devices are to be individually inspected.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
2007	11/24/08 7:23 AM	Work Orders	Device Printout Modifications	Change order of device printout to be the route order instead of grouped by device type. Change the header info only when you chance the printout type.		Bill Baur	Complete	Important	Mark Birchmeier	
2005	11/21/08 2:33 PM	Employee	Label	Remove letters "ABA" from "ABA Ckg/Savings Acct"		Bill Baur	Complete	When you get to it	Bill Baur	Gail
2004	11/21/08 2:17 PM	SpokenForDiscrepancy Utility	Logging	Have corrections put into logging table.		Bill Baur	Complete	Important	Bill Baur	
1998	11/19/08 2:59 PM	Customer	Credit Display	Use \$ format for Service Credit, Total Credit, and Credit Balance.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
1996	11/17/08 2:12 PM	Comment	Track Comment Deletion/Modification	in the logging table		Bill Baur	Complete	Important	Mark Birchmeier	
1994	11/17/08 1:05 PM	Credit	Credit Warning Revamp	See attached notes and mockups		Bill Baur	Complete	Important	Mark Birchmeier	Discuss w/ Mark before continuing. -MB
1993	11/17/08 12:57 PM	Work Orders	Do Not allow to schedule a WO	If a customer is on Credit Hold "C" or marked as Do NOT Service "X", then do not allow scheduling of work orders.	Keep existing block that a work order cannot be created if the customer is marked as Do NOT service "X". If the WO has a negative amount i.e. it is a return, then it is exempt from this.	Bill Baur	Complete	Important	Mark Birchmeier	
1990	11/17/08 11:49 AM	Work Orders	SS Work Orders w/ Linked Need to Show Hydros	SS WOs that have a Linked PS whose portable system is checked on the SS WO, need to show the Hydro & 6-year test counts (like the PS work orders do) on the route Sheet.		Bill Baur	Complete	Important	Mark Birchmeier	
1987	11/14/08 8:52 AM	Certificates	Reopen	Add "Certificate Reopened" to WO comments.		Bill Baur	Complete	When you get to it	Bill Baur	
1986	11/14/08 7:57 AM	AB Scenario	When viewing the AB scenario, check the credit limit	if the credit limit of the customer is less than the interval price of the autobill (annual price / # of invoices sent per year), then give a warning message if the autobill is not setup for credit card payment. Something like: "The customer's credit limit of \$_____ is insufficient to pay for this AutoBill's interval price of \$_____. Please contact Accounting to rectify this issue or decrease the billing interval to lower the interval price."		Bill Baur	Complete	Important	Mark Birchmeier	
1985	11/14/08 7:49 AM	Work Orders	Material Pullsheets - do not show credit issue messages	if a WO is a Material pullsheet, do not show the credit warning, credit override or other credit issue warning messages. Just bypass them without any indication of an issue and no comments		Bill Baur	Complete	Important	Mark Birchmeier	
1983	11/13/08 3:41 PM	Employee	I/O Grid	Only save fields when changed. Show them as light green.		Bill Baur	Complete	When you get to it	Bill Baur	
1977	11/13/08 10:02 AM	Certificates	Add "Email Certificate" to CertCover drop down (under Print)	This does the same thing as the right click on the FX4view menu		Bill Baur	Hold	When you get to it	Mark Birchmeier	Put on hold due to unsolved modal problems. - WFB
1975	11/12/08 12:42 PM	Work Orders	Repair Certificate	Currently, Repair QV is picked from the Dat file. Need ability to change Question Version in File Maint. QV should come from the CertSheet.		Bill Baur	Complete	Important	Bill Baur	Nadine
1970	11/11/08 10:43 AM	Employee	Security Codes	If an employee has security code 0 for the employee program, then flash a warning message "You are currently not setup to view the employee database. Please contact Human Resources to gain employee database access."	Right now it just closes without any message. That makes people think that the program is not working or that their computer is broken.	Bill Baur	Complete	Important	Mark Birchmeier	
1966	11/6/08 11:59 AM	Sales Book	Tax & Shipping	Keep Sales Tax and Shipping Totals on Totals tab.		Bill Baur	Complete	When you get to it	Bill Baur	Gary
1963	11/5/08 3:46 PM	Scheduling Tool	Credit Pending	Add ability to cancel creating a WO when credit is pending.		Bill Baur	Complete	Important	Bill Baur	Nadine
1957	11/4/08 10:09 AM	Work Orders	Scheduling Tab	Make the flexgrid of schedule slots sortable.		Bill Baur	Complete	Important	Bill Baur	Mark
1954	10/31/08 2:18 PM	Certificates	Labor Rate	Take labor rate from DatType "TechCost".		Bill Baur	Complete	Important	Bill Baur	Mark
1952	10/30/08 3:08 PM	Customer	New Letter Feature	Can you have the default save location be the supporting docs for the customer? -Brett	Save the file to customer supporting documentation as nameofflettertype-ToContact#####-datetime.doc (where nameofflettertype = the name of the letter selected, ##### is the contact number, datetime is the datetime in YYYYMMDDHHMM format (this is to make it a unique filename)).-Mark	Bill Baur	Complete	When you get to it	Brett Straten	

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1951	10/30/08 12:33 PM	Employee	Security level based usage	1. Using the 10's field in security levels change access: 1. 0 = no access to emp3.exe 2. 1 = limited access to emp3.exe 1. a. don't allow access to SS#, chargerate, comments, security level, aba account#, aba chkg/savings account#, direct deposit menu, options I/O grid menu, secure menu 3. 3. 9 = full access to emp3.exe 1. do NOT have different programs. Use the same program and make the fields invisible or buttons disabled that they should not see. 4. Fix Vacation and Sick Days 5. Fix resize vertical		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1950	10/30/08 10:05 AM	Quotes	ReQuote	Instead of renaming quote copy with "a, b, c...Doc" use "Rev1, Rev2, Rev3...Doc"		Bill Baur	Complete	Important	Bill Baur	Carl
1943	10/24/08 11:17 AM	Work Orders	Location Comment in WO Details tab	This is not readable beyond 2 lines. Can we make it scrollable or expandable? We could use up some space in the hand entered comment (1/2 each?)		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1940	10/22/08 6:50 AM	Sales Book	Layout	Add tab control: Invoice/WO listing Sales Book Totals Break down by employee		Bill Baur	Complete	Important	Bill Baur	Mark
1938	10/20/08 11:17 AM	Work Orders	Material Pullsheets and Credit Cards	Material Pullsheets are never invoiced. Therefore, we should not ask about charging the credit card if we are creating a material pullsheet (clicking on the create material pullsheet button in jobs).		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1935	10/17/08 3:38 PM	Reports	PS Projection	Implement base line pricing.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1934	10/17/08 3:37 PM	Quotes	PS Quote	Implement base line pricing.		Bill Baur	Complete	Important	Bill Baur	Tom W
1933	10/17/08 6:33 AM	Employee	Export	UPDATE 10/21/2008 by Mark: Use FlexGrid SaveGrid routine with option to include or not include Social Security #. Then automatically open the exported Excel file.	Reimplement the export function.	Bill Baur	Complete	important	Bill Baur	Susan
1932	10/15/08 3:44 PM	Maintenance	Move System	Check for Autobills and give warning to update when exists.		Bill Baur	Complete	Important	Bill Baur	
1926	10/14/08 3:24 PM	Maintenance	Invoice	Add ability to delete line items.		Bill Baur	Complete	Important	Bill Baur	Terri
1923	10/14/08 3:18 PM	Maintenance	Move System	Change "File Not Found" err msg to "No Support Docs"		Bill Baur	Complete	When you get to it	Bill Baur	
1921	10/10/08 7:14 AM	Certificates	Add Fields to CertCover	CompleteDateTime: This will be the date-time the cert was marked complete. CompleteBy: This will be the employeenumber of the person who marked the cert complete. PrintedDateTime: This will be the date-time the cert was printed	PrintedBy: This will be the employeenumber of the person who marked the cert printed or printed the cert.	Bill Baur	Complete	Important	Mark Birchmeier	
1919	10/6/08 2:59 PM	Certificates	Fire Pump - Special Case Routine	When entering certificate sheet for fire pump, add a button (yeah, I know I told you not to add special case buttons...but this is different) that says Fire Pump Test Results. This button will save the currently entered data (tech, hours, opcode, system information, etc.) will copy the "Fire Pump Test.xls" in the masters directory to the supporting documentation directory of the equipment renaming the file to "Fire Pump Test Cert Num #####-SS.xls" (where ##### is the certificate number and SS is the system number)	Then it will open that new file.	Bill Baur	Complete	important	Mark Birchmeier	Let me know if you have any questions.
1917	10/3/08 11:51 AM	Certificates	Add Certificate Number	To the automated email subject during the batch printing of certificates.		Bill Baur	Complete	Important	Mark Birchmeier	
1916	10/3/08 6:39 AM	Invoicing	PS Price Matrix	Create s new datatype ('PS Conversion') and a Function to alter FX status codes.		Bill Baur	Complete	Important	Bill Baur	Created Function ConvertStat(Cn, stat)
1913	10/2/08 6:43 AM	Invoicing	Discount	Do not apply to FX parts (e.g. gauge).		Bill Baur	Complete	Important	Bill Baur	Mark
1911	10/1/08 8:24 AM	Invoicing	Mandee	Special pricing: \$45 up to 5 10#ABC units + \$7 per additional unit. Refill 6 Yr and Hydro: \$50		Bill Baur	Complete	important	Bill Baur	Tom W
1902	9/29/08 8:02 AM	Reports	PS Projection	Remove line amounts when minimum service charge applies.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1901	9/29/08 7:56 AM	Time Sheet	Import From Sched Bd	Do not use travel time from or to home on time sheet. Do include travel time back to AFP. Do not update last WOTS for travel time back to AFP.		Bill Baur	Complete	Important	Bill Baur	
1900	9/26/08 7:42 AM	Certificates	Devices	Add ability to delete a device by setting the .Active flag to "D".		Bill Baur	Complete	Important	Bill Baur	Mark
1898	9/25/08 10:20 AM	View	Add State column to Location List	in FX4view		Bill Baur	Complete	Important	Mark Birchmeier	
1897	9/25/08 7:28 AM	Certificates	Cert Cover Cleanup	1. change the layout the systems to a flexgrid. 2. add columns for number of techs & tech hours 3. add tech hours at teh bottom with a comparison to the schedule board hours with a button to reconcile/redistribute the variances between the various systems 4. do away close certificate screen and run the validation from the main cert cover screen and then give a popup box that asks permission to the close the cert. 5. Allow for editing of the system description (this would also change the system description in the equipment/ssequip table)		Bill Baur	Complete	important	Mark Birchmeier	This can introduce major bugs. Please test this very well with a number of different customers, system combinations, portables, add/remove systems, with previously written certs, etc. Do not put this live until Mark can really test it.-MB

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1894	9/24/08 1:44 PM	View	Minor changes	1. Zipcode routine's cancel button is halfway off the screen when only a few zipcode options are shown.	2. When cancelling a new customer, the customer is still saved if you hit Cancel button, but it is saved without any data. The customer number should be removed from the billadr table. We don't need to recycle the cust#, but we should not keep a blank customer.	Bill Baur	Complete	When you get to it	Mark Birchmeier	
1893	9/24/08 10:41 AM	Certificates	Duplication Avoidance	Validate the certificate systems if preexisting certificate is found.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
1891	9/23/08 1:54 PM	Tech Box	Emailed Route Sheet	Add FX counts.		Bill Baur	Complete	Important	Bill Baur	Mark
1888	9/22/08 3:32 PM	Certificates	Looping Through Sheets	Allow pressing next without op status when no editing is done.		Bill Baur	Complete	When you get to it	Bill Baur	
1884	9/19/08 3:17 PM	Work Orders	SS WO Cover	Add checkbox to suppress the printing of unchecked systems on the cover sheet.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1880	9/18/08 11:42 AM	Quotes	When creating a quote from a certificate	in the area where the deficiencies is automatically transferred to the quote, also include the following if there is any data in the fills table: "# of techs:", "# of hours", "Material Required:", & "Special equipment:"		Bill Baur	Complete	Important	Mark Birchmeier	
1877	9/17/08 12:45 PM	Employee	Add New Address	Current Address fields will be called physical address.	New Address fields will be mailing address fields: mailingaddress, mailingcity, mailingstate, mailingzip	Bill Baur	Complete	Important	Mark Birchmeier	
1876	9/17/08 12:32 PM	View	Search Row	Move to the matching row after you press left search button Job#, Workorder#, or Invoice#.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1870	9/15/08 9:49 AM	Fire Officials	Add Quarterly Inspections Required	Under "Requirements" add "Require Quarterly Inspections" under sprinkler. Also do not allow manual entry into either Sprinkler or Kitchen because the data will not be saved.		Bill Baur	Complete		Brett Straten	
1862	9/11/08 2:53 PM	Schedule Board	Allow editing of Vacation appointments	But only allow editing of the start time, not the duration, employee, date, comment, etc. Also, do not allow deletion.		Bill Baur	Complete	Important	Mark Birchmeier	Out usually precedes the reason. I can't think of a reason to require it.
1860	9/11/08 10:37 AM	Employee	Add field to employee database & program	"MilesFromOffice"	This is not a required field.	Bill Baur	Complete	Important	Mark Birchmeier	
1855	9/10/08 10:43 AM	Certificates	When opening a certificate and adding a tech	do not display popup box. Just add the tech to the certcover.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1853	9/10/08 8:07 AM	Quotes	Add Requote button	This button will copy the original quote to the supporting documentation section. Then it will rename the original quote filename to add a letter after then quote name or increment the letter after the quote name by 1 character (i.e. Quote12345.doc will become Quote12345a.doc and Quote12345a.doc will become Quote12345b.doc). This new filename will replace the quote filename in the quote screen and the quote will be opened (replacing the quote number, if possible on the quote or at least telling the user to change the quote number).		Bill Baur	Complete	When you get to it	Mark Birchmeier	The purpose is to automate the creation of a quote history when a quote is changed by changes in what the customer needs or asks for.-MB
1844	9/5/08 11:09 AM	Work Orders	Add COD to routesheet	Next to the amount in the route sheet, add the letters COD if the WO is marked as COD.		Bill Baur	Complete	Important	Mark Birchmeier	
1840	9/4/08 11:28 AM	Employee	Direct Deposit	Put retrieved records in Last Name, First Name order.		Bill Baur	Complete	Important	Bill Baur	Gail
1837	9/4/08 11:14 AM	Date Time Stamp	Show Initiated & Changed By	Move this to the FXView Options menu.		Bill Baur	Complete	Important	Bill Baur	Mark
1836	9/4/08 11:13 AM	Employee	Direct Deposit	Add ABA Account fields to Employee screen.		Bill Baur	Complete	Important	Bill Baur	Gail
1833	9/3/08 7:34 AM	Date Time Stamp	Workorders, Certificates, Equipment	Add Check Boxes to turn off "Initiated / Changed By" pop-up.		Bill Baur	Complete	Important	Bill Baur	Mark
1829	9/2/08 7:28 AM	Tech Box	Optimize	Add screen indicator that route was optimized.		Bill Baur	Complete	When you get to it	Bill Baur	
1828	9/2/08 6:48 AM	Work Orders	Verizon	Have status 4 and status 5 set to status 64.		Bill Baur	Complete	Important	Bill Baur	Tom W
1827	9/2/08 6:44 AM	Certificates	Retrieve Sheet	Re-get certsheets record each time sheet is viewed.		Bill Baur	Complete	Important	Bill Baur	Mark
1825	9/2/08 6:41 AM	Tech Box	Travel Time	Add flag to indicate if Travel Time was imported.		Bill Baur	Complete	Important	Bill Baur	
1823	8/29/08 7:42 AM	Quotes	Projection	Covert status 4 prices to status 64 for Verizon accounts.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1819	8/28/08 7:28 AM	Tech Box	Gas Mileage	After interfacing with Map-Point, save distance in the RouteSheet table.		Bill Baur	Complete	Important	Bill Baur	Susan
1815	8/27/08 7:10 AM	Time Sheet	Comments	Change "Find Comment" to "Search Comments"		Bill Baur	Complete	When you get to it	Bill Baur	
1814	8/26/08 3:40 PM	Equipment	Devices (Duplicate Function)	Right click menu option in equipment and certificate entry on the device list called "Duplicate Device" with a hot key as Ctrl + D.	This will duplicate the device on the currently highlighted row and place it below the currently highlighted row, then that new row's location field will become highlighted. Duplicated device type, device description, & device location.	Bill Baur	Complete	Important	Mark Birchmeier	The data entry is not happening in groups of devices. Rather, it is happening one device at a time when reading off of the page. Right now, the add device is too long right click, add device, select device type, click add, click Ok, then edit that device. A quick hotkey Ctrl + D would do the same work way quicker.
1806	8/22/08 7:05 AM	Employee	Direct Deposit	Add column header input screen.		Bill Baur	Complete	Important	Bill Baur	Gary

