



QAD Adaptive Applications

Installation Guide **QAD Internationalization Poland Extension**

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Installing into QAD Enterprise Edition

This chapter describes instructions for installing the extended internationalization features for Poland into a QAD Enterprise Edition environment.

Overview 2

This section describes the QAD name changes.

Requirements 2

This section describes the requirements for the Poland extended internationalization features.

Procedure 3

This section describes the procedure of installing the Poland Internationalization Extension.

License Code 6

This section describes the license code requirements.

Troubleshooting 7

This section describes the process of resolving common issues during installation.

Customizations 9

This section describes requirements for program customizations.

Overview

This chapter provides instructions for installing extended internationalization features for Poland into a QAD Enterprise Edition environment. For information about QAD Web UI installation, see “Installing into QAD Web UI” on page 27.

Product Name Changes

Starting from September 2019, the new name for QAD’s complete portfolio of products is QAD Adaptive Applications, and QAD Adaptive ERP is the name for QAD’s flagship ERP solution. QAD Adaptive ERP includes the functionality previously associated with QAD Cloud ERP and QAD Enterprise Applications – Enterprise Edition (EE).

Requirements

The internationalization extension features for Poland require QAD Enterprise Edition 2016 and higher.

Important Due to new I19 packaging formats, you must have YAB 1.6 or higher. If you use QAD Adaptive Applications 2018, you must have Financials Patch 2 (QAD Financials FIN 2018 Patch 02) and YAB 1.6 or higher installed.

Requirements for the White List Web Service

The following software must be installed on the server as a prerequisite to using the Web service for White List validation:

- OpenSSL (the latest version or at least version 1.0.2h)
- cURL (version 7.20.0 at a minimum)

Verify Core Product Fixes

The extended internationalization features for Poland include an update to programs in the core QAD EE product, as listed in Table 1 and Table 2.

Table 1
QAD EE Programs Modified by the Poland Package

Version 2016 EE to 2020 EE
soivmta2.p
sosomtlb.p

Table 2
QAD EE Programs Modified by the Poland Package

Version 2017 EE to 2020 EE
sbmta.p
sbmta6.p
sbpstc.p



Before you install the Poland package, check if you received fixes from QAD Support for any of the files listed in Table 1 and Table 2, and verify if you or QAD Services customized any of the programs. Depending on the outcome, perform one of the following actions:

- If you received a fix to one of the listed files, contact QAD Support to discuss your next steps.
- If you customized QAD programs, merge the customizations with the modifications included in this package.

Note If QAD Services performed a program customization, contact QAD Services, who will then perform the program merges.

Important If there are customizations in the propath that share the same file name as a program included in this internationalization extension, then those customizations take precedence, and the package installs completely. It is the best practice to create customizations with a unique file name so that they do not conflict with the package.

Procedure

Table 3
Installation Procedures

On-Premise or Cloud Installation	Procedure
Cloud	“Installing the Poland Internationalization Extension in a YAB Environment – Cloud Installation” on page 3
On-Premise	“Installing the Poland Internationalization Extension in a YAB Environment – On-Premise Installation” on page 3

Installing the Poland Internationalization Extension in a YAB Environment – Cloud Installation

For information about installing the Poland Internationalization Extension into a QAD cloud environment, contact QAD Cloud Operations.

Installing the Poland Internationalization Extension in a YAB Environment – On-Premise Installation

If you install the Poland Internationalization Extension in an on-premise environment of 2016 EE or higher, use YAB.

YAB is a deployment and management toolset that covers all products installed into an Enterprise Edition environment. You can use it to start, stop, reconfigure, and maintain the consistency of your Enterprise Edition environments. Your environment is defined in terms of discrete units, or packages, which you can replace and add, as needed.

For more information about using YAB, see *QAD Configuration and Administration Guide YAB 1*.

To install this extension using YAB, perform the following steps:

- 1 Set the downtime for the environment.

Note Installation lasts from one to two hours, depending on the location of the server and on the number of packages to be downloaded.

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- 2 Back up the database and Enterprise Edition.
- 3 Download the add-on file from the QAD Store or from QAD Release Fulfillment.
- 4 Move the file to a file system that is accessible from the UNIX host where your Enterprise Edition environment is installed.
- 5 Change to the directory where Enterprise Edition is installed.
- 6 Install the Poland Installation Extension by entering the following command:

```
yab install zip file
```

where *zip file* is the name of the file you received from QAD.

For example,

```
yab install i19pl-app-image-encrypted-X.X.X.X.zip
```

where each X represents a number for that particular package.

The product installs.

