**Summer 21.29**

21.29 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDuQ>

21.29 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDuQ>

1. Jira 5821 - automated

a. New Picklist Value

i. ‘sydata\_\_c

ii. ‘sydata\_txntype

iii. ‘Transfer Sales Invoice

2. Jira 5521 - manual

a. New Custom Settings

b. Go to Custom Settings 🡪 Click Manage Application Settings 🡪 Add new custom setting

i. Name = sjn\_PBPChecker

Description = Scheduled Name for class PBPChecker

Value = PBChecker

ii. Name = sjn\_PeriodicBatchProcessor

Description = Scheduled Name for classPeriodicBatchProcessor

Value = PeriodicBatchProcessor

iii. Name = sjn\_SOAPIBatchProcessor

Description = Scheduled Name for classSOAPIBatchProcessor

Value = SOAPIBatchProcessor

b. **Delete Custom Settings**

i. Name = soapiprocessor\_AutoRescheduleAfter

ii. Name = soapiprocessor\_AutoRestartOnFailure

3. Jira 6292 - manual

a. Delete Validation Rule

i. ‘pjproj\_\_c.object

ii. Validation Rule = ‘Project\_No

4. Scripts - automated

a. ‘rstk.ScriptExecutor2.execute('update\_poaphdr\_batchnoidx', true);

b. ‘rstk.ScriptExecutor.execute('update\_sorma\_soinv',true);

**Summer 21.37**

21.37 – https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDym

21.37 – https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDym

1. New Custom Setting – manual

a. New Custom Settings

b. Go to Custom Settings 🡪 Click Manage Application Settings 🡪 Add new custom setting

a. Name = OnHeroku\_cssimstdmove

Value = false

Description = If true Heroku Execution is enabled for cssimstdmove

b. Name = hvpe\_AllowFailedSydataBatchResubmit

Value = false

Description = SydataProcessor - Allow resubmission of failed sydata batches

c. This Custom Setting May already be in orgs

Name = hvpe\_BatchConsecutiveTxnsOnly

Value = false

Description = HVPE - Only include consecutive sydata txns in a batch

d. Name = hvpe\_DeferEventOnConcurrencyError

Value = false

Description = HVPE - Allow deferral of sydata events on concurrency error

e. Name = hvpe\_MaxSydataBatchResubmissions

Value = 3

Description = HVPE - Max number of resubmissions for failed sydata batches

2. New Picklist Value - Automated

a. ‘sydata\_\_c

i. ‘sydata\_txntype\_\_c

ii. ‘Firm All Sales Order Lines

Un-Firm All Sales Order Lines

**Summer 21.40**

21.40 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE0n>

21.40 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE0n>

1. New Custom Setting - Manual

a. Name = cssimstdmove\_TxnobjsBatchLimit

Description = Max batch size for insert into txnobjs

Value = 50

2. Edit History Tracking Fields - Manual

a. Go to object (syusr\_\_c.object) 🡪 “Custom Fields & Relationships” 🡪 “Set History Tracking”

i. Default Sales Division

Default Division

Employee Type

Fringe Ohd

Hourly Rate

Labor Charging User

Labor Ohd

Limited Access User

Mobile Access User

Multi-Division

Full Access User

Labor Grade

Multi-Company

Responsible Buyer Indicator

Responsible Inventory Planner Indicator

Responsible Engineering Indicator

Service Requisition Submission Indicator

User’s Authorization ID

User’s Organizational Department

b. Go to object (syconfig\_\_c.object) 🡪 “Custom Fields & Relationships” 🡪 “Set History Tracking”

i. Allocations

Allow Change to Serialized Inventory Loc

Daily Limit on SOAPI Transactions

Daily Limit on POLOADER Transactions

Daily Limit on SYDATA Transactions

Dedicated SOAPI Batch Processor

FinancialForce Project Id Field

FinancialForce Invoice with Journals

Freight – Other Landed

Multi-Division Active

Net Change is available for DRP

Net Change is available for MRP

Numb Categories Allowed Per Limited User

Number of Full Access Users

Number of Labor Charging Users

Number of Limited Access Users

Number of Mobile Access Users

RootForms Active

Z\_Obsolete (First Z\_Obsolete field listed)

3. Script - Automated

‘rstk.ScriptExecutor.execute('set\_sohdr\_custcurreny', true);

4. Script - Automated

‘rstk.UserPermission.initializeUserCounts();

**Summer 21.41**

21.41 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE1H>

21.41 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE1H>

**Summer 21.42**

21.42 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE1W>

21.42 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE1W>

1. Overwrite Existing below Email Templates with updated ones in Dev-qa-ff

a. Sales Order Acknowledgement

b. POPrintTemplate

**Summer 21.43**

21.43 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE1g>

21.43 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE1g>

1. New Custom Setting

a. Name - soapi\_bulksoapis

b. Value – false (for B.Yond this value should be true)

**Summer 21.44**

21.44 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE20>

21.44 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE20>

**Summer 21.45**

21.45 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2A>

21.45 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2A>

**Summer 21.46**

21.46 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2K>

21.46 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2K>

1. New Custom Setting

a. Name = soapi\_maxbulkasyncblock

Value = 100

2. New Picklist Value

a. ‘sydata\_\_c

i. ‘sydata\_txntype\_\_c

ii. ‘Process BULK Async SOAPIs

**Summer 21.47**

21.47 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2P>

21.47 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2P>

1. Jira 7068 – For B.Yond prod upgrade we need to make sure the script runs successfully on the Process Log (this script is mainly for them)

a. ‘rstk.ScriptExecutor.execute('clearPohdrTempAddrFields',true);

**Summer 21.48**

21.48 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2Z>

21.48 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2Z>

**Summer 21.49**

21.49 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2e>

21.49 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2e>

**Summer 21.50**

21.50 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2j>

21.50 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE2j>

1. Custom Setting

Name = BypassTriggerForOpportunityLineItem

Value = False (True for Curriculum Associates)

2. Overwrite Existing below Email Templates with updated ones in Dev-qa-ff

a. SOInvoiceTemplate

**Summer 21.53**

21.53 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE4V>

21.53 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE4V>

1. New Custom Setting

Name = sydata\_ResubmitLockErrSyncSydataToHVPE

Description = SydataProcessor - Resubmit sync sydatas, failed due to locking error to HVPE

Value = true

2. New Picklist Values

‘syusr\_\_c

‘syusr\_definelimited\_\_c

‘Warehouse

‘syconfig\_\_c

‘rstk\_\_syconfig\_definelimited\_\_c

‘Warehouse

3. Delete Field

‘sohdr\_\_c

‘sohdr\_sellusrno\_\_c

4. Delete Picklist Value

‘sydata\_\_c

‘rstk\_\_sydata\_txntype\_\_c

Delete ‘Custom Transaction

5. ‘rstk.ScriptExecutor.execute('set\_soppy\_syvatclass', true);

**Summer 21.54**

21.54 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE4f>

21.54 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE4f>

**Summer 21.55**

21.55 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE4p>

21.55 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE4p>

1. Remove Picklist Value

a. ‘sydata\_\_c

‘sydata\_txntype\_\_c

Remove Picklist Value = ‘Transaction Type

[RSTK-6935](https://rootstockmfg.atlassian.net/browse/RSTK-6935) – As part of Jira,  we have removed WO over Receipt flag from Division Master and added to SYCONFIG page.

**NOTE to SUPPORT / P & D**

* When this feature is deployed, we need to set the new SYCONFIG\_WOOVERRCPT field to TRUE for those customers already using the feature.  As of  Oct 12 2020 that list of customers is as follows:
  + Capcium
  + Equipter
  + HDCS
  + Mahajan Home
  + Nanophase Technologies Corporation
  + NuLeaf Naturals
  + Portland Roasting
  + Pro-Tech Manufacturing
  + Sightglass Management
  + Spectro Coating Corp

**Summer 21.56**

21.56 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE4u>

21.56 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE4u>

**Summer 21.57**

21.57 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE5Y>

21.57 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE5Y>

**Summer 21.59**

21.59 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE67>

21.59 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE67>

1. ‘rstk.ScriptExecutor2.execute('remove\_orphan\_dimvals', true);

2. ‘rstk.ScriptExecutor.execute('populate\_externalid\_pobolhdr',true);

3. New Custom Setting

a. Name = SOPICKLISTGENERATOR\_SOPICKDS\_PER\_BATCH

b. Description = SO PickList Details per Batch

c. Value = 50

4. Edit existing Custom Setting

a. Name = PurgeSystemTxn\_recordsPerThread

Value = 1000 (Value needs to be changed to 1000)

**Summer 21.61**

21.61 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE6g>

21.61 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE6g>

**Winter 2021 - 21.64**

21.64 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE7A>

21.64 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE7A>

1. Jira 7287 Script
   1. ‘rstk.ScriptExecutor.execute('encrypt\_gateway\_password', true);
2. Jira 7338 Script
   1. ‘rstk.ScriptExecutor.execute('set\_soppy\_fedacct',true);

**Winter 21.65**

21.65 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE8D>

21.65 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE8D>

**Winter 21.67**

21.67 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE8X>

21.67 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VE8X>

1. Jira 7867 Script - Automated
   1. ‘rstk.ScriptExecutor.execute('set\_soinv\_discpct',true);

**Winter 21.72**

21.72 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064Lv>

21.72 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064Lv>

1. Jira 7299 – Manual
   1. Add New Custom Field on Standard Object ‘Email’
      1. Data Type = Formula
      2. Field Label = Email Record ID
      3. Field Name = Email\_Record\_ID
      4. Formula Return Type = Text
      5. Email Record ID (Text) = ‘HYPERLINK("/"& Id , Id )
         1. Paste this text in blank text box
2. Jira 7887 - Manual
   1. New Custom Setting
      1. Name = BypassTriggerForQuote
      2. Value = True
3. Jira 7952 - Manual
   1. New Custom Setting
      1. Name = soinvprint\_pdfsperpage
      2. Value = Integer value, defaults to 100 - Controls the number of invoice PDFs per page.
4. Jira 7868 - Manual
   1. New Custom Setting
      1. Name = NUM\_CREDIT\_MEMO\_LINES\_IN\_GRID
      2. Description = Number of Lines to be displayed in "Add & Delete Credit Memo Lines" grid on SOINV page
      3. Value = 10
5. Jira 7333 - Automated
   1. ‘rstk.ScriptExecutor2.execute('execute\_update', true, new Map<String,Object>{

'scope' => 1000,

'skipTrigger' => true,

'query' => ' select id, icitemacc\_subpovaracctind\_\_c from icitemacc\_\_c where icitemacc\_subpovaracctind\_\_c = null or icitemacc\_subpovaracctind\_\_c = false ',

'updateDetails' => new Map<String,Object>{

'icitemacc\_subpovaracctind\_\_c' => true

}

});

1. Jira 7867 - Automated
   1. ‘rstk.ScriptExecutor.execute('set\_soinv\_discpct',true);
2. Jira 7119 - Automated
   1. ‘rstk.ScriptExecutor2.execute('set\_porcptap\_rcptnoidx',true);
3. Jira 7833 - Automated
   1. ‘rstk.ScriptExecutor.execute('set\_pohdr\_closedate',true); (Do not run this script 17 Sept 21)
   2. ‘rstk.ScriptExecutor.execute('set\_sohdr\_closedate',true);

**Winter 21.82**

21.82 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064P9>

21.82 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064P9>

1. New Picklist Value
   1. ‘poaphdr\_\_c
      1. ‘poaphdr\_apmatchind\_\_c
         1. New Picklist Value = Reopen Closed Batch

**Winter 21.84**

21.84 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064Pd>

21.84 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064Pd>

1. Jira 8219
   1. ‘rstk.ScriptExecutor.execute('set\_icitemlot\_haveqty', true);

**Winter 21.85**

21.85 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064Pi>

21.85 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064Pi>

**Winter 21.86**

21.86 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUN4>

21.86 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUN4>

1. ‘rstk.ScriptExecutor.execute('set\_povend\_externalid',true);

**Winter 21.87.1**

21.87.1 – [https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VEHQ](https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VEHQ%20)

21.87.1 – [https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VEHQ](https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VEHQ%20)

**Winter 21.90**

21.90 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUPj>

21.90 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUPj>

**Winter 21.91**

21.91 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUQ3>

21.91 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUQ3>

1. New Custom Setting
   1. Name = FFA\_AutoSwitchToSingleCompanyMode
   2. Value = False
2. New Custom Setting
   1. Name = timeqtybooking\_AutoSelectQtyBkngAction
   2. Value = True
3. Script
   1. ‘rstk.ScriptExecutor2.execute('setWoordopactQtyshhiprcvd',true);

**Winter 21.93**

21.93 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUQN>

21.93 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUQN>

1. Edit picklist value
   1. ‘poline\_\_c

b. ‘rstk\_\_poline\_typesel\_\_c

* + 1. Edit picklist value ‘Direct to ‘Direct Material

**Winter 21.97**

21.97 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gURk>

21.97 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gURk>

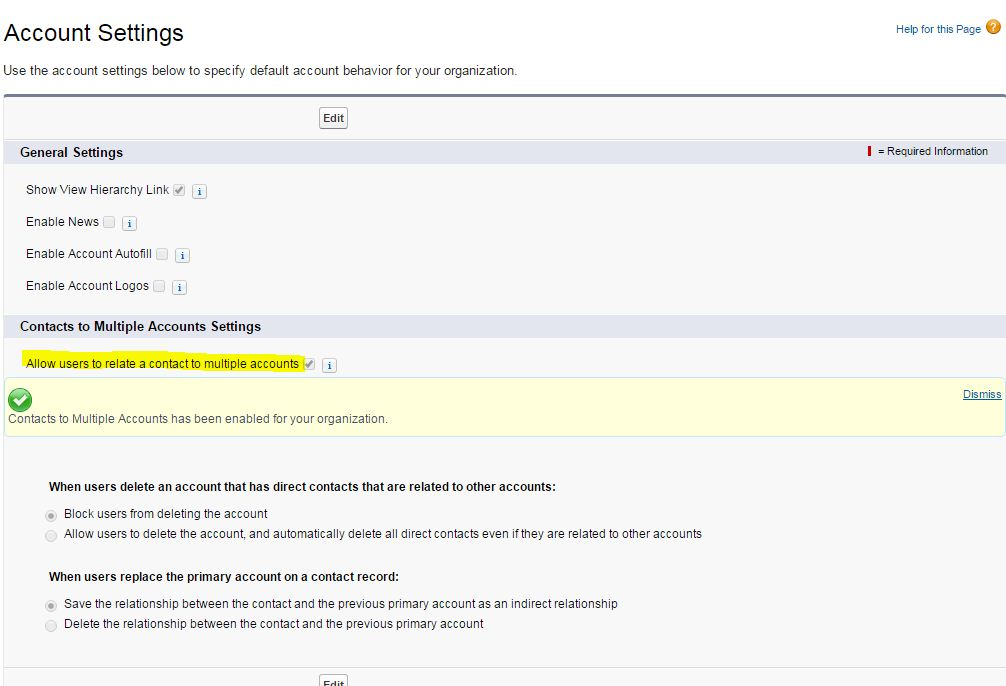
1. New Custom Setting
   1. Name = MaxSOLines
   2. Value = 1000
   3. Description = Maximum number of sales order lines

**Winter 22.2**

22.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUTv>

22.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUTv>

1. Need to edit “Account” Settings
   1. Check “Allow users to relate a contact to multiple accounts



**Winter 22.4**

22.4 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUUF>

22.4 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gUUF>

**Winter 22.9**

22.9 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjuY>

22.9 – [https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjuY](https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjuY%20)

1. Add picklist value - Manual
   1. Object = rstk\_\_sogateway\_\_c
      1. Field = rstk\_\_sogateway\_provider\_\_c
         1. Add picklist value
            1. Value = authorize.net
            2. API Name = AuthorizeNet
2. Edit picklist value - Manual
   1. Object = rstk\_\_sydata\_\_c
      * 1. Edit picklist value on same field for all 3 objects
           1. Field = rstk\_\_sydata\_process\_\_c
        2. Edit Picklist Value = “Processing Complete” to “ProcessingComplete”
3. Edit picklist value - Manual
   1. Object = rstk\_\_sydatat\_\_c
      * 1. Edit picklist value on same field for all 3 objects
           1. Field = rstk\_\_sydata\_process\_\_c
        2. Edit Picklist Value = “Processing Complete” to “ProcessingComplete”
4. Edit picklist value - Manual
   1. Object = rstk\_\_poloader\_\_c
      * 1. Edit picklist value on same field for all 3 objects
           1. Field = rstk\_\_poloader\_process\_\_c
        2. Edit Picklist Value = “Processing Complete” to “ProcessingComplete”
5. De-activate validation rule - Manual
   1. Object = rstk\_\_poitemvend\_\_c
      1. ‘De-activate Validation Rule = ‘Validate\_RcptLodId\_PoItem\_Type\_OutOper
6. Add Custom Setting - Manual
   1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      1. Name = heroku\_RealTimeOAuthCheck
      2. Description = If checked, OAuth validation response will be received real time.
      3. Value = False
         1. (Customers will have to change this to True see issues like RootForms requests not moving from ‘In progress’ state or MRP/ARAging jobs getting stuck)

**Winter 22.10**

22.10 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjud>

22.10 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjud>

22.10.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VEJH>

22.10.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VEJH>

**Winter 22.19**

22.19 - [https://login.salesforce.com/packaging/installPackage.apexp?p0= 04t4O000000MjxD](https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjud)

22.19 - [https://test.salesforce.com/packaging/installPackage.apexp?p0= 04t4O000000MjxD](https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjud)

Run HelpSetup – upsert

Helpsetup-2021-09-08