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1799	8/19/08 9:47 AM	Work Orders	Material Pull Sheets	Put in strong warning against changing Internal Mark-up.		Bill Baur	Complete	Important	Bill Baur	Mark
1797	8/19/08 7:19 AM	Invoicing	Billing by Location	Add additional billing contact to Shipping.		Bill Baur	Complete	Important	Bill Baur	Mark
1793	8/18/08 12:54 PM	Comment	Add My Last Comment to the drop down list in FX4view	This will find the customer for which you last entered a comment.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1790	8/15/08 2:41 PM	Quotes	FXView Popup Menu	Do not show "Email Quote" when there is no quote. Move "Add New Quote" to the top.		Bill Baur	Complete	When you get to it	Bill Baur	Phil
1784	8/14/08 6:40 AM	Certificates	Operational Condition	Remove the lines preceding status and add definitions of Operational, Partially Operational, and Non-Operational.		Bill Baur	Complete	Important	Bill Baur	Remove:"This certifies that the equipment described below was inspected by Associated Fire Protection, and left."
1777	8/7/08 2:48 PM	Contacts	When searching by last name...	the most useful thing to see on the search results is the first name, but that bit of info is missing.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1775	8/4/08 11:05 AM	Work Orders	Log changes to woline	The date/time changed is modified for all woline even when only one line is changed. This should be happening on a line by line basis. Also, we should be logging woline changes in the logging table.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1774	8/4/08 11:02 AM	Work Orders	WO & Invoice to only use the default office's info	Regardless of what office services that location, use the default office's company name, address, & info.		Bill Baur	Complete	Mission Critical	Mark Birchmeier	Replaced NY office work order header with Paterson office.
1773	7/30/08 4:54 PM	Tech Box	Route Sheet	Add half hour lunch.		Bill Baur	Complete	Important	Bill Baur	Brett
1772	7/30/08 4:53 PM	Tech Box	Make Total 8	Add routine to make total hours add up to 8.		Bill Baur	Complete	Important	Bill Baur	Bryan
1771	7/30/08 7:36 AM	Work Orders	Creating New SS WO	If there are no recent work orders for which to report, we do not need to see the recent work order screen		Bill Baur	Complete	Important	Bill Baur	Mark
1767	7/28/08 11:18 AM	Quotes	Comment Section Revision	Change comment section to work like the regular comments (including follow-up date). Kind of the way the Job's comment section works.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1765	7/24/08 11:29 AM	Work Orders	System Service Work Orders	Do not allow the creation of an SS or SC work order when no systems exist.		Bill Baur	Complete	Important	Bill Baur	
1761	7/23/08 6:58 AM	FX4 Front Menu	Menu Option Under FXView	Add ability to reset forms to upper left corner.		Bill Baur	Complete	Important	Bill Baur	Susan
1760	7/22/08 2:49 PM	Function	DisplayPhone	Allow letters in phone numbers, do not format phone numbers when letters are used.		Bill Baur	Complete	Important	Bill Baur	Mark
1756	7/15/08 9:57 AM	Certificates	Adding Portable System	Create linked PS work order.		Bill Baur	Complete	Important	Bill Baur	
1746	6/27/08 6:57 AM	View	Contact Chk Box	Change tool tip to read "Default to Contact..." instead of "Default to Prospect..."		Bill Baur	Complete	When you get to it	Bill Baur	
1745	6/27/08 6:55 AM	View	Bill Address List	When you left click or double click the last row it loads another 200 recs. Eliminate this as this is unexpected behavior.		Bill Baur	Complete	Important	Bill Baur	Bryan L
1744	6/25/08 11:11 AM	View	Look-Up	Increase speed on listing. With partial entry, show all that match (Co Name, Last Name, and City).		Bill Baur	Complete	Important	Bill Baur	
1742	6/25/08 7:49 AM	View	Address Buttons	Program thinks you're entering a state if you enter a 2 digit#.		Bill Baur	Complete	Important	Bill Baur	Reinterpret as a street number.
1738	6/23/08 2:43 PM	Equipment	Monitoring Acct# Listing	Switch reading AcctNum from SSEquip to SysData.		Bill Baur	Complete	Important	Bill Baur	
1735	6/23/08 7:12 AM	Certificates	Inspection Sheet	Print * next to required fields.		Bill Baur	Complete	Important	Bill Baur	
1734	6/23/08 7:12 AM	Work Orders	Inspection Sheet	Print * next to required fields.		Bill Baur	Complete	Important	Bill Baur	
1727	6/18/08 7:07 AM	Certificates	Portables Invoice	Sync Next, Prev, and Back buttons between PS invoice and cert sheets.		Bill Baur	Complete	Important	Bill Baur	Mark
1726	6/18/08 7:05 AM	Certificates	Next / Prev	Sync Next, Prev, and Back buttons between cert sheets and device sheets.		Bill Baur	Complete	Important	Bill Baur	Mark
1724	6/16/08 9:59 AM	Certificates	Invoicing PS WO	Update CertSheet servicemen along with Invoice servicemen.		Bill Baur	Complete	Important	Bill Baur	
1723	6/16/08 9:50 AM	Invoicing	PS Linked WO	If the portable system is checked on the parent wo, use the parent's WOTS records.		Bill Baur	Complete	Important	Bill Baur	
1718	6/12/08 6:43 AM	Certificates	Hours	Make Hours required to close certificate.		Bill Baur	Complete	Important	Bill Baur	
1717	6/11/08 1:44 PM	Work Orders	WO Comment	Add WO comment when reopening certificate.		Bill Baur	Complete	When you get to it	Bill Baur	
1716	6/11/08 11:34 AM	Certificates	Certificate Preview	Add the printing of blank device pages.		Bill Baur	Complete	Important	Bill Baur	Mark
1714	6/10/08 4:41 PM	Certificates	Labor Display	Format to not show more than 3 decimal places.		Bill Baur	Complete	Important	Bill Baur	
1713	6/10/08 4:39 PM	Work Orders	Labor Display	Format to not show more than 3 decimal places.		Bill Baur	Complete	Important	Bill Baur	
1712	6/10/08 4:38 PM	Certificates	WOTS <- CertSheet	Create routine to distribute discrepancy among certificate sheets.		Bill Baur	Complete	Important	Bill Baur	Mark
1711	6/10/08 4:34 PM	Certificates	Certificate Sheets	Create unique index: Crtnum + Sn		Bill Baur	Complete	Important	Bill Baur	
1708	6/9/08 7:55 AM	Customer	Changing To Bill Client	If autobill interval price exceeds the customer's credit limit, display a warning.		Bill Baur	Complete	Important	Bill Baur	Mark
1707	6/9/08 7:47 AM	Certificates	Inspection Date	Make Inspection date required to close certificate.		Bill Baur	Complete	Important	Bill Baur	Mark

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1706	6/9/08 7:40 AM	Work Orders	Update Spoken-For	Only run update once per work order session.		Bill Baur	Complete	Important	Bill Baur	
1705	6/6/08 3:06 PM	Sales Book	SSTechRevenue Changes	For S invoices: separate the invlines that have a productcode A from all other productcodes into a separate line on the sstechrev and mark it as a "C" instead of an "I"	Idea behind this: those invoice lines really represent billing for work done on certificates, so the credit should be given as a certificate instead of an invoice.	Bill Baur	Complete	Important	Mark Birchmeier	to be done & tested before the end of June.
1697	6/2/08 7:05 AM	Work Orders	Credit Override	Make the override comment show both on FXView and on the WO comment tab.		Bill Baur	Complete	Important	Bill Baur	Mark
1696	6/2/08 6:41 AM	Maintenance	Delete Certificate	Also delete CertDevice file.		Bill Baur	Complete	Important	Bill Baur	
1691	5/28/08 1:55 PM	Work Orders	Credit Hold	Place comment as an automated work order comment instead of as a customer comment.		Bill Baur	Complete	Important	Bill Baur	Mark
1688	5/28/08 7:22 AM	Invoicing	Changing Part	Save invoice lines and send user to work order when part changes are needed.		Bill Baur	Complete	Important	Bill Baur	Mark
1686	5/23/08 1:14 PM	Work Orders	Automated Inventory Adjustment	Add button to Inventory Adjustment box that says "OK to All" or something like that. This button will automate the process of doing the inventory adjustment without having to click OK for each part number.		Bill Baur	Complete	Important	Mark Birchmeier	
1685	5/23/08 9:50 AM	Work Orders	When printing, too much paper is being spent on time slots	When a work order lasts for several months, the number of timeslots printed is wasteful. Add a check that if there is more than 4 timeslots for a work order, give a popup that says "There are ## schedule slots for this work order. Would you like to print only the schedule slots for today and tomorrow?" If the answer is Yes, then print only the timeslots for today and tomorrow (if today's day is Friday, then print Monday's timeslot if no Saturday or Sunday timeslot are present). If no, then print all time slots (as is currently being done).		Bill Baur	Complete	Important	Mark Birchmeier	
1677	5/21/08 6:27 AM	Invoicing	Inventory Tracking	Do not allow part quantity changes.		Bill Baur	Complete	Important	Bill Baur	Mark
1672	5/16/08 5:48 AM	Maintenance	Move Location	Incorporate SysDevice and CertDevice tables.		Bill Baur	Complete	Important	Bill Baur	
1669	5/14/08 10:09 AM	Certificates	When closing a certificate, remove the override date on the location	see title		Bill Baur	Complete	Important	Mark Birchmeier	NTF
1667	5/14/08 9:51 AM	Employee	Employee Data Base for Direct Deposit Information	Need a database to capture all employee direct deposit information relating to payroll, and the ability to dump into a cvs file.		Bill Baur	Complete	Important	Garry Rienstra	
1660	5/8/08 6:44 AM	Scheduling Tool	Auto Create SS WO	Filter out systems that are already check-marked on existing active WOs.		Bill Baur	Complete	Mission Critical	Bill Baur	Mark
1659	5/8/08 6:31 AM	Text Search	Company Name	Convert listbox to flexgrid to allow for sorting. Right now it's tough to find because the results are in numeric order by customer number.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
										Try to find a company name that starts with the letter M and has "realty" in it...
1655	5/7/08 5:31 AM	Edit Address	Select Zipcode	Improve process and display.		Bill Baur	Complete	Important	Bill Baur	Mark
1654	5/6/08 9:25 AM	Text Search	Street	Convert listbox to flexgrid to allow for sorting.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1652	5/6/08 5:35 AM	Work Orders	Inventory Confirm	Do not allow to be bypassed by pressing Esc.		Bill Baur	Complete	Important	Bill Baur	Mark
1650	5/5/08 8:04 AM	Work Orders	SS WO - Linked PS WO	Instead of automatically not checking portable systems over 20 units, give query instead.		Bill Baur	Complete	When you get to it	Bill Baur	
1649	5/5/08 7:59 AM	Tech Box	View / Print Route	Give warning when system is not active.		Bill Baur	Complete	Important	Bill Baur	
1648	5/4/08 5:51 PM	Work Orders	Automated Comments	Do not allow editing or deletion.		Bill Baur	Complete	Important	Bill Baur	Mark
1640	4/29/08 3:50 AM	Work Orders	Quote Technicians	Display techs from quote in the work order schedule box.		Bill Baur	Complete	Important	Bill Baur	Brett
1638	4/27/08 5:21 AM	Work Orders	List Filter	Remove Instr function from the MySQL call to improve speed.		Bill Baur	Complete	Important	Bill Baur	Mark
1634	4/25/08 4:43 AM	Employee	Import / Export	Implement I/O grid.		Bill Baur	Complete	Important	Bill Baur	
1629	4/22/08 4:15 PM	Maintenance	Move Location	Give a warning when moving to an existing location.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
1626	4/15/08 10:20 AM	Certificates	Cert Preview Needs Updating	to include the new SysData & SysDevice info.		Bill Baur	Complete	Important	Mark Birchmeier	
1619	4/7/08 3:45 PM	Equipment	Add FX	Do not show the 10 status fields when adding a new FX.		Bill Baur	Complete	When you get to it	Bill Baur	Brett
1618	4/7/08 7:01 AM	Work Orders	SS WO QV Printout	Rearrange devices into their own section.		Bill Baur	Complete	Important	Bill Baur	Brett