Additional Steps to Upgrade from Version 1.0

If you install version 3.4 of the Poland Internationalization Extension as a replacement for version 1.0, remove the customization related to Internal Invoice Report. This report was removed from the package.

Removing User-Defined Fields

- 1 Open User-Defined Field Delete (36.4.12.2.4).
- 2 Search for fields with the Polish Tax description.

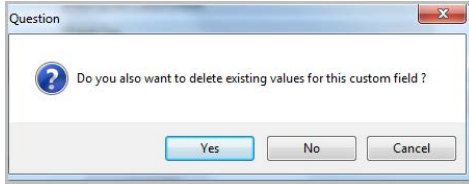
Note The field for the customization contains the `tPostingLine.CustomShort8` identifier or the `tPostingLine.CustomShort9` identifier.

Fig. 1
User-Defined Field Browse for Delete

Component Label	Description	Field Name	Side Label	Label (US)
Supplier Invoice	Payment Modality	tClInvoice.CustomCombo9	Payment Modali...	Payment Modality
Supplier Invoice	CIG	tClInvoice.CustomShort0	CIG	CIG
Supplier Invoice	CUP	tClInvoice.CustomShort1	CUP	CUP
Supplier Invoice	Contract Number	tClInvoice.CustomShort8	Contract Number	Contract Number
Supplier Invoice	Reported to Spesometro	tClInvoice.CustomShort9	Reported to Sp...	Reported Spesometro
Country	Black List	tCountry.CustomShort9	Black List	Black List
Supplier	Reported to Spesometro	tCreditor.CustomShort9	Reported to Sp...	Reported Spesometro
Customer	j3p	tDebtor.CustomCombo0	j3p	j3p
Customer	CustomerCategory	tDebtor.CustomCombo1	Category	Category
Customer		tDebtor.CustomCombo5	das	as
GL Account	Responsable du compte	tGL.CustomCombo0	Responsable du...	Responsable du cpt
Posting	Polish Tax	tPostingLine.CustomShort8	Polish Tax	Polish Tax
Posting	Polish Tax	tPostingLine.CustomShort9	Polish Tax	Polish Tax

- 3 If you find a field with the `tPostingLine.CustomShort8` or `tPostingLine.CustomShort9` identifiers, delete the field. The system displays a confirmation message, as shown in Figure 2.

Fig. 2
User-Defined Field Delete, Confirmation Message



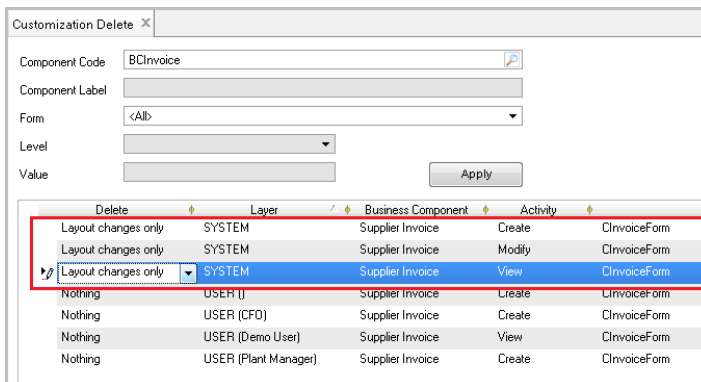
Note To remove any user-defined fields for the old customization, click Yes.

Deleting Supplier Invoice User Customizations

- 1 Open Customization Delete (36.4.18.3).
- 2 Specify BCInvoice in the Component Code field to display Supplier Invoice customizations.

Note You can locate three entries where the Layer column is set to SYSTEM. There should be entries for `Activity View`, `Create`, and `Modify`. For each Supplier Invoice customization entry, change the action in the Delete column from Nothing to Layout changes only.

Fig. 3
Customization Delete



- 3 Click Delete.

Additional Steps to Upgrade from Version 3.3.1

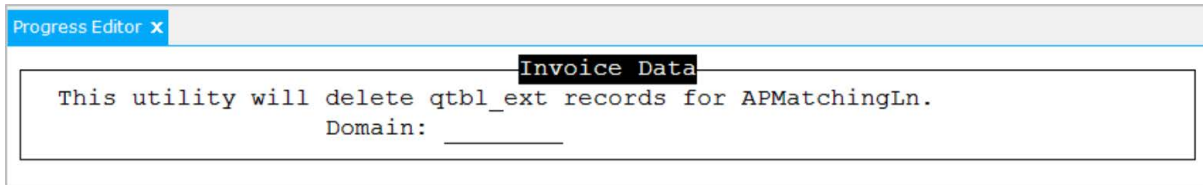
To install the new version of the Poland Internationalization Extension as a replacement for version 3.3.1, remove the product group codes stored on the supplier invoice line level, as they are not required. The ability to add product group codes to supplier invoices was removed from the package.

