**Winter 19.1**

19.1 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001dzU

19.1 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001dzU

1. Jira #22

⁃ ‘sydivaddr\_\_c

- ‘sydivaddr\_type\_\_c

⁃ New Picklist Value - Automated

⁃ ‘Remit Address

⁃ Edit Picklist Value - Manual

⁃ Change ‘Label’ field on “Both” pick list value to “All

2. Jira #1491

⁃ ‘sydefault\_\_c - Manual

⁃ Change page layout assignment to version 22

3. Ticket #24099

⁃ ‘syusr\_\_c - Automated

⁃ New Picklist Values

⁃ ‘syusr\_expsfustartopt\_\_c

⁃ ‘Clock-On and Clock-Off

⁃ ‘syusr\_sfustartopt\_\_c

⁃ ‘Clock-On and Clock-Off

4. Ticket #24756

⁃ ‘icitem\_\_c - Manual

⁃ De-activate Validation Rule

⁃ ‘Yield\_Validation

5. Jira #781 - Automated

⁃ ‘**rstk.ScriptExecutor.execute('set\_sohdr\_sumppy', true);**

**Winter 19.3**

19.3.1 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000MjC9

19.3.1 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000MjC9

1. Jira #628 - Automated

- sydata\_c.object

- New Picklist Values

- ‘sydata\_txntype\_\_c

- ‘Sales Order Pack Reversal

Sales Order Pick(Issue) Reversal

Sales Order Pick-Pack Reversal

Sales Order Pick-Pack-Ship Reversal

Sales Order Shipment Reversal

**Winter 19.4**

19.4 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001fJi

19.4 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001fJi

**Winter 19.5**

19.5 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001fKg

19.5 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001fKg

**Winter 19.6**

19.6.2 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001fNz

19.6.2 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001fNz

1. Jira #1790 - Manual

- ‘sydefault\_\_c

- Change page layout assignment to version 23

2. Jira #1886 - Manual

- ‘soinvline\_\_c

- Delete Field

- ‘Tracking Number

3. Jira #1282 - Automated

- Run 1282\_menu script

**Winter 19.7**

19.7 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001fMN

19.7 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001fMN

1. Jira #1863 - Automated

- ‘sydata\_\_c

- New Picklist value

- ‘sydata\_txntype\_\_c

- ‘Sales Order Pack-Ship Reversal

2. Jira #1901 - Manual

Missing objecthelp pages

- Click ‘Edit’ when you pull up the object and change the ‘Context-Sensitive Help Setting’

- ‘gljed\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_gljed

- ‘icitemsiteproj\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_icitemsiteproj

- ‘pjprojwbs\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_pjprojwbs

- ‘poconttype\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_poconttype

- ‘poroute\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_poroute

- ‘portetype\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_portetype

- ‘poship\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_poship

- ‘sylimitd\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_sylimitd

- ‘sylimits\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_sylimits

- ‘syresult\_\_c

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_syresult

- ‘syresultd

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_syresultd

3. Jira #1885 - Manual – Run this step if upgrade is not going to be at least to build 19.14

- Run Deletion Script

- ‘Delete [select id from rstk\_\_helpsetup\_\_c];

- Run new updated page help csv file

- Use Data Loader to ‘Insert’ the org with the new csv file (CSV file located in Technical Support Repository)

csv file named = Helpforthispage-2019-04-03a

- Data object = Help (rstk\_helpsetup\_\_c)

- The ‘Name’ Field will have to be dragged down manually in the Auto-Match window.



- Change all customer orgs SYCONFIG setting with new help fuel

- https://rootstock.force.com/Trailblazer/

4. Jira #2016 - Automated

- Run 2016\_menu script

5. Jira #1919 - Automated

- Run 1919\_menu

- Run 1919\_menu\_part2

6. Jira #1327 - Automated

- Run 1327\_menu script

**Winter 19.8**

19.8.1 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IZce>

19.8.1 – https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IZce

1. Jira #2014 - Manual
   1. Missing objecthelp pages

- Click ‘Edit’ when you pull up the object and change the ‘Context-Sensitive Help Setting’

- ‘obship\_\_c or ‘Outbound Shipment

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_obship

- ‘obshipcont\_\_c or ‘Outbound Shipment Container

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_obshipcont

- ‘icitemsite\_\_c or ‘Inventory Item by Site

- Change ‘Context-Sensitive Help Setting’ to objecthelp\_icitemsite

2. Jira #2158 - Manual

a. Change page layout assignment

- ‘sydefault\_\_c or ‘SYDEFAULT

- Change page layout to version 25

3. Jira #2201 - Manual

a. New Custom Setting

Click ‘Manage’ “Application Settings” 🡪Add New Setting

- Name = costrollup\_MinCpuForIcitemstdSave

- Default Value = 2500

4. Jira #1119 - Manual

a. New Custom Setting

Click ‘Manage’ “Application Settings” 🡪Add New Setting

- Name = timeqtybooking\_MaxNumberOfBookings

- Default Value = 8

- Description = Time & Qty Booking - Max number of bookings

5. Jira #2211 - Manual

a. Template Change – Copy and paste ‘Packing Slip - MASTER - DO NOT MODIFY’ from dev-qa-ff

b. Overwrite customer’s existing Packing Slip template with the Master copy from dev-qa-ff only if RS-Support was last to modify template

- If customer modified template last then create a backup Packing Slip template named ‘Packing Slip BU’ with the changes from dev-qa-ff

**Winter 19.9**

19.9 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B00000063l3>

19.9 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B00000063l3>

**Winter 19.10**

19.10 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B00000063mV>

19.10 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B00000063mV>

1. Jira #2288 Summit Truck Bodies Only

a. New Custom Setting

Name = PLMItemProcessingLimit

Value = 100

Description = PLMItem Processing Limit

**Winter 19.11**

19.11.3 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjEA>

19.11.3 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjEA

**Winter 19.13**

19.13.1 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3lf

* 1. .1 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3lf

1. Jira #201 - Automated
   1. Delete Validation Rule
      1. ‘soamort\_\_c or ‘Sales Order Line Amortization Schedule
         1. Validation Rule = ‘Customer\_can\_not\_change
   2. New picklist value - Automated
      1. ‘sydata\_\_c or ‘SYDATA - System Transaction Object
         1. Field Name = ‘sydata\_txntype\_\_c
            1. New Value = ‘PO Receipt Reversal
2. Jira #2322 - Automated
   1. New picklist value
      1. ‘csusracctcntl\_\_c or ‘Cost Acct User Control Record
         1. Field Name = ‘csusracctcntl\_txnid\_\_c
            1. New values =‘CYCLECNT

‘INVLOCADJ

1. Jira #2053 - Automated
   1. Delete Field
      1. ‘sohdr\_\_c or ‘Sales Order Header
         1. Field Name = ‘rstk\_\_NewFormula\_\_c

**Winter 19.15**

19.15.4 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gTcO

19.15.4 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gTcO

1. Jira #1911 This step has to be done before the upgrade or else the upgrade will fail
   1. De-activate Validation Rule
      1. ‘sorma\_\_c or ‘RMA Detail
         1. Validation Rule = ‘sorma\_syorg\_validation
2. Jira #2484 - Automated
   1. Delete Fields
      1. ‘soline\_\_c or ‘ Sales Order Line
         1. Field Names = ‘rstk\_\_Do\_not\_deploy\_checkbox\_fmla\_\_c

‘rstk\_\_Do\_not\_Packaged\_SO\_Line\_History\_del\_\_c ‘rstk\_\_Do\_not\_Packaged\_Product\_ID\_del\_\_c ‘rstk\_\_Do\_not\_Packaged\_Customer\_ID\_\_c

1. Jira #238
   1. Change page layout assignment - Manual
      1. ‘icitemlot\_\_c or ‘Inventory By Lot Number
      2. Change page layout assignment to version 3
   2. ‘Run Scripts – Automated
      * 1. ‘rstk.ScriptExecutor.execute('set\_ltexpireind', true);
        2. ‘rstk.ScriptExecutor.execute('set\_issexpiredate', true);
      1. If you run into bad ID errors when check the Process Log, then skip over the IDs with this template script:
         1. ‘rstk.ScriptExecutor.execute('set\_ltexpireind', 'bad ID, bad ID ', true);
2. Jira #2509 - Automated
   1. ‘rstk.ScriptExecutor.execute('fix\_socust\_unbilledorders', true);

**Winter 19.21**

19.21 – https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDJH

19.21 – https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDJH

1. Jira #45 - Automated
   1. Delete Fields
      1. ‘sydiv\_\_c or ‘Division Master
         1. Field Names = ‘rstk\_\_Show\_System\_Qty\_\_c

‘rstk\_\_Hold\_Inventory\_Reconciliation\_Batch\_\_c

1. Jira #792 - Manual
   1. New Custom Setting

Click ‘Manage’ “Application Settings” 🡪 Add New Setting

* + 1. Name = qbonline\_retryinternalservererror\_500
    2. Value= true
    3. Description = When Quickbooks replies with "Internal Server Error" (status code 500) the export is resent once.

1. Jira #2343 - Manual
   1. New Custom Setting

Click ‘Manage’ “Application Settings” 🡪 Add New Setting

* + 1. Name = useNewPOAPMatchUI
    2. Description = To switch between POAPMatch Old UI & New UI
    3. Value = false

1. Jira #2457 - Manual
   1. Delete old report version with new version (Newer Version should have creation year in 2019)
      1. Report Folder - Rootstock\_Work\_Orders
      2. Note: See ‘Created Date’ column (in the far right) to determine which report to delete
      3. Rootstock WIP Valuation2
         1. Delete older version of same report
      4. Rootstock WO Variance Report2
         1. Delete older version of same report
2. Jira #2841 - Automated
   1. Note: Field cannot be deleted in BOC because it is referenced in non-packaged Apex classes
   2. Delete Field
      1. ‘sydata\_\_c or ‘SYDATA - System Transaction Object
         1. Field Name = ‘rstk\_\_sydata\_socontainer\_\_c
3. Jira #2612 - Manual
   1. De-activate Validation Rule
      1. ‘soline\_\_c or ‘Sales Order Line
         1. Validation Rule = ‘DueDateNLTToday

**Winter 19.23**

19.23 – https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDJq

19.23 – https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDJq

1. Jira #2612 - Manual
   1. Delete Validation Rule
      1. ‘soline\_\_c or ‘Sales Order Line
         1. Validation Rule = ‘DueDateNLTToday

**Winter 19.24**

19.24 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDKj>

19.24 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000VDKj>

1. Jira #2592 - Automated

* **‘rstk.ScriptExecutor.execute('set\_icitem\_supplymultiplierind', true);**

1. **Jira #2990 - Automated**
   1. **‘rstk.ScriptExecutor.execute('set\_wocst\_wosonumind', true);**

**Winter 19.30**

19.30 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3ot>

19.30 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3ot>

1. Jira #45 - Manual
   1. Copy ‘Work Order Receipt Traveler’ Template from Dev-qa-ff and paste into Customer orgs
2. Jira #2198 - Manual
   1. Change href on ‘Rootstock Support Portal’ menu record to

‘https://rootstock.force.com/Trailblazer/s/

1. Jira #2437 - Manual
   1. Modify ‘page key’ of menu records
      1. ‘Requirements’ page key = icixr\_\_c
      2. ‘Shop Floor Time Entry Transactions’ page key = shopfloortimeentrytrans
      3. ‘Default Page Layout’ page key = objpagesetup\_\_c
2. Jira #3038 - Manual
   1. Change page layout assignment
      1. ‘syconfig\_\_c
         1. Change page layout assignment to version 8
3. Jira #3044 - Manual
   1. ‘sopcomp\_\_c
      1. Remove ‘New’ from Product Components List View
4. Jira #3102 - Manual
   1. Change page layout assignments
      1. ‘soaghvd\_\_c
         1. Change layout to version 2
      2. ‘soagp\_\_c
         1. Change layout to version 3
      3. ‘soagpcq\_\_c
         1. Change layout to version 2
      4. ‘soagpq\_\_c
         1. Change layout to version 2
      5. ‘soagpt\_\_c
         1. Change layout to version 2
      6. ‘soagptq\_\_c
         1. Change layout to version 2
      7. ‘soagpc\_\_c
         1. Change layout to version 2
5. Jira #3046 - Automated
   1. Run 3046-PriceBookDetail\_menu\_script
6. Jira #3005 - Automated
   1. Run 3005 script.txt

**Winter 19.32.2**

19.32.5 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000063vX>

19.32.5 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000063vX>

1. Jira #3107 - Manual
   1. ‘sydefault\_\_c
      1. Change page layout to version 27

**Winter 19.33**

19.33 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3rJ>

19.33 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3rJ>

1. Jira #3498 - Manual
   1. New Custom Setting added under Application Settings
      1. New Custom Setting – False for USDA and TRUE for all other customers
         1. Name: emailTemplates\_autoupdatevfpages
         2. Value: TRUE (False only for customer USDA)
2. ‘sydiv\_\_c - Manual
   * 1. ‘rstk\_\_sydiv\_autoprintrcpt\_\_c
        1. Make Picklist Value ‘ No’ the default

**Winter 19.35**

19.35 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3tP>

19.35 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3tP>

1. Jira #1914 - Automatic
   1. ‘poloader\_\_c
      1. Change page layout assignment to PO Loader.v4
      2. New picklist value
         1. ‘poloader\_mode\_\_c
            1. ‘Close All Lines Short
2. Jira #3595 - Automatic
   1. ‘poline\_\_c
      1. Delete Field ‘Poload\_Test\_\_c
3. Jira #2845 - Manual
   1. ‘sydefault\_\_c
      1. Edit Picklist value
         1. ‘sydefault\_formovr\_wpk\_\_c
            1. Change ‘Email Template’ to ‘PDF’
4. Jira #3253 - Manual
   1. ‘pecoi\_\_c
      1. Remove ‘New’ button from ‘ECO Master Detail List View’
5. Jira #3270 - Manual
   1. Copy ‘PO Print’ Email Template from Dev-QA-FF into customer orgs
6. Jira #3305 - Automatic
   1. ‘icitem\_\_c
      1. Delete Field ‘Multiplier
7. Jira #3276 - Automatic
   1. ‘rstk.ScriptExecutor.execute('set\_sydiv\_autoprintrcpt', true);

**Winter 19.36**

19.36 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3wO>

19.36 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3wO>

**Winter 19.37**

19.37 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3xH>

19.37 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A3xH>

1. Jira #3688

a. ‘ socontract\_\_c - Manual

i. De-activate validation rule

ii. ‘socontract\_taxloc\_validation

* 1. ‘soprod\_\_c - Automatic
     1. ‘soprod\_enttype\_\_c - New picklist value
        1. ‘Qty Limits Per Period Skip
  2. ‘soentusesum\_\_c - Manual
     1. Add fields to ‘Search Filter Fields
        1. Name, Contract Entitlements, Covered Item, Day, Entitled To Product, Month, Sequence

**Winter 19.38.1**

19.38.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gTho>

19.38.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gTho>

**Winter 19.42**

19.42 – https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A40a

19.39 – https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000A40a

1. Jira #1807
   1. ‘soaddr\_\_c - Manual
      1. Delete Validation Rule
         1. ‘Tax\_loc\_cannot\_be\_empty\_for\_ship\_type
   2. ‘socaddr\_\_c - Manual
      1. Delete Validation Rule
         1. ‘Verified\_TaxLoc
2. Jira #2962 - Automatic
   1. ‘sydata\_\_c
      1. ‘sydata\_txntype\_\_c
         1. ‘Credit Memo for Sales Invoice
3. Jira #3368 - Automatic
   1. ‘poship\_\_c
      1. ‘poship\_destination\_\_c
         1. ‘Dalian Warehouse
4. Jira #3594 – Give field permissions to below field - Manual
   1. sydefault\_\_c.object
      1. Label Name: SYDEFAULT
         1. ‘Workday - Auto Approve Vendor Invoices
5. Jira #3510 – Mark Andy Only
   1. Application Setting
      1. Name = socntl\_nobypassupdatesolines
      2. Value = true
6. Jira #3565 – Financial Force Customers Only
   1. ‘Journal object
      1. Add new custom link to FF ‘journal’ object
      2. Label = Cost Transactions
      3. Name = Cost\_Transactions\_LEX
      4. Behavior = Display in new window
      5. Button or Link URL = {!URLFOR("/apex/Csttransqry", null, [journalid=c2g\_\_codaJournal\_\_c.Id] ) }
      6. Height (in pixels) = 600
      7. Width (in pixels) =
      8. Window Position = No Preference
      9. Resizable = CheckBox is checked
      10. Description = Provide link to Rootstock Cost Transaction
      11. Object Name = Journal
      12. Link Encoding = Unicode (UTF-8)
      13. Display Type = Detail Page Link
      14. Show Address Bar = Checkbox not checked
      15. Show Scrollbars = Checkbox is checked
      16. Show Toolbars = Checkbox is not checked
      17. Show Menu Bar = Checkbox is not checked
      18. Show Status Bar = Checkbox is not checked

Add this link to the assigned layout

1. Jira #3566 - Manual
   1. Set All tabs ‘Default Off’
      1. ‘DRP Processing
      2. ‘Planned Location Transfer Query
      3. ‘Engineering BOM Query
      4. ‘Forecast Fast Entry
      5. ‘MRP Launch
      6. ‘Summary Review By Item
      7. ‘Detailed Review By Item
      8. ‘Work Center Capacity Planning Workbench
      9. ‘Operation Assignments by Work Center
      10. ‘Cost Transaction Query
      11. ‘Inventory Reconciliation Automatic Gen
      12. ‘Cycle Count Report
      13. ‘Shortage Report
      14. ‘Inventory Valuation By Date
      15. ‘PO Issue
      16. ‘PO Issue Reversal
      17. ‘Purchase Order Authorization
      18. ‘Open PO Lines with Bar Code
      19. ‘PO AP Match
      20. ‘PO Receipt Reversal
      21. ‘Mass Firm Work Orders
      22. ‘WO Issue
      23. ‘WO Issue Reversal
      24. ‘User Time Entry
      25. ‘Time and Quantity Booking
      26. ‘Time and Quantity Booking Reversal
      27. ‘WO Receipt Reversal
      28. ‘Consolidated Work Order Picklist
      29. ‘SO Fulfillment
      30. ‘SO Fulfillment Pre Selection
      31. ‘Product Configurator
      32. ‘Create Invoice For All Shippers
      33. ‘Credit Release
      34. ‘SO Line Amortization Processing
      35. ‘Chart of Accounts Import
      36. ‘Sales Invoice Export
      37. ‘Payable Invoice Export
      38. ‘General Journal Export
      39. ‘Purge Cost Transactions
      40. ‘Purge System Transactions
      41. ‘Purge Work Orders
      42. ‘Purge Purchase Orders
      43. ‘Purge Sales Orders
      44. ‘Generate Recurring Billing
      45. ‘Sales Contract Device Deal Management
      46. ‘Sales Contract Device Transfer
      47. ‘WO Picklist
      48. ‘WO Traveler
      49. ‘Work Order Scheduling
      50. ‘Clock-On Job
      51. ‘Clock-Off Job
      52. ‘Clock On and Clock Off
      53. ‘New Disassembly Order
      54. ‘Work Center Dispatch List
2. Jira #3581
   1. ‘icreq\_\_c - Manual
      1. Delete Validation Rule
         1. ‘Project\_Charge\_Code\_Project\_Validation
      2. Set History Tracking to below fields - Manual
         1. ‘Actual Approve Date
         2. ‘Actual Firm Date
         3. ‘Buy Division
         4. ‘Due Date
         5. ‘Effectivity Date
         6. ‘Effectivity Indicator
         7. ‘Item No
         8. ‘Item Revision
         9. ‘MRP Launch
         10. ‘Organizational Department
         11. ‘Project Charge Code
         12. ‘PO Price Override
         13. ‘PO Qty
         14. ‘Primary Vendor
         15. ‘Project
         16. ‘Converted Qty
         17. ‘Decimal Qty Precision
         18. ‘Purchase Qty
         19. ‘Site
         20. ‘Job Code
   2. ‘sydiv\_\_c – Manual
      * 1. ‘sydiv\_polotautometh\_\_c
           1. ‘Use Prefix Only
      1. Add Search Filter Fields - Manual
         1. Name, Division Number, ECO Active, Home Project, Inventory Active, Main Site, Multi-Site, Ohd Rate, Labor, Priority Option, Routing Active
3. Jira #3613 - Automated
   1. ‘wocst\_\_c
      1. New Button Link
         1. ‘Label/Name = WO Issue
4. Jira #3695 - Manual
   1. ‘sydata\_\_c
      1. Change page layout assignment to version 4
   2. ‘soapi\_\_c
      1. Change page layout assignment to version 4
5. Jira #3723 - Manual
   1. ‘syconfig\_\_c
      1. Update History Tracking to below fields
      2. ‘Allocations
      3. ‘Code Revision Level
      4. ‘Daily Limit on SOAPI Transactions
      5. ‘Daily Limit on Poloader Transaction
      6. ‘Daily limit on Sydata Transaction
      7. ‘Dedicated SOAPI Batch Processor
      8. ‘Entitlements Active
      9. ‘FinancialForce Invoice with Journals
      10. ‘FinancialForce Project Id Field
      11. ‘Freight – Other Landed
      12. ‘Grade Level
      13. ‘Labor Only Work Orders
      14. ‘Multi-Division Active
      15. ‘Number of Authorized Users
      16. ‘Number of Paid User Licenses
      17. ‘Recurring Services Active
      18. ‘RootForms Active
6. Jira 3581 - Automatic
   1. ‘sydiv\_\_c
      1. Delete Field
         1. ‘rstk\_\_custom\_polotprefix\_\_c
7. Jira #940 - Automatic
   1. ‘rstk.ScriptExecutor.execute('set\_confcomp\_sumlabhours', true);
   2. ‘rstk.ScriptExecutor.execute('set\_confdcomp\_sumlabhours', true);
8. Jira #3254 - Automatic
   1. 3254\_menu script
9. Jira #3570 - Automatic
   1. ‘rstk.ScriptExecutor.execute('set\_sytxncst\_journalentrynoindex', true);
10. Jira #3590 – Pacer Group Only (Manual Script)
    1. 3590 script
11. Jira #3693 - Automatic
    1. 3693\_menu

**Winter 19.45**

19.45 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000kgtY

19.45 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000kgtY>

1. Jira #1411 - Manual
   1. Edit object ‘syvatclass\_\_c
      1. Enable Reports
2. Jira #1725 - Manual
   1. Edit object ‘soapi\_\_c
      1. Add Search Filter Fields
         1. Name, API Mode, Sales Division, Sales Order Header, Sales Order Line, Update existing Sales Order, Upload Group, Update (overwrite) Custom Fields, Retry Indicator, Record Processed
3. Jira 1725 - Manual
   1. Edit object ‘soinv\_\_c
      1. Enable Reports
   2. Edit object ‘sozone\_\_c
      1. Enable Tracking History
   3. Edit object ‘sozonediv\_\_c
      1. Enable Tracking History
      2. Add Search Filter Fields
         1. Shipping Zone Division Detail Name, Sales Division, Inventory Division, Shipping Zone, VAT Class, Cost of Sales Account, Sales Account, Issue From Site, Issue From Location ID
4. Jira #2492 - Manual
   1. ‘pohdr\_\_c
      1. Change page layout assignment to version 3
   2. Edit New Flow
      1. RS\_Clone\_Purchase\_Order\_Lines.flow
      2. Change ‘Description’ to
         1. ‘Clones an existing Purchase Order Header and its lines. To be used via custom button/action on record page.

Allows users to input a dock date, and either select the same Vendor or a new one.

In order to add this flow as a custom link to Purchase Order page using the slide menu, or as a Custom Button or Link within Purchase Order Header object, set URL to: /flow/rstk/RS\_Clone\_Purchase\_Order\_Lines?recordId={!recordId}

Can clone up to 199 PO Lines

1. Jira #3945 - Automatic
   1. ‘iclocitem\_\_c
      1. Delete Fields
         1. ‘rstk\_\_iclocitem\_phyinvcount\_\_c
         2. ‘rstk\_\_iclocitem\_phyinvrunno\_\_c
2. Jira #3948 - Manual
   1. Edit object ‘sotax\_\_c
      1. Add Search Filter Fields
         1. Name, Primary Sales Division, Tax Location ID, Description, Total Tax Rate
3. Jira #4004 - Manual
   1. ‘sydefault\_\_c
      1. Change page layout assignment to version 28

**Winter 19.47.1**

19.47.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000063xE>

19.47.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000063xE>

1. Jira #4027 - Automatic

a. ‘sydata\_\_c

i. ‘sydata\_txntype\_\_c - New pIcklist Values

1. ‘Complete Disassembly WO

Derived Component Receipt

Derived Component Receipt Reversal

Qty Complete at Operation Reversal

**Winter 19.48.2**

19.48.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2bb>

19.48.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2bb>

1. Jira #3844 – Manual
   1. ‘porcptap\_\_c
      1. Add ‘AP Match’ button to ‘PO Receipt Transactions List View’
   2. Add Fields to Search Results
      1. Name, AP Batch Number, AP Due Date, AP Invoice Amount, AP Quantity, AP Unit Price, Date Authorized, Purchase Order, PO Line, Last Modified Date
   3. ‘sydatad\_\_c
      1. Enable Reports
2. Jira #3850 - Manual
   1. ‘sohdr\_\_c
      1. Change page layout assignment to version 7

**Winter 19.49.2**

19.49.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000QwMY>

19.49.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000QwMY>

1. Jira #3666 - Manual

a. ‘pebomdisoutput\_\_c

i. Enable Tracking History

ii. History Tracking

* + - * Component Item
      * Cot Allocation Pct
      * Major Byproduct
      * Name
      * Parent Item
      * Quantity Per

1. Jira #3877 – Manual
   1. ‘syapcntl\_\_c

a. Add fields to Search Filter Fields

i. ‘Name, Default Carrier, Invoice Source, Last AP Batch Number, Process Option, Last Activity Date

3. Jira #4213 - Manual

a. Change description on ‘RSTK\_WO\_Close\_Short.flow

i. ‘Performs reversal of transactions and qty. bookings required to adjust Qty. Required and process the WO closure. Supports receipts at multiple operations.

In order to add this flow as a custom link to Work Order Header page using the slide menu, or as a Custom Button or Link within Work Order Header object, set URL to: /flow/rstk/RSTK\_WO\_Close\_Short?recordId={!recordId}

* 1. ‘icclockdtl\_\_c
     1. Enable History Tracking
     2. Enable Reports
     3. Add fields to search results

‘Name, Clock Transaction, Hours, Labor Reversed, OP Comments, Labor Txn, Move Only, Operation, Ship

**Winter 19.51.1**

19.51.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2gW>

19.51.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2gW>

1. Jira #2856 - Manual

a. Custom Setting 🡪 Manage Application Settings 🡪 Create ‘new‘

i. Name = soapi\_updatecustomerdefaults

ii. Value = False

2. Jira #4276 - Manual

a. ‘gljed\_\_c

i. Add Fields to Search Filter Fields

ii. ‘Name, Division, Journal Header, Line Description, Cross Reference GL Account,

Dimension1 Value, Dimension2 Value, Dimension3 Value

1. Jira #4362 - Manual
   1. ‘sydefault\_\_c
   * ‘sydefault\_formovr\_ack\_\_c
     + Make ‘No Override’ the default picklist value

**Winter 19.52**

19.52 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2gM>

19.52 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2gM>

* + - 1. Jira 4508 - Manual
         1. ‘plmitem\_\_c

Add Search Filter Fields

Name, Product Group, BOM Changed, Inventory Commodity Code, Inventory Division, Item Number, PLM Import Session, Previous Rootstock Item Revision, Revision Number

* + - 1. Jira 4290 Needs to be done by Customer if they have Quickbooks
         1. Quickbooks 2.0 OAuth setup
  1. Direct the customer to log into [Intuit’s Developer website](http://developer.intuit.com/) with the their Quickbooks credentials.
  2. Create the Quickbooks app:
     1. Click My Apps in the upper right.
     2. Click the blue + Create an app button.
     3. Click Quickbooks Online and Payments panel.
     4. Choose a name, like "Rootstock ERP Integration".
     5. Select the necessary scopes, at a minimum “Accounting“.
     6. Click Create App.
  3. Configure the app for production access:
     1. Clicks My Apps in the upper right.
     2. Click on the new app's name, from above.
     3. Click Keys & OAuth under Production on the left.
     4. Complete "Production Keys requirements".  
        **NOTE:** Although these setting support an app that would be distributed to others, the customer's app is only for their use, so the following 2 items are insignificant.
     5. Add the 2 URLs requested which can be the customer's company's website, for example http://rootstock.com. **DO NOT use our URL for the customer.**
     6. Select an industry for the app. "None of the above" is sufficient.
     7. Click the Save button.
     8. Note the App Store Status will be "Not Listed", indicating the app is not publicly available.
  4. Observe Client Id and Secret:
     1. Click on Keys & OAuth under Production on the left.
     2. We’ll copy and paste the Client Id and Secret to Salesforce shortly.

Create Authentication Provider  
Ref: <https://help.salesforce.com/articleView?id=sso_provider_openid_connect.htm&type=5>  
Begin with “Define an OpenID Connect Provider in Your Salesforce Org”.

* 1. If not already available, log into the Salesforce org.
  2. Go to the Setup page. Search Setup for “Auth. Provider”. Click on the result.
  3. Create a new Authentication Provider with the following.
     1. Name: Quickbooks\_OAuth\_V2
     2. Provider Type: "Open ID Connect"
     3. Consumer Key: client Id (Copy and paste from the Quickbooks website.)
     4. Consumer Secret: client secret (Copy and paste from the Quickbooks website.)
     5. Authorize Endpoint URL: https://appcenter.intuit.com/connect/oauth2
     6. Token Endpoint URL: https://oauth.platform.intuit.com/oauth2/v1/tokens/bearer
     7. Save.
  4. Upon saving, note the generated callback URL near the bottom.

Edit Quickbooks app

* 1. Return to the Quickbooks page.
  2. Add "Callback URL" generated during the preceding step to "Redirect URIs" list.
  3. Save

Create Named Credentials  
Ref: <https://help.salesforce.com/articleView?id=named_credentials_define.htm&type=5>

* 1. Go to the Setup page. Search Setup for “Named Credential”. Click on the result.
     1. Name:  Quickbooks\_REST\_API
     2. URL: https://quickbooks.api.intuit.com
     3. Identity Type: Named Principal
     4. Authentication Protocol: OAuth 2.0
     5. Authentication Provider: Quickbooks\_OAuth\_V2 (The name from above.)
     6. Scope: com.intuit.quickbooks.accounting
     7. Save.
  2. Upon saving, Quickbooks authorization will occur requiring the verification of selecting a company.

**Winter 19.53**

19.53 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2iw>

19.53 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2iw>

**Winter 19.56**

19.56 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2kT>

19.56 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2kT>

1. Jira 3996 - Manual
   1. ‘povclass\_\_c
      1. Enable Reports
      2. Enable Tracking History
      3. Search Results Fields
         1. Vendor Class Name, Vendor Class, Description, Pay Type, Credit Card Account, Bank Account Name, Payment Terms, Multi Company Vendor Indicator, Accounts Payable User, Defualt Company for Vendor
2. Jira 4203 – Automatic
   1. ‘rstk.ScriptExecutor.execute(‘update\_pohdr\_address\_lookups’, true);

‘rstk.ScriptExecutor.execute(‘update\_poline\_address\_lookup’, true);

1. Jira 4630 - Automatic
   1. Delete Field
   2. ‘sydata\_\_c
      1. ‘rstk\_\_sydata\_syterms\_\_c
2. Jira 4013 - Manual
   1. ‘soprod\_\_c
      1. Enable Reports
      2. ‘soprod\_avataxcodeind\_\_c
         1. Default Value = True

Automatic

* 1. ‘rstk.ScriptExecutor.execute(‘set\_prod\_avataxcodeind’, true);

1. Jira #4686 - Manual
   1. Custom Setting 🡪 Manage Application Settings 🡪 Create ‘new‘

Name = sytxncst\_PoRcptSkipTotLocQtyForSrlItm

Value = False

* + - Make the value = True for Direct Solar

**Winter 19.58.4**

19.58.4 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2me>

19.58.4 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2me>

1. Jira #4041 - Automatic
   1. ‘poloader\_\_c
      1. New Picklist Values
         1. ‘poloader\_mode\_\_c
            1. ‘Clone

Delete Header

Delete Both

Delete Line

1. Jira #4413 - Manual
   1. ‘icdreq\_\_c
      1. Enable Track History
      2. Enable Reports
      3. Search Filter Fields
         1. ‘Name, Work Order, Commodity Code, Due Date, Expected Qty, Qty Requested, Core Item, Received Qty, Rejected Qty
      4. De-activate Validation Rule
         1. ‘Actual\_Yield\_Qty\_Whole\_Number
2. Jira #4460 - Automatic
   1. ‘rstk.ScriptExecutor2.execute('remove\_orphan\_dimvals', true);

**Winter 19.62.2**

19.62.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000kgz2>

19.62.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000kgz2>

1. Jira #4220 - Automated
   1. ‘sydata\_\_c
      1. New Picklist Values
         1. ‘sydata\_txntype\_\_c
            1. ‘Prepayment Close Out

Prepayment Create Credit Note

Prepayment Recall

Prepayment Release

1. Jira #4669 - Manual
   1. ‘processlog\_\_c
      1. Enable Reports
      2. Add Fields to Search Filter Fields
         1. ‘Name, Apex Job ID, Batch Started, Batch Finish, Completed, Error Occurred, Error Message

**Winter 19.63.1**

19.63.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000EV4E>

19.63.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000EV4E>

1. Jira #4528
   1. ‘sytxncst\_\_c
      1. Delete Field
         1. ‘TestUpdate
2. Jira #4802 - Manual
   1. Delete Custom Settings
      1. Click “Custom Settings” 🡪 Click Manage “Application Settings” 🡪 Delete the below listed settings
      2. Name = deleteIcitemprojWhenZeroQty
      3. Name = deleteIcitemsiteprojWhenZeroQty

**Winter 19.65.1**

19.65.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000IZzt>

19.65.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000IZzt>

1. Jira #5101 - Automated
   1. ‘rstk.ScriptExecutor2.execute('update\_ttaphdr\_poaphdr\_to\_value', true);

**Winter 19.66**

19.66.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O0000001fkH>

19.66.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O0000001fkH>

1. Jira 5149 - Manual
   1. Custom Setting
      1. Name = **sydata\_BatchSizeForWoiss**
      2. Description = **SYDATA - Batch Size for WO Issue**
      3. Value = 10

**Winter 20.2**

20.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2sI>

20.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2sI>

**Winter 20.17**

20.17 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2uE>

20.17 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Y2uE>

1. Jira #4773 - Automated
   1. ‘rstk.ScriptExecutor.execute('set\_prod\_amort', true);
2. Jira #5086 - Automated
   1. ‘rstk.ScriptExecutor.execute('update\_poline\_poitemvend', true);

**Winter 20.20**

20.20 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gU2K>

20.20 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gU2K>

1. Jira #5338 - Manual
   1. Delete Validation Rule
      1. ‘socondev\_\_c
         1. Validation Rule = ‘Last\_RMA\_Number
2. Jira #5194 - Manual
   1. Custom Setting
      1. Name = sydataprocessor\_HVPEEnabled
      2. Value = True
      3. Description = SydataProcessor - HVPE enabled
3. Jira #4387 - Automated
   1. New Picklist Value
      1. ‘poloader\_\_c
         1. ‘poloader\_mode\_\_c
            1. Picklist Value = ‘API Mode

4. Scripts - Automated

* 1. ‘rstk.ScriptExecutor.execute('set\_poasnreq\_lotnos', true);
  2. ‘rstk.ScriptExecutor.execute('set\_pocontpick\_lotnos', true);

**Winter 21.8**

21.8 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjbk>

21.8 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjbk>

1. Jira #5646 - Manual

a. Delete Object

i. ‘soshipser\_\_c

2. Jira #5148 - Manual

a. ‘sycurr\_\_c

i. ‘sycurr\_currency

ii. Edit only Label Value

iii. Change “Mxn.” To “Mxn”

**Winter 21.9**

21.9 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjbz>

21.9 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjbz>

1. Jira 5536 - Manual

a. De-activate Validation Rule on Prepayment Detail object

i. ‘soppy\_\_c

ii. De-activate Validation Rule =

“CustomercannotHaveAnInvoiceingCustAssocd

**Winter 21.18**

21.18.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gU7A>

21.18.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000gU7A>

1. Jira 5617 - Manual

a. Add picklist values to SYDATA - System Transaction Object

i. ‘sydata\_\_c

i. Add below picklist values to “rstk\_\_sydata\_txntype\_\_c” field

ii. ‘Allocate PO Component

Deallocate PO Components

Deapprove Sales Invoice Batch

Reopen Sales Invoice Batch

**Winter 21.25**

21.25 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjhE>

21.25 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjhE>

1. Jira 5820

a. Fix Field permissions

i. ‘soinv\_\_c – Sales Order Invoice Header

ii. ‘Error Date

2. Jira 5824

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

3. Jira 4303

a. ‘rstk.ScriptExecutor.execute('set\_soprod\_srlind',true);

4. Jira 5925

a. ‘rstk.ScriptExecutor.execute('set\_solineser\_srlnoidx', true);

b. ‘rstk.ScriptExecutor.execute('set\_soshipsrl\_srlnoidx', true);

**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 – Rootstock Support Step

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 - Manual

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 - Manual

a. Name = soapi\_maxbulkasyncblock

Value = 100

2. New Picklist Value - Automated

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>

Automated – Rootstock Support Step

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 – Manual

* 1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’

Name = BypassTriggerForOpportunityLineItem

Value = False (True for Curriculum Associates)

2. Rootstock Support Manual Step

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 – Manual

* 1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’

Name = sydata\_ResubmitLockErrSyncSydataToHVPE

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

Value = true

2. New Picklist Values - Automated

Object = rstk\_\_syusr\_\_c

Object Field = rstk\_\_syusr\_definelimited\_\_c

New Picklist Value = Warehouse

Object = rstk\_\_syconfig\_\_c

Object Field = rstk\_\_syconfig\_definelimited\_\_c

New Picklist Value = Warehouse

3. Delete Field - Automated

Object = rstk\_\_sohdr\_\_c

Delete Field = rstk\_\_sohdr\_sellusrno\_\_c

4. Delete Picklist Value - Manual

Object = rstk\_\_sydata\_\_c

Object Field = rstk\_\_sydata\_txntype\_\_c

Delete Picklist Value = Custom Transaction

5. Automated

‘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**

21.55.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000khHm>

21.55.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000khHm>

1. Delete Picklist Value - Manual

a. Object = sydata\_\_c

Object Field = rstk\_\_sydata\_txntype\_\_c

Delete Picklist Value = Transaction Type

**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. Script - Automated

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

2. Script - Automated

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

3. New Custom Setting – Manual

* 1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’

a. Name = SOPICKLISTGENERATOR\_SOPICKDS\_PER\_BATCH

b. Description = SO PickList Details per Batch

c. Value = 50

4. Edit existing Custom Setting – Manual

* 1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’

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 - Automated
   1. ‘rstk.ScriptExecutor.execute('encrypt\_gateway\_password', true);
2. Jira 7338 Script - Automated
   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. Select ‘Email’ dropdown from Setup sidebar 🡪 ‘Email Message’ dropdown 🡪 Select ‘Fields’ 🡪 Scroll down to bottom of page to ‘Email Message Custom Fields & Relationships’ section 🡪 Select ‘New’
         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 )Paste blue highlighted text into blank text box
2. Jira 7887 - Manual
   1. New Custom Setting
   2. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      1. Name = BypassTriggerForQuote
      2. Value = True
3. Jira 7952 - Manual
   1. New Custom Setting
   2. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      1. Name = soinvprint\_pdfsperpage
      2. Description = Integer value, defaults to 100 - Controls the number of invoice PDFs per page.
      3. Value = 100
4. Jira 7868 - Manual
   1. New Custom Setting
   2. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      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);

**Winter 21.75**

21.75 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064Mo>

21.75 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064Mo>

**Winter 21.76**

21.76 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064My>

21.76 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064My>

**Winter 21.80**

21.80 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064OG>

21.80 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O00000064OG>

**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 - Manual
   1. Navigate to object = rstk\_\_poaphdr\_\_c
      1. Click on Field = rstk\_\_poaphdr\_apmatchind\_\_c
         1. Add 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 - Automated
   1. ‘rstk.ScriptExecutor.execute('set\_icitemlot\_haveqty', true);

**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. New Script - Automated

‘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 – Manual
   1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      1. Name = FFA\_AutoSwitchToSingleCompanyMode
      2. Value = False
2. New Custom Setting - Manual
   1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      1. Name = timeqtybooking\_AutoSelectQtyBkngAction
      2. Value = True
3. Script - Automated
   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 - Manual
   1. Navigate to rstk\_\_poline\_\_c object

b. Click field =‘rstk\_\_poline\_typesel\_\_c

* + 1. Edit ‘Direct’ picklist value
       1. Change picklist value label to ‘Direct Material’
          1. Do not change API name

**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 Settings - Manual
   1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      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>

Manual

1. Need to edit “Account” Settings – Needs to be done before upgrade attempt
   1. Navigate to Account dropdown in setup bar 🡪 Select 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 Label = “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 Label = “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 Label = “Processing Complete” to “ProcessingComplete”
5. Add picklist value – Manual
   1. Object = rstk\_\_iccomcod\_\_c

                                                              i.      Field = rstk\_\_iccomcod\_itemtype\_po\_pl\_\_c

* + - 1. Add Picklist Value
         1. Value = Outside Operation

1. Add picklist value – Manual
   1. Object = rstk\_\_pocomcod\_\_c

                                                              i.      Field = rstk\_\_pocomcod\_itemtype\_pl\_\_c

* + - 1. Add Picklist Value
      2. Value = Outside Operation

1. De-activate validation rule - Manual
   1. Object = rstk\_\_poitemvend\_\_c
      1. ‘De-activate Validation Rule = ‘Validate\_RcptLodId\_PoItem\_Type\_OutOper
2. 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 if there are 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>

22.19 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjxD>

Run HelpSetup – upsert

Helpsetup-2021-09-08

**Winter 22.20**

22.20 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjxS>

22.20 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000MjxS>

1. Add Custom Setting - Manual
   1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      1. Name = ttapline\_AsyncCopyClientCustomFields
      2. Description = Async copy of client custom fields from sydatad
      3. Value = False
2. Add Custom Setting - Manual
   1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      1. Name = ttapline\_EnableCustomFldCopyFrmSydatad
      2. Description = Enable custom field copy from sydatad to ttapline
      3. Value = False
3. Add Custom Setting - Manual
   1. ‘Develop’ in setup bar 🡪 ‘Custom Settings’ 🡪 Click ‘Manage’ on Application Settings 🡪 Click ‘New’
      1. Name = salesprepay\_deriveNumberFromId
      2. Value = true
4. Add Picklist Value
   1. Object = rstk\_\_sydiv\_\_c
      1. Field = rstk\_\_sydiv\_polotautometh\_\_c
         1. Add New Picklist Value = Use Next in Sequence (No Override)

**Winter 22.27**

22.27 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjya>

22.27 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mjya>

1. Jira 9558
   1. ‘rstk.ScriptExecutor.execute('set\_pohdr\_closedate',true);
   2. ‘rstk.ScriptExecutor.execute('set\_sohdr\_closedate',true);

**Winter 22.30**

22.30 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mk0R>

22.30 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4O000000Mk0R>