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1610	3/31/08 7:41 AM	Invoicing	For Install Invoices, Add Engineer	Replace the Delivery person with the job's Engineer, if the invoice had a job number associated with it. Please account for the fact that the job may not have an engineer assigned.		Bill Baur	Complete	When you get to it	Mark Birchmeier	Extranet will also need to be updated by Mark.
1607	3/27/08 1:44 PM	Schedule Board	View Map	Add "View Map" to pop-up menu.		Bill Baur	Complete	Important	Bill Baur	Bryan L.
1603	3/26/08 3:18 PM	Location Address	Fire Official	Add column headings.		Bill Baur	Complete	Important	Bill Baur	
1600	3/26/08 12:07 PM	Location Address	View Fire Official	Allow viewing fire official when not in Edit mode.		Bill Baur	Complete	Important	Bill Baur	
1599	3/26/08 11:48 AM	Fire Officials	Always Loads Entire Table	Do not load entire table when entering a specific FO Number.		Bill Baur	Complete	Important	Bill Baur	Mark
1593	3/25/08 7:41 AM	FX4	Dat Table	Do not load entire Dat table, replace "Find" statements with "Select" statements. Do not load Zip file at start-up.		Bill Baur	Complete	Important	Bill Baur	Mark
1592	3/24/08 1:33 PM	Customer	Exit without Save	Add "Not saved" warning to a new customer when hitting "Back" instead of "Add and View".		Bill Baur	Complete	Important	Bill Baur	Nadine
1591	3/24/08 7:13 AM	Maintenance	Move Location	Include the moving of new tables: SysData and SysDevice.		Bill Baur	Complete	Important	Bill Baur	
1590	3/21/08 9:31 AM	AB Scenario	Allocation Display	Add check box to hide inactive and removed scenarios.		Bill Baur	Complete	When you get to it	Bill Baur	Phil
1588	3/21/08 7:49 AM	Maintenance	Move Location	Add ability to move ABScenarios to new customer# if warranted.		Bill Baur	Complete	Important	Bill Baur	Phil
1587	3/20/08 8:40 AM	Certificates	Operational Status	Do not allow certificates to be closed without an operational status.		Bill Baur	Complete	Important	Bill Baur	Nadine
1586	3/20/08 7:28 AM	AFP3	Make AFP3 DOS Program Work	Retrieve work order numbers: 23862, 24071,24822, 2248(as per invoice S38288), 389(as per invoice F38620), 2261(as per invoice S42407), 28045, 28444, 28610, 28778, 29606, 32615, 42353, 42424, 45010.		Bill Baur	Complete	Important	Bill Baur	Roland
1585	3/19/08 7:13 AM	View	Search By City	Load every record that contains the entered city, not just the first 200.		Bill Baur	Complete	Important	Bill Baur	Mark
1583	3/14/08 7:35 AM	Employee	Validate Input	1. Make sure that all required fields are entered 2. Lastnames cannot have any spaces in it 3. Usernames cannot have any spaces in it 4. Make sure that the following are not used elsewhere: 1. Initials 2. Sched Board Name 3. Username 4. SS Number 5. Drivers License #		Bill Baur	Complete	Important	Bill Baur	Mark
1582	3/14/08 7:32 AM	Employee	Required Fields	1. Fields that are required should be in Red or have a * after the label Fields that are required: 1. Firstname 2. Lastname 3. DeptNum 4. DateHired 5. Effective Date Hired 6. Salesman 7. Service Tech 8. Initials 9. Username (this should default to first initial lastname - i.e. Mark Birchmeier = mbirchmeier) 10. Admin Supervisor 11. Office		Bill Baur	Complete	Important	Bill Baur	Mark
1581	3/14/08 7:29 AM	Employee	Department Selection	DeptNum should be a drop down menu of available departments so we don't have to know or guess what to enter.		Bill Baur	Complete	Important	Bill Baur	Mark
1580	3/14/08 7:28 AM	Jobs	Convert Permit #	Convert from number to varchar(255)		Bill Baur	Complete	Important	Mark Birchmeier	NOTE: Please make sure to check the job report (in crystal reports) to make sure that if this field is referenced, it still works. Also, make sure that when doing the conversion that we don't lose existing data.
1579	3/12/08 5:15 PM	Schedule Board	Confirmed By	Change "Marked Confirmed" selections in pop-up menu to check-mark style.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
1575	3/11/08 9:02 AM	Invoicing	Invoice Heading FAX	Add Invoice FAX to main company variables in vbdirs.ini.		Bill Baur	Complete	Important	Bill Baur	
1573	3/10/08 8:54 AM	Invoicing	Heading	Create company variables for invoice heading (use vbdirs.ini).		Bill Baur	Complete	Important	Bill Baur	Invoices should always show main office, "Assoc Fire Protection".
1570	3/10/08 8:34 AM	FX4	Office Location License #	Save and display individual License # for each office location.		Bill Baur	Complete	Important	Bill Baur	Mark
1569	3/10/08 8:22 AM	Quotes	Signed Quote Button	Have Signed Quote button stay visible when made into a Lost Customer.		Bill Baur	Complete	Important	Bill Baur	Carl M
1568	3/10/08 8:20 AM	Schedule Board	Mark Confirmed	Add "Mark Confirmed By" to pop-up selections.		Bill Baur	Complete	When you get to it	Bill Baur	Bryan L
1565	3/5/08 9:52 AM	Scheduling Tool	Help	Add "Service Due with WO Quote" explanation to Help.		Bill Baur	Complete	Important	Bill Baur	
1564	3/5/08 9:50 AM	Scheduling Tool	Svc Due With WO Quote	Indicate the existence of work order quotes and add link in pop-up menu.		Bill Baur	Complete	Important	Bill Baur	
1563	3/5/08 9:47 AM	FX4	PO Number	Increase PO Number from 24 chars to 255 chars.		Bill Baur	Complete	Important	Bill Baur	
1561	3/4/08 3:49 PM	Lost Customer	When adding a lost customer	inactive the extranet		Bill Baur	Complete	Important	Mark Birchmeier	This already happens.
1559	3/4/08 7:08 AM	Maintenance	Delete Devices	Add ability to delete Device records.		Bill Baur	Complete	Important	Bill Baur	Mark, Brett

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1557	3/3/08 6:27 AM	Reports	Production Report	Merge customer projections with Microsoft Word (include AFP logo).		Bill Baur	Complete	Important	Bill Baur	To make it easy to send a FAX.
1555	2/28/08 6:44 AM	Scheduling Tool	Pop-up Menu	Add "View Map" to the pop-up menu on the top WO grid.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1554	2/28/08 6:40 AM	Time Sheet	Pay-code - Non-Tech	For Installation dept Vac, Hol, Sick time, change pay-code form 30 to 31 for non-tech employees.		Bill Baur	Complete	Important	Bill Baur	Gary
1551	2/26/08 9:36 AM	Lost Customer	Certificates	Inactivate certificates that correspond to cancelled work orders.		Bill Baur	Complete	Important	Bill Baur	
1550	2/26/08 7:41 AM	Lost Customer	Date-Time Stamp	Update ChangedBy and DateChanged when customer is cancelled.		Bill Baur	Complete	When you get to it	Bill Baur	Updated WO2, WOTS, SSEquip, Quotes, and AutoBill.
1549	2/26/08 7:17 AM	Lost Customer	Dialog / LostCust.Log	Change btrieve calls to MySQL calls to speed up process.		Bill Baur	Complete	Important	Bill Baur	Changed for WO2, WOTS, AutoBill and Quotes.
1548	2/26/08 7:15 AM	Lost Customer	WOTS	Only cancel future time-slots.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1546	2/25/08 1:14 PM	Reports	PS Projection And PS Work Orders	Change 6 Yr Maint and Hydro Test calculation by 3 months (include 3 months beyond the calculated service due date.)		Bill Baur	Complete	Important	Bill Baur	Tom W.
1544	2/21/08 5:30 PM	Work Orders	Dot Matrix	SS Work order printout doesn't happen until I click OK on the certificate count msgbox - remove msgbox.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
1539	2/15/08 11:33 AM	Work Orders	Email credit application	Change the text entry box to the same type of drop down list that is used for the extranet email password routine (one that is pre-populated with the email addresses listed in the contact, but is still hand enterable)		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1537	2/15/08 9:46 AM	Work Orders	Number Of Line Items	Display the number of line items on SStab.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
1536	2/15/08 6:49 AM	Work Order Time Slot	Job Hrs Entry	Change textbox to a dropdown combo.		Bill Baur	Complete	When you get to it	Bill Baur	Bryan L
1535	2/12/08 7:05 AM	Employee	Next/Previous	Make Next/Prev order same as the menu listing selected.		Bill Baur	Complete	Important	Bill Baur	Susan
1534	2/12/08 7:01 AM	Employee	Export/Import	Add link to help document.		Bill Baur	Complete	When you get to it	Bill Baur	Susan
1533	2/12/08 7:00 AM	Certificates	Certificate Preview	Add ability to change output, printer vs DOS file, from within the utility.		Bill Baur	Complete	Important	Bill Baur	Mark
1531	2/12/08 6:53 AM	Certificates	Increase Question Version Length	Inspection input screen only goes up to 139 lines. New question version 99 needs 387 lines.		Bill Baur	Complete	Mission Critical	Bill Baur	Doubled length of input scree, increased length of graphical.
1530	2/11/08 7:37 AM	Sales Book	Customer#	Right justify.		Bill Baur	Complete	When you get to it	Bill Baur	
1527	2/7/08 9:02 AM	Sales Book	Screen Display	Reposition start display to show division totals.		Bill Baur	Complete	When you get to it	Bill Baur	
1526	2/7/08 8:50 AM	View	Address Fields	Increase address text box size for Customer and Quote screens.		Bill Baur	Complete	When you get to it	Bill Baur	
1524	2/6/08 9:22 AM	Work Orders	Material Pull Sheet	The printout of "Date Ordered" should be with "Date Started" and "Date Completed".		Bill Baur	Complete	When you get to it	Bill Baur	Improved the lining up of Job#, Initiated By, Sold By and PO.
1523	2/5/08 12:18 PM	FX4	Increase Text Box Size	Rearrange fields for following forms:	Credit Card, Edit Customer, Ship Location, Edit Contact, Lost Customer, and Fire Official	Bill Baur	Complete	Important	Bill Baur	
1521	2/5/08 12:08 PM	Employee	Increase Street, City	Resize, rearrange text fields.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
1519	2/4/08 6:54 AM	Equipment	Comments	Remove equipment comments from showing on the SS workorder screen display.		Bill Baur	Complete	Important	Bill Baur	Brett
1518	2/4/08 6:51 AM	Equipment	Comments	Unrestrict comment length.		Bill Baur	Complete	Important	Bill Baur	Mark
1517	2/4/08 6:50 AM	Equipment	Comments	Do away with the historical copy equipment comment table - sswocmts, too much confusion. The SS workorder cover sheet will print whatever the current Equipment comments are.		Bill Baur	Complete	Important	Bill Baur	Discussion with Brett.
1516	2/1/08 6:57 AM	Equipment	Equipment Comments	Add Time-stamp fields and displ in new comment grid.		Bill Baur	Complete	Important	Bill Baur	Brett
1512	1/29/08 11:00 AM	View	Newly Added Contacts	Have all newly added contacts automatically show up in the View screen grid and in the current drop-down box without a refresh.		Bill Baur	Complete	Important	Bill Baur	
1508	1/24/08 11:10 AM	Customer	New Flag in Billadr	"Special Labor Rate"	Added to the "Warnings" section of the customer edit screen. Also shows up in red under Warnings in FX4view.	Bill Baur	Complete	Important	Mark Birchmeier	Used "L" as Special Labor Rate flag.
1507	1/24/08 6:54 AM	Scheduling Tool	Pop-up Selection	Add "View Map" to service due grid.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1506	1/24/08 6:52 AM	Tech Box	Pop-up Menu	Move "View Customer" to second choice like the schedule board.		Bill Baur	Complete	When you get to it	Bill Baur	Tom W.
1505	1/23/08 1:53 PM	Sales Book	Create New Product Code "Super Dealers"	Rewrite "Month Budget" DatType - break down into:DatType "DivisionCodes" and "ProductCodes".	Eliminate prodcode.cox.	Bill Baur	Complete	Important	Bill Baur	
1504	1/23/08 1:40 PM	Jobs	Rewrite Insert Statement	Add field names to insert statement for future backward compatibility.		Bill Baur	Complete	Important	Bill Baur	
1499	1/23/08 12:24 PM	Tech Box	View	Add button to view work orders like view route sheet.		Bill Baur	Complete	Important	Bill Baur	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1497	1/21/08 1:58 PM	View	All docs tab	All docs tab flex grid should have the most recent doc on top -- now it appears pretty random		Bill Baur	Cancelled	When you get to it	Roland Straten	on hold pending RFS discussion-MB 1/22/08
1494	1/21/08 7:52 AM	Database	Expand fields for company name, address and city	any reason that we can't allow 255 characters in these fields?	Start with CreditCard, then billadr, shipadr, autobill", contact", FO, employee, --did I miss any other tables?	Bill Baur	Complete	When you get to it	Mark Birchmeier	*Please let me know when autobill & contact is done so that I can modify the PO programs. -MB
1492	1/17/08 2:09 PM	Location Address	Listing	When I sort by a column and then look at that info for that location when I go back the sort does not stay by the way I had previously set it.		Bill Baur	Complete	When you get to it	Bill Baur	Tom W.
1490	1/16/08 7:19 AM	Tech Box	Route Sheet	Move location of "date/time printed" and add initials of the employee printing the route sheet.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1489	1/15/08 9:38 AM	Work Orders	To Certificate	Have a double-click on the certificate text box go to certificate.		Bill Baur	Complete	When you get to it	Bill Baur	Mark
1488	1/15/08 9:35 AM	View	Add Permit Number Field	Add under Permit Status in Jobs form.	255 VarChar string.	Bill Baur	Complete	When you get to it	Mark Birchmeier	
1487	1/15/08 8:12 AM	Certificates	Cancelling Certificate	Use the term "Cancel" instead of "Inactivate" and insert work order comments.		Bill Baur	Complete	Important	Bill Baur	
1486	1/15/08 8:09 AM	Work Orders	Cancelling Certificate Along With Work Order	When cancelling and uncancelling a work order with a certificate, insert work order comments.		Bill Baur	Complete	Important	Bill Baur	
1485	1/14/08 3:54 PM	Certificates	Cancelling Work Order	Inactivate certificate when cancelling work order and re-activate certificate when un-cancelling work order.		Bill Baur	Complete	Important	Bill Baur	Mark
1484	1/14/08 12:18 PM	Certificates	Certificate Listing	Add customer name and location name to certificate listing.		Bill Baur	Complete	Important	Bill Baur	
1483	1/14/08 9:12 AM	Certificates	Certificate Listing	Change list box to Component-One grid. Indicate inactive records in grey.		Bill Baur	Complete	Important	Bill Baur	
1482	1/14/08 9:10 AM	Tech Box	Route Sheet	Add "Date, Time Printed" to print-out.	Indicate "OPTIMIZED" on print-out when route has been optimized.	Bill Baur	Complete	Important	Bill Baur	Tom W.
1481	1/14/08 9:07 AM	Scheduling Tool	Drag Drop Multiple WOTS	Space slots apart for display on schedule board.		Bill Baur	Complete	Important	Bill Baur	Tom W.
1480	1/14/08 9:05 AM	View	Inactive Certificates	Add "Show Inactive Certificates" to menu selection.		Bill Baur	Complete	Important	Bill Baur	Mark
1479	1/11/08 7:04 AM	Certificates	Add Ability To Inactivate	FX4 program FX4view tab sections list Create certificate list Certificate follow-up list Certificate batch printing list SSTechRevenue program Make sure that these certificates do not appear on this list		Bill Baur	Complete	Important	Bill Baur	Mark
1477	1/9/08 2:07 PM	Time Sheet	When Out is marked, then automatically add sick time	only if enough sick time is available.		Bill Baur	Cancelled	Important	Mark Birchmeier	Hold until the policy is reviewed. -MB
1476	1/9/08 11:20 AM	Work Orders	When an SS work order is cancelled	Delete the related certificate.	Do you think we should check if any data has been entered and allow the user a way out if there is???	Bill Baur	Complete	Important	Mark Birchmeier	worked with Andrea and cancelled WO#106161 with the Navigator. She could not cancel the work order because there was a credit invoice. The invoice indicated that the work could not be done due to a broken heat line. A different work order was created to do the work the next month. Since WO#106161 could not be done, the blank certificate had no value, and so we deleted it. The work order was showing in the list of work orders without certificates so needed to be cancelled. Work orders with either an invoice or a certificate currently can not be cancelled or deleted. I will update the program to allow cancellation. Certificates and Invoices should not be automatically deleted, they should be viewed first, as in this case the invoice was legitimate.
1474	1/8/08 10:53 AM	Quotes	Quote Work Orders	Do NOT allow quote work orders to be written on a material pullsheet.		Bill Baur	Complete	Important	Mark Birchmeier	
1473	1/7/08 12:28 PM	Schedule Board	appointments & workorders	when there is a conflict in a time slot, you cannot see the appointment -- should have something like the multiple feature		Bill Baur	Complete	Important	Roland Straten	Please add the Edit Appointment, Delete Appointment to the right click menu to deal with this issue.

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1471	1/4/08 3:08 PM	Credit Card Processing	Change Credit Card Processing for expiration date	Change the display format in the flexgrid for credit card expiration date to be MMY.	Keep the data entry and storage the same, without changing it. Just change the display in the flexgrid.	Bill Baur	Complete	Important	Mark Birchmeier	
1470	1/4/08 1:47 PM	Invoicing	Add "Process with Credit Card" option	This would allow us process previously written invoices with a credit card without having to go to maintenance.		Bill Baur	Cancelled	Important	Mark Birchmeier	this had already been done. good work Bill. -MB
1466	12/31/07 10:17 AM	Schedule Board	Off-Hour Appointments	Show week-end and night appointments as Off-hours when week-ends and nights are not displayed.		Bill Baur	Complete	Important	Bill Baur	
1465	12/28/07 4:00 PM	Time Sheet	Add Out To Sched Bd	Have the Note combo box generate appointment occurrences.		Bill Baur	Complete	Important	Bill Baur	Roland
1462	12/28/07 11:00 AM	Work Orders	SS WO Certificate Of Inspection Fill-Out Sheets	Increase Long Fill-Ins from 3 printed lines to 4 printed lines.		Bill Baur	Complete	Important	Bill Baur	Brett
1457	12/20/07 7:23 AM	View	Employee Follow-Ups	Improve functionality: add progress bar, number of recs, stop button, scroll track, and initiate upon check box click.		Bill Baur	Complete	Important	Bill Baur	
1453	12/18/07 10:34 AM	View	Next follow up on search	Under search / view my customers it would be really great if we could have the next follow up date listed in the flex grid		Bill Baur	Complete	Important	Roland Straten	
1452	12/18/07 10:13 AM	Work Orders	First time inspection	If there is no previous inspections for a piece of equipment, print "FIRST TIME INSPECTION" next to the that piece of the equipment on the certcover so that the tech knows that we are inspecting for the first time.		Bill Baur	Complete	When you get to it	Brett Straten	This should probably be based on the existence of a previous certsheets for that system.
1449	12/13/07 8:23 AM	MySQL	Replace instr() functions from WHERE clause of MySQL statements	This causes the database to look through all records to check the result and compare it to the instr test.		Bill Baur	Complete	When you get to it	Mark Birchmeier	We should replace all those with better statements.
1447	12/13/07 7:28 AM	Work Orders	SS Work Order Print Check-Boxes	Checking Due should check Print.		Bill Baur	Complete	Important	Bill Baur	Mark
				Unchecking Due should uncheck Print.						
				Do not allow checking Print unless Due is checked.						
				Add comment when you either check or uncheck Due .						
1444	12/7/07 11:47 AM	Maintenance	Utility	Create utility to find the records pointing to missing customers.		Bill Baur	Complete	Important	Bill Baur	Phil
1440	12/6/07 7:03 AM	Schedule Board	Legend	Add "Appointment Overlap"		Bill Baur	Complete	When you get to it	Bill Baur	
1437	12/5/07 8:58 AM	Appointments	Tool-Tip	If multiple appointment instances fall on the same cell, show all instances in tool-tip.		Bill Baur	Complete	Important	Bill Baur	
1436	12/5/07 7:56 AM	Appointments	Tool-Tip	Clarify, indicate Series# and Instance#.		Bill Baur	Complete	Important	Bill Baur	
1435	12/5/07 7:38 AM	Schedule Board	Appointment Overlap	Show both WO menu items and Appointment menu items in the Popup selection for overlapped cells.		Bill Baur	Complete	Important	Bill Baur	Mark
1431	12/3/07 3:18 PM	Work Orders	Printing of a WO for 2 days	The problem is that if a work order is printed a second time, only the items that haven't been inspected should be printed.	Maybe we need a new checkbox that would suppress the printing of the selected items? Maybe a checkbox that defaults to all the printed ones that says print (and if you uncheck them, then it doesn't print those)????	Bill Baur	Complete		Mark Birchmeier	Let's discuss this with Brett.
1428	11/30/07 12:05 PM	Work Orders	Material Pull Sheets	Keep showing popup menu selection "View Inventory Item" after the pulling of items has started.		Bill Baur	Complete	When you get to it	Bill Baur	Tom M
1426	11/30/07 11:51 AM	Invoicing	Process Credit Card	Add help link to Process Credit Card.		Bill Baur	Complete	When you get to it	Bill Baur	
1424	11/28/07 2:09 PM	Invoicing	Add a way to select/add a credit card after an invoice is written	Also be able to unselect the credit card after an invoice is written. This should require credit card processing clearance.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1423	11/28/07 1:56 PM	Schedule Board	Timesheet out -> Schedule Board Appointment	see attached file for programming notes		Bill Baur	Complete	Important	Roland Straten	
1421	11/28/07 6:47 AM	Equipment	Add Tertiary Info (SysDevice)	Create Device meta-data and Device data entry.		Bill Baur	Complete	Important	Bill Baur	
1418	11/26/07 7:44 AM	Employee	Holiday Listing	Change from UniqueId order to Date order. Change grids to ScrollTrack = True.		Bill Baur	Complete	Important	Bill Baur	
1415	11/20/07 3:29 PM	Work Orders	Add New Priority	Add Priority "13 Off Hours"		Bill Baur	Complete	When you get to it	Bill Baur	Brian L
1414	11/20/07 3:23 PM	Location Address	Customer Appointments	Add Help link to diagram.		Bill Baur	Complete	When you get to it	Bill Baur	
1411	11/20/07 3:19 PM	Time Sheet	Logging Vacation	Add vacation date, "Added", "Deleted", "Changed".		Bill Baur	Complete	Important	Bill Baur	Mark
1407	11/20/07 6:48 AM	Tech Box	Route Sheet	Change from military time to 12 hr time.		Bill Baur	Complete	When you get to it	Bill Baur	Rosa

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1403	11/15/07 10:40 AM	Work Orders	Inventory.SpokenFor	Update Inventory.SpokenFor whenever loading a work order.		Bill Baur	Complete	Important	Bill Baur	Mark
1402	11/15/07 7:34 AM	Work Orders	Save Cost in WOLine More Accurately	Currently saved as Cost from Inventory. This make accounting reconciliation difficult.	Save it as (Cost + EffectiveShippingCost) * Internal Markup.	Bill Baur	Complete	Important	Mark Birchmeier	Go live December 1, 2007
1399	11/14/07 6:52 AM	Certificates	Fill-In Requirement	Add ability to require or not require specific Fill-Ins.		Bill Baur	Complete	Important	Bill Baur	Mark
1391	11/9/07 10:29 AM	Work Orders	Modify Status Area	see attached mockup		Bill Baur	Complete	Important	Mark Birchmeier	
1390	11/8/07 1:36 PM	Work Orders	InitDateTime	Make all work order line records that do not have InitDateTime equal to WO2.DateOrdered.		Bill Baur	Complete	Important	Bill Baur	Update when FX4 is updated.
1373	10/23/07 8:53 AM	Scheduling Tool	Top Section Loading	Why does this take so long to load? Isn't it just getting a record set according to the selection criteria? This should be much quicker than the bottom section.		Bill Baur	Complete	Important	Mark Birchmeier	Removed Instr from query.
1369	10/22/07 7:01 AM	Quotes	PS Quote	Create new quote type: PS Budget - All Customers		Bill Baur	Complete	Important	Bill Baur	This is very similar to the portable service quote Bill just wrote. Report starts with the user entering the starting month/year & ending month/year for report (report will be from first day of starting month/year to the last day of the ending month/year). Portable service anticipated revenue for all active portable equipment (much like the quotes for customers to view all locations anticipated revenue, but this looks at all active portable systems).
1365	10/18/07 11:28 AM	Credit	Change the trigger for credit warnings	currently they trigger when a customer's current credit is less than the combined total of the uninvoiced work orders and the balance on the invoices.	This should be changed to only trigger when the above combination exceeds the credit limit by 7% or the credit limit is exceeded by \$100.	Bill Baur	Complete	Important	Mark Birchmeier	
1364	10/18/07 9:39 AM	Equipment	List of Equipment (sys type) should be alphabetical	Display this drop down list in equipment sorted by the description. Also, the currently list shows each system twice. It should only show each system once.		Bill Baur	Complete	Important	Mark Birchmeier	
1363	10/18/07 9:08 AM	Work Orders	Part# Spoken-For WO List	Add pop-up selection to list current work orders needing the same part#.		Bill Baur	Complete	Important	Bill Baur	Tom Mancusco
1362	10/17/07 10:32 AM	Mailings	New Mailing	No way to add a mailing.		Bill Baur	Complete	Important	Bill Baur	
1361	10/17/07 9:59 AM	Time Sheet	Do not allow entry of time to 5### paycodes	We are doing away with 5### paycodes for marketing for future use. We still need to see historical data, but the 5### Marketing paycodes should no longer be a selectable choice in the drop down list.		Bill Baur	Complete	Important	Mark Birchmeier	Please be sure to allow for future jobs that will eventually hit the 5000 level.
										Sumhours should still be able to access the 5### paycodes until the end of 2008.
1360	10/17/07 7:07 AM	View	DeleteLog Table	Add PrimaryKey name field.		Bill Baur	Complete	Important	Bill Baur	
1356	10/9/07 8:07 AM	Invoicing	Remove Credit Warning Message from Overdue invoices	When writing a WO, skip the check that tests for invoices that are overdue for a specific number of days.		Bill Baur	Complete	Important	Mark Birchmeier	
1353	10/8/07 7:40 AM	Time Sheet	Find Text	Make columns sort on results grid.		Bill Baur	Complete	When you get to it	Bill Baur	
1351	10/4/07 2:39 PM	Certificates	Create Certificates List	Add "View Customer" to the pop-up menu.		Bill Baur	Complete	Important	Bill Baur	
1342	10/3/07 7:03 AM	Data	OfflineEdit Field	All tables should save field as "N" if they are not "Y"		Bill Baur	Complete	Important	Bill Baur	
1341	10/3/07 7:02 AM	Data	MySQL Representation	Cert Cover: Complete, RepairCertificate, DoNotPrint, Printed, & Reviewed fields are blank instead of "Y" or "N"		Bill Baur	Complete	Important	Bill Baur	Mark
1340	10/3/07 7:00 AM	Certificates	Create Certificate List	Single click to open the certificate is a pain since I keep opening a cert when I just intend to select the flexgrid so I can use the wheel on my mouse.		Bill Baur	Complete	Important	Bill Baur	Mark
1337	10/2/07 11:39 AM	Tech Box	Route Sheet	Remove blank line from Travel and from Job Time.		Bill Baur	Complete	When you get to it	Bill Baur	Roland
1332	9/28/07 3:50 PM	Route Sheet	Redo Multi-Day Route Sheet	Redo According to RFS instructions.		Bill Baur	Complete	Important	Mark Birchmeier	
1330	9/27/07 7:44 AM	Certificates	Slow	Implement index for Checkbox and Fill-in arrays.		Bill Baur	Complete	Important	Bill Baur	
1327	9/25/07 9:52 AM	Quotes	Add new quote type: PS Budget All Locations	This will be a report similar to the current master for "PS Scheduled Inspection Quote", but will only show the total for each location and will get info for all locations.		Bill Baur	Complete	Important	Mark Birchmeier	
1325	9/25/07 7:03 AM	Work Orders	WO Number Entry	Change zero to blank on the olive green screen text input.		Bill Baur	Complete	When you get to it	Bill Baur	Bob K.
1323	9/21/07 8:15 AM	Certificates	Non-Part Total	Print the discount last and do not print the parts subtotal since the discount now also pertains to non-part line items.		Bill Baur	Complete	Important	Bill Baur	
1321	9/20/07 10:55 AM	Maintenance	Invoice	Do not exit invoice after viewing unless Save/View/Exit is pressed. Add explanation how to recalculate sales tax when wrong.		Bill Baur	Complete	Important	Bill Baur	
1319	9/20/07 6:56 AM	Invoicing	PS Invoicing	Include non-part line items in customer PS discount.		Bill Baur	Complete	Important	Bill Baur	Tom

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1317	9/19/07 7:14 AM	Certificates	Max Question Number	Increase maximum Fill-In question number from 200 to 2000.		Bill Baur	Complete	Important	Bill Baur	
1316	9/19/07 7:11 AM	General	DisplayPhone	Update function to increase extension length beyond its 6 digit limitation.		Bill Baur	Complete	Important	Bill Baur	Changed to allow s 12 digit ext when storing as a 22 char compressed string, 20 digits if stored as a 30 char string.
1315	9/18/07 7:58 AM	Sales Book	Check Tax+Shipping	Show asterisk on invoices where Subtotal+tax+shipping do not equal Total Invoice.		Bill Baur	Complete	Important	Bill Baur	Gary
1311	9/17/07 7:02 AM	FX4	Exit Without Save	For Customer, Certificates, Quotes, and Jobs:	Rephrase warning to read "Do you want to save your changes?" instead of "Do you want to exit without saving?"	Bill Baur	Complete	When you get to it	Bill Baur	
1303	9/14/07 7:12 AM	View	Grid Updates	Have all grids update when associated forms are saved. E.g. if Quote status changes, show change on FXFView when the Save button is pressed. Have WO status update when first WOTS is scheduled.		Bill Baur	Complete	Important	Bill Baur	
1302	9/14/07 7:08 AM	Certificates	New WOTS	When an additional WOTS is added after a certificate has been created, add to certificate cover (unless 3 names are already there).		Bill Baur	Complete	Important	Bill Baur	
1298	9/13/07 1:42 PM	Certificates	Follow-up checked on Cert Sheet	Add + symbol to the operational status on the cert cover form (not the printout) to indicate that this is the one that needs a follow-up.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1296	9/12/07 8:16 AM	Location Address	Sorting by a column selects a location	When in FX4view on a customer with multiple locations, if you sort by the column in location (like city), it will select on the the locations to be the location that you view and the All Locations button will appear.	Sorting should not change the selected location (if one is selected).	Bill Baur	Complete	When you get to it	Mark Birchmeier	
1287	9/7/07 8:28 AM	View	Suppress Certs whose WO before shipped	Please be careful of the times when the WO gets erased or cancelled or the WO to cert link is broken/mislinked. If the WO cannot be found, then the cert should be shown.	Do not suppress the number in the WO itself. We should still be able to link from there.	Bill Baur	Complete	When you get to it	Mark Birchmeier	
1285	9/6/07 3:13 PM	Maintenance	Certificate Sheets	Can not find certificate sheet for certificate 11084 sheet number 1.		Bill Baur	Complete	Important	Bill Baur	Andrea - Added ability to find next existing sheet number.
1278	9/5/07 12:57 PM	Lost Customer	Extranet Cancellation	Mark the customer as extranet disabled when doing the extranet routine		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1277	9/4/07 2:42 PM	Jobs	Comments Order	Change the order that the comments (job and related) are shown to be from the most recent to the oldest (recent on top, oldest on bottom).		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1270	8/30/07 8:45 AM	Time Sheet	Installation Paycodes	When using the recommend from schedule board, if the work order that that WOTS is referencing has a job number, then make that job number the paycode.	This will help to ensure the recommend and tracking happen correctly.	Bill Baur	Complete	When you get to it	Mark Birchmeier	Program already does this.
1269	8/30/07 7:04 AM	AB Scenario	FX View	Add ability to go to an AB Scenario by entering its contract #.		Bill Baur	Complete	When you get to it	Bill Baur	Phil
1267	8/29/07 11:36 AM	Change Of Address	Needs Improvement	Need a way to clear and re-select records. Clarify process flow.		Bill Baur	Complete	Important	Bill Baur	
1265	8/28/07 3:52 PM	View	Add Print Ability to Flexgrids	Add right click menu item for all flexgrids that will print that flexgrid. The title of the print file would be the customer company name and the customer number.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1264	8/28/07 3:02 PM	Invoicing	When clicking on the credit an entire invoice button	add an invoice line to the invoice that has been credited that states "Credit Invoice Number ##### has been written for this invoice on MM/DD/YYYY by username"		Bill Baur	Hold	When you get to it	Mark Birchmeier	Susan says this does not suffice and will not meet her needs. Therefore we will discuss this in the FX4 dev meeting and put it on the back burner.-MB
1262	8/28/07 12:09 PM	Schedule Board	Multiple Day Route Sheet	Show total hours if all selected days (punch-clock) are entered.		Bill Baur	Complete	When you get to it	Bill Baur	
1261	8/28/07 10:14 AM	Employee	Changes to prevent wrongful data entry	Do not allow entry of vacationdays (vac days remaining can still be entered). If the user enters S or s as the Pay Type, then default the sick days to 5 and change the pay type to S If Pay Type h is entered, then change it to H New employees should default to active employees checked. error on the following conditions when trying to save (do not allow to save without it): username not entered or not unique effective date hired not entered dept num not entered pay type <> S and pay type <> H		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1260	8/28/07 6:54 AM	Schedule Board	Multiple Day Route Sheet	Add signature line.		Bill Baur	Complete	Important	Bill Baur	Peggy
1258	8/27/07 7:21 AM	Employee	New Field "WorkersCompCode"	Add WorkersCompCode to database and to Employee program.		Bill Baur	Complete	Important	Bill Baur	Susan
1257	8/24/07 6:55 AM	Schedule Board	Multiple Day Route Sheet	Add comment field, and make more room for hand-written time. Show weekends only if the "Show Weekends" menu option is checked.		Bill Baur	Complete	Important	Bill Baur	Peggy
1254	8/23/07 1:12 PM	Employee	Add field for Worker's Comp Code	It will be optional 4 digit number		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1252	8/22/07 3:52 PM	Schedule Board	Multiple day printout	Print blank lines for punch-clock when none entered.		Bill Baur	Complete	Important	Bill Baur	
1250	8/20/07 4:25 PM	Tech Box	Show Cancelled Time-Slots	Show cancelled time-slots with strike-through but do not include them in the Recalculate function.		Bill Baur	Complete	Important	Bill Baur	Mark
1246	8/20/07 7:51 AM	Schedule Board	Multiples Display	The Multiples Display needs to show Tech Acknowledge, Tech Arrived, and Tech Complete symbols.		Bill Baur	Complete	Important	Bill Baur	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1244	8/16/07 7:37 AM	Schedule Board	Time-Slot Display	Have color represent work order status and the strike-through represent Time-Slot status. Do the same in the Multiples display.		Bill Baur	Complete	Important	Bill Baur	Mark
1243	8/16/07 7:31 AM	Work Order Time Slot	Create Original vs Actual	Add tab control and present new fields.		Bill Baur	Complete	Important	Bill Baur	Roland
1239	8/14/07 2:21 PM	Work Order Time Slot	Marking A Work Order Open	Do not delete WOTS entries when a work order is marked "Open".		Bill Baur	Complete	Important	Bill Baur	Tom / Mark
1237	8/14/07 2:05 PM	Route Sheet	Modify the Week long route sheet / WO printout	Print a single route sheet that accounts for all the days and then print all unique work orders. See the previously used manual timesheet page for an example (see attached, but don't be this complicated).		Bill Baur	Complete	Important	Mark Birchmeier	
1232	8/13/07 7:41 AM	Tech Revenue	Analyze Impact Of Cancelled Time-Slots	SSTechRev uses certificate sheets, so no change is needed.		Bill Baur	Complete	Important	Bill Baur	
1229	8/9/07 11:14 AM	Work Orders	Add "Packing Slip" button to WO	This will print the regular WO, but without prices, subtotals, totals, shipping charges, hazmat, etc.	The WO title will be replaced with Packing Slip (i.e. where it says Equipment Work Order or Material Pull Sheet, it will say Equipment Packing Slip or Material Pull Sheet Packing Slip)	Bill Baur	Complete	Important	Mark Birchmeier	Added check box and updated Crystal Reports as well as dot matrix reports.
1228	8/9/07 7:06 AM	Fire Officials	From Certificate	Change the "Fire Officials" button to "Fire Official" and go directly to the assigned fire official instead of the list.		Bill Baur	Complete	When you get to it	Bill Baur	
1226	8/8/07 10:52 AM	SumHours	Show In Task Bar	Make form non-modal so it shows in the task bar.		Bill Baur	Complete	When you get to it	Bill Baur	Moved routines from module to form to show it non-modally.
1225	8/8/07 7:36 AM	Work Order Time Slot	Saving Status	Saving changes changes the WOTS status to the work order status. With the new system, WOTS status should be independent of the work order status.		Bill Baur	Complete	Mission Critical	Bill Baur	
1223	8/8/07 7:26 AM	Work Order Time Slot	Reactivate	Add ability to reactivate time-slots that have been cancelled from cancelled work orders.		Bill Baur	Complete	Important	Bill Baur	
1221	8/7/07 6:59 AM	Tech Box	Cancelled Time-Slots	Displayed cancelled work order time-slots if the time-slots them-selves are not cancelled.		Bill Baur	Complete	Important	Bill Baur	John H.
1218	8/7/07 6:55 AM	Work Order Time Slot	Cancelled Work Orders	Allow time-slots to remain un-cancelled.		Bill Baur	Complete	Important	Bill Baur	John H.
1217	8/7/07 6:53 AM	Work Orders	WOTS Duration	Allow shorter durations than 15 minutes.		Bill Baur	Complete	Important	Bill Baur	John H.
1215	8/6/07 6:54 AM	Fire Officials	FO View vs. Select	Right click on the fire official list to get a drop down with 2 options: View and Select.		Bill Baur	Complete	Important	Bill Baur	Depending how you access the certificate, the popup menu may or may not work. It only works through two levels. For the case where the pop-up is not available, the "Select" button method is used.
1214	8/6/07 6:50 AM	Fire Officials	Add Select To FO Display Screen	Add a Select button to the fire official screen that selects the fire official and returns you to the CertCover		Bill Baur	Complete	Important	Bill Baur	Mark
1210	8/2/07 7:06 AM	Invoicing	Process Credit Card	When adding credit card to work order after it's been invoiced, give warning and option to update the invoice with credit card#. (This puts the invoice on the cr.crd process list).		Bill Baur	Complete	Important	Bill Baur	Gail - E.g.: WO 102761
1206	7/30/07 2:03 PM	Time Sheet	Add logging of vacation and sick day usage	Add to the logging table following the layout used by the automated vacation entry tool - this will go live on 8/1/2007.	Log addition of vacation, changes in vacation hours, addition of sick days, changes in sick day hours, etc. Log the change to the timesheet as well as the modifications to the employee database (esp. vachoursremaining). When making a change to vachoursremaining, ask for a comment to be entered. This comment would be entered in the logging table.	Bill Baur	Complete	When you get to it	Mark Birchmeier	See CCLID # 1261 as well.
1201	7/27/07 3:13 PM	Database	Change to standard AES encryption	Do for Credit Card # & Social Security # using MySQL built in encryption/decryption techniques.	Add field to the creditcard table called "Last 4" that stores the last 4 digits to make it easier to display the last 4 digits without decrypting the database field.	Bill Baur	Complete	When you get to it	Mark Birchmeier	AES_ENCRYPT("string to encrypt","private key")
1198	7/27/07 7:05 AM	Certificates	Graphical vs. Input Screen	Implement a change that if the certificate is closed, then we go to the view screen instead of the input screen regardless.		Bill Baur	Complete	Important	Bill Baur	Mark
1195	7/25/07 8:02 AM	Certificates	Hours Per Day	"Start - Finish" time works on hours per day. Add an HoursPerDay field to certcover. Also, when calculating total Start-Finish time skip week-ends and holidays.		Bill Baur	Complete	Important	Bill Baur	
1194	7/25/07 7:48 AM	Certificates	Closing A Certificate	Display message telling user how to proceed when the Certificate Sheets do not add up to the Time-slots.		Bill Baur	Complete	Important	Bill Baur	
1191	7/25/07 7:36 AM	Certificates	Certificate Listing	Open in the same position on the screen it was in last. Also, leave the listing loaded so you can easily refer back to it to browse to a different certificate.		Bill Baur	Complete	Important	Bill Baur	
1189	7/24/07 2:14 PM	Work Orders	SS / Linked PS work orders	I noticed that a linked PS work order can be scheduled even if the SS work order has the portable checked. Do we want to block the scheduling of Linked PS's if they are already accounted for in the SS work order?		Bill Baur	Complete	Important	Mark Birchmeier	Yes, explanation given to user to uncheck PS on the SS WO.
1188	7/24/07 11:20 AM	Wireless	Tech sub-program	develop program for use on the laptop (a specific sub-set of FX4)		Bill Baur	Hold	Important	Mark Birchmeier	Need to meet to discuss design.-MB

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1187	7/24/07 11:17 AM	Wireless	Automate DatabaseVersion DAT entries for following tables	Trigger points need to be established. Separate to-send table should be added. Already done: DAT & FXF Need to add: Employee Zipcodes FX3 database Inventory? No HR, Salary, SS, Home info!		Bill Baur	Hold	Important	Mark Birchmeier	
1185	7/24/07 11:06 AM	Jobs	Modify % Complete, Job Status sections & credit	The current drop down options for % complete should be moved to the Job Status section (but not show the number). This Job Status should also allow for hand entry of unique text.	Once a job is marked as 100% complete, change the credit limit of the job to zero and make a job comment that states the job has been marked 100% complete and state the previous credit limit.	Bill Baur	Complete	Important	Mark Birchmeier	
1184	7/24/07 7:07 AM	Quotes	Quote Letter	Undo this item:		Bill Baur	Complete	Important	Bill Baur	This is for Signed Quotes not Written Quotes .
1183	7/24/07 7:06 AM	Quotes	Quote Letter	Need a utility to move existing to the supporting docs folder.		Bill Baur	Cancelled	Important	Bill Baur	This is not what we want to do. Quotes should remain in the quotes folder.-MB
1179	7/20/07 7:10 AM	Work Orders	SS WO	Add to system right click popup menu the choice to go to the Linked PS work order for a linked portable system.		Bill Baur	Complete	When you get to it	Bill Baur	
1178	7/19/07 7:20 AM	Certificates	Prev / Next	Always show Prev / Next buttons on certificate sheets.		Bill Baur	Complete	Important	Bill Baur	Mark
1177	7/18/07 4:06 PM	Certificates	Position	Have certificate cover, certificate input, and certificate sheet retain their previous positions.		Bill Baur	Complete	When you get to it	Bill Baur	
1176	7/17/07 1:16 PM	Tech Box	Create a separate route sheet printout	The following has been changed to Original vs Actual 1. This should print on a laser printer. 2. This should look just like the regular dot matrix printout 3. The originaltime, endtime and traveltime should be displayed in the left hand section where we currently show the schedtime. 4. The schedtime, endtime, traveltime, should be shown in the section that the actual time is displayed as an underscore. 5. Display all entries for that day if the original or sched date is for the date in question. 6. If the original date is different than the report's date, then do not show it. Show an underscore "blank" section instead. 7. If the sched date is different than the report's date, then do not show it. Show an underscore "blank" section instead. 8. Arrange according to the original time. If on a previous day, then show the blank sched at the bottom. 9. Please discuss this with Mark before starting.		Bill Baur	Complete	Important	Mark Birchmeier	
1174	7/16/07 11:11 AM	Schedule Board	entering recurring appointments	when you enter a recurring appointment, the default end date is one year later ie 2008 if you enter a date now.		Bill Baur	Complete		Roland Straten	Changed the end date to default to the start date.
1173	7/16/07 9:17 AM	Quotes	Change signed quotes save to a folder within supporting docs folder.	We also need to do a training session.-MB to handle this item.		Bill Baur	Complete	When you get to it	Mark Birchmeier	Utility ready to be run to move existing Signed Quotes to their respective Sup Docs folders. - WFB 9/10/07.
1172	7/16/07 6:54 AM	Invoicing	Credit Invoices	Create DatType for credit invoice reasons.		Bill Baur	Complete	When you get to it	Bill Baur	Created DatType "Credit Invc Rsn"
1171	7/13/07 8:38 AM	Certificates	Create New Question Version	Create a Quarterly Question Version for a Preaction-System.		Bill Baur	Complete	Important	Bill Baur	Nadine
1170	7/12/07 7:10 AM	Certificates	Repair Certificates	Only allow SC work orders to create Repair Certificates. Force the selection of system on the work detail tab first.		Bill Baur	Complete	Important	Bill Baur	
1168	7/2/07 7:29 AM	Supporting Documentation	Add DateTime tooltip	add the following line to the fil_MouseMove sub-routine in all supporting documentation sections:	And add a column in the All Docs flexgrid that states the date time of the file.	Bill Baur	Complete	Important	Mark Birchmeier	
1167	7/2/07 7:28 AM	Quotes	Customer information form automation	Information about a customer needs to be easier to convey from a quote. Add a button to the quote that says "Customer Info Form" that uses the attached Word document as a template.	Automate the insertion of info for any possible fields within that form (customer name, address, number, etc.).	Bill Baur	Complete	Important	Mark Birchmeier	
1165	6/29/07 9:12 AM	Certificates	CertPreview	Add ability to print blank FXF to the dot matrix. (as if it were done in a work order)		Bill Baur	Complete	Important	Mark Birchmeier	
1162	6/27/07 8:41 AM	Search Screen	1 Minute timeout to delete textbox	The entry textbox for the main search screen should be deleted after 1 minute of not being used.	When the screen is active (focus set), do not delete the text box. If the screen is in the background or invisible, then timeout after 1 minute.	Bill Baur	Complete	When you get to it	Mark Birchmeier	This is done, but some people may like to see what they did last. - WFB
1161	6/27/07 7:04 AM	View	Date Sched.	Display the first WOTS date scheduled instead of the last WOTS date scheduled.		Bill Baur	Complete	Important	Bill Baur	Phil, Brett
1160	6/26/07 1:48 PM	Certificates	Repair Certificate Printout	link within FX4		Bill Baur	Complete	Important	Mark Birchmeier	Cert Crystal Reports (saved in all regular report directories):

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1154	6/20/07 8:01 AM	Scheduling Tool	Systems Pop-up Box	Have systems also show upon up-arrow and down-arrow clicks with the "Show Systems On Click" selection.		Bill Baur	Complete	Important	Bill Baur	Bryan L.
1153	6/20/07 7:58 AM	Inventory	Logging	Add comment indicating the origin of the change.		Bill Baur	Complete	Important	Bill Baur	
1152	6/20/07 7:57 AM	Maintenance	System Equipment	Add routine to allow moving a system to a different location by inactivating the current system and then copy it to the new location.	You must inactivate the old system because it might be tied to a previous certificate. Be sure to copy the supporting documentation as well and account for system number changes.	Bill Baur	Complete	When you get to it	Bill Baur	Put on Hold due to limited need. -MB 6/25/07
1150	6/20/07 7:53 AM	Work Orders	Need Write Space On SC Work order	Add 5 blank lines to SC work order.		Bill Baur	Complete	When you get to it	Bill Baur	Harvey V.
1146	6/19/07 10:08 AM	Schedule Board	Add visual indication of the tech statuses	To the tech box and the schedule board, add indication if the WOTS has tech acknowledged, started or completed. How about: ⊙ = started √ = completed; (can we use those characters?) OR [-] = acknowledged (including brackets) [/] = started (including brackets) [X] = complete (including brackets) OR - = acknowledged + = started = = completed		Bill Baur	Complete	Important	Mark Birchmeier	We need to standardize on a tech started, in progress, arrived nomenclature. What do you think?
1145	6/19/07 10:00 AM	Certificates	Make Changing of Inspection Types Easier	From within a certificate, allow the changing of the inspection type. This would change the SS work order as well and would get a new question version. Check to make sure that we are not corrupting any data. If there is already data entered for that system and we are changing the question version number, then that data needs to be erased (after asking permission to erase the data).		Bill Baur	Complete	Important	Mark Birchmeier	.
1144	6/19/07 9:54 AM	Wireless	Track initiation and changes to more tables	see prog. notes	The in-house programs will need to be modified to handle and record those fields as well. We do not need to display that information at this time. We can add that write reports as needed.	Bill Baur	Complete	Important	Mark Birchmeier	1. Fields to Add: 1. InitDateTime 2. InitBy 3. ChangedDateTime 4. ChangedBy 2. Tables to which to add those fields: 1. WOLine2* 2. SSSheet* 3. CertSheet* 4. Fillins* 5. QuesData* 6. PSEquip* 7. TimeDetail* 8. PunchClock* 9. WOTS* 10. RouteSheet* 11. ApptOccurrence 12. ApptSeries 3. Also, modify many existing tables to track datetime instead of just date: 1. autbill 2. billadr 3. certcover* 4. invoice 5. jobs 6. prospect* 7. quotes 8. shipadr* 9. ssequip* 10. wo2* * = Add "OfflineEdit" field that will be used
1142	6/18/07 1:26 PM	Tech Box	Route Sheet routine to print the entire week	A separate button that says something like "Print Entire Week". This would print a route sheet for each day that week and print a single copy of all unique work orders.	i.e. if work order # 10212 is scheduled for Monday-Thursday, and then work order # 10345 is scheduled for Friday, then print a route sheet for each day (Mon-Fri) and print a single copy of WO#10212 & a single copy of WO#10345.	Bill Baur	Complete	Important	Mark Birchmeier	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1141	6/18/07 1:21 PM	Work Order Time Slot	Automatically create multiple time slots	1. If more than 8 hours of duration are entered 1. Pop-up question that asks what the length of the day should be. 2. Then create a time slot of each week day (non-weekend, non-holiday) for that duration. 3. i.e. 1 WOTS entry per tech per day. 4. Examples: If 5 days is entered as the duration and 10 hours per day, then do 5 10-hour days. If 40 hours is entered as the duration and 10 hours per day, then do 5 8-hour days. 2. Remove the feature from the schedule board and the WOTS entry that tries to split long durations into multiple days. 1. i.e. if 8:00 AM start time is entered and 10 hours is entered for the duration, do NOT show the end time as 10:00 AM (implying the next day).		Bill Baur	Complete	Important	Mark Birchmeier	Additional Benefits: 1. FX4mobile will show schedule each day 2. Wireless initiative will be easier to implement 3. Timesheet "Recommend from Schedule Board" will begin to work for installation. 4. All tech days will correctly show extended work days (14+ hour days do occasionally happen) on the schedule board and on WOTS screens 5. Reporting of time spent on a work order/week/month will be simplified.
1130	6/6/07 9:17 AM	Work Order Time Slot	Arrive / Leave	Have manual entry of time as well as drop-down immediately update Job Time display.		Bill Baur	Complete	Important	Bill Baur	
1122	6/1/07 12:54 PM	Work Orders	WOTS Data Entry	1. Allow entry choices: 1. Enter Start Time & Duration, the End Time is calculated 2. Enter Start Time & End Time, the Duration is calculated.		Bill Baur	Complete	Important	Mark Birchmeier	
1116	6/1/07 7:59 AM	Customer	Credit Limit Change Comment	Comment should include the previous and new credit limit amount.		Bill Baur	Complete	Important	Bill Baur	Mark
1115	6/1/07 7:40 AM	Certificates	Cert Cover and Cert Sheet	Add ability to delete inspection date.		Bill Baur	Complete	When you get to it	Bill Baur	
1110	5/25/07 10:02 AM	Schedule Board	If a note has a comment, then display comment instead of note	Not a rush.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1106	5/25/07 7:16 AM	View	All Docs	Add Expand to All Docs popup menu.		Bill Baur	Complete	When you get to it	Bill Baur	Brett
1105	5/25/07 7:11 AM	Work Orders	New PS Work Order Without Portable Sys	When entering the Portable SSEquip rec for a new PS WO, do not unload the screen when you press Add. This will give you the opportunity to then enter FXs.		Bill Baur	Complete	When you get to it	Bill Baur	Tom
1104	5/24/07 11:59 AM	Time Sheet	Crystal Report	Update print-out to say "Out" instead of "Absent".		Bill Baur	Complete	Important	Bill Baur	Roland
1102	5/23/07 10:36 AM	Jobs	Email / COD	When a job is first added, send an email to JobAdded stating a job has been added with the job number, customer number, customer name, etc.	When a job is changed to 95% complete, send an email to JobNotification stating a job has been marked as 95% complete with the job number, customer number, customer name, etc. If the COD checkbox is checked and there is a credit limit or there is not a credit limit and the COD checkbox is not checked, give a warning message that states "Please select either COD or Job Credit Limit." when the job is saved.	Bill Baur	Complete	Important	Bill Baur	
1101	5/23/07 7:44 AM	Work Orders	Type Of Work Order Selection Screen	Remove ability to change customer and location from this screen to avoid potential conflicts with work order customer and location.		Bill Baur	Complete	Important	Bill Baur	Mark
1096	5/23/07 7:29 AM	Credit Status Email	Credit Warning	Standardize credit warning format to: Credit Override: A&P, Cust# 2-1, WO# 98957 Credit Warning: A&P, Cust# 2-1, WO# 98574 Credit Change: A&P, Cust# 2		Bill Baur	Complete	When you get to it	Bill Baur	Mark
1094	5/22/07 7:26 AM	Work Orders	Product Code Entry	Have product code entry form retain the same screen location it had previously.		Bill Baur	Complete	When you get to it	Bill Baur	
1092	5/22/07 7:22 AM	Equipment	Add Duplicate Description	If the description has a number, have it increment.		Bill Baur	Complete	Important	Bill Baur	Phil
1091	5/21/07 2:23 PM	Time Sheet	change "Absent" to "Out"	I lost this battle.-MB		Bill Baur	Complete	When you get to it	Mark Birchmeier	
1089	5/18/07 7:33 AM	Certificates	Use Crystal Report version of printout	Cert Preview: Change to use the Crystal Report version	FX4: Change to use the Crystal Report version for individual sheet views	Bill Baur	Complete	Important	Mark Birchmeier	Cert Preview: CertificateFXF.rpt
1086	5/16/07 3:57 PM	View	Hot Key Ctrl+C	Use a different Hot key sequence because Ctrl+C is used for Copy.		Bill Baur	Complete	Important	Bill Baur	Mark
1084	5/16/07 3:45 PM	Time Slot	Schedule	Retain last position of frmSchedule.		Bill Baur	Complete	Important	Bill Baur	Tom
1083	5/16/07 9:18 AM	Wireless	Ability to generate a cert before an SS wo is complete	The reason for this is so the techs can fill it in digitally while still on the job site.		Bill Baur	Complete	Important	Mark Birchmeier	
1081	5/16/07 7:55 AM	Date Time Picker	Can Not See Days of The Week Title	Change to a different color than grey.		Bill Baur	Complete	When you get to it	Bill Baur	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1073	5/10/07 8:45 AM	Scheduling Tool	Top Grid Mouse Follow	Have mouse follow turn off when Systems Pop-up is off (unchecked).		Bill Baur	Complete	When you get to it	Bill Baur	Tom
1072	5/10/07 8:25 AM	Work Orders	Mark Complete	Have frmMarkComplete open in the same position it was last.		Bill Baur	Complete	When you get to it	Bill Baur	Tom
1068	5/8/07 3:49 PM	Work Orders	Add WOTS lines to SC Wolines	Add a DatType for default tech payrate.	Add a button called "Import Tech Times" that would make a woline item (grouped by WOTS day) for each WOTS entry. Include travel time and durations in Qty (in hours) and charge rate at the datatype rate.	Bill Baur	Complete	Important	Mark Birchmeier	
1066	5/4/07 12:34 PM	Work Orders	Add scheduling contact info to WO2 screen	this will help Nadine with schedule changes.	Add it under/next to the person to see.	Bill Baur	Complete	When you get to it	Mark Birchmeier	This should not be a field in the WO2 table. This just needs to display the shipadr scheduling contact's first & last names and their phone number.
1065	5/4/07 12:12 PM	Invoicing	Hand entered work order checking	If already invoice: "This work order has already been invoiced. Would you like to re-invoice this work order?"		Bill Baur	Complete	Important	Mark Birchmeier	
				If a different department: "This work order was written for the ____ department. Would you like to invoice this work order under the ____ department?"						
1060	4/26/07 9:53 AM	Work Orders	Add Permit Status to WO	take options for drop down list from jobs permit status	When wo is marked shipped/complete, if permit status < final inspection scheduled, then popup question "Would you like to create a Permit Closing work order?" If yes, then create a new WO of the same type that has a WOline that says "Final Inspection for permit from WO# XXXXX." Also add a comment to the original work order stating that a permit follow-up work order has been created and the follow-up work order's wo#.	Bill Baur	Complete	When you get to it	Mark Birchmeier	
1056	4/24/07 9:28 AM	View	Add Supporting Documentation to Billadr & FX4view	Research generation of a list view of all documents within a customer and how they are linked.-DONE Add supporting documentation to the billadr screen (in place of the current Business Opportunities section.	The bus.opp section and the current tabs in the mail tab will be moved to a popup form. The current Mail tabs will be replaced with "Docs" tabs that will look similar to the source code referenced in Programmer Note. (the filename & folder descriptive (not the folder name) will be in the flexgrid (e.g. Autobil Scenario 1 instead of ../AutoBill/Scenario1))	Bill Baur	Complete	When you get to it	Mark Birchmeier	
1054	4/24/07 8:18 AM	Invoicing	Address Explanation	Add Help "Sold To" and "Ship To" address explanation.		Bill Baur	Complete	When you get to it	Bill Baur	Answering question for Terri.
1053	4/23/07 8:17 AM	Equipment	Add Duplicate Button	Add a button that duplicates the piece of equipment to a new piece of equipment with the identical specs (price, autobill (that needs to be updated as well), description, service dates, etc.)		Bill Baur	Complete	When you get to it	Mark Birchmeier	Make sure that you can click Duplicate multiple times in a row, each time you go to the new piece of equipment and can edit it or just click duplicate again.
1052	4/23/07 7:26 AM	Work Orders	Email Over Credit Limit	Send Email message when credit exceeds limit or not established.		Bill Baur	Complete	Important	Bill Baur	
1048	4/20/07 7:07 AM	Schedule Board	Tech Box	Add ability to right click on the day you want the Tech Box to open for.		Bill Baur	Complete	When you get to it	Bill Baur	Requested by Tom
1046	4/19/07 4:58 PM	Contact Box	Show coloration of contact types.	Pain to open and close to you find the right person. If their title showed it would be easier		Bill Baur	Complete	When you get to it	Susan Straten	
1044	4/18/07 10:59 AM	Tech Box	Default Time Interval	Have Tech Box time interval default to the last selected Tech Box time interval.		Bill Baur	Complete	When you get to it	Bill Baur	Roland
1041	4/16/07 11:42 AM	Change Of Address	Streamline This Function	1. ask a question before it starts if you want to only update the item you just updated or if you would like to search for other customer/locations/contacts to update. 2. redesign layout to make it clearer what is being updated and what is not. 3. double-check logic involved in the update routine.		Bill Baur	Complete	When you get to it	Mark Birchmeier	Let's talk about this before we start. There are many people asking for a redesign because they just don't understand it. That's partially a training issue, partially a design issue. We can address both through the program. -MB

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1038	4/9/07 1:24 PM	Tech Box	Route Sheet modification	Modify the route sheet to only show specific info.		Bill Baur	Complete	Important	Mark Birchmeier	Route Sheet: Time Actual Start ### _____ (start from Home/AFP) Travel ### ----- Arrive ### _____ Stop 1 Duration ### Leave ### _____ ----- Travel ### ----- Arrive ### _____ Stop 2 Duration ### Leave ### _____ ----- Travel ### ----- Arrive ### _____ (end at Home/AFP) the _____ is where techs would write in information the ### is the times in hours:minutes that
1035	4/6/07 7:01 AM	Jobs	Job Limit	If there is a credit limit for a particular job and it is not marked as COD, then the work orders written for those jobs should default to bill client. They should be allowed to shipped since the job has a credit limit (even if the customer does not have a credit limit).	If the COD flag is set, then the work order should default to Mark COD on WO and Cash/Check.	Bill Baur	Complete	Important	Bill Baur	
1034	4/4/07 2:05 PM	Customer	Billadr Credit Card Removal	There is currently not a way to remove the credit card from billadr. Please make the Enter Later button remove the currently saved credit card (this should also work the same way in autobill and work orders)		Bill Baur	Complete	Important	Mark Birchmeier	
1033	4/4/07 10:29 AM	Invoicing	Credit Card Authorization Codes	Need to be strings instead of just numbers		Bill Baur	Complete	Important	Mark Birchmeier	
1032	4/4/07 9:50 AM	Work Orders	Add line at bottom of wo printout that says paid by credit card	Just like the invoices, add the line that the work order was paid by credit card number ****-****-****-####.		Bill Baur	Complete	Important	Mark Birchmeier	
1031	4/4/07 9:49 AM	Work Orders	Credit Card Charging on Work Orders	All work orders to be credit card charged. (this is new)		Bill Baur	Complete	Mission Critical	Mark Birchmeier	Add fields to wo2: AuthorizeCode, CreditCardProcessed, CreditCardAmount. Add work order priority to dat: Waiting for Credit Card Charge. If an equipment (only equipment) work order is saved with the above priority, send an automated email to the creditcardprocessing email address that says a work order needs to be credit card processed (similar to the invoice automated email). Add to the credit card processing flexgrid a list of work orders that have the new priority mentioned above (unless they have the creditcardprocessed flag set) When those work orders are processed, save the authorization code to the work order, mark the work order as creditcardprocessed, and record the amount that was charged. Then change the priority of that work order to normal. If an equipment (only equipment) work order has the creditcardprocessed flag set, do not allow changes to prices (including woline/shipping/hazmat/taxes), quantities and do not allow the deletion or addition of work order lines. When an invoice is written for a work order that has already been processed, copy the authorization code to the invoice and mark the invoice as creditcardprocessed. This will indicate that the invoice does not need

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
1029	4/4/07 7:09 AM	Invoicing	Add Shortcuts	Add shortcuts to Work order and Customer in a pop-up menu.		Bill Baur	Complete	Important	Bill Baur	
1025	3/30/07 8:09 AM	Maintenance	Invoice	Add new field AuthorizedCode.		Bill Baur	Complete	When you get to it	Bill Baur	
1021	3/28/07 7:18 AM	Scheduling Tool	WO Credit Status	Highlight work-orders that are pending credit approval and/or credit card information. Do not allow drag-drop to tech-box or schedule board.		Bill Baur	Complete	Mission Critical	Bill Baur	
1015	3/20/07 3:22 PM	Customer	All Locations Tax Status	The functionality would be to: 1) when billadr is marked tax exempt, all locations & scenarios are tax exempt. When billadr tax exempt is unchecked, local options will decide tax status. When tax exempt is unchecked and apply globally is unchecked, all location will be taxable.		Bill Baur	Complete	Important	Bill Baur	Roland
1014	3/20/07 3:15 PM	Work Orders	Add FX's due for hydro/six year	Use the same formula as on the route sheet to display FX's due for hydro/six year on the portable work orders.		Bill Baur	Complete	Important	Mark Birchmeier	
1013	3/20/07 7:42 AM	Invoicing	Credit Card	We need a way to add the credit card from the actual invoicing screen. Currently there is a spot for last 4 digits, but this doesn't work. This needs to be replaced with a Pay by Credit Card button that goes to the credit card entry/selection form.		Bill Baur	Complete	Important	Bill Baur	
1006	3/14/07 8:01 AM	Scheduling Tool	Highlight AFPMustCall	Highlight "AFPMustCall" (from ShipAdr) service due records.		Bill Baur	Complete	Important	Bill Baur	Tom
1002	3/8/07 8:53 AM	Work Orders	Recommend synchronization of inspections	<p>Creating SS work orders: When creating a new SS work order. Check service interval IF two or more active systems exist with the service interval = annual and one of the annual systems is due THEN print pop up window with heading:</p> <p>"There are two or more systems with the same service interval currently done at different times. Would you like to inspect these systems at the same time to reduce travel costs? (Explain to the customer that we will be doing the system earlier than normal)"</p> <p>List the systems in question in the message include: System #, System Type.</p> <p>Two buttons YES and NO. Pressing Yes would create the SS work order with the two or more systems checked to print. Pressing No would create the work order with only the systems due for inspection at the current time checked.</p> <p>We are only going to include annual systems now, but we may want to alter this in the future to include all active systems with the same same service interval.</p>		Bill Baur	Complete	When you get to it	Brett Straten	
1000	3/8/07 8:10 AM	Time Sheet	Closed Jobs	Do not display closed jobs in the drop-down combo box.		Bill Baur	Complete	Important	Bill Baur	Gary, Peggy
991	3/1/07 11:56 AM	Dat File	QteLoss.idx	Bring this file into the Dat table.		Bill Baur	Complete	When you get to it	Bill Baur	
990	2/28/07 7:17 AM	Tech Box	Pop-up Menu	Add selections: In Shop, and Shop Done, to pop-up menu.		Bill Baur	Complete	When you get to it	Bill Baur	Tom
988	2/28/07 7:12 AM	FX4	AutoStart	Add Job AutoStart.		Bill Baur	Complete	Important	Bill Baur	
987	2/23/07 1:51 PM	Customer	New Payment Option	Add "None Selected" as a Payment Option.		Bill Baur	Complete	Important	Bill Baur	
984	2/23/07 12:52 PM	Work Orders	WOTS Addition	In the WOTS form, Add the location's Sched Contact name & Phone Number		Bill Baur	Complete	When you get to it	Mark Birchmeier	
980	2/22/07 7:20 AM	Search	ShipAdr & Contact Address Search	Make it work like the BillAdr Address search routine.		Bill Baur	Complete	Important	Mark Birchmeier	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
977	2/21/07 12:40 PM	New Customer	New Customer Routine Changes	<p>1. Add new payment option as a default</p> <p>2. force selection of payment option when creating a work order</p> <p>3. don't allow scheduling/shipping of work orders when there is not credit</p> <p>4. show payment options in FX4view</p> <p>5. See Programmer Note for details and discuss with me before programming.</p>		Bill Baur	Complete	Important	Mark Birchmeier	<p>1. Add "No Payment Option Selected" to the Payment Options in Customer. This will be the default selection for new customers.</p> <p>2. When a user click New Work Order for a customer that has the "No Payment Option Selected" payment option selected, give a popup message:</p> <p>1. No Payment Option is Currently Selected. Please Select a Payment Option (Tool Tips should be added for the payment options):</p> <p>1. Credit Card on File (this is the default)</p> <p>1. When selected, this will bring up the old enter credit information form we used to have.</p> <p>2. The customer's Payment Option is changed to Credit Card on File with the required info from this form.</p> <p>2. Credit</p> <p>1. When selected, this will bring up a button to email the credit application or to view the credit application (from where they can fax the credit application).</p> <p>2. The customer will be flagged as Credit with a \$0 credit limit and check the credit pending checkbox in the customer.</p> <p>3. COD</p> <p>2. Regardless of choice, a comment will be entered in the customer to state the changes made.</p> <p>3. Work orders whose customer has credit selected with a \$0 credit limit, do not allow</p>
974	2/20/07 7:02 AM	Customer	Email Notification For Credit Hold	<p>If a customer is put on Credit Hold or on Do Not Service</p> <p>Send an automated email to the salesperson and accountrep of that customer (send only 1 email, if they are the same person).</p> <p>Only send one email, even if both credit hold and do not service are checked in the same edit session.</p> <p>If that customer does not have a salesperson or accountrep, then send an automated email to recipient "SalesManager" which is saved as a dat value (the automated email routine handles this automatically).</p> <p>The email should say this:</p> <p>Subject: "Customer has been placed on _____." (Credit Hold or Do Not Service or Credit Hold & Do Not Service)</p> <p>Message Body: "Customer # - Location #: ___-_" & vbCrLf & "Company Name: _____"</p>		Bill Baur	Complete	Important	Bill Baur	
973	2/20/07 7:01 AM	Certificates	Email For Non-Operational Systems	<p>When a certificate is marked close, check to see if that certificate has any non-operational systems.</p> <p>If there are any non-operational systems, then send an automated email to the salesperson and accountrep of that customer (send only 1 email, if they are the same person).</p> <p>If that customer does not have a salesperson or accountrep, then send an automated email to recipient "SalesManager" which is saved as a dat value (the automated email routine handles this automatically)</p> <p>The email should say this:</p> <p>Subject: "A Certificate of Inspection has been issued with a Non-Operational System"</p> <p>Message Body: "Customer # - Location #: ___-_" & vbCrLf & "Company Name: _____" & vbCrLf & "Certificate #: _____"</p>		Bill Baur	Complete	Important	Bill Baur	
968	2/14/07 6:51 AM	Contacts	Salutation	Increase length from 10 to 40 chars.		Bill Baur	Complete	When you get to it	Bill Baur	
967	2/13/07 6:53 AM	Location Address	FO Frame	Toggle color of FO frame with color option.		Bill Baur	Complete	When you get to it	Bill Baur	
966	2/12/07 3:04 PM	Certificates	Link To Quoteld	Add warning if Quoteld is not saved upon exit.		Bill Baur	Complete	When you get to it	Bill Baur	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
963	2/12/07 7:31 AM	Certificates	Batch Printing	fire official email text should be modified to ready the following: Subject: "Associated Fire Protection Certificate of Inspection for _____" where _____ is the location name on the certificate. Body Message: "Attached you will find the Certificate of Inspection for _____. If you should have any questions, please feel free to contact us at any time. Sincerely, Associated Fire Protection" In Certificate Edit: Replace the "Customer Letter" button with a button that says "View Customer Certificates" This button will open a view of the certificate report with the customer letter. Replace the "Print Certificates" button with a button that says "Print Customer Certificates" This button will print the certificate report with the customer letter. Replace the "Fire Official Letter" button with 2 buttons. One that says "View Fire Official Certificates" and the other says "Print Fire Official Certificates. These will function like the two buttons above, but will use the fire official letter instead of the customer letter. The Fax/PDF button can now be removed since the view can export to a pdf and the print can go to the fax printer. When clicking the "View Report" button in the individual certificate sheet		Bill Baur	Complete	Mission Critical	Bill Baur	
956	2/7/07 9:21 AM	Employee	Default Direct Deposit to being checked	per Susan		Bill Baur	Complete	Important	Mark Birchmeier	
953	2/5/07 11:12 AM	Maintenance	New Certificate Fields	Add new fields: DoNotPrint, Printed, Reviewed, ReviewedBy, ReviewedDateTime.		Bill Baur	Complete	Important	Bill Baur	
950	2/2/07 10:58 AM	Time Sheet	Add the current user to the "Supervisor Approval List"	This will allow the supervisors to go to the people for which they are responsible and go back to themselves.		Bill Baur	Complete	When you get to it	Mark Birchmeier	
947	1/31/07 7:13 AM	Customer	New Customer	Should default to COD.		Bill Baur	Complete	Important	Bill Baur	Phil
945	1/30/07 7:51 AM	FX4 Menu	Contacts List	Change list box to grid.		Bill Baur	Complete	When you get to it	Bill Baur	
944	1/30/07 7:48 AM	Customer	Warnings Comment	Remove cancel button from input box (causes confusion).		Bill Baur	Complete	Important	Bill Baur	
938	1/25/07 11:45 AM	FX4 Menu	Menu	Add access letters to menu items.		Bill Baur	Complete	When you get to it	Bill Baur	
937	1/25/07 10:05 AM	Quotes	Yellow Card	Show frame around Yellow Card.		Bill Baur	Complete	When you get to it	Bill Baur	
935	1/24/07 7:35 AM	Certificates	Certificate Preview	Update help for new DAT editor.		Bill Baur	Complete	When you get to it	Bill Baur	
934	1/23/07 2:38 PM	Certificates	Input Sheets	Place number next to check box selection to help visual alignment.		Bill Baur	Complete	Important	Bill Baur	
932	1/23/07 11:39 AM	Work Orders	SS Work Order	Do not allow the adding or removing of a system once a certificate has been created.		Bill Baur	Complete	Important	Bill Baur	
928	1/23/07 7:38 AM	Work Orders	Deletion	Prevent the deletion of work orders that have either an invoice, certificate, or is a PS linked work order with it checked on its parent SS work order.		Bill Baur	Complete	Important	Bill Baur	
926	1/23/07 7:22 AM	Certificates	For Batch Printing	Add field to contact (prospect) that says "Certificates sent via" with radio button options for post & email.		Bill Baur	Complete	Important	Bill Baur	
925	1/22/07 7:22 AM	Employee	Add Comments	Add the same type comment grid used in FX4 View.		Bill Baur	Complete	Important	Bill Baur	
921	1/19/07 7:19 AM	Certificates	Print Flags	Add flag to certificate that says "Do not print"	Add flag to certificate that says "printed" so that we know to only print/email the certificates that are closed, not printed and do not have the do not print flag set.	Bill Baur	Complete	Important	Bill Baur	This is with CCL item 843.
920	1/18/07 11:55 AM	Quotes	Add checkbox for "Insufficient Data" flag under the S-Quote section	this will only be visible when the quote is marked as an S-Quote.		Bill Baur	Complete	Important	Mark Birchmeier	
919	1/18/07 7:29 AM	Work Orders	Prodcodex.cox	Recompile Prodcodex.cox to use Dat table instead of DAT files.		Bill Baur	Complete	Mission Critical	Bill Baur	Updated P:\FX4, P:\FX4 Beta, and P:\Test Data\FX4
917	1/17/07 8:11 AM	Contacts	Add field for Certificate Preference	Prefers Certificates Via: Mail or Email (radio buttons).	This would determine how the batch certificate program would deal with it.	Bill Baur	Complete	Important	Mark Birchmeier	
914	1/16/07 12:21 PM	Time Sheet	Print Out	Indicate on Crystal report when Time sheet is not complete.		Bill Baur	Complete	Important	Bill Baur	
913	1/16/07 12:19 PM	Maintenance	Move System	Move System needs to update the PSEquip table when the system type is Portables.		Bill Baur	Complete	Mission Critical	Bill Baur	Phil
910	1/15/07 9:46 AM	Work Orders	Tax reason	When selecting Choose Tax Rate or Choose Tax Amount in a Work Order, allow (but don't require) entry of the tax exempt reason (default to blank)		Bill Baur	Complete	Important	Mark Birchmeier	
909	1/11/07 3:38 PM	Work Orders	Shortcut	Add shortcut to FX4View from work order.		Bill Baur	Complete	When you get to it	Bill Baur	Bryan
908	1/11/07 2:37 PM	Sales Book	Date Range	Add ability to print by invoice number or by date range.		Bill Baur	Complete	Important	Bill Baur	
907	1/11/07 2:35 PM	Invoicing	Print Invoices	Skip the printing of credit invoices.		Bill Baur	Complete	Important	Bill Baur	Susan
906	1/11/07 2:33 PM	Invoicing	Credit Invoice	Have credit invoice appear in edit mode.		Bill Baur	Complete	Important	Bill Baur	Susan

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
904	1/11/07 8:52 AM	Invoicing	Credit Invoice	I think I have mentioned this before but when you click on the option to credit an entire invoice, can we bring the credit up onto the screen in edit mode so that the reason for the credit can be added to the text of the credit?		Bill Baur	Complete	Important	Bill Baur	Susan
903	1/11/07 7:44 AM	Time Sheet	Print	Allow the printout of incomplete time-sheets with a warning.		Bill Baur	Complete	Important	Bill Baur	
902	1/11/07 7:43 AM	Schedule Board	Auto Refresh	Add option to turn off auto-refresh.		Bill Baur	Complete	Important	Bill Baur	Manalapan
900	1/10/07 4:23 PM	Maintenance	Checking Work for the end user	Add things like not being able to delete invoices in a month previous to the current month.		Bill Baur	Complete	When you get to it	Mark Birchmeier	Disallowed, but you can not protect against wrong file maintenance. The user has to be responsible for what he/she does.
899	1/10/07 9:06 AM	Equipment	Service Dates	Remove Enable buttons but only save LastService and NextSched dates if a change has been made.		Bill Baur	Complete	Important	Bill Baur	Phil works with these dates constantly and the Enable process slows up work.
898	1/9/07 2:24 PM	Schedule Board	Custom Titles	Add ability to rename Custom 1, 2 and 3.		Bill Baur	Complete	Important	Bill Baur	Roland
896	1/9/07 1:35 PM	Credit Card	Delete Needed	Add pop-up selection to delete UEZ expiration and Credit Card Expiration dates for AutoBill, ShipAdr and WO2.		Bill Baur	Complete	Important	Bill Baur	
895	1/9/07 1:33 PM	Credit Card	New Fields	Need CreditCardLastFour and CreditCardExpires fields in BillAdr, AutoBill, and WO2 tables.		Bill Baur	Complete	Important	Bill Baur	
892	1/8/07 7:26 AM	Customer	Tax Exempt	We need to use a new field in the tax exempt reason datatypes. This field will indicate if that tax exempt reason applies to all or only the work orders and jobs. If the field indicates wo and jobs only, then do not show it as an usable reason in the drop down list for billadr, shipadr and autobill. ST-8 is the only current type that can only apply to WOs and jobs. All others apply to all tax exempt reasons.		Bill Baur	Complete	Important	Bill Baur	
891	1/8/07 7:24 AM	Customer	Tax Exempt	Tax Exempt: Apply to all locations: In billadr, change the "All Locations" check box to read "Entire Customer Tax Exempt"		Bill Baur	Complete	Important	Bill Baur	
890	1/5/07 9:20 AM	Employee	Add comments section to Employee Database	Only on Emp3.exe.	Add flexgrid section like the customer comments (probably a new table). Field List: AutoInc(hidden), Date/Time, Comment (text), EmployeeNumber, EnteredBy, DateChanged(hidden), ChangedBy(hidden)	Bill Baur	Complete	When you get to it	Mark Birchmeier	
889	1/5/07 8:35 AM	Data	FXF	Utilize FXF table for data instead of DAT table.		Bill Baur	Complete	Important	Bill Baur	
887	1/5/07 7:50 AM	Quotes	Types	Remove Inergen, Halon, and Argon from drop-down types.		Bill Baur	Complete	Important	Bill Baur	Carl
886	1/5/07 7:48 AM	FX4	Shipadr Listing	Replace PersonToSee (no longer used) with SiteContact.		Bill Baur	Complete	Important	Bill Baur	
885	1/5/07 7:46 AM	Quotes	Type	Drop-down box not alphabetized.		Bill Baur	Complete	Important	Bill Baur	
882	1/5/07 7:30 AM	FX4	Tax Exempt Reasons	Use new field in Dat table that indicates the reason is ForJobsAndAutoBillOnly.		Bill Baur	Complete	Important	Bill Baur	
880	1/5/07 7:23 AM	View	BillAddress and ShipAdr Listing	Do not show full grid when pressing F3, Shift F3, if it's not populated yet.		Bill Baur	Complete	When you get to it	Bill Baur	
879	1/5/07 7:19 AM	FX4	ExemptId	Create new integer field 'ExemptId' in BillAdr, WO2, Shipadr, and Autobill to replace the single char field 'ExemptReason'.		Bill Baur	Complete	Important	Bill Baur	
878	1/4/07 1:03 PM	Work Orders	Ability to close a work order without invoicing	If a work order has a \$0.00 amount in it and the user clicks the status change for Invoiced, show a pop-up that asks "Would you like to close this work order without creating an invoice?" If yes is clicked, then the work order is marked as invoiced/certificate written and a comment is added with the date/time stamp that the work order was closed without an invoice. If no is click, then just return the status to where it was and continue edit mode.		Bill Baur	Complete	Important	Mark Birchmeier	
877	1/4/07 10:25 AM	Work Orders	In SS WOs, do not display the override date	use the equipment's last inspection/next scheduled date instead of the override date when displaying the last inspection/next scheduled date in the list of systems.		Bill Baur	Complete	Mission Critical	Mark Birchmeier	
876	1/4/07 10:24 AM	Work Orders	Popup Message for Selecting Equipment	Only show the pop-up message when a SC or IN work order is originally started if no piece of equipment is selected.		Bill Baur	Complete	Important	Mark Birchmeier	
875	1/4/07 10:22 AM	Equipment	Lock out changes to last service date and next scheduled date.	on existing equipment, put a button next to each date. The dates will be defaulted to disabled. Once you click the button, it will enable that date when in edit mode. Only update the table if the date field(s) are enabled.		Bill Baur	Complete	Mission Critical	Mark Birchmeier	
874	1/3/07 7:02 AM	FX4 Menu	Shipping Locations List	Change list box to a grid.		Bill Baur	Complete	Important	Bill Baur	
855	12/21/06 7:14 AM	FX4 Front Menu	Menu	Put command buttons into top menu as well.		Bill Baur	Complete	When you get to it	Bill Baur	Roland
843	12/15/06 6:55 AM	Certificates	Batch Printing	Before beginning, look into changing the printout of the certificates to use WORD and document variables. -MB	Create automated routine to print/email (based on the cert contact in the shipadr's preference) a group of selected certificates, along with their customer and fire official letters.	Bill Baur	Complete	Important	Bill Baur	
812	12/4/06 9:08 AM	Work Orders	Add three new statuses to work orders	These will be optional statuses and can be represented by checkboxes with employee number (shown as full name) and datetime it is entered. These will be used in the future for any wireless tools we develop.	Tech Acknowledge Tech Arrived Tech Complete	Bill Baur	Complete	Important	Mark Birchmeier	

Change List ID	Date	Module	Title	Descrip1	Descrip2	Assigned To	Status	Priority	CreatedBy	Prog Notes
811	12/4/06 9:04 AM	Fire Officials	Move to Contacts Flexgrid in Locations	This should be just another entry of in the contacts flexgrid.	The way that fire officials are searched (put into flexgrid and show all entries).	Bill Baur	Cancelled	When you get to it	Mark Birchmeier	
808	12/4/06 8:42 AM	Smart Searches	Upgrade street & city searches	When searching for a street address, change the logic to search in a more intuitive fashion. Make this more like the searches found on maps.google.com.		Bill Baur	Complete	Important	Mark Birchmeier	Modified version: Created filter that gets more specific with what is entered. I.e. First street is filtered, then if given City is filtered, then if given state is filtered. Phase 1: If you enter 100 Jackson St, then find all addresses on Jackson St., then find all 100 addresses. Present in a flexgrid. Phase 2 (the ultimate search, if we can skip to here, then let's do it!): If you enter 100 Jackson St, then do as Phase 1. If you enter 100 Jackson St, Paterson, NJ, then search for 100 jackson st, paterson, nj. If only 1 record is found, go to that record. If multiple, then show flexgrid of results. All Jackson St in Paterson, NJ together, then all Jackson St outside of Paterson, NJ, then all 100 in Paterson, NJ, then all 100 outside of Paterson, NJ. Present data in a flexgrid. If enter Pateson, NJ, then show all Paterson, NJ addresses in a flexgrid. If you enter Jackson St, Paterson, NJ, then get all Jackson St in Paterson, NJ. Then get all Jackson St outside paterson. If you enter Jackson St, then get all Jackson St addresses.
700	10/10/06 8:47 AM	Time Sheet	Import From Sched Bd	Marked as Absent, you can still import time. This should not happen.		Bill Baur	Complete	Important	Bill Baur	This routine also needs to check if importing Sick time or vacation time to make sure that it is doing it correctly (checking sick days available and decreasing available vacation days)-MB
684	9/29/06 1:36 PM	View	Search	Convert the output to a flexgrid instead of a list box for Customer and for Shipping Locations.		Bill Baur	Complete	When you get to it	Bill Baur	
383	5/17/06 12:25 PM	Equipment	Add Secondary Info (SysData)	see programmer notes		Bill Baur	Complete	Important	Mark Birchmeier	Per Device Inspection Info on Alarm Systems (must be optional and extendable to other system types & handhelds): Separate table linked to CN, LN, SN, device info, type, loc., route#, last inspect., inspect. interval, etc. i. Level 1: General / Generic Info ii. Level 2: Detailed Info (fields setup by Meta Table) iii. Level 3: Component Info (fields setup by Meta Table) b. ;Fire Pump Information in Database c. ;Possible solutions for a & b: i. Button to bring up master document. Then auto-save it to the supporting documentation section. ii. Key fields saved for each system type that would populate a template that is automatically printed when an SS sheet is selected for that system. (e.g. top fields on the fire pump form) d. √ Documentation entry: Drag/Drop target on Equipment (flexgrid). Description of item popup. e. select documenation to print with work orders.
21	7/28/05 11:09 AM	Work Orders	Printing of entire schedule for techs	Installation workorders get long when all schedule slots are displayed. Possibly add a checkbox that only printed schedule slots for today and future schedules (be careful with the multiple day schedule slots). We need more input from Peggy when we decide to implement this.		Bill Baur	Complete	When you get to it	Mark Birchmeier	