To remove the product group codes from the supplier invoice level, run the `utjpkdelqtbl.p` utility, performing the following steps:

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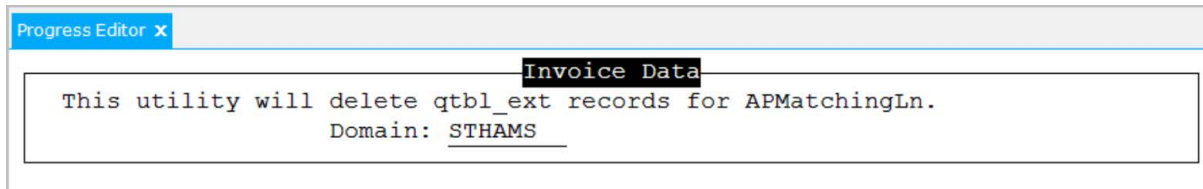
- 1 Open Progress Editor (36.25.80).
- 2 Enter `run us/ut/utjpkdelqtbl.p` and press F1. The utility starts and displays an information message, as shown in Figure 4.

Fig. 4
The utjpkdelqtbl.p Utility Output



- 3 Specify the domain for which you would like to update the records and press Enter.

Fig. 5
The utjpkdelqtbl.p Utility Output



To print product group code information from Sales Order Maintenance/Pending Invoice Maintenance level and not from Item Master Maintenance, perform the following steps:

- 1 Contact Service Delivery who can support you in preparing the source code for this purpose by applying the changes described in the [Knowledgebase](#).
- 2 Prepare the custom programs setup described in “Registering Custom Programs” on page 23.

License Code

To use the installed Poland Internationalization Extension, specify a valid license code.

Generalized Codes

The installation creates values for the generalized codes field, `QAD_I19_PL_PRODUCT_GROUP_CODE`. These codes are created in the system domain. You must manually create the codes in Generalized Codes Maintenance for other domains, as required.

Table 4
Generalized Codes Maintenance, QAD_I19_PL_PRODUCT_GROUP_CODE

Field Name	Value	Comments
QAD_I19_PL_PRODUCT_GROUP_CODE	Product group code that appears in the drop-down menu for the Product Group Code field in Item Master Maintenance. Also, the same values appear in the Product Group Code field for Customer Invoice and Supplier Invoice functionalities. There are separate generalized codes for each possible product group code, as shown in Figure 6.	Description of the product group code. For QAD-recommended comments, see Appendix A of the <i>QAD Internationalization Poland Extension User Guide</i> . These comments are based on data from the Polish tax authorities as of March 2020, which is subject to change in the future.

Fig. 6
Generalized Codes Maintenance, Possible Account Types Recorded in QAD_I19_PL_PRODUCT_GROUP_CODE

The screenshot shows the 'Generalized Codes Browse' window. The search criteria are 'Field Name = QAD_I19_PL_Product_Group_Code' and 'Field Name equals QAD_I19_PL_Produ'. The results table is as follows:

Field Name	Value	Comments	Group
QAD_I19_PL_PRODUCT_GROUP_CODE			APP
QAD_I19_PL_PRODUCT_GROUP_CODE	01	Poland Product Code 01	APP
QAD_I19_PL_PRODUCT_GROUP_CODE	02	Second Poland Product Code 02	APP
QAD_I19_PL_PRODUCT_GROUP_CODE	03		APP
QAD_I19_PL_PRODUCT_GROUP_CODE	04		APP
QAD_I19_PL_PRODUCT_GROUP_CODE	05		APP
QAD_I19_PL_PRODUCT_GROUP_CODE	06		APP

Granting User Access

All UI customizations for the Poland package are implemented at role level, and are visible only to users with the role QAD Poland Role. Create this role in Role Create (36.3.6.1) and specify permissions in Role Permissions Maintain (36.3.6.5).

Check if all users who need access to the Poland package menus, user-defined fields, and other customizations in the .NET UI have their default role set to QAD Poland Role.

Important If you are assigned the QAD Poland Role but it is not your default role, you can access the Poland programs and reports, but any UDFs are not displayed automatically. To display the UDFs, change to the QAD Poland Role role using Tools > Design Mode > Customization level (Role) for every program with UDFs.

For more information about roles and permissions, see *QAD Security and Controls User Guide*.

Troubleshooting

Installation output is captured in the following log file:

```
build/logs/yab.log
```

Known Issues

YAB Installation Errors Related to `finudf` and `fin-sync`

During YAB installations, the following errors related to `finudf` or `fin-sync` may appear:

```
BuildContext - finudf-i19-pl-update ERROR
BuildContext - fin-sync-run-update ERROR
```

To resolve these errors, upgrade to the latest YAB version or assign a blank password to the `mfg` user before restarting the installation.

Running QRF Reports that Use Financial APIs

In a YAB environment, you may see an issue when running QAD Reporting Framework reports that use Financial APIs. If the `propath` is incorrect, QAD Reporting Framework crashes.

To resolve the issue related to the incorrect `propath`, after the extension is installed in a YAB environment, specify the Financials proxy source to include in the MFG application server `propath` by performing the following steps:

- 1 Edit `build/config/configuration.properties` as follows:

```
#@append
appserver.mfg.propath=${packages.fin-src-proxy.dir}
```
- 2 Apply the following change:

```
yab appserver-mfg-update
```
- 3 Restart the application.

Installing the Extension in an Environment with Existing Internationalization Extensions

When you install Poland Internationalization Extension in an environment that contains packages for other countries, and these packages depend on old versions of the `i19-library` package or `i19-intrastat` package, the following error occurs:

```
ERROR [main] Boot - The request does not have a solution.
```

To fix this error, reinstall all internationalization packages using the latest version of the package that is causing this issue—`i19-library` or `i19-intrastat`.

Or, as a temporary solution, perform the following steps:

- 1 Update the `configuration.properties` file to treat all references to `i19-library` as references to the latest package version, for example, `i19-library-1.0.0.27`:

```
dependency.redirects=i19-library=i19-library-1.0.0.27
```
- 2 Apply the following change:

```
yab -check-for-updates -r -v
```
- 3 Install the `.zip` file for the new package again.
- 4 Run the `yab info` command and then check if all expected packages are listed.

Important Check this setting for each internationalization extension installation. If a new package requires a new version of the `i19-library` or `i19-intrastat` package, update the `dependency.redirects` setting accordingly.

Example The `i19-ru-operations` package is already installed and depends on the `i19-library` package, version 1.0.0.3. If you install the `i19pl-app` package, which depends on the latest version of the `i19-library` package—1.0.0.27, an error occurs. As a temporary solution, update the `configuration.properties` file with the latest version of the `i19-library` package, `dependency.redirects=i19-library=i19-library-1.0.0.27`, and then install the `i19pl-app` package again.

Customizations

Non-Intrusive Customizations

The extended internationalization features for Poland include customizations to the following programs:

- `bcinvoice.p`
- `bcreditor.p`
- `bdinvoice.p`

If you made customizations to these QAD programs, merge your customizations with the modifications included in this package.

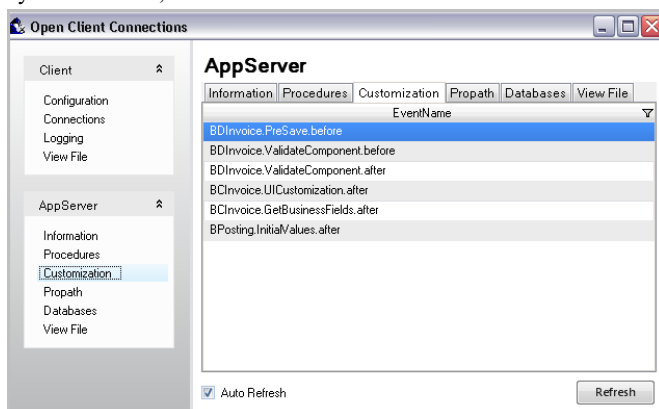
The programs listed above are located in `docs/Poland_NI_Customizations.zip`, in the package.

That file also includes another i-file in the package: `i19ispl.i`.

Once the necessary merges are complete — or if no customizations are required for these files — extract all programs from the ZIP file and place them in the AppServer PROPATH directory, where financial customizations are typically stored. Compile the programs and then trim the fin server.

To check if the customizations were detected, use the Customization tab in System Monitor (36.24.3.4).

Fig. 7
System Monitor, Customization Tab



UI Customizations

All UI customizations for the Poland package are implemented at role level, and are only visible to users with QAD Polish Role. Create this role in Role Create (36.3.6.1) and specify permissions in Role Permissions Maintain (36.3.6.5).

Fig. 8
Role Modify

Fig. 9
Role Permissions Maintain

Ensure that all users who need access to the Poland package customizations have their default role set to QAD Polish Role in Role Membership Maintain (36.3.6.6).

Fig. 10
Role Membership Maintain

Link	User Login	Role Name	Default Role	Domain Code	Entity Code
<input checked="" type="checkbox"/>	mfg	SuperUser	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	EmployeeNotify	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	SupplierNotify	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	CustomerNotify	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	EndUserNotify	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	qadadmin	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	uidesign	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	rpDsgn	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	rpAdmin	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	ProductTxns	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	ProductModify	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	InventoryModify	<input type="checkbox"/>	10USA	10CORPCONS
<input type="checkbox"/>	mfg	PostAutoBallNotify	<input type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	QAD Polish Role	<input checked="" type="checkbox"/>	10USA	10CORPCONS
<input checked="" type="checkbox"/>	mfg	SuperUser	<input type="checkbox"/>	10USA	10USACO
<input checked="" type="checkbox"/>	mfg	EmployeeNotify	<input type="checkbox"/>	10USA	10USACO

For more information about roles and permissions, see *QAD Security and Controls User Guide*.

User-Defined Fields

A number of user-defined fields are delivered with the Poland Internationalization Extension.



Note Before adding the user-defined fields, see “Generalized Codes” on page 6.

Table 5
User-Defined Fields in the Poland Internationalization Extension

Component	User-Defined Field	UI Field Label	Web UI Availability
Open Item Adjustment	tOIAdjust.CustomDate0	Settlement Date	Yes
Customer	tDebtor.CustomCombo12	Split Payment	No
Supplier	tCreditor.CustomCombo14	White List Validation	No
Customer Invoice	tDInvoice.CustomDate2	New Tax Point Date	Yes
	tDInvoice.CustomLong0	Correction Reason	Yes
	tDInvoice.CustomShort1	Corrected Invoice Number	Yes
	tDInvoice.CustomInteger3	Period of Corrected Invoice	Yes
	tDInvoice.CustomCombo10	Split Payment	No
	tDInvoice.CustomCombo11	VAT Base/Retained Tax Correction	No
Supplier Invoice	tDInvoice.CustomCombo12	Product Group Code	Yes
	tCInvoice.CustomDate2	New Tax Point Date	Yes
	tCInvoice.CustomLong1	Correction Reason	Yes
	tCInvoice.CustomShort6	Corrected Invoice Number	Yes
	tCInvoice.CustomInteger1	Period of Corrected Invoice	Yes
	tCInvoice.CustomDate1	Invoice Receipt Date	Yes
	tCInvoice.CustomDate5	Retained Tax Date	Yes
	tCInvoice.CustomCombo3	Split Payment	No
tCInvoice.CustomCombo11	VAT Base/Retained Tax Correction	No	

Importing UI Customizations

The Poland Internationalization Extension provides customization for the components listed in Table 6.

Table 6
Components with Customizations for the Poland Internationalization Extension

Component	Related File in Package
Open Item Adjustment	OIAdjustment_Customization.zip
Customer	Customer_Customization.zip
Supplier	Supplier_Customization.zip
Customer Invoice	CustomerInvoice_Customization.zip
Supplier Invoice	SupplierInvoice_Customization.zip
All of the above	All_Customizations.zip

Note You can load all customizations at once using the All_Customizations.zip file.

The customizations are done at role level. If you have customizations for these components at the general level, or want to save customizations at a different level, then add your customizations manually. For more information about customizations, see “Verifying Existing Customizations” on page 12 and “Adding UI Customizations Manually” on page 12.

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For components that do not contain existing customizations, to import the customization, perform the following steps:

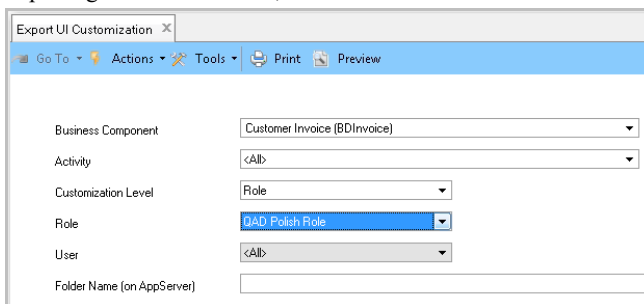
- 1 Start the QAD .NET client.
- 2 Open Import UI Customization (36.4.18.2).
- 3 Extract the zip folder containing the customization—for example, `SupplierInvoice_Customization.zip`—in the installation directory.
- 4 Set the value of the Folder Name field on AppServer to `[INSTALLATION DIR]/Customization_folder`.
For example, `[INSTALLATION DIR]/SupplierInvoice_Customization`.
- 5 Click Import.
- 6 Repeat the earlier steps for all customizations that you want to import.

Verifying Existing Customizations

To verify existing customizations in your QAD EE application:

- 1 Open Export UