RELEASE UPGRADE NOTES

The demo1 profiles are:

RS Baseline Platform Users

RS Full Access Platform Users

Buzzballz

Plumb Signs

Lodi

Bluescape SB already done.

These are safe to run on RS internal orgs if we need to temporarily free up space on an org.

// Delete MRP Plan Notes - OK to delete on internal orgs

rstk\_\_mrpplannotes\_\_c[] mrpplannotess = [

select id, rstk\_\_triggeroptions\_\_c from rstk\_\_mrpplannotes\_\_c limit 10000];

for (rstk\_\_mrpplannotes\_\_c mrpplannotes : mrpplannotess) {

                mrpplannotes.rstk\_\_triggeroptions\_\_c = '{"ST":"1","SAE":"1"}';

}

delete mrpplannotess;

// MRP Process Threads - OK to delete on internal orgs

mrpthread\_\_c [] mrpthreads = [

select id from mrpthread\_\_c order by id asc limit 10000];

delete mrpthreads;

<https://na48.salesforce.com/033U000000094R9?tab=PackageExports>

16.50.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001cMO>

16.50.2 - [https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001cMO](https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001cMO)

16.48 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VBAo>

16.48 - [https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VBAo](https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VBAo)

16.47 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VBA0>

16.47 - [https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VBA0](https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VBA0)

[16.46.1- https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VBAP](16.46.1-%20https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VBAP)

16.46 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VB9b>

16.46 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VB9b>

1. Ticket #8619
   1. ‘confgroup\_\_c
      1. Change page assignment to version 2
2. Ticket #14583
   1. ‘confsess\_\_c
      1. New Picklist Value
      2. ‘confsess\_output\_\_c
         1. ‘Item-Serial Features
   2. ‘confsess\_\_c
      1. Search Layouts new items
         1. **Lookup Dialogs**
            1. Name, Session ID
         2. **Search Filter Fields**
            1. Name, Session ID, Customer, Configuration Product
3. Ticket #11045
   1. ‘wocst\_\_c
      1. Search Layouts
         1. Edit Work Orders List View
            1. Make sure that ‘New Disassembly Work Order’ button is not showing in selected buttons

16.45.1-- <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000632v>

16.45.1- https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000632v

16.45 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VB76>

16.45 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VB76>

1. Ticket #11041
   1. ‘soconrc\_\_c
      1. Change page assignment to version 6
      2. ‘soconrc\_application\_\_c
         1. ‘Applies to a Specific Product Group
            1. Re-order alphabetically
2. Ticket #11345
   1. ‘soconpbbatch\_\_c
      1. Change page assignment to version 4
      2. ~~New Web Link~~
         1. ~~‘Change Invoice Date~~
3. Ticket #13000
   1. ‘sydata\_\_c
      1. ‘sydata\_txntype\_\_c
         1. ‘Sales Invoice Payment

Sales Invoice Payment Reversal

16.44.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000kfPd>

16.44.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000kfPd>

16.43.11-https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000MhYR

16.43.6 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000MhW6>

16.43.6 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000MhW6>

16.43.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000MhVN>

16.43.1 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000MhUe

16.43.1 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000MhUe

16.43 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VB1R>

1. Ticket #11107
   1. ‘soamort\_\_c
      1. Delete Validation Rule
         1. ‘Shipment\_Date\_can\_not\_change
2. Ticket #11406
   1. ‘sydefault\_\_c
      1. Change page assignment to version 12
3. Ticket #13413

Add new Application Setting Detail

Setup > Develop > Custom Settings - Click **MANAGE** Application Settings where the Namespace Prefix = rstk

1. Name = autoComplete\_minimumChar
2. Value = 4
3. Description = Minimum characters required for autocomplete field to get query result.
4. Ticket #13549
   1. ‘rstk.ScriptExecutor.execute('fix\_icitemsiteproj\_qtyavail', true);
5. Ticket #13737
   1. [13737\_Menu.txt](https://app.teamsupport.com/dc/1/attachments/8397939)
6. Ticket #14207
   1. 14207 script
7. Ticket #13673
   1. 13673 script
      1. In customer orgs, run the script and if it returns rows in the log where it is showing that a quantity 'Should be ...', then change the first line to Boolean doUpdate = true, and run it as many times as it takes until you don't get any rows in the log with 'Updated ..'

16.42 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VB1H>

16.42 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VB1H>

16.41.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000gSTt>

16.41.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000gSTt>

16.41.1- <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000gSTo>

16.40.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000kfN3>

16.40.2 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000kfN3

16.40- <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAzB>

16.39.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAzG>

16.39.1 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAzG

16.38.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001bvx>

16.38.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001bvx>

16.38.1 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001bvs

16.38.1 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B0000001bvs

16.38 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAx5>

16.38 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAx5>

[16.37.2 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IYIx](16.37.2%20-%20https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IYIx) [16.37.2 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IYIx](16.37.2%20-%20https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IYIx)

16.37.1 : https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IYIs

16.37.1 : https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IYIs

1. Ticket #12651
   1. ‘icitem\_\_c
      1. Change page assignment to version 5
   2. ‘icitemlot\_\_c
      1. Search Layouts
         1. Check ‘New’ button on List View
2. Ticket #11272
   1. ‘sydata\_\_c
      1. New Picklist Value
         1. ‘sydata\_txntype\_\_c
            1. ‘Credit Memo for RMA

Work Order – Auto Serialize from Primary Component

* + 1. Deactivate Picklist Value
       1. ‘sydata\_txntype\_\_c
          1. ‘inventory transfer

1. Ticket #12649
   1. ‘socntl\_\_c
      1. ‘socntl\_avaexcludegeo\_\_c
         1. ‘CAYMAN ISLANDS (KY/CYM)
2. Ticket #12711
   1. ‘poasn\_\_c
      1. Deactivate Validation Rule
         1. ‘Vendor2
   2. Field Set
      1. Remove all displayed fields from the field set
3. Ticket #13639
   1. ‘poitemvend\_\_c
      1. Create New Field Set
         1. Field Label = Custom Fields
         2. Field Set Name = RSFieldSet
         3. Where is this used? = For user defined fields on Visual Force pages
4. Ticket #13651
   1. ‘sydata\_\_c
      1. Set History Tracking
         1. ‘Background Processing
         2. ‘Inventory Item
         3. ‘Lot Number
         4. ‘Location Number
         5. ‘Mfg Account
         6. ‘Processing Indicator
         7. ‘Project Number
         8. ‘Shipper Header
         9. ‘Spawn Closing of PO AP Match Batch
         10. ‘Spawn Creation of Packing Slip Detail
         11. ‘Spawn SO Shipment Txn
         12. ‘Spawn Create Invoice Txn
         13. ‘Spawn SO Pick-Pack Txn
         14. ‘Spawned From SYDATA
         15. ‘To Inventory Division
         16. ‘To Inventory Location ID
         17. ‘To Inventory Site
         18. ‘Transaction Reversal Indicator
         19. ‘Transaction Quantity
         20. ‘Transaction Type
5. Ticket #13723
   1. ‘menu\_\_c
      1. Change page assignment to version 2
6. Ticket #13809
   1. ‘appsecurity\_\_c
      1. Change Page Assignment to version 2
   2. ‘poloader\_\_c
      1. Change Page Assignment to version 3
   3. ‘sydata\_\_c
      1. Change Page Assignemnt to version 3
7. Ticket #12711(BOC Only)
   1. Run Script
      1. [12711\_Menu.txt](https://app.teamsupport.com/dc/1/attachments/8165049)
8. Ticket #13809
   1. Run Script
      1. 13809.txtx

**Release Upgrade Notes Fall 16.36**

16.36 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAnE>

16.36 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAnE>

1.       Ticket #13446

a.       ‘Sydefault\_\_c

                                                   i.      Change page layout assignment to version 11

2.       Ticket #2581

a.       Run ICIXR scripts

                                                   i.      First Run – 2581 ICIXR script part 1.txt

                                                 ii.      Then run – 2581 ICIXR script part 2.txt

3.       Ticket #13344

a.       Menu-16.35-Pkgd.txt

4.       Ticket #13393

a.       [Menu-16.36-Pkgd.txt](https://app.teamsupport.com/dc/1/attachments/8023789)

Release 16.35.6

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAtw>

Release 16.35.5

https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAsU

**Release Upgrade Notes Fall 16.35**

16.35.2 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VArg

16.35.2 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VArg

1. Ticket #11221
   1. ‘syconfig\_\_c
      1. Change page assignment to version 4
   2. ‘sydiv\_\_c
      1. Change page assignment to version 5
2. Ticket #12388
   1. ‘soppy\_\_c
      1. Change page assignment to version 2
   2. ‘appsecurity\_\_c
      1. Delete field
         1. ‘Shipper
   3. ‘sydata\_\_c
      1. ‘SYDATA\_TXNTYPE
         * 1. New picklist values

‘Sales Order Payment Authorization

Sales Order Payment

Sales Order Payment Reversal

Sales Order Payment Cancel Authorization

1. Ticket #13315
   1. ‘sohdr\_\_c
      1. Change page assignment to version 4
   2. Check ‘sohdr\_\_c and ‘sohdrpay\_\_c object level and field level permissions on all RS-Full Access profiles
2. Ticket #12645
   1. ‘soconrc\_\_c
      1. Change page assignment to version 5
3. Ticket #12388 (Plasco ID only)
   1. Run 12388.txt
4. Ticket #13344
   1. Menu-16.35-Pkgd.txt
5. Ticket #12920
   1. ‘rstk.ScriptExecutor.execute('update\_icitemsrl\_name', true);
6. Ticket #13154
   1. Check Dimvals on Mevion before and after running Dimvals Script on ticket 13154 (Only do this for Mevion)

‘select count () from rstk\_\_dimvals\_\_c

* 1. ‘rstk.ScriptExecutor.execute('remove\_orphan\_dimvals', true, new Map<String,Object>{'createdAfter' => Date.newInstance(2001, 1, 1)});

**Release Upgrade Notes Fall 16.34**

16.34.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IY7s>

16.34.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IY7s>

1.       Ticket #8954 BOC only

8954.txt

2.       Ticket #9256 BOC only

9256.txt

3.       Ticket #12418

‘rstk.ScriptExecutor.execute('set\_confdcomp\_calculatedprice', true);

**Release Upgrade Notes Fall 16.33**

16.33.9 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000kfBL>

16.33.9 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000kfBL>

1.       Ticket #12172

a.       ‘socntl\_\_c

                                                   i.      Change page assignment to version 2

b.      ‘soprod\_\_c

                                                   i.      Change page assignment to version 5

2.       Ticket #12344

a.       ‘Supitem\_\_c

                                                   i.      Delete Fields

1.       ‘Approved By Chemsource

2.       ‘Approved By Chemsource - Date

3.       ‘Approved By Customer

4.       ‘Approved By Customer - Date

3.       Ticket #11655 (Promat Only)

a.       Add Fields

                                                   i.      ‘sytxncst\_\_c

                                                 ii.      Create ‘sytxncst\_extjournal’ field

1.       Data Type: Lookup(Journal)

2.       Label: "Journal"

3.       Field Name: sytxncst\_extjournal

                                                iii.      ‘Journal Line Item

                                               iv.      Create ‘Rootstock Cost Transaction’ field

1.       Data Type: Lookup(Rootstock Cost Transaction)

2.       Label: ‘Rootstock Cost Transaction’

3.       Field Name: Rootstock\_Cost\_Transaction

4.       Ticket #12248 (Financial Force orgs only)

a.       Add button

a.       ‘sales credit note

                                                                           i.      Create New button ‘ Rootstock Credit Memo’

1.       Label = Rootstock Credit Memo

2.       Behavior = Execute JavaScript

3.       Display Type = Detail Page Button

4.       Copy and paste this script in the ‘OnClick JavaScript’ section

a.       ‘//This script is used in a custom button on the Financial Force Sales Credit Note //Label: Rootstock Credit Memo //Display Type Detail Page Button //Behavior: Execute Javascript  //Content Source: OnClick JavaScript  {!REQUIRESCRIPT("/soap/ajax/19.0/connection.js")}  var result = sforce.connection.describeGlobal();  var sobjects = result.getArray("sobjects");  var re = /([A-Za-z0-9]+)?(\_\_)?(icixr\_\_c)/;  var prefix = '';  for (var i=0; i<sobjects.length; i++) {  var mData = re.exec(sobjects[i]);  if (mData ==null) continue;  if (mData[3] == 'icixr\_\_c') {  prefix = mData[1]==null?'':(mData[1]+mData[2]);  break;  }  }  var qry = "select id, "+prefix+"soinv\_acctinvoice\_\_c from "+prefix+"soinv\_\_c where "+prefix+"soinv\_acctinvoice\_\_c like '{!c2g\_\_codaCreditNote\_\_c.Id}%'";  var results = sforce.connection.query(qry);  var records = results.getArray('records');  var rec = null;  if (records.length > 0) {  for (var i=0;i<records.length;i++) {  if (records[i][prefix+"soinv\_acctinvoice\_\_c"].indexOf('{!c2g\_\_codaInvoice\_\_c.Id}') == 0) { rec=records[i]; break; }  }  }  if (rec == null) {  alert('Rootstock Credit Memo not found.');  } else {  parent.location.href="/"+rec.Id;  }

                                                                         ii.      Add button “Rootstock Credit Memo” to ‘sales credit note extended’ page layout

5.       Ticket #11655 (Promat Only)

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

6.       Ticket #12418

a.       ‘rstk.ScriptExecutor.execute('set\_confdcomp\_calculatedprice', true);

7.       Ticket #12698

a.       ‘rstk.ScriptExecutor.execute('set\_sytxncst\_locqtyupdind', true);

8.       Ticket #12751

a.       ‘**rstk.AppSettings.setValue('procreplen\_ReplenishmentsEnabled', 'true', 'DRP - Replenishments Enabled');**

**Release 16.33.6**

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000kfAw>

**Release Upgrade Notes Summer '16 - 16.33**

16.33.4 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000kfAN>

16.33.4 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000kfAN>

1.       Ticket #12172

a.       ‘socntl\_\_c

                                                   i.      Change page assignment to version 2

b.      ‘soprod\_\_c

                                                   i.      Change page assignment to version 5

2.       Ticket #12344

a.       ‘Supitem\_\_c

                                                   i.      Delete Fields

1.       ‘Approved By Chemsource

2.       ‘Approved By Chemsource - Date

3.       ‘Approved By Customer

4.       ‘Approved By Customer - Date

3.       Ticket #11655 (Promat Only)

a.       Add Fields

                                                   i.      ‘sytxncst\_\_c

                                                 ii.      Create ‘sytxncst\_extjournal’ field

1.       Data Type: Lookup(Journal)

2.       Label: "Journal"

3.       Field Name: sytxncst\_extjournal

                                                iii.      ‘Journal Line Item

                                               iv.      Create ‘Rootstock Cost Transaction’ field

1.       Data Type: Lookup(Rootstock Cost Transaction)

2.       Label: ‘Rootstock Cost Transaction’

3.       Field Name: Rootstock\_Cost\_Transaction

4.       Ticket #12248 (Financial Force orgs only)

a.       Add button

a.       ‘sales credit note

                                                                           i.      Create New button ‘ Rootstock Credit Memo’

1.       Label = Rootstock Credit Memo

2.       Behavior = Execute JavaScript

3.       Display Type = Detail Page Button

4.       Copy and paste this script in the ‘OnClick JavaScript’ section

a.       ‘//This script is used in a custom link on the Financial Force Sales Invoice

//Label: Cost Transaction

//Display Type: Detail Page Link

//Behavior: Execute Javascript

//Content Source:

OnClick JavaScript

{!REQUIRESCRIPT("/soap/ajax/19.0/connection.js")}

v

ar result = sforce.connection.describeGlobal();

var sobjects = result.getArray("sobjects");

var re = /([A-Za-z0-9]+)?(\_\_)?(icixr\_\_c)/;

var prefix = '';

for (var i=0; i<sobjects.length; i++)

{

var mData = re.exec(sobjects[i]);

if (mData ==null) continue;

if (mData[3] == 'icixr\_\_c') {

prefix = mData[1]==null?'':(mData[1]+mData[2]);

break;

}

}

var qry = "select id, "+prefix+"soinv\_acctinvoice\_\_c from "+prefix+"soinv\_\_c where "+prefix+"soinv\_acctinvoice\_\_c like '{!c2g\_\_codaCreditNote\_\_c.Id}%'";

var results = sforce.connection.query(qry);

var records = results.getArray('records');

var rec = null;

if (records.length > 0) {

for (var i=0;i<records.length;i++) {

if (records[i][prefix+"soinv\_acctinvoice\_\_c"].indexOf('{!c2g\_\_codaInvoice\_\_c.Id}') == 0) { rec=records[i];

break;

}

}

}

if (rec == null) {

alert('Rootstock Credit Memo not found.');

} else {

parent.location.href="/"+rec.Id;

}

                                                                         ii.      Add button “Rootstock Credit Memo” to ‘sales credit note extended’ page layout

5.       Ticket #11655 (Promat Only)

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

6.       Ticket #12418

a.       ‘rstk.ScriptExecutor.execute('set\_confdcomp\_calculatedprice', true);

7.       Ticket #12698

a.       ‘rstk.ScriptExecutor.execute('set\_sytxncst\_locqtyupdind', true);

8.       Ticket #12751

a.       ‘**rstk.AppSettings.setValue('procreplen\_ReplenishmentsEnabled', 'true', 'DRP - Replenishments Enabled');**

**Release Upgrade Notes Summer '16 - 16.32**

16.33 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAMI

16.33 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000VAMI

1.       Ticket #12172

a.       ‘socntl\_\_c

                                                   i.      Change page assignment to version 2

b.      ‘soprod\_\_c

                                                   i.      Change page assignment to version 5

2.       Ticket #12344

a.       ‘Supitem\_\_c

                                                   i.      Delete Fields

1.       ‘Approved By Chemsource

2.       ‘Approved By Chemsource - Date

3.       ‘Approved By Customer

4.       ‘Approved By Customer - Date

3.       Ticket #11655

a.       Add Fields

                                                   i.      ‘sytxncst\_\_c

                                                 ii.      Create ‘sytxncst\_extjournal’ field

1.       Data Type: Lookup(Journal)

2.       Label: "Journal"

3.       Field Name: sytxncst\_extjournal

                                                iii.      ‘Journal Line Item

                                               iv.      Create ‘Rootstock Cost Transaction’ field

1.       Data Type: Lookup(Rootstock Cost Transaction)

2.       Label: ‘Rootstock Cost Transaction’

3.       Field Name: Rootstock Cost Transaction

4.       Ticket #12248

a.       Add button

a.       ‘sales credit note

                                                                           i.      Add button “Rootstock Credit Note” to page layout

5.       Ticket #11655

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

6.       Ticket #12418

a.       ‘rstk.ScriptExecutor.execute('set\_confdcomp\_calculatedprice', true);

7.       Ticket #12698

a.       ‘rstk.ScriptExecutor.execute('set\_sytxncst\_locqtyupdind', true);

8.       Ticket #12751

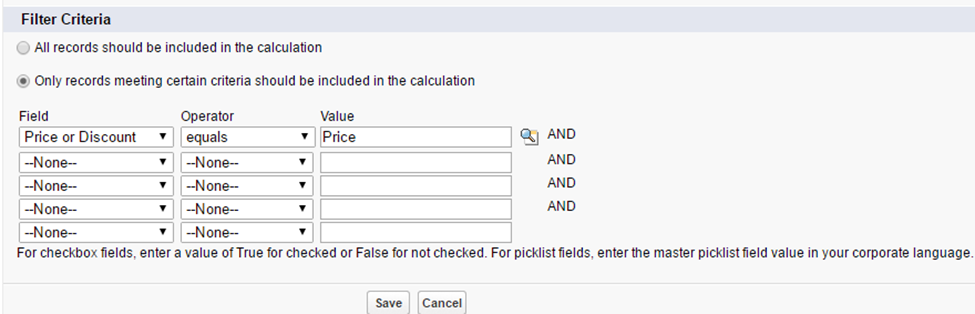
a.       ‘**rstk.AppSettings.setValue('procreplen\_ReplenishmentsEnabled', 'true', 'DRP - Replenishments Enabled');**

**Release Upgrade Notes Spring 16.31**

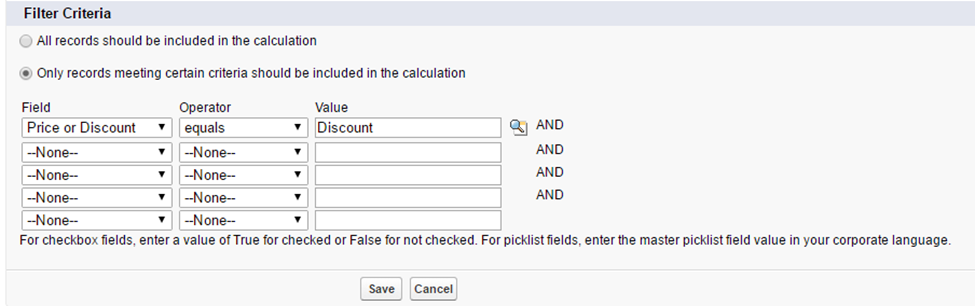
16.31.1 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IXjI>

16.31.1 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000IXjI>

1. Ticket #10129
   1. ‘Soagpc\_\_c
      1. Edit filter criteria on field ‘soagpc\_soagpcqp



* + 1. Edit filter criteria on field ‘soagpc\_soagpcqd



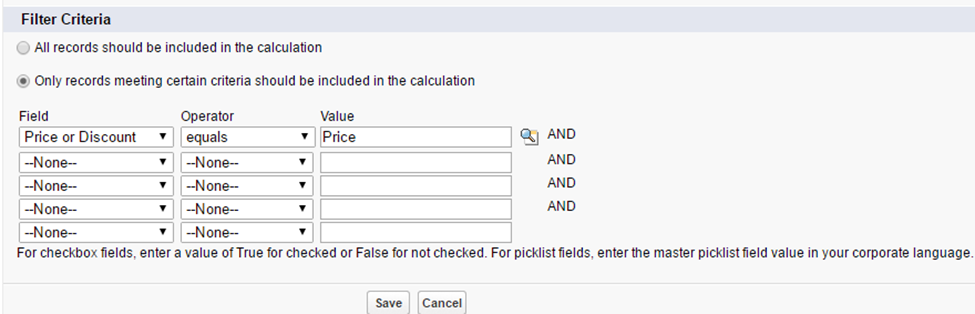
1. Ticket #11702
   1. ‘rtwctr\_\_c
      1. Validation Rules
      2. ‘CapacityDay\_Labor\_Range
         1. Change to Active
      3. ‘CapacityDay\_Machine\_Range
         1. Change to Active

**# Release Upgrade Notes Spring 16.30**

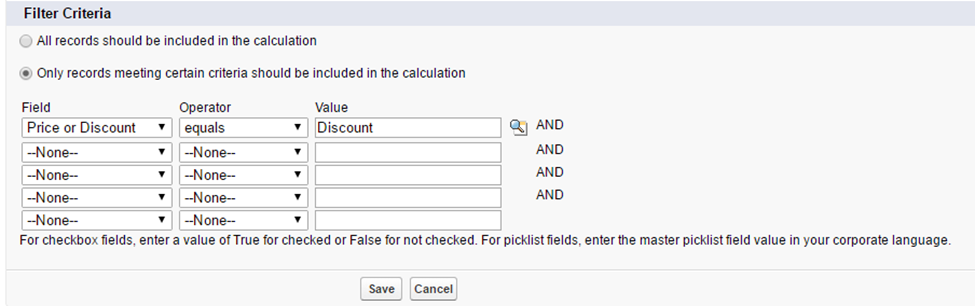
16.30 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000Mh0H>

16.30 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0B000000Mh0H>

1. Ticket #10129
   1. ‘Soagpc\_\_c
      1. Edit filter criteria on field ‘soagpc\_soagpcqp



* + 1. Edit filter criteria on field ‘soagpc\_soagpcqd



1. Ticket #11702
   1. ‘rtwctr\_\_c
      1. Validation Rules
      2. ‘CapacityDay\_Labor\_Range
         1. Change to Active
      3. ‘CapacityDay\_Machine\_Range
         1. Change to Active

**Release Upgrade Notes Spring 16.29**

16.29 – https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gS2F

16.29 – https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gS2F

1.       Ticket #7190

a)      ‘soprod\_\_

a.       Change page assignment to version 4

2.       Ticket #12455

a.       ‘sozone\_\_c

                                                   i.      Change page assignment to version 2

3.       Run Script

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

4.       Run Script

a.       ‘11893.txt

5.       Run Script

a.       ‘12365.txt

6.       Run Script

a.       ‘12371 missing menu option.txt

**Release Upgrade Notes Spring 16.28**

16.28 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gS12>

16.28 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gS12

**Release Upgrade Notes Spring 16.27**

16.27 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gRmY>

16.27 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gRmY

1.       Ticket #12327

a.       ‘ictransreq\_\_c

a.       Change page assignment to version 2

b.      Add Search Layouts to ‘Search Results’

                                                                                       i.      Item Number, Transfer Status, Transfer Quantity, Transfer From Site, Transfer From Location ID, Transfer From Location Number, Transfer to Site, Transfer To Location ID, Transfer To Location Number

**Release Upgrade Notes Spring 16.26**

16.26.3 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000IXAM

16.26.3 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000IXAM>

16.26.1 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000IX8G

16.26.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000IX8G>

1.       Ticket #9158 Financial Force Orgs only

a)      Financial Force Accounting ‘Journal’ object

                                                               i.      Create ‘Sales Credit Note’ field

1.       Data Type: Lookup(Sales Credit Note)

2.       Label: "Sales Credit Note"

3.       Field Name: Sales\_CreditNote

                                                             ii.      Edit page layout and add ‘Sales Credit Note’ field

2.       Ticket #11704

a.       ‘sydata\_\_c

                                                   i.      ‘sydata\_txntype\_\_c

1.       ‘Avalara Tax Calculation

Process Async POLOADERs

3.       Ticket #11714

a.       ‘sycmp\_\_c

New Picklist Values

                                                   i.      ‘sycmp\_dim1source\_\_c

1.       ‘Vendor

                                                 ii.      ‘sycmp\_dim2source\_\_c

1.       ‘Vendor

                                                iii.      ‘sycmp\_dim3source\_\_c

1.       ‘Vendor

                                               iv.      ‘sycmp\_dim4source\_\_c

1.       ‘Vendor

                                                 v.      ‘sycmp\_dim5source\_\_c

1.       ‘Vendor

                                               vi.      ‘sycmp\_dim6source\_\_c

1.       ‘Vendor

                                              vii.      ‘sycmp\_dim7source\_\_c

1.       ‘Vendor

                                            viii.      ‘sycmp\_dim8source\_\_c

                                               ix.      ‘Vendor

b.      ‘sydimovr\_\_c

New Picklist Values

                                                   i.      ‘sydimovr\_source\_\_c

1.       ‘Vendor

4.       Ticket #11825

a.       ‘soamort\_\_c

                                                   i.      Delete Validation Rule

                                                 ii.      ‘Start\_Year\_must\_be\_between\_2015\_to\_2099

5.       Ticket #11916

a.       ‘confcomp\_\_c

                                                   i.      Delete Validation Rule

1.       ‘Qty Per must be 1 for Labor Components

6.       Ticket #11891

a.       ‘icitemacc\_\_c

                                                   i.      Change assignment to version 2

7.       Ticket #11886

a)      ‘icitem\_\_c

a.       Change page layout to version 4

b)      ‘pebom\_\_c

a.       Change page layout to version 2

c)       ‘Peitem\_\_c

a.       Change page layout to version 2

d)      ‘pjproj\_\_c

a.       Change page layout to version 2

e)      ‘pohdr\_\_c

a.       Change page layout to version 2

f)       ‘poitem\_\_c

a.       Change page layout to version 4

g)      ‘povend\_\_c

a.       Change page layout to version 2

h)      ‘rtlabgrd\_\_c

a.       Change page layout to version 2

i)        ‘rtrouthdr\_\_c

a.       Change page layout to version 2

j)        ‘rtroutoper\_\_c

a.       Change page layout to version 2

k)      ‘rtwctr\_\_c

a.       Change page layout to version 2

l)        ‘socclass\_\_c

a.       Change page layout to version 2

m)    ‘socomm\_\_c

a.       Change page layout to version 3

n)      ‘socust\_\_c

a.       Change page layout to version 2

o)      ‘sohdr\_\_c

a.       Change page layout to version 3

p)      ‘soinv\_\_c

a.       Change page layout to version 2

q)      ‘Soline\_\_c

a.       Change page layout to version 2

r)       ‘soprod\_\_c

a.       Change page layout to version 3

s)       ‘soship\_\_c

a.       Change page layout to version 3

t)       ‘sowarr\_\_c

a.       Change page layout to version 3

u)      ‘syacc\_\_c

a.       Change page layout to version 2

v)      ‘syfob\_\_c

a.       Change page layout to version 2

w)    ‘syfrghtrm\_\_c

a.       Change page layout to version 2

x)      ‘sylocid\_\_c

a.       Change page layout to version 2

y)      ‘Syorg\_\_c

a.       Change page layout to version 2

z)       ‘syshipviatype\_\_c

a.       Change page layout to version 2

aa)   ‘syterms\_\_c

a.       Change page layout to version 2

**Release Upgrade Notes Spring 16.25**

16.25.1 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cFcu

16.25.1 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cFcu

**From:**

**Subject: Release Upgrade Notes Spring 16.24**

16.24.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000IW8W>

16.24.1 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000IW8W

1.       Ticket #11802

a.       Delete/erase Fields on ‘gljed\_\_c

                                                   i.      ‘Debit Account

                                                 ii.      ‘Credit Account

b.      Delete/erase Fields on ‘DEPRECATED - Rootstock Financial Control

                                                   i.      ‘Default AP Account

                                                 ii.      ‘Default AR Account

~~c.       Delete/erase on ‘DEPRECATED - General Ledger Account~~

~~i.      Fields:~~

~~1.       ‘Formula External Id~~

~~2.       ‘rstk\_\_glacct\_glcntl\_\_c~~

~~ii.      Validation rule:~~

~~1.       glcntl\_validation~~

d.      Delete objects

                                                   i.      ‘DEPRECATED - Fiscal Year

                                                 ii.      ‘DEPRECATED - General Ledger Account

                                                iii.      ‘DEPRECATED - Rootstock Financial Control

2.       Ticket #8952

a)      ‘poasnreq\_\_c – Might not be on all orgs

a.       Delete Validation Rule

                                                                           i.      ‘Lot\_Expiration\_Date\_validation

**From:**

**Subject: Release Upgrade Notes Spring 16.23**

16.23: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kemg>

16.23: <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kemg>

1.       Ticket #10828

a.       ‘soamort\_\_c

                                                   i.      Delete validation rule

**1.** ‘**Start\_Year\_must\_be\_between\_2016\_to\_2099**

2.       Ticket #11237

a.       ‘poitem\_\_c

                                                   i.      change page assignment to version 3

3.       Ticket #11754

a.       ‘soprod\_\_c

                                                   i.      Delete Validation Rule

1.       ‘Salesforce\_Product\_Name

4.       Ticket #8949

a.       8949.txt

**Release 16.22**

16.22 – https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kehG

16.22 – https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kehG

1.       Ticket #11700

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

**Release Upgrade Notes Spring 16.21.2**

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V98o>

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V98o>

**Release Upgrade Notes Spring 16.21.1**

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V94W>

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V94W>

Release Upgrade Notes Spring 16.20.5

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kecj>

Release Upgrade Notes Spring 16.20.3

16.20.3: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kebR>

16.20.3: <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kebR>

1.       Ticket #11333 – Only on Bluescape and SonomaBelle

Modify SYDEFAULT Page Layout - remove Z\_OBSOLETE fields (x3) and add new Intacct User Password field between Intacct User ID and Intacct Company, on lower left. Update SYCONFIG with Intacct Sender ID = Rootstock and Intacct Sender Password = sEET7rUzrN

**Release Upgrade Notes Spring 16.19**

16.19: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000keH3>

16.19: <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000keH3>

1.       Ticket #5275

a)      delete all custom fields and validation rules on the following objects:

a.       DEPRECATED - Fiscal Year

b.      DEPRECATED - General Ledger Account

c.       DEPRECATED - Rootstock Financial Control

b)      This only needs to be done on pde3f, pde5f and pde4f.

2.       Ticket #11453

a)      When deploying to any and all orgs, need to change SYCONFIG Help URL to http://www.rootstock.com/wp-content/uploads/

3.       Ticket #10016

‘rstk.ScriptExecutor.execute('set\_poitem\_vatclassind', true);

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

4.       Ticket #11152

Run sequentially

a)      ‘11152 menu delete.txt

b)      ‘11152 rs-support-menu-add1.txt

c)       ‘11152 rs-support-menu-add2.txt

**Release Upgrade Notes Spring 16.18.2 (Spring Release 16)**

16.18.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cExU>

16.18.2 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cExU

1.       Ticket #11034

a.       Before updating customer org, go into org and delete old dashboards and reports – DO NOT DELETE REPORTS IF MODIFIED BY CUSTOMER

b.      Delete Rootstock Sales Analysis Dashboards

                                                   i.      ‘RS-SA Sales Analysis – Customer & Product

                                                 ii.      ‘RS-SA Sales Analysis – Salesperson

c.       Delete old Rootstock Sales Analysis reports

                                                   i.      ‘RS-SA by Customer Class w/Gross Margin

                                                 ii.      ‘RS-SA by Customer w/Gross Margin

                                                iii.      ‘RS-SA by Division by Cust Class w/GM

                                               iv.      ‘RS-SA by Division by Prod Group w/GM

                                                 v.      ‘RS-SA by Product Group w/Gross Margin

                                               vi.      ‘RS\_SA by Product w/Gross Margin

                                              vii.      ‘RS-SA by Project w/GM

                                            viii.      ‘RS-SA by Salesperson by Cust Class w/GM

                                               ix.      ‘RS-SA by Salesperson by Cust w/GM

                                                 x.      ‘RS-SA by Salesperson by Prod Group w/GM

                                               xi.      ‘Rs-Sa by Salesperson by Prod w/GM

                                              xii.      ‘RS-SA by Sales Order w/GM

2.       Ticket #7137

a.       ‘sopack\_\_c

                                                   i.      Delete field

1.       ‘sopack\_soship\_\_c

3.       Ticket #11116

a.       ‘socntl\_\_c

                                                   i.      Verify Field Level Security on RS profiles for ‘socntl\_generickit\_\_c

4.       Ticket #8971

a.       ‘sohdr\_\_c

                                                   i.      Delete Validation Rules

1.       ‘Sales\_Order\_Total\_Amount\_Not\_Negative

2.       ‘Sales\_Order\_Total\_Not\_Negative

5.       Ticket #10394

a.       ‘sydata\_\_c

                                                   i.      New Picklist

1.       ‘sydata\_txntype\_\_c

a.       ‘Sales Order Pack

6.       Ticket #10578

**‘rstk.ScriptExecutor.execute('update\_poasnReqArrivalStatus',true);**

**Release Upgrade Notes Winter 16.15**

**16.15.3** <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000625z>

**16.15.3** <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000625z>

16.15 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdrz>

16.15 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdrz>

1.       Ticket #10949

Can't change item description

a)      poitem\_\_c.

a.       ‘Validate\_UpdDesc = active

**Release Upgrade Notes Winter 16.13**

16.13 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdlR>

16.13 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdlR>

1.       Ticket #10458

a.       ‘rtwcgroup\_\_c

b.      Edit Page Layout

                                                   i.      Add ‘Work Center Group Detail’ button to related list and then uncheck ‘New’ button

2.       Ticket #10586

a.       ‘icitem\_\_c

                                                   i.      Change Page Assignment to version 3

3.       Ticket #10619

a.       ‘sormadmd\_\_c

                                                   i.      Delete Fields

1.       ‘Quantity in Inspection

2.       ‘Quantity Scrapped

3.       ‘Quantity Shipped

4.       Ticket #10666

a.       ‘sydefault\_\_c

                                                   i.      Change Page Layout Assignment to version 9

5.       Ticket #9051

a.       Verify the 'Customer Company Name' field on the In-House customer record is in sync with the ‘Organization Name’ field on the customer's Company record.  Update the In-House customer record as needed.

6.       Ticket #10752

a.       Account.object

                                                   i.      Delete Validation Rule

1.       ‘No\_Account\_Number\_Change

7.       10235.txt - Update ticket for customers with any issues so we can resolve

**Release Upgrade Notes Winter 16.11**

16.11.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gRBh>

16.11.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gRBh>

1.       Ticket #7686

a.       ‘sydefault\_\_c

                                                   i.      Change Page Layout Assignment to version 8

b.      ‘povend\_\_c

                                                   i.      New Picklist values

1.       ‘povend\_paytype\_\_c

a.       ‘Check

Cash

EFT

Credit Card

2.     Ticket #10646

a.     ‘icitemsrl\_\_c

                                                   i.      Change Page Assignment to version 2

3.        ‘Socntl\_\_c

a.       Fix field level security for ‘Hide Commissions Button in SO Entry’

4.       ‘pohdr\_\_c

a.       ‘pohdr\_ordsts\_\_c

                                                   i.      Add new picklist value after ‘3-Approvals Processing’

1.       ‘4-Approved

5.     Ticket #7686

a.     7686 menu script.txt

6.     Ticket #10201

**a.       ‘rstk.ScriptExecutor.execute('**update\_indexedaccountnumber**',true);**

7.       Ticket #8917

a.       8917 menu update.txt

                                                   i.      Internal orgs only

**Release Upgrade Notes Winter 16.10**

16.10.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdf8>

16.10.1 - [https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdf8](https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdf8)

**Release Upgrade Notes Winter 16.9**

16.9 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdPg>

16.9 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdPg>

1.       Ticket #10318

a.       replace the RS SOInvoiceTemplate and  SOInvoiceTemplateBatch HTML code with the dev-qa-ff version

2.       Ticket #7183

a.       ‘poitem\_\_c

                                                   i.      Change Page Assignment to version 2

3.       Ticket #9137

a.       ‘syusr\_\_c

                                                   i.      Picklist Value: ‘syusr\_expsfustartopt\_\_c

1.       Labor Booking = True

a.       Sort alphabetically

                                                 ii.      Picklist Value: ‘syusr\_sfustartopt\_\_c

1.       Labor Booking = True

4.       Ticket #9779

a.       ‘peitem\_\_c

                                                   i.      Delete Validation Rule

1.       ‘Item\_Length\_Limit

5.       Ticket #10282

a.       ‘confess\_c

                                                   i.      Picklist value: ‘confsess\_status\_\_c

1.       New = true

                                                 ii.      ‘exteranlid\_\_c– delete/erase field

b.      Enable FLS on confsess\_\_c: externalid\_\_c field for System Admin and all full access profiles (this was corrected in pde4 on 3/21/2016 – so any new installations using 16.11 or greater will be ok)

                                                   i.      Setup > Create Objects > confsess\_\_c > externalid\_\_c > Set Field-Level Security

c.       10282-set-confsess-externalid.txt

                                                   i.      Run script until ‘No confsess\_\_c records found for update’ is displayed

6.       Ticket #9648

**a.       ‘rstk.ScriptExecutor.execute('update\_SOReasonCode',true);**

7.       Ticket #9778

**a.** ‘rstk.**ScriptExecutor.execute('updateSocontractDealCalculations2',true);**

8.       Ticket #7058

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

9.       Ticket #9137

a.       9137 menu.txt

**Release Upgrade Notes Winter 16.8**

16.8 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdPM>

16.8 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kdPM>

**Release Upgrade Notes Winter 16.7**

16.7 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000Y16i>

16.7 - [https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000Y16i](https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000Y16i)

1.       1.    Ticket #2581

a.       ‘customext\_\_c

                                                   i.      Picklist Value: ‘fcstentry\_mode\_\_c

1.       Generate forecast entries = false

2.       Ticket #8359

a.       ‘sydata\_\_c

                                                   i.      New Picklist Values : ‘sydata\_txntype\_\_c

1.       ‘PO AP Match Using Detail

Close PO AP Batch

Create Packing Slip Detail

Approve Sales Invoice

Allocate Sales Order Line

**i.        Re-Order all picklist values in alphabetical order**

3.       Ticket #8363

a.       ‘soibatch\_\_c

                                                   i.      Change Layout assignment to version 2

                                                 ii.    Search layout >  Sales Order Invoice Batches List View

1.       Remove “New, Change Owner, Accept”

4.       Ticket #9129

a.       ‘socomm\_\_c

                                                   i.      ‘socomm\_prodtype\_\_c

1.       Move “Stock” to end of list

5.       Ticket #9874

a.       ‘icreq\_\_c

                                                   i.      Delete Field

1.       ‘Dim Values (Obsolete)

6.       Ticket #10074

a.       ‘pohdr\_\_c

                                                   i.      Delete Picklist Item: ‘pohdr\_ordsts\_\_c

1.       7-Line Item Received

2.       8-All Line Items Received

7.       Ticket #10074

a.       ‘rstk.DebugUtil.updatePohdrStatus();

8.       8363 menu script.txt

9.       10013 menu script.txt

**Release upgrade Notes Winter 16.6**

16.6.1 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU000000061bH

16.6.1 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU000000061bH

1.       Ticket #8362

a.       ‘socust\_\_c

                                                   i.      Delete Picklist value : ‘socust\_rsigroupopt\_\_c

1.       MSA

2.       Ticket #8745

a.       ‘socontract\_\_c

                                                   i.      Change Page Layout Assignment to version 6

3.       Ticket #9622

a.       **‘rstk.ScriptExecutor.execute('populate\_lot\_serials', true);**

**Release Upgrade Notes Winter 16.5**

16.5 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cDp8>

16.5 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cDp8>

1.       Ticket #9907

a)      Account.object

b)      Delete Button

a.       Default\_some\_values

c)       Validation Rule

a.       No Account Number Change = Active

**Release Upgrade Notes - Winter 16.4**

16.4.1 : <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kd5s>

16.4.1 : <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kd5s>

1.       Ticket #8361

a.       ‘Account.object

                                                   i.      Change page layout to Rootstock Account Layout.v2

                                                 ii.      Only change layout assignments to profiles using old Rootstock Account Layout

2.       Ticket #9356

a.       ‘socontract\_\_c

                                                   i.      Change Page Assignment to version 5

3.       Ticket #9625

a.       ‘poreq\_\_c

                                                   i.      Change page assignments to version 3

4.       Ticket #9741

a.       ‘woorddmd\_\_c

                                                   i.      ‘woorddmd\_homeprojind\_pl\_\_c

1.       Delete Picklist Value

a.       WBS Home

**Release Upgrade Notes Winter 16.2**

16.2 : <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cDd0>

16.2 : <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cDd0>

**Release Upgrade Notes Winter 16.1**

16.1.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000001YLX>

16.1.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000001YLX>

1.       Ticket #8969

a.       ‘socondev\_\_c

                                                   i.      Change Page Layout to version 3

b.      ‘soconrc\_\_c

                                                   i.      Change Page Layout to version 4

c.       ‘socontract\_\_c

                                                   i.      Change Page Layout to version 4

2.       Ticket #9033

a.       ‘iclocitem\_\_c

                                                   i.      ‘iclocitem\_replenishstatus\_\_c

1.       Color ‘Green’= ‘true’

3.       Ticket #9220

a.       ‘locadd\_\_c

                                                   i.      ‘locmove\_moveoption\_\_c

1.       Move to an existing stock loc = ‘true’

4.       Ticket #9483

a.       ‘syreqind\_\_c

                                                   i.      Remove ‘New’ button on Indirect Requisitions search layout

5.       Ticket #9623

a.       ‘soorddmd\_\_c

                                                   i.      Remove ‘New’ button on Sales Order Demand List View search layout

6.       Ticket #9033

a.       Run separately and wait for the first one to be done before running the second script

                                  i.    ‘rstk.ScriptExecutor.execute('set\_serial\_index', true);

                                                 ii.      ‘rstk.ScriptExecutor.execute('populate\_lot\_serials', true);

7.    Ticket #9433

a.       ‘rstk.ScriptExecutor2.execute('update\_sytxncst\_acctgdate\_to\_datetime', true);

8.       Ticket #9540

a.       ‘rstk.ScriptExecutor2.execute('update\_sowarr\_srlno\_index', true);

9.       Ticket #9545

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

Release Notes 1.192

1.       Ticket #8969

a.       ‘socondev\_\_c

                                                   i.      Change Page Layout to version 3

b.      ‘soconrc\_\_c

                                                   i.      Change Page Layout to version 4

c.       ‘socontract\_\_c

                                                   i.      Change Page Layout to version 4

2.       Ticket #9033

a.       ‘iclocitem\_\_c

                                                   i.      ‘iclocitem\_replenishstatus\_\_c

1.       Color ‘Green’= ‘true’

3.       Ticket #9033

a.       Run separately and wait for the first one to be done before running the second script

                                  i.    ‘rstk.ScriptExecutor.execute('set\_serial\_index', true);

                                                 ii.      ‘rstk.ScriptExecutor.execute('populate\_lot\_serials', true);

4.    Ticket #9433

a.       ‘rstk.ScriptExecutor2.execute('update\_sytxncst\_acctgdate\_to\_datetime', true);

5.       Ticket #9540

a.       ‘rstk.ScriptExecutor2.execute('update\_sowarr\_srlno\_index', true);

6.       Ticket #9545

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

1.191.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000001YKZ>

1.191.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000001YKZ>

1.       Ticket #8088

a.       ‘PrintTemplateMapping\_\_c

                                                   i.      Change Page Assignment to PrintTemplateMapping\_\_c-Print Template mapping Layout.v2

2.       Ticket #9284

a.       ‘supdmd\_\_c

                                                   i.      ‘supdmd\_displaytab\_\_c

1.       Change ‘Display All’ to: Display All (Uses the Greater of Forecast vs. Demands)

2.       Change ‘Exclude Forecast’ to: Exclude Forecast (Uses Non-Forecast Demands Only)

3.       Change ‘Only Forecast’ to: Only Forecast (Uses Forecast Demands Only)

3.       Ticket #9402

a.       ‘poline\_\_c

                                                   i.      deactivate

1.       ‘POLINE\_QTYREQ\_NOT\_LESS\_THAN\_OUTSTDG

4.       Ticket #9392

a.       ‘rstk.ScriptExecutor.execute('cleanup\_soconpbddist', true);

5.       Ticket #9410

a.       Run 9410.txt script

6.       Ticket #8088

a.       Replace the HTML in the following email templates using the ‘MASTER - DO NOT MODIFY’ version in dev-qa-ff.  If the existing customer template was modified by anyone other than RS Support, then make a backup (clone) of the existing template first.  Do not modify customer templates.

                                                   i.      POPrintTemplate

                                                 ii.      SOInvoiceTemplate

                                                iii.      Sales Order Acknowledgement

                                               iv.      Quote Template

7.       Ticket #8959 (BOC only)

a.       ‘ScriptExecutor.execute('add\_icreqOnSupreq',true);

8.       Ticket #5497

a.       Run 5497.txt script

1.190: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cDCo>

1.190: <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cDCo>

This deployment includes 1.189 and 1.188 plus all patches – see Release Upgrade Notes 1.189.msg for additional manual steps.

1.       Ticket #6615 (not BOC) – New menu options: Purchase Requisition and Indirect-Service Requisition

a.       Script 6615.txt

2.       Ticket #9276

a.       ‘poreq\_\_c

                                                   i.      Change page layout assignment to poreq\_\_c-Purchase Requisition Layout.v2

1.189.1: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cDDc>

1.189.1: <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cDDc>

1.       Ticket #8039

a.       ‘poline\_\_c

                                                   i.      Change Layout assignment to poline\_\_c. – Poline Default Layout.v2

~~2.       Ticket #8746~~

~~a.       ‘syusr\_\_c~~

~~b.      ‘syusr\_pricelog\_\_c: add pick list values to end of list~~

~~i.      ‘Trace~~

~~Debug~~

3.       Ticket #9001

a.       ‘supitem\_\_c

                                                   i.      ‘Dip\_Tube\_Torque

Activate validation rule

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

4.       Ticket #9240

a.       ‘rstk.ScriptExecutor.execute('update\_invoiceHeaderName',true);

5.       Ticket #8754

a.       ‘rstk.ScriptExecutor.execute('fix\_sorels', '<sohdr Id>');

6.       Ticket #7264 (not BOC) – New menu option: Item Usage Forecast

a.       7264.txt

7.       Ticket #6615 (not BOC) – New menu options: Purchase Requisition and Indirect-Service Requisition

a.       Do not run script until the 1.189.2 patch for 6615 is ready – The script will need to run on any customers updated to 1.189 prior to the patch

b.      Script 6615.txt

1.188

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cCpC>

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000cCpC>

1. Ticket #8942

SO Fulfill - Auto Issue of Lots - do by Expiration Date

1. SalesOrderFullfillment.cls
2. SolineIssueDetail.cls
3. woiss\_\_c.object
   1. New Field Name: ZZ-WO Issue
      1. sodmd\_iclotitemexpires
4. SalesOrderWorkBench.page
5. Ticket #9175

Amortization: Incorrect results (?)

1. ControllerExtnSoinvline.cls
2. SalesOrderFullfillment.cls
3. SOInvLib.cls
4. THSoshipline.cls

1.187.2 – <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kcGC>

1.187.2 – <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000kcGC>

1.       Ticket #7196

a)      ‘Syconfig\_\_c

a.       Change Page Assignments to ‘Syconfig\_\_c-SYCONFIG Layoutv2.layout

2.       Ticket #7196

a)      ‘sydefault\_\_c

a.       Change Page Assignments to ‘sydefault\_\_c-SYDEFAULT Layout v7.layout

3.       Ticket #8777

a)      ‘soconrc\_\_c

a.       Change Page Assignment to ‘soconrc\_\_c-Contract Recurring Charges Layout v3.layout

4.       Ticket #8854

a)      ‘socaddr\_\_c

a.       Change Page Assignment to ‘socaddr\_\_c-Customer Address v2.layout

5.       Ticket #8889

a)      ‘soconpbbatch\_\_c

a.       Change Page Assignment to ‘soconpbbatch\_\_c-Billing Run Batch Header Layout v3.layout

6.       Ticket #8889

a)      ‘soconpbbatch\_\_c

a.       Check ‘Allow Activities’ checkbox

7.       Ticket #8867

a)      ‘socomm\_\_c

a.       Deactivate Validation Rule: Validate\_ship\_rmaSite

8.       Ticket #8533

a)      Data conversion – populates sowarr\_socontract\_\_c field – verify successful completion

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

c)       Already run on CSG SB’s

9.       Ticket #8851

a)      Data conversion - Sets sowarr\_srlno\_index\_\_c = sowarr\_srlno\_\_c – Run until log displays ‘NO MORE SOWARR RECORDS TO BE UPDATED’

b)      8474.txt

1.186.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V6OY>

1.186.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V6OY>

1.       Ticket #7214

a.       ‘sydata\_\_c

b.      New Picklist Values: sydata\_txntype\_\_c

‘PO Close  
PO Close Reversal

1.       After PO Receipt in picklist order

2.       Ticket #7278

a.       ‘soorddmd\_\_c

                                                   i.      Delete soorddmd\_\_c-SO Demand Layout.layout and replace with soorddmd\_\_c-SO Demand Layout v2.layout

3.       Ticket #8584

a.       ‘sormh\_\_c

                                                   i.      Delete sormh\_\_c-Return Material Authorization Layout.layout and replace it with sormh\_\_c-Return Material Authorization Layout v2.layout

4.       Ticket #8528

a.       ‘Soconpbbatch\_\_c

                                                   i.      Remove ‘New’ button from Billing Run Batch Header List View on search layouts

5.       Ticket #8480

a.       ‘rstk.ScriptExecutor.execute('update\_sytxncst\_acctgdate\_to\_datetime', true);

b.      Run Script [pkgd\_cost\_system\_txn\_purge\_menu\_add.txt](https://app.teamsupport.com/dc/1/attachments/4109530)

                                Updates Ticket 8480 and Ticket 8512

1.184.2 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gPGv

1.184.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000gPGv>

1. Ticket #8392
   1. ‘Sydefault\_\_c.object - Delete layoutv5 (and earlier versions) and replace it with layoutv6
   2. Do not delete non-packaged layouts or any RS layout that was modified by the customer
2. Ticket #8581 – soconpbill\_\_c.object
   1. New Picklist value: soconpbill\_status\_\_c: Add to end of list
      1. ‘Rejected with Errors
3. Ticket #7278
   1. Run 7278\_RS\_Support\_Menu.txt
   2. Adds SOORDDMD menu option
4. Ticket #8406
   1. Edit SYDEFAULT record and set the ‘Auto Create RMA When SIW on a Case’ checkbox field to true for all customers except CSG
5. Ticket #8490 (Bluescape Only)
6. Need to delete the 'G/L Account' menu option (where Page Key = cc) in Bluescape's orgs when this fix is deployed. The program fix will display the correct menu option.
7. Ticket #8735 (IDS only)
   1. ‘soconrc\_\_c: Modify v2 page layout
      1. Add ‘Keep Billing Until Device is Deactivated’ field after ‘Continue Billing When Term Expires’
8. Ticket #8404 (CSG only)
9. **Run this script to identify multiple default ship-to addresses**
   1. **‘rstk.ScriptExecutor.execute('search\_Multi\_Default\_Cust\_Addr',true);**
10. **The fix data and run:**
    1. **rstk.ScriptExecutor.execute('update\_NameField\_OfCustomerAddress',true);**

**Check Process Log for success and if the script completes with errors than note how many duplicates and ask customer which one should be the correct one**

1.183.3 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V5on>

1.183.3 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V5on>

6230 - Soconchg\_\_c:

Disable validation rule

                                                               i.      ‘Misc\_Chrg\_Cant\_Be\_Edited

7125 - gljeh\_\_c:

Delete Field

                                                               i.      ‘gljeh\_glyear\_\_c

FOR ALL PAGE LAYOUTS BELOW – DO NOT DELETE OLD REPORT IF IT WAS MODIFIED BY SOMEONE OTHER THAN ROOTSTOCK SUPPORT – BUT STILL RE-ASSIGN THE NEW LAYOUT TO THE PROFILES

7318 - soamort\_\_c:

Delete old layout: Sales Order Line Amortization Schedule Layout

Ensure ‘SOLineAmortizationScheduleLayout’ is assigned to all profiles.  This will happen automatically if only 2 layouts exist.

7318 - soamortaud\_\_c: VERSION 2 OF THE LAYOUT WAS NOT INCLUDED IN THE RELEASE – MAY ONLY IMPACT ID SYSTEMS – NO CHANGES NECESSARY

Assign ‘Sales Order Line Amortization Audit Layout v2’ to all profiles

Delete old layout: Sales Order Line Amortization Audit Layout

7318 – soamorttxn\_\_c:

Delete old layout: Sales Order Line Amortization Txns Layout

Ensure ‘Sales Order Line Amortization TXN Layout’ is assigned to all profiles

8549 - soconpbaud\_\_c:

Delete old layout: Contract Periodic Billing Change Audit Layout

Ensure ‘Contract Periodic Billing Change Audit Layout v2’ is assigned to all profiles

8549 – soconpbdtl\_\_c:

Delete old layout: Contract Periodic Billing Detail Layout

Ensure ‘Contract Periodic Billing Detail Layout v2’ is assigned to all profiles

8549 - soconpbill\_\_c:

Delete old layout: Contract Periodic Billing Layout

Ensure ‘Contract Periodic Billing Layout v2’ is assigned to all profiles

8549 - soconpbrc\_\_c:

Delete old layout: Contract Periodic Billing Recurring Chrg Layout

Ensure ‘Contract Periodic Billing Recurring Chrg Layout v2’ is assigned to all profiles

8549 - soconpbaud\_\_c:

Search Layouts

Remove ‘New, Accept, Change Owner’ buttons from ‘Contract Periodic Billing Change Audits List View’

7318 - soamort\_\_c:

Search Layouts

                                                               i.      Remove ‘New’ button from ‘Sales Order Line Amortization Schedules List View’

Enable validation rules

                                                               i.      ‘Per\_Unit\_Sales\_Amount\_can\_not\_change

                                                             ii.      ‘Starting\_Month\_can\_not\_change

Disable validation rule

1. ‘Quantity\_Sold\_can\_not\_change

7318 - soprod\_\_c:

Delete Fields

                                                               i.      ‘formula\_oresp\_\_c

                                                             ii.      ‘formula\_orgid\_\_c

                                                            iii.      ‘formula\_presp\_\_c

                                                           iv.      ‘soprod\_reqservicefrm\_\_c

7318 - syacc\_\_c:

Delete Field

                                                               i.      ‘syacc\_glacct\_\_c

New pick list values: syacc\_gltype\_pl\_\_c:

                                                               i.      ‘Deferred Costs

                                                             ii.      Enable the ‘Sort values alphabetically’ checkbox on the Reorder page

7889 - povend\_\_c:

Delete Validation Rules

                                                               i.      ‘Validate\_MfgAcctDiv\_ExpAcct

                                                             ii.      ‘Validate\_MfgAcctDiv

                                                            iii.      ‘Validate\_ExpAcct

Delete Fields

                                                               i.      ‘povend\_expenseacct\_\_c

1. ‘povend\_expenseacctovrind\_\_c

8253 – sydata\_\_c:

New pick list values: sydata\_txntype\_\_c: Add after Sales Order Pick(Issue)

1. ‘Sales Order Pick-Pack
2. Sales Order Shipment

8548 – Fix email templates for RS packaged version

CreditMemoTemplate: Edit template and replace relatedTo.lines\_\_r with relatedTo.rstk\_\_lines\_\_r

SOInvoiceTemplateBatch: Edit template and replace relatedTo.lines\_\_r with relatedTo.rstk\_\_lines\_\_r

Note: Some orgs may already be OK

Do not change templates in pde4

Note any customers who have custom versions of these templates.  Do not change the customer templates.

8511 – Modify RS-Inv-Val-Rpt report

Reports Tab

Rootstock Inventory Management folder

Edit RS-Inv-Val-Rpt report (using the dropdown to the left of report)

Edit 'Item Inv. Value' field in the Formulas folder

Replace the Formula with:

                                                               i.      ‘rstk\_\_icitemstd\_\_c.rstk\_\_icitemstd\_stducsttot\_\_c:AVG \* rstk\_\_iclocitem\_\_c.rstk\_\_iclocitem\_locqty\_\_c:SUM

Select OK and Save

See ticket for more details

The fix was already applied in Spectro's production and sandbox

7318 – Data conversion: Sets SOPROD\_AMORTIZEIND to TRUE

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

May need to temporarily disable one or more soprod validation rules

8404 – Data conversion: Fixes Customer Address records

‘rstk.ScriptExecutor.execute('update\_NameField\_OfCustomerAddress',true);

Verify success by checking the processlog list view

8420 – Data conversion

‘rstk.ScriptExecutor.execute('update\_sormh\_install', true);

Verify success on processlog list view before running next script

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

Verify success by checking the processlog list view

May need to temporarily disable one or more sorma/sormh validation rules

6230 - New Menu options: Use 6230\_cpq\_menu\_options.txt

Sales Contract Device Deal Management

Sales Contract Device Transfer

7318 – New menu options: Use 7318\_amortization\_menu\_update-pkg.txt

SO Line Amortization Schedules

SO Line Amortization Processing

8391 (BOC only) – ALREADY DONE ON BOC PRODUCTION – patch 1.181.7

Delete all the scheduled jobs except their nightly MRP run

Run script after jobs deleted

1. 8391\_1.txt – verify w/ Kevin before running on BOC SB’s

8414 (Spectro / Peterson only)– Data conversion: Set SOCADDR\_DEFAULTINSTALL = TRUE, SOCADDR\_USEASINSTALL = TRUE where SOCADDR\_DEFAULTSHIPTO = TRUE

rstk.ScriptExecutor.execute('update\_install\_addresses', true);

This can then be run on request (not on all users indiscriminately)  where they do not want to have to deal with Installation address - and have address that were created before we introduced the concept of installation addresses.

Do not run on CSG / ID Systems or any other customers except Spectro and Peterson

1.181.5 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009y1Z

1.181.5 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009y1Z>

1.181.4 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009y1A>

1.181.4 - [https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009y1A](https://ltest.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009y1A)

1.181.3 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009y15

1.181.3 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009y15

1.      7874 – Email templates updated – copy HTML from dev-qa-ff and paste into customer templates – use the “MASTER – DO NOT COPY” versions

a.      RMATemplate.email

b.      SOAckTemplate.email

c.       SOInvoiceTemplate.email

d.      SOPackingSlip.email

Note: Clone the template as a backup if you suspect the customer made changes to the template.  Per policy, they are not supposed to modify the packaged version of the template.  You can tell if the ‘Modified By’ is someone other than Rootstock Support.  Notify me if this occurs so I can follow up with the customer.

2.      7693 – socontract\_\_c:

a.      Assign ‘Standard Contract Master Layout.v2’ layout to all profiles

3.      8238 – Data conversion – fixes socaddr name field (version run in 1.180 did not work)

a.      “rstk.ScriptExecutor.execute('update\_NameField\_OfCustomerAddress',true);

b.      Verify success by checking the processlog list view

4.      8152 – Data conversion – updates sorma where sorma\_custno\_\_c = null

a.      Use 8152 script.txt

b.      Run script until log shows “NO MORE SORMA RECORDS FOUND FOR UPDATE”

c.       May need to temporarily disable sorma\_\_c validation rules in order to run script

5.      8218(not BOC) – Menu change: "Credit Terms" moved to "System Setup"

a.      Run 8218 menu script.txt

6.      8282 – Menu change – hide the add option symbol ‘+’ for the Supplier Requisition menu option

a.      Use 8282 script.txt

b.      Verify on BOC orgs

Please use the following URL for any further upgrades, specifically Nexius production when we get the green light.

1.180.4 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000XzgH>

1.180.4 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000XzgH>

1.180.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000XzPH>

1.180.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000XzPH>

Release 1.180 – deployed as 1.180.1

1.      Ticket #6231

a.      “soconpbbatch\_\_c

                                                  i.      Edit  page layout assignment to use layout.v2

2.      Ticket #7373

a.      “sydefault\_\_c

                                                  i.      Edit  page layout assignment to use layout.v5

3.      Ticket #8019

a.      “soconrc\_\_c

                                                  i.      Edit  page layout assignment to use layout.v2

                                                ii.      Edit v2 page layout and add new field ‘Apply Num of Billing Periods by Device’ after ‘Number of Periods Billed’

4.      Ticket #7791

a.      Modify Search Layouts – socontract\_\_c

                                                  i.      Search Filter Fields: Add the following:

1.      Name

2.      Contract Approval Status

3.      Contract Customer

4.      Contract ID

5.      Description

6.      Hardware Installation Customer

7.      Master Services Agreement

8.      Pricing Customer

9.      Sales Customer

10.  Sales Division

b.      Edit ‘Standard Contract Master Layout’ page layout - socontract\_\_c

                                                  i.      ‘Create Misc Charge for All Active Devices’ button – add to end of existing Custom Buttons section

5.      Ticket #7804

a.      “soconrc\_\_c: THIS MAY ALREADY BE DONE ON THE CUSTOMER ORGS

                                                  i.      “soconrc\_active\_\_c: Set Default Value to Checked

                                                ii.      “soconrc\_overterm\_c: Set Default Value to Checked

6.      Ticket #8008

a.      “povend\_\_c

                                                  i.      Delete Field:  povend\_exchangerate\_\_c

7.      Ticket #8008

a.      “syconfig\_\_c

                                                  i.      New Picklist Item: add to end of list: syconfig\_financials\_\_c

1.      “Rootstock

8.      Ticket #7891

a.      Script – Fixes Poline Price

                                                  i.      “rstk.DebugUtil.adjustPolinePriceDecimals();

9.      Ticket #7789

a.      Script – Fixes Customer Address records

                                                  i.      “rstk.ScriptExecutor.execute('update\_NameField\_OfCustomerAddress',true);

10.  Ticket #7035

a.      Script – RUN SCRIPTS SEPARATELY – WAIT FOR FIRST SCRIPT TO COMPLETE BEFORE RUNNING SECOND SCRIPT – CHECK STATUS OF FIRST SCRIPT ON THE PROCESSLOG LIST VIEW RESULTS

                                                  i.      “rstk.ScriptExecutor.execute('create\_IcinvreconBatchHeader',true);

                                                ii.      “rstk.ScriptExecutor.execute('update\_icinvrecon',true);

1.      See ticket for details:

a.      After completion user will get report , if they found any Exception while processing any records , those records need to fix for respective validation (mostly data correction).

b.      After Fixing re execute again, this will process  any unprocessed records .

                                              iii.      7035\_menu options.txt

11.  Ticket #8215

a.      Script – New menu option: Inventory Valuations By Date

                                                  i.      8215 menu option.txt

12.  Ticket #6231

a.      Script - New menu option: Recurring Billing Batch Review

                                                  i.      6231\_menu.txt

                                                ii.      Note: This menu option may not appear on the Site Map for all customers

13.  Ticket #7893

a.      Script – Deletes and re-adds the ‘RS Support Functions’ menu options

                                                  i.      7893.txt script

URL: 1.179.3 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009xK2>

1.179.1 – https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009xJY

1.179.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000009xJY>

1.       7762: Data Conversions Script

a.       “rstk.ScriptExecutor.execute('update\_NameField\_from\_Formula',true);

2.       7802/7090 – rtwctr\_\_c

a.       Delete ‘Test’ field

1.178 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EOqf>

1.178 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EOqf>

1. 7762: Data Conversions Script
   1. “rstk.ScriptExecutor.execute('update\_NameField\_from\_Formula',true);

Use the following URL for any remaining 1.176.6 upgrades or new installs.  This contains the fix for 7880 (Site Map bug).

1.177.5 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V47m>

1.177.5 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V47m>

1.177.2 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V45H

1.177.2 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000V45H

1. 7537: Pick List changes: syconfig\_financials\_\_c
   1. Add new values:
      1. “Intacct

QuickBooks Desktop

* 1. Reorder all values in this order:
     1. Accounting Seed
     2. Dynamics AX
     3. EXO
     4. FinancialForce
     5. Intacct
     6. QuickBooks
     7. QuickBooks Desktop

1. 7145: Delete field: appsecurity\_\_c
   1. “m\_glcntl\_\_c
2. 7670: Permanently disable validation rules for all customers: socontract\_\_c
   1. “Contract\_Terms\_Template
   2. “Master\_Services\_Agreement
3. 7568: New menu option: Use 7568\_new\_menu.txt
   1. Obj Page Setup
4. 7145: New menu options: Use 7145\_inbound\_menus.txt
   1. Inbound Shipment Route Type
   2. Inbound Shipment Container Type
   3. Inbound Shipment Route
   4. Inbound Shipment
5. 7768: Delete menu option: Use 7768.txt
   1. Deletes ‘PO Receipt Export’ menu option
6. 7705: Data conversion script: Set new SOISS Cost transactions fields to zero
   1. Use 7705\_solrel\_init.txt
   2. Run until no more records are updated – adjust the limit value if necessary
7. 7376 (FinancialForce customers only):
   1. Setup > Create > Objects > Payable Invoice > Buttons, Links, and Actions
   2. Edit “PO\_Receipt\_Txn” link
   3. Copy and paste script to target org using dev-qa-ff version
8. 7670 (CSG and IDS only): Already done on CSG prod/SB’s
   1. Data conversion script:
      1. Temporarily disable the following socontract\_\_c validation rules:
         1. “Customer\_for\_Recurring\_Billings
         2. “Hardware\_Installation\_Customer
         3. “Pricing\_Customer
         4. “Sales\_Customer
      2. Run script – use 7670.txt
         1. Change log levels: Set System to “ERROR” level
         2. If there is a CPU time exceeded error then change line 16 to a lower value (e.g. change to limit 500];) and re-run.
         3. Continue running the same script until a message is displayed of either:
            1. Contract Updates complete OR
            2. Contract Updates complete with x failure(s)

If failures occur then change log level on System to ‘DEBUG’

Re-run script

Download the log file

Will need to work with customer on fixing the errors

* + 1. Re-enable socontract\_\_c validation rules: (leave all rules disabled for CSG)
       1. “Customer\_for\_Recurring\_Billings
       2. “Hardware\_Installation\_Customer
       3. “Pricing\_Customer
       4. “Sales\_Customer

1. 7538 (Pacer Prod only): No code changes – apply sandbox email template changes to production – see ticket – ALREADY DONE

1.176.6 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000005y3O>

1.176.6 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000005y3O>

1.176.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000005xkE>

1.176.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000005xkE>

1.176 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EOJG>

1.176 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EOJG

Release 1.176 (includes release 1.175)

1. 7179: icitemstd\_\_c: Pick list changes
   1. “icitemstd\_poitemcstmtlind\_pl\_\_c
      1. Set ‘Copy From PO History’ default to True
   2. “icitemstd\_simstdmoveupdind\_pl\_\_c
      1. Set ‘Automatic’ default to True
2. 7218: Pick list changes: syacc\_gltype\_pl\_\_c
   1. Change ‘WO Variance’ to ‘WO/Subc PO Variance’
3. 7147: Pick list changes: rtroutoper\_type\_pl\_\_c
   1. Set “Standard Operation” as default
4. 7415: New pick list value: socclass\_dfltprodtype\_\_c
   1. Value: “All’
   2. Default: False
   3. Add to top of list
5. 6208: Delete fields: socontract\_\_c
   1. “socontract\_invdelmeth\_\_c
   2. “socontract\_invtemplate\_\_c
   3. “socontract\_paymentmeth\_\_c
   4. “socontract\_terms\_\_c
6. 6208: Delete fields: soline\_\_c
   1. “soline\_sumlabaltprice1\_\_c
   2. “soline\_sumlabaltprice2\_\_c
   3. “soline\_sumnicaltprice1\_\_c
   4. “soline\_sumnicaltprice2\_\_c
7. 6208: Delete fields: soprod\_\_c
   1. “soprod\_taxexemptfrm\_\_c
8. 7387: Delete fields: sohdr\_\_c
   1. “sohdr\_upgroup\_\_c
9. 6600: Delete fields: poline\_\_c
   1. “poline\_overrideam\_\_c
10. 7279: socttch\_\_c
    1. Search Layouts: Contract Terms Template Clause History List View:
    2. Remove New, Accept, Change Owner buttons
11. 6210: Delete validation rules: sowarr\_\_c
    1. “endusercust\_validation
    2. “socontact\_validation
    3. “socontract\_validation
    4. “soprod\_validation
12. 6208: New page layouts – assign to all profiles
    1. All customers
    2. “soapi\_\_c-Sales Order API Layout v2.layout
    3. “soprod\_\_c-Product Master Layout v2.layout
    4. IDS only
    5. “socomm\_\_c-socomm Layout v2.layout
    6. “socompp\_\_c-Component Pricing Layout v2.layout
    7. “soconchg\_\_c-Contract Miscellaneous Charges Layout v2.layout
    8. “soconpp\_\_c-Contract Products for Purchase Layout v2.layout
    9. “soconppsched\_\_c-Contract Purchase Product Schedule Layout v2.layout
    10. “soconrc\_\_c-Contract Recurring Charges Layout v2.layout
    11. “soconrcdist\_\_c-Contract Recurring Charges Account Distr Layout v2.layout
    12. “soconrcnic\_\_c-Recurring Charge Service Components Layout v2.layout
    13. “soconrcser\_\_c-Contract Recurring Charge by Device Layout v2.layout
    14. “soconrev\_\_c-Contract Revision History Layout v2.layout
    15. “socontract\_\_c-Standard Contract Master Layout.layout
13. 6210: New page layouts – assign to all profiles
    1. All customers
    2. “sowarr\_\_c-Shipped Item Warranty Layout v2.layout
       1. CSG: ProdSup SB: They need to modify “CSG Shipped Item Warranty” layout or assign “Shipped Item Warranty Layout v2” to several profiles
    3. IDS only
    4. “socondev\_\_c-Contract Covered Serialized Devices Layout v2.layout
14. ~~7327: New page layouts – assign to all profiles~~
    1. ~~socomm\_\_c-socomm Layout v2.layout – already done in 6208~~
15. 7335: New page layouts – assign to all profiles
    1. “sydefault\_\_c-SYDEFAULT Layout v4.layout
16. 5594: dimvals page layout: dimvals\_\_c
    1. Remove the triggeroptions field
17. 7062: Data conversion script:
    1. “update [select Id from rstk\_\_confcomp\_\_c];
    2. Run until no more records are updated
    3. Fails in CSG ProdSup SB – Lance to rework script
       1. Had to modify script: update [select Id from rstk\_\_confcomp\_\_c where rstk\_\_confcomp\_site\_\_c = null limit 2000];
    4. Fails in dev-qa-ff:
       1. System.DmlException: Update failed. First exception on row 0 with id a8Qd00000004CCcEAM; first error: CANNOT\_INSERT\_UPDATE\_ACTIVATE\_ENTITY, rstk.confcomp: execution of BeforeUpdate caused by: rstk.ValidationException: Number of Decimals cannot exceed Qty Decimal value for selected Entity: (0) (rstk) : []
18. 7344: Data conversion script:
    1. “rstk.ScriptExecutor.execute('set\_icixr\_wocst');
    2. Verify success by checking rs-support email notification
19. 6863: Data conversion script:
    1. “rstk.ScriptExecutor.execute('populate\_externalid\_soagh',true);
    2. “rstk.ScriptExecutor.execute('populate\_externalid\_soagp',true);
    3. Verify success by checking rs-support email notification
20. 7551: Data conversion script:
    1. ~~“rstk.ScriptExecutor.execute('set\_soshipline\_defaults');~~
    2. ~~Verify success by checking rs-support email notification~~
    3. Use 7551\_soshipline.txt script in Developer Console. Run until log shows zero rows updated.
21. 7639: Data conversion script:
    1. Use 7639\_sohdr.txt. Run until log shows "AException: Sales Order Updates complete".
22. 7264: Menu updates: Add ‘Item Usage Forecast’: Use 7264.txt
23. 6212(IDS only): Menu updates: Add ‘Master Services Agreement’: Use 6212\_MSA-Services-Agreement.txt
24. 6209 (IDS only): Menu updates: Use 6209.txt
    1. Generate Recurring Billing
    2. Contract Periodic Billing Review
    3. Sales Contract Maintenance
25. 6208 (IDS only): Pick list changes: soconpbdtl\_type\_\_c
    1. From: device recurring charge To: Device Recurring Charge
    2. From: device miscellaneous charge To: Device Miscellaneous Charge
    3. From: contract miscellaneous charge To: Contract Miscellaneous Charge
26. 6208 (IDS only): Set ‘Content Source’ page overrides on socontract\_\_c
    1. Edit: Socontract2
    2. New: Socontract2
    3. View: SocontractView
    4. Customers can override these settings by using the objpagesetup program. Currently not on menu.
    5. We will need to override the settings on CSG using objpagesetup – USE PRODSUP SB SETUP FOR PROD
27. 6212 (IDS only): New page layouts – assign to all profiles
    1. “socustmsa\_\_c-Customer MSA Layout v2.layout
    2. “somsa\_\_c-Master Services Agreement Template Layout v2.layout
28. 6208 (IDS only): Enable validation rules: socontract\_\_c
    1. “Contract\_Term
    2. “Customer\_for\_Recurring\_Billings
    3. “Hardware\_Installation\_Customer
    4. “Installation\_Customer\_Address
    5. “Pricing\_Customer
    6. “Sales\_Customer
    7. “Sales\_Customer\_BillTo\_Address
    8. “Sales\_Customer\_ShipTo\_Address
    9. “Service\_Customer\_BillTo\_Address

1.176 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EOJG>

1.176 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EOJG

Release 1.176 (includes release 1.175)

1. 7179: icitemstd\_\_c: Pick list changes
   1. “icitemstd\_poitemcstmtlind\_pl\_\_c
      1. Set ‘Copy From PO History’ default to True
   2. “icitemstd\_simstdmoveupdind\_pl\_\_c
      1. Set ‘Automatic’ default to True
2. 7218: Pick list changes: syacc\_gltype\_pl\_\_c
   1. Change ‘WO Variance’ to ‘WO/Subc PO Variance’
3. 7147: Pick list changes: rtroutoper\_type\_pl\_\_c
   1. Set “Standard Operation” as default
4. 6208: Pick list changes: soconpbdtl\_type\_\_c
   1. From: device recurring charge To: Device Recurring Charge
   2. From: device miscellaneous charge To: Device Miscellaneous Charge
   3. From: contract miscellaneous charge To: Contract Miscellaneous Charge
5. 7415: New pick list value: socclass\_dfltprodtype\_\_c
   1. Value: “All’
   2. Default: False
   3. Add to top of list
6. 6208: Delete fields: socontract\_\_c
   1. “socontract\_invdelmeth\_\_c
   2. “socontract\_invtemplate\_\_c
   3. “socontract\_paymentmeth\_\_c
   4. “socontract\_terms\_\_c
7. 6208: Delete fields: soline\_\_c
   1. “soline\_sumlabaltprice1\_\_c
   2. “soline\_sumlabaltprice2\_\_c
   3. “soline\_sumnicaltprice1\_\_c
   4. “soline\_sumnicaltprice2\_\_c
8. 6208: Delete fields: soprod\_\_c
   1. “soprod\_taxexemptfrm\_\_c
9. 7387: Delete fields: sohdr\_\_c
   1. “sohdr\_upgroup\_\_c
10. 6600: Delete fields: poline\_\_c
    1. “poline\_overrideam\_\_c
11. 6208: Set ‘Content Source’ page overrides on socontract\_\_c:
    1. Edit: Socontract2
    2. New: Socontract2
    3. View: SocontractView
    4. Customers can override these settings by using the objpagesetup program. Currently not on menu.
    5. We will need to override the settings on CSG using objpagesetup
12. 7279: socttch\_\_c
    1. Search Layouts: Contract Terms Template Clause History List View:
       1. Remove New, Accept, Change Owner buttons
13. 6208: Enable validation rules: socontract\_\_c
    1. “Contract\_Term
    2. “Customer\_for\_Recurring\_Billings
    3. “Hardware\_Installation\_Customer
    4. “Installation\_Customer\_Address
    5. “Pricing\_Customer
    6. “Sales\_Customer
    7. “Sales\_Customer\_BillTo\_Address
    8. “Sales\_Customer\_ShipTo\_Address
    9. “Service\_Customer\_BillTo\_Address
14. 6210: Delete validation rules: sowarr\_\_c
    1. “endusercust\_validation
    2. “socontact\_validation
    3. “socontract\_validation
    4. “soprod\_validation
15. 6208: New page layouts – assign to all profiles
    1. soapi\_\_c-Sales Order API Layout v2.layout
    2. socomm\_\_c-socomm Layout v2.layout
    3. socompp\_\_c-Component Pricing Layout v2.layout
    4. soconchg\_\_c-Contract Miscellaneous Charges Layout v2.layout
    5. soconpp\_\_c-Contract Products for Purchase Layout v2.layout
    6. soconppsched\_\_c-Contract Purchase Product Schedule Layout v2.layout
    7. soconrc\_\_c-Contract Recurring Charges Layout v2.layout
    8. soconrcdist\_\_c-Contract Recurring Charges Account Distr Layout v2.layout
    9. soconrcnic\_\_c-Recurring Charge Service Components Layout v2.layout
    10. soconrcser\_\_c-Contract Recurring Charge by Device Layout v2.layout
    11. soconrev\_\_c-Contract Revision History Layout v2.layout
    12. soprod\_\_c-Product Master Layout v2.layout
    13. socontract\_\_c-Standard Contract Master Layout.layout
16. 6210: New page layouts – assign to all profiles
    1. socondev\_\_c-Contract Covered Serialized Devices Layout v2.layout
    2. sowarr\_\_c-Shipped Item Warranty Layout v2.layout
17. 7335: New page layouts – assign to all profiles
    1. sydefault\_\_c-SYDEFAULT Layout v4.layout
18. 6212: New page layouts – assign to all profiles
    1. socustmsa\_\_c-Customer MSA Layout v2.layout
    2. somsa\_\_c-Master Services Agreement Template Layout v2.layout
19. 5594: dimvals page layout: dimvals\_\_c
    1. Remove the triggeroptions field
20. 7062: Data conversion script: \*\*\*\*DO NOT RUN ON CSG\*\*\*\* UNTIL 7525??? PATCH IS DEPLOYED
    1. “update [select Id from rstk\_\_confcomp\_\_c];
    2. Run until no more records are updated
21. 7344: Data conversion script:
    1. “rstk.ScriptExecutor.execute('set\_icixr\_wocst');
    2. Verify success by checking rs-support email notification
22. 6863: Data conversion script:
    1. “rstk.ScriptExecutor.execute('populate\_externalid\_soagh',true);
    2. “rstk.ScriptExecutor.execute('populate\_externalid\_soagp',true);
    3. Verify success by checking rs-support email notification
23. 7551: Data conversion script:
    1. ~~“rstk.ScriptExecutor.execute('set\_soshipline\_defaults');~~
    2. ~~Verify success by checking rs-support email notification~~
    3. Use 7551\_soshipline.txt script in Developer Console. Run until log shows zero rows updated. Adjust ‘limit’ value if necessary.
24. 7639: Data conversion script:
    1. Use 7639\_sohdr.txt. Run until log shows "AException: Sales Order Updates complete". Adjust ‘limit’ value if necessary.
25. 7264: Menu updates: Add ‘Item Usage Forecast’: Use 7264.txt
26. 6212(IDS only): Menu updates: Add ‘Master Services Agreement’: Use 6212\_MSA-Services-Agreement.txt
27. 6209 (IDS only): Menu updates: Use 6209.txt
    1. Generate Recurring Billing
    2. Contract Periodic Billing Review
    3. Sales Contract Maintenance

Release 1.173 – deployed as 1.173.1

1.173.1 – https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000005xAY&newUI=1

1.173.1 – https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000005xAY&newUI=1

1. 6198: Change default pick list value: woiss\_displayoptions\_\_c
   1. Set ‘Display All Components’ as default
2. 6187: New pick list value: socust\_dfltprodtype\_\_c
   1. Add as first value in list:
      1. Value: All
      2. Default: True
3. 6624: New pick list values: sydata\_txntype\_\_c: Add to end of list
   1. “Extract Operations

Extract Components1.1

Process Async SOAPIs

1. 7050: sydefault\_\_c: Modify page layout for v3
   1. Remove ‘PowWow Company Number’ from Integration section
2. 7112: soorddmd\_\_c: Modify ‘Search Results’ Search Layout to match pde4. The fields should be:
   1. SOORDDMD Name
   2. LNE
   3. Item
   4. Qty Required
   5. QTYISS
   6. Required date
   7. Price
   8. Last Modified Date
3. 6150: icitem\_\_c: New layout
   1. Reassign v2 layout to all profiles
4. 7053: Data conversion scripts: Populates the divorder field if null
   1. “rstk.ScriptExecutor.execute('set\_sohdr\_divorder', true);
   2. “rstk.ScriptExecutor.execute('set\_soline\_divorder', true);
   3. The scripts will skip any sales orders that are invalid. To see the ones that couldn't be updated run:
      1. Non-pkg orgs: select id, name from sohdr\_\_c where sohdr\_divorder\_\_c = null
      2. Pkg orgs: select id, name from rstk\_\_sohdr\_\_c where rstk\_\_sohdr\_divorder\_\_c = null
   4. Then try and save these orders individually, they will show the reason why they can't be saved and after being fixed (and saved) the new fields will be updated.
5. 6227: Data conversion script: Sets soprod\_reqserviceind\_\_c / soprod\_sowarrtypeind\_\_c = true where false;
   1. use 6227.txt
   2. May need to run multiple times. Check the “Rows” updated in the log. You can also adjust the “limit” value if needed.
6. 6988: Data conversion: Initialize externalid\_peitemmfr
   1. “rstk.ScriptExecutor.execute('populate\_externalid\_peitemmfr',true);
   2. May need to temporarily disable validation rules on peitemmfr\_\_c if script errors out
7. 7064: Menu updates: use 7064-Add-RS-Support-Functions-menu-options.txt
8. 7180: New menu option: Site to site Transfer – use 7180\_Site-to-Site-Transfer\_menu\_option.txt
9. 6385 (IDS only): New menu option: Contract Terms Template – Use 6385-add-menu-option.txt
10. 6187 (Do NOT run on any customer): Data conversion script – Need permission from customers
    1. rstk.ScriptExecutor.execute('set\_default\_product\_types', true);
11. 7198 (CSG only): socontract\_\_c: Edit the View Action and change the Visualforce Page from SocontractView to Socontract

Release 1.172

1.172.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000ENrJ&newUI=1>

1.172.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000ENrJ&newUI=1>

1. 7107: sydata\_\_c: Delete the following pick list values: sydata\_txntype
   1. PO Issue
   2. PO RTV
   3. PO Close
   4. Sales Order Package
   5. Sales Order Shipment by Line
   6. Sales Order Shipment by Shipper
   7. Sales Order Shipment by Container
   8. RMA Receipt
   9. RMA Inspection Transfer
   10. RMA Shipment
   11. WO Scrap
   12. Loc Add
   13. Inventory Cost Adjust
   14. Machine Booking
   15. Qty Complete at Operation

Release 1.171

Two new scripts were added to SVN to address the Packing Slip issue we encountered yesterday:

7120\_set\_sopackline\_soline.txt

6763\_set\_sopackline\_shipline.txt

I also updated SVN with revised manual steps:

1.171.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000QoLE>&newUI=1

1.171.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000QoLE>&newUI=1

1. 6870: Account standard object: Delete field: Active\_\_c
2. 6763: Data conversion: rstk.DebugUtil.populateSoshipline();
   1. Verify script succeeds with Status = Success.  If it fails due to reading too many records run the following script in the Developer Console (may need to be run multiple times):
      1. 6763\_set\_sopackline\_shipline.txt
3. 7120: Data conversion: Run the following script in the Developer Console (may need to be run multiple times):
   1. 7120\_set\_sopackline\_soline.txt
4. 7113: Email template update: SOInvoiceTemplateBatch
   1. Edit template and change ‘terms\_\_c’ to ‘rstk\_\_ terms\_\_c’ OR replace template with dev-qa-ff version.
5. 6921 (SolarCity only): New Custom Settings: ALREADY DONE IN PATCH 1.170.1 FOR PROD/SB
   1. mrp\_CpuTimePerIcixrForDmdSupLoad
      1. Value: 10
   2. mrp\_RunPriorVersion
      1. false
6. 6941 (BOC only): Page layout change: sydefault\_\_c
   1. Add “Run Principal API in Test Mode” as last field in the Information section
7. 6882 (CSG only): Add “Sales Order Entry – HV” menu option: Apply to production – use 6882.txt

You will need to re-run the manual steps for tickets 6763/7120 on the customer orgs you did on Monday.

Then start with the following customers today:

Peterson

Promat

Re-Steel

Rotary Airlock

Unionwear

Then proceed with the remaining customers on your list.

Release 1.170

1.170 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EKtL&newUI=1

1.170 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EKtL&newUI=1>

Manual steps:

1. 6844: New Custom Setting:
   1. “costrollup\_SplitBomExplode
   2. Value: false
   3. If set to true, then the BOM explode (during cost rollup) will split across multiple batch apex threads. This custom setting has a default value of false.
   4. Set value to ‘true’ for customers experiencing the issue
2. 5677: New Custom Settings:
   1. “QC\_Enabled
      1. Value: false
   2. “QC\_SalesOrderFullfillment
      1. Value: false
   3. “sytxncst\_AsyncProcessing (may already exist)
      1. Value: false (do not change value if this setting already exists)
3. 6860: New Custom Setting:
   1. “procreplen\_MaxIcreplensForNetChange
   2. Value: 10000
   3. Description: Max Replenishments to process in Net Change mode
4. 6793: Update Description field on Custom Setting:
   1. Edit ‘mrp\_BaseNumberOfBatches‘, if it exists, and set ‘Description’ field to ‘Base number of batches used for MRP’
5. Add new list view for ‘Application Settings’ custom setting
   1. View name: Rootstock
   2. Fields: Name, Description , Value, Created Date, Updated by User, Last Modified Date
   3. Restrict Visibility: Visible to all users
6. 6902: sydiv\_\_c: Delete field: sydiv\_mtlcostonlyind\_\_c
7. 6717: sopack\_\_c: Delete field: sopack\_div\_\_c
8. 6722: socontract\_\_c: Delete field: socontract\_fixedmonthlyfee\_\_c
9. 6853: mrpplannotes\_\_c: Delete fields:
   1. “externalid\_\_c
   2. “formula\_extid\_\_c
   3. “formula\_projno\_\_c
   4. “formula\_searchindex\_\_c
   5. “mrpplannotes\_clientid\_\_c
   6. “mrpplannotes\_div\_\_c
   7. “mrpplannotes\_ts\_\_c
   8. “searchindex\_\_c
10. 6722: New pick list value on socomm\_prodtype\_\_c
    1. Add to end of list: Recurring Service
11. 6722: New pick list value on soprod\_prodtype\_\_c
    1. Add to end of list: Recurring Service
12. 6853: Data conversion script:
    1. 6853-Set-mrpplannotes\_projid\_\_c-to-mrpplannotes\_proj\_\_c.txt
    2. Run multiple times until log shows “NO MORE RECORDS FOUND TO BE UPDATED”
13. 6860 (CSG only): Data conversion script
    1. Script needs to be run at CSG – see comment# 4- Script was provided to Dave S and he will coordinate running it with customer

Release 1.169

Use the new URL’s which include a few patches:

1.169.3 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000UzKY&newUI=1>

1.169.3 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000UzKY&newUI=1>

1.169 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EKQO&newUI=1

1.169 - https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EKQO&newUI=1

Manual steps:

1. 6572: icixr\_\_c: Delete fields:
   1. “icixr\_buydiv\_\_c
   2. “icixr\_div\_\_c
2. 6572: pellc\_\_c: Delete fields
   1. “pellc\_div\_\_c
3. 6089: Add new pick list value: sydata\_txntype\_\_c
   1. Add after PO RTV: PO Close
4. 6089: Correct field-level security for: sydata\_\_c
   1. For each of the following fields set the Visible checkboxes on the “Set Field-Level Security” page.  Do so for all ‘full access’ profiles based on the customer database. Verify System Administrator is set too.
      1. “Configuration Session
      2. “Sales Invoice Batch
5. 6712: ictransreq\_\_c: Disable validation rules:
   1. “Division
   2. “Item\_Number2
6. 6712: ictransreq\_\_c: Delete fields:
   1. “formula\_divno\_\_c
   2. “ictransreq\_div\_\_c
7. 6754: sydefault\_\_c: Modify ‘SYDEFAULT Layout v3’ page layout
   1. Add ‘QuickBooks Timeout’ field after ‘QuickBooks Online Token Secret’ in the Integration section
8. 1964: soinv\_\_c: Delete pick list value on soinv\_txntype\_\_c:
   1. Debit Memo
9. 1964: soinv\_\_c: Add ‘New Credit Memo’ button to ‘Sales Order Invoice Header List View’
   1. Select ‘Search Layouts’
   2. Select Edit on ‘Sales Order Invoice Header List View’
   3. Move ‘New Credit Memo’ to Selected Buttons
   4. Save

Release 1.168 – deployed as 1.168.1

1.168.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU00000005uM1&newUI=1>

1.168.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU00000005uM1&newUI=1>

Manual steps:

1. 6579/6580: sydefault\_\_c: Assign ‘SYDEFAULT Layout v3’ to all profiles
   1. Setup > Create > Objects
   2. Select object
   3. Page Layouts
   4. Page Layout Assignment
   5. Edit Assignment – This displays a list of all profiles.  Current page layout should be ‘SYDEFAULT Layout v2’.
   6. Highlight all profiles – even those that are not set to ‘SYDEFAULT Layout v2’, if any. Be sure to scroll down to the end of the profile list.
   7. Set ‘Page Layout To Use:’ to ‘SYDEFAULT Layout v3’
   8. Save
2. 6696: Correct field-level security for soline\_\_c: (only needs to be done if upgrading to this version)
   1. Setup > Create > Objects
   2. Select Sales Order Line object
   3. For each of the following fields set the Visible checkboxes on the “Set Field-Level Security” page.  Do so for all ‘full access’ profiles based on the customer database.  Verify System Administrator is set too.
      1. “Freight Amount – Home Currency
3. 6696: Delete field: soline\_price1cc\_\_c

Release 1.166

1.166 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EK4Z&newUI=1>

1.166 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EK4Z&newUI=1>

Release 1.165

Use the following URL which includes 2 patches:

1.165.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000MWYe&newUI=1>

1.165.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000MWYe&newUI=1>

Manual steps:

1. 6514: Data conversion: Fixes customer master for unbilled orders
   1. “rstk.ScriptExecutor.execute('fix\_socust\_unbilledorders', true);
   2. This script may take a while to run.  When complete it sends an email to rs-support titled “SCRIPT EXECUTION COMPLETED” or “SCRIPT EXECUTION COMPLETED WITH ERRORS”.
   3. Check the email and note any customers where this script failed with errors.

You can also check the status of the script by bringing up the list view for the processlog object.  The process name is fix\_socust\_unbilledorders.

listview?rectype=processlog

Patch 1.164.1

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000IOV9>&newUI=1

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000IOV9>&newUI=1

**Release 1.164**

1.164 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EJnq>&newUI=1

1.164 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EJnq&newUI=1>

Manual Steps:

1. 5865: Data conversion: Set externalid field on solineatp\_\_c
   1. “rstk.DebugUtil.populateExternalId('solineatp\_\_c');
2. 6156 (CSG only): New pick list value: socontract\_status\_\_c
   1. Add “New” to end of list
3. 6407 (CSG only): New menu option: Create Invoice for All Shippers – use 6407-add-menu-option.txt

The patch is complete.  Please use the following URL when upgrading additional customers to 1.163.

1.163.2 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000UyHI>&newUI=1

1.163.2 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000UyHI>&newUI=1

**Release 1.163**

1.163.1 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000UyGy&newUI=1>

1.163.1 - <https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000UyGy&newUI=1>

Manual steps:

1. 6341: Data conversion: updates existing soregion\_\_c records
   1. “rstk.ScriptExecutor.execute('populate\_externalid\_soregion',true);
2. 6391: Delete extra menu option “Inventory Reconciliation Review & Processing” – use 6391-delete-menu-option.txt
3. 6056: New pick list value: confcompvar\_source\_\_c
   1. Add “Group” to end of list
4. 6033: New pick list values: sydata\_txntype\_\_c: add to end of list
   1. “Create Invoice for Shipper

Approve Sales Invoice Batch

Close Sales Invoice Batch

Transfer Sales Invoice Batch

**Release 1.162** – deployed as 1.162.1

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EJgt&newUI=1>

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tU0000000EJgt>&newUI=1

1. 6041: Data conversion: initialize existing pohdraddr.name records
   1. “rstk.DebugUtil.populatePohdraddrName();
   2. OK if it errors out with “System.ListException: List index out of bounds: 0” – means there are no pohdraddr records.
   3. Programmers note: On PDE3 there are only 10000 pohdraddr records to update and there are many bad records. So I had to temporary disable the object validation rules for pohdraddr. And you may have to run the script multiple times if there are over 10000 records to update.
2. 6182: New menu option – Add “General Journal Export” – use 6182.txt
   1. Note: This script has already been run on The Good Bean’s prod/sandbox & Pacer SB
3. 6263: Create script to blank out the keyprefix field on the menu record where name is Credit Release – use 6263.txt
   1. Already run in pde4
4. 6017: New pick list values
   1. “socntl\_projnoopt\_\_c: Add new pick list values to end of list
      1. “Set to Sales Order/Sales Line Number  
         Set to Sales Order/Sales Line Number with Prefix
   2. “socntl\_wonumbpolicy\_\_c: Add new pick list values to end of list
      1. “Use Sales Order Number plus Line with Prefix (WO12345-1)
5. 5564 (Spectro Coating only): Rob TODO
   1. Requires manual deployment of code – see comment# 11 – use code from sfdev\_customers repository
      1. WOReceiptwithLOT.cls
      2. WOReceiptwithLOTTracker.cls
      3. WOReceiptwithLOT.page
   2. Also requires adding several new fields to wocst\_\_c/icitemlot\_\_c – see spec and dev-qa

Release 1.161

1. 6154 (CSG only): Fix ‘dash’ character in pick list fields (Customer – 2) in dev-qa-ff , pde4 and CSG orgs (may already be fixed in test2 SB)
   1. “sycmp\_dim1source THRU sycmp\_dim8source
   2. “sydimovr\_source
   3. Verify by editing a Customer Master record and select the Dimension 2 field – drop-down should populate

Release 1.160 – BOC/CSG only

1. No manual steps

Release 1.159

1. After upgrade completes select the Rootstock Site Map menu and any menu option. If an error occurs bring up the failed record ID and delete the record. This should prevent any further failures.
2. 6015: Add custom settings: Name: poapmatch\_MaxReceiptsToDisplay Value: 200

Release 1.158 – BOC only

1. No manual steps

Release 1.157

1. 5333 (CSG and all prod orgs): Replace RMATemplate email template contents with dev-qa-ff version
2. 6028 (CSG only): Conversion script – sets ExternalId field on syzipsite\_\_c
   1. “rstk.DebugUtil.populateExternalId('syzipsite\_\_c');
3. 5819 (BOC only) – supitem\_\_c: Delete validation rule: Temp\_Downloads\_Distribution\_Email\_1

Release 1.156 (includes 1.155)

1. 5560: Correct field security for socomm\_\_c: (only needs to be done if upgrading to this version)
   1. Setup > Create > Objects
   2. Select Product Group Master object
   3. For each of the following fields set the Visible checkboxes on the “Set Field-Level Security” page.  Do so for all full access profiles based on the customer database.
      1. “Prevent Packaging of a Partial Line
      2. “Prevent Pack of Partial Shipment Sets
      3. “Shipment Set ID
2. 5859 (pde3/4/5/6 only): Account.object (ALREADY IN PACKAGE)
   1. Add validation rule: No\_Account\_Number\_Change
3. 5370 (DICA only): AccountingSeed's “Billing” object (AcctSeed\_\_Billing\_\_c): add externalid\_\_c field (see dev2) – ALREADY DONE ON DICA PROD/SB
4. 5560 (CSG only): Conversion script: Set Shipment Set ID, Prevent Packaging of a Partial Line and Prevent Pack of a Partial Shipment Sets fields to TRUE – use 5560.txt

Release 1.154

1. 5942: icreplenish\_\_c: Delete validation rule: dfltxferqty\_validation
2. 5862 (CSG and all live cust): Update Sales Order Case and Install Address on soline\_\_c from solineextn\_\_c: use 5862.txt
3. 5902 (CSG only):
   1. sycmp\_\_c: New pick list value: sycmp\_dim(1-8)source\_\_c
      1. Add “Customer - 2” after Customer
   2. sydimovr\_\_c: New pick list value: sydimovr\_source\_\_c
      1. Add “Customer - 2” after Customer
      2. Move “Mfg Eng Department” after Inventory Item
4. 5939 (CSG only): Set external id & name to new form on syzip\_\_c: use 5939.txt

Release 1.153

1. 5700 (Arrow and all orgs with data): Conversion script – set poitemcst\_curavgprice and poitemcst\_cumavgprice to poline value – use 5700.txt
2. 5173 (Pacer and all custs): New menu option: SO Fulfillment Pre-Selection – use 5173.txt
3. 5609 (BOC only): supitem\_c
   1. Delete fields:
      1. “supitem\_tempcheckstore\_\_c
   2. Disable validation rules:
      * 1. “Action\_Reqd\_Once\_Recorder\_is\_Downloaded

Batch\_Lot\_Number

Batch\_Quality\_Hold\_on\_Arrival

Get\_Packaging\_Serial\_Numbers

Manufacturing\_Location\_of\_Receptacle

Quantity\_per\_Container

Receptacle\_Fill\_Volume

Return\_of\_Temperature\_Recorder\_Required

Serial\_Number\_recording\_required

Software\_Download\_Tool\_Supplied

Temperature\_Reading\_on\_Arrival

Temperature\_download\_Email\_Required

* 1. Delete validation rules:
     1. “Shipping\_Temp\_Max

Release 1.152

1. 5759/5869 (Pacer plus live cust): Fix name field on syshipviatype\_\_c records
   1. Do an edit/save on Shipping Method records to fix records with record ID values in the Name field (if any exist)
      1. Rootstock Site Map
      2. Shipping Methods menu option
      3. Edit/save all records showing the Name field as an ID.
      4. This will set the Name field to “Code (Description)”
2. 5771 (1st light plus live custs): Conversion script to delete porcptap records: see comments# 7/8 – use 5771.txt
   1. Run script in non-commit mode to get a list of records – then in commit mode
3. 5466 (Enduraplas plus prod orgs):
   1. gljed\_\_c:
      1. ~~Enable Activities, History and Reports~~
      2. “gljed\_drcr\_\_c: add new pick list value to end: Both
      3. ~~Enable Track History for:~~
         1. ~~Amount~~
         2. ~~Line Description~~
         3. ~~Journal Header~~
         4. ~~Mfg Account~~
         5. ~~Project~~
         6. ~~Export Summary~~
         7. ~~Cross Reference GL Account~~
      4. ~~Search Layout: Search Filter Fields: add the following~~
         1. ~~Name~~
         2. ~~Division~~
         3. ~~Journal Header~~
         4. ~~Line Description~~
         5. ~~Debit Account~~
         6. ~~Credit Account~~
         7. ~~Cross Reference GL Account~~
         8. ~~Dimension1 Value~~
         9. ~~Dimension2 Value~~
         10. ~~Dimension3 Value~~
   2. ~~gljeh:~~
      1. ~~Enable History and Reports~~
      2. ~~Enable Tranck History for:~~
4. ~~Company~~
5. ~~Division~~
6. ~~External Accounting Date~~
7. ~~External Export Batch~~
8. ~~External Journal Number~~
9. ~~Fiscal Year - gljeh\_fyr\_\_c~~
10. ~~Journal Description~~
11. ~~Posted to GL~~
12. ~~Reference~~
    * 1. ~~Search Layout: Search Filter Fields: add the following~~
         1. ~~Journal Number~~
         2. ~~Company~~
         3. ~~Division~~
         4. ~~External Export Batch~~
         5. ~~External Journal Number~~
         6. ~~Journal Description~~
         7. ~~Posted to GL~~
         8. ~~Reference~~
         9. ~~Last Modified Date~~
13. 5808 (CSG only): wocst\_\_c:
    1. OK - ~~Web Link: Extract\_Operations:~~ 
       1. ~~URL changed from alert(performTask); to alert();~~
    2. OK - ~~Compact Layouts:~~ 
       1. ~~Primarychanged from SYSTEM to wo\_mobile~~
       2. ~~Verify Compact Layout fields are in sync:~~
          1. ~~Order Number~~
          2. ~~Item Number~~
          3. ~~Qty Required~~
          4. ~~Due Date~~
          5. ~~Status~~
          6. ~~Project~~
14. 5726 (BOC only): supitem\_\_c: Disable validation rules:
15. “Carrier\_for\_Returns

Contact\_Name

Contact\_Phone\_Number

Deviate\_From\_Standard\_Min\_Max

Expected\_of\_Residual\_in\_Empty\_Receptcl

Export\_Documents\_and\_Labeling

Frequency\_of\_Returns

Gross\_Wt\_of\_Return\_Including\_Resid

Packing\_Group

Shipping\_Temp\_Max\_C

Shipping\_Temp\_Min\_C

Shipping\_Temp\_Min\_F

Storage\_Temp\_Max\_C

Storage\_Temp\_Max\_F

Storage\_Temp\_Min\_C

Storage\_Temp\_Min\_F

Sub\_Risk\_Class

1. 5726 (BOC only): Fix supitem\_itemplanreview\_\_c field – use 5726.txt

Release 1.151

1. 5186: customext\_\_c: not included in patch – manually update CSG
   1. Replace current pick list values: wocst\_status\_\_c
   2. “2-Firm
   3. “3-Allocated
   4. “4-Ready for activity
   5. “5-Pick List records generated
2. 5721: 5688: lwocst\_\_c: enable Allow Activities
3. 5761: sydata\_\_c: sydata\_txntype\_\_c: New pick list value
   1. Add to end of list: Export Configuration Session
4. 5721: POPrintTemplate.email template: update other custs in next release – complete on dev-qa-ff, BOC, CSG
   1. Replace w/ dev-qa-ff version
5. 5650: Delete menu option for SO KitComponents – use 5650.txt
6. 5186: Menu change (All customers): Move “Consolidated Work Order Picklist” from CSG group to Work Orders group – complete on dev-qa-ff, BOC, CSG
   1. Use 5186.txt – deletes existing menu option on CSG orgs and adds new menu option to Work Orders group
7. 5749: Script: updates the soline\_orgid values from the solineextn\_orgid – use 5749.txt
8. 5601: Data conversion: Update Name values on Vendor Address: povendpoaddr\_\_c
   1. “rstk.ScriptExecutor.execute('update\_Name\_from\_Formula', true);
9. 5688: Script: use 5688.txt
   1. Enable “Approval Enabled” and “Activities Enabled” menu\_\_c fields
   2. Set recordtype = lwocst on menu\_\_c
10. 5749: sycmp\_\_c: (CSG only) New pick list value: add “Site” to end of list for each field
    1. sycmp\_dim1source\_\_c
    2. sycmp\_dim2source\_\_c
    3. sycmp\_dim3source\_\_c
    4. sycmp\_dim4source\_\_c
    5. sycmp\_dim5source\_\_c
    6. sycmp\_dim6source\_\_c
    7. sycmp\_dim7source\_\_c
    8. sycmp\_dim8source\_\_c
11. 5749: sydimovr\_\_c: sydimovr\_source\_\_c : Pick list changes(CSG only)
    1. New pick list value: Add “Site” to end of list
    2. Delete “Mfg. Eng. Department”
12. 5753: Script (Pacer prod only) – Alan already ran script

Patch 1.150.2 – ALREADY COMPLETE – REMAINING CUSTOMERS TO BE UPDATED IN 1.151

1. 5186: Menu change (All customers): Move “Consolidated Work Order Picklist” from CSG group to Work Orders group – complete on dev-qa-ff, BOC, CSG
   1. Use 5186.txt – deletes existing menu option on CSG orgs and adds new menu option to Work Orders group
2. 5721: POPrintTemplate.email template: CSG only for patch – update other custs in next release – complete on dev-qa-ff, BOC, CSG
   1. Replace with dev-qa-ff version
3. 5186: customext\_\_c: CSG only – complete on dev-qa-ff, CSG
   1. Replace current pick list values: wocst\_status\_\_c
   2. “2-Firm
   3. “3-Allocated
   4. “4-Ready for activity
   5. “5-Pick List records generated

Release 1.150

1. 5569: Correct the external ids for syshipviatype\_\_c
   1. “rstk.DebugUtil.populateExternalId('syshipviatype\_\_c');
2. 5598: Correct external ID’s on sopackdmd\_\_c
   1. ~~“rstk.DebugUtil.populateExternalId('syshipviatype\_\_c');~~
   2. “rstk.DebugUtil.populateExternalId('sopackdmd\_\_c'); - see Excel reminder for list of completed orgs
3. 5491: Data conversion: updates new field on Account
   1. “rstk.ScriptExecutor.execute('update\_customer\_carrier\_accounts', true);
4. 5559: New pick list values: sydata\_\_c: sydata\_txntype\_\_c: add to end of list
   1. “Generate WO Picklist

Delete WO Picklist

Allocate WO Components

Deallocate WO Components

1. 5601: Delete Validation rules (BOC only): supitem\_\_c
   1. “Dip\_Tube\_Part\_Number – was missed in 1.149
2. 5663: New menu option (BOC only): Consolidated Requisition Review and Processing – use 5663.txt
3. 5689: Data conversion: (BOC only)
   1. “rstk.WMSReceiptAndQtyohAPI.runfuture();
4. 5186: customext\_\_c: Pick list changes: (CSG only)
   1. “RecordstoDisplay\_\_c: Set “200” as default
   2. “ccreport\_sortoption\_\_c: Set “Sort by Oldest Date and then Item” as default
   3. “schstarttime\_\_c: Set “12:00 AM” as default
5. 5667: New menu option (CSG only): Planned Transfer Picklist – use 5667.txt
6. ~~5186: New menu option (CSG only): Consolidated Work Order Picklist – use 5186.txt~~ REPLACED WITH NEW SCRIPT

Release 1.149

1. 5530: Custom setting: set to 500
   1. “supdmdrev\_MaxIcixrsToDisplay
2. 5023: syusr\_\_c: syusr\_sfustartopt\_\_c: Set “Labor Booking” as default pick list value
3. 5538: sydata\_\_c: sydata\_txntype\_\_c: Add pick list value to end of list
   1. “Create Sales Invoice
4. 5550: Sets soentwarr\_soline\_\_c = soentwarr\_sowarr\_\_r.sowarr\_soline\_\_c – use 5550.txt
5. 5601: supitem\_packgroup\_\_c: Add pick list value to end of list (BOC only)
   1. “None
6. 5601: supitem\_\_c: Delete Validation rules: (BOC only)
   1. “Chemical\_Code
   2. “Dip\_Tube\_Cap\_Torque
   3. “ETA\_of\_Dip\_Tube\_Key\_Checker
   4. “ETA\_of\_Torque\_Adaptor
   5. “Dip\_Tube\_Part\_Number – disable – delete on next release
7. 5254: New menu option (BOC only): Picklist for Consolidation (Temporary) Containers - use 5254.txt
8. 5257: New menu option (BOC only): Receptacle Master – use 5257.txt

Release 1.148 –

1. ~~5463: icitmusag\_\_c:~~
   1. ~~OK - Verify View ActionOverride is using IcitmusagView~~
2. 4339: sydata\_\_c:
   1. “sydata\_txntype\_\_c: new pick list values
      1. Add to beginning
         1. PO Authorization
         2. PO AP Match
      2. Add after WO Receipt
         1. WO Receipt Reversal
         2. WO Close
      3. Add after Qty Complete at Operation
         1. Custom Transaction
   2. “PO Authorization

PO AP Match

WO Receipt Reversal

WO Close

Custom Transaction

1. 5462: POPrintTemplate change: (replace with dev-qa-ff version if upgrading to 1.151.1)
   1. Non-packaged orgs

From: <apex:outputPanel layout="none" rendered="{!line.linetype\_\_c!='Desc' && line.linetype\_\_c!='Lastline'}">

To: <apex:outputPanel layout="none" rendered="{!line.linetype\_\_c!='Desc'}">

* 1. Packaged orgs

From: <apex:outputPanel layout="none" rendered="{!line.rstk\_\_linetype\_\_c!='Desc' && line.rstk\_\_linetype\_\_c!='Lastline'}">

To: <apex:outputPanel layout="none" rendered="{!line.rstk\_\_linetype\_\_c!='Desc'}">

1. 5255: New menu option (BOC only): Supplier Part Change Request – ~~use 5255.txt – ALREADY INCLUDED 5557\_pkg\_orgs.csv~~
   1. Set inactive menu field to false for Supplier Part Change Request records – records already exist

Release 1.147 – BOC, CSG

1. 5451: socontent\_\_c:
   1. Delete “Entitlement\_cannot\_be\_Null” validation rule
2. 5557: Menu updates (BOC only) – replace Inbound Logistics menu group with BOC group
   1. Use DataLoader to add new BOC menu options – import menu\_5557\_pkg\_orgs.csv
   2. Delete old Inbound Logistics menu options – use 5557.txt

Release 1.146 – BOC, CSG, IPA, Pacer, Pioneer

1. 5469: soapi\_\_c: Verify Activities, History and Reports are enabled
2. 5469: soapi\_\_c: Search Layouts: Sales Order APIs List View: Verify Change Owner checkbox is not set
3. 5539: sydefault\_\_c: Page Layout v2
   1. Add “Use High Volume SO Entry UI” to Integration section
4. 5149: Find/fix missing records – run for each division
   1. “rstk.ScriptExecutor.execute(

'fix\_nodelete\_missing\_icproj\_icsiteproj',

false,

new Map<String,Object>{'divid' => 'xxx'}

);

1. 5256: New menu options (BOC only) – use 5256.txt

Release 1.145 –

1. 2185: soline\_\_c:
   1. Add fields to “Sales Order Lines Tab” Search Layout.
      1. Fields are: Line, Product, Qty Ordered, Qty Allocated, Qty Issued, Qty Packaged, Qty Shipped, Unit Price, Discount Pct, Firm
   2. ~~OK - Set action override to soline for Edit, New and View~~
   3. ~~OK - Set action override to solinedelete for Delete~~
2. 2185: sohdr\_\_c: SOHDR Layout v2: Add Sales Order Line to related lists.
3. Update the sales order line Names to be padded to 3 numbers to allow correct sorting on list view – use 2185.txt
4. 5494: poasn\_\_c: Delete “Consolidation\_Center3” validation rule (BOC only)
5. 5306: supreq\_\_c: delete fields on all orgs (BOC only)
   1. “supreq\_poshipcontc
   2. “supreq\_poshipcontw
6. ~~OK - 5313: icitem\_\_c: verify pick list values on new field - icitem\_invstate\_\_c (Solid, Liquid, Gas and Plasma)~~
7. ~~OK - 5306: poshipcont\_\_c: Verify Override Actions are using VF pages~~
8. 5306: New menu option (BOC only): “Inbound Shipment Container” – use 5306.txt
9. 5222: New menu option (BOC only): Item Analysis and Simulations – use 5222.txt

Release 1.144

1. 5440: Data conversion: update shipper lines with empty dates – use 5440.txt – run until all records are updated
2. 4608: Custom Setting: supdmdrev\_MaxIcixrsToDisplay Value: 250 (500 if updating >= 1.149)
3. 5077: see ticket comments 13/15 for details (BOC only)
   1. New Remote Site Settings – see dev-qa-ff
      1. Name: Chemsource\_Live URL: <https://webservices.chemsource.ie:8585> Description: Chemsource Live
      2. Name: Principal URL: <https://83.70.173.186:8181>
      3. Name: Principal2 URL: <http://83.70.173.186:8181>
4. 5151: Add menu option: Advance Shipment Notification – use 5151.txt (BOC only)

Release 1.143.1

1. 5305: FF orgs only - See ticket for creating interface class to FFA's BulkProcesInvoices API method
   1. Internal orgs and sandboxes (can also use Force.com IDE):
      1. Select the Site Map and change URL to […apex/PostInstallCheck](https://c.na12.visual.force.com/apex/PostInstallCheck)
      2. Enter login credentials – user must have FF license
      3. Select the following actions:
         1. FinancialForce Discard Invoice API
         2. FinancialForce Post Invoice API
         3. FinancialForce Post Credit Note API
         4. Test class for the Financialforce interface
   2. Customer production orgs (use “release 1.143 – manual deployment” project)
      1. Use Force.com IDE to deploy classes from dev-qa-ff
      2. FFDiscardInvoice\_2
      3. FFPostInvoice\_2
      4. FFPostCreditNote\_2
      5. TestFinancialForce2
2. 5179: Edit/save syconfig record to automatically set the Financial System Interface field based on the old field values for Accounting Package, FinancialForce Interface Active and QuickBooks Interface Active fields – Password on syconfig page is R00tst0ck2012
3. 5151: poasn\_\_c: Verify Edit, New and View actions are set to VF pages: (BOC only)
   1. Edit – set to poasn
   2. New – set to poasn
   3. View – set to poasnView
4. ~~5151: Add “Advance Shipment Notification” menu option – use 5151.txt (BOC only) HOLD TILL NEXT RELEASE~~
   1. ~~Rename list view from Advanced to Advance~~
   2. ~~Replace ASN Number field with Name field in list view~~

Release 1.142

1. 5412: Update SOInvoiceTemplate Email Template and custom version on IPA too:

<apex:outputText value="Prepayment"/>

<apex:outputText value="({0,Number,###,###,###,###,##0.00})">

<apex:param value="{!relatedTo.totalppya\_\_c}"/>

</apex:outputText>

<apex:outputText value="Invoice Total"/>

<apex:outputText value="{0,Number,###,###,###,###,##0.00}">

<apex:param value="{!relatedTo.grandtotal\_\_c - relatedTo.totalppya\_\_c}"/>

</apex:outputText>

1. 5175: Add permissions for RS API Read-only profile (BOC SB only)
   1. poasn\_\_c.object
   2. poasnreq\_\_c.object
   3. supmtr\_\_c.object
   4. poshipcont\_\_c.object
   5. poshipcontdtl\_\_c.object
2. 5078/5120: menu changes – use 5078.txt (BOC only)
   1. Supplier Requisition
   2. Process Forecast Upload

Release 1.141

1. 5211 – Edit/save SO control record and reset template fields if necessary. Template must be set as "Available For Use". Verify Invoice template exists on SO Control record.
2. 5268: sowarrdtl\_\_c: sowarrdtl\_soshipsrl\_\_c: delete field
3. 5243: sowarr\_\_c: Delete “soldtocust\_validation” rule
4. 5287: Re-enable the FFA trigger – use 5287.txt (FFA orgs only for c2g v10 or less)
5. 5217: Menu update: Use 5217.txt – includes various changes that affect all orgs (ran in pde4 also)
6. 5338: socontract\_\_c: CSG-only:
   1. Enable “Enable Reports”
   2. Enable “Track Field History”
   3. Enable “Track Activities”
7. ~~5149: Data conversion: see comment# 5 for details – run on all cust orgs – only when sylocid\_nodelete field is enabled – CSG/Pacer and possibly others~~ (REPLACED WITH 1.141.2)
   1. ~~Search log for FOUND~~
   2. ~~May need to use Chrome due to excessive memory usage~~

Release 1.140

1. 5108: Use 5108.txt
   1. Sets sohdr\_ustat\_\_c = sohdrextn\_ustat\_\_c
   2. Run until debug “Op:Update|Type:sohdr\_\_c|Rows:xx” where xx < 1000
   3. If error occurs add id to list as workaround – see ticket for details
2. 5273: poconctr\_\_c: poconctr\_type\_\_c: Add pick list value “Both” to end of list

Release 1.138

1. ~~5112: Manually deploy trigger and test class (FFA orgs only)~~ HOLD OFF UNTIL OPEN ISSUES ARE RESOLVED
   1. ~~Deploy from “1.138 – trigger & test class – pde5” project~~
   2. ~~Note: need to modify trigger file for non-packaged orgs -~~
2. New menu options for 5071/5115 – use 5071.txt (BOC only)
   1. Add “Supplier Part Master” to Inbound Logistics group
   2. Add “Forecast Control” to Inbound Logistics group
3. 5137: Manually add custom settings - auto-creation may not be working – Sam may provide a script (Jennifer Behr only)
   1. rstk.AppSettings.setValue('sofullfill\_MaxPackDtlsForRegularApex', '50');
   2. rstk.AppSettings.setValue('sofullfill\_MaxPkShpDtlsForRegularApex', '30');
   3. rstk.AppSettings.setValue('sofullfill\_MaxShipDtlsForRegularApex', '50');

Release 1.137

1. 5056: icitemproj\_\_c: Delete/erase field: icitemproj\_poprice\_\_c
2. 5058 (from previous release): icitemss\_\_c.object
   1. Delete validation rule: Item\_and\_Superitem\_must\_be\_different (was disabled in 1.136)
3. ~~5112: Manual changes on FF customer orgs: Add trigger to FF Sales Invoice object (remove rstk for non-packaged orgs)~~
   1. ~~“trigger c2gcodeinvoice on c2g\_\_codaInvoice\_\_c (after update) {~~

~~new rstk.THC2gCodaInvoice().delegate();~~

~~}~~

1. 5072: New menu options for 5072/5073/5074/5083 – use BOC menu changes.txt (BOC only)

Release 1.136

1. Compile all classes after each upgrade
2. Reset Rootstock LMA login access
3. 4538: Data conversion: rstk.DebugUtil.populateSopackShiphdr();
4. 4405: Data conversion: Updates the product email ind's to true
   1. Use 4405.txt – run multiple times until “Updating x products...” where x<1000
5. 5058: icitemss\_\_c: Deactivate validation rule: Item\_and\_Superitem\_must\_be\_different
6. ~~4179: sydata\_\_c: sydata\_process\_\_c: Set “Ready” as the default selection~~
7. ~~4951: ictransreq\_\_c: ictransreq\_status\_\_c: Set “Planned” as the default selection~~

Release 1.134/1.135

1. Compile all classes after each upgrade
2. Reset Rootstock LMA login access
3. 5026: sopack\_\_c-Packing Slip Header Layout 2.layout
   1. Add fields to “Packing Slip Line” related list
      1. Product Number
      2. Sales Order Line Number
      3. Sales Order Number
      4. Shipper Number
4. 4367: OpportunityLineItem-Opportunity Product Layout.layout
   1. Add new fields to layout:
      1. Priced From Rootstock
      2. Price Source
   2. Add new Visualforce Page to layout:
      1. RSOpportunityPricing – set Height to 32 pixels
5. 4367: QuoteLineItem-Quote Line Item Layout.layout
   1. Add new fields to layout:
      1. Priced From Rootstock
      2. Price Source
   2. Add new Visualforce Page to layout:
      1. RSQuotePricing – set Height to 32 pixels

There are no manual steps for releases 1.132 and 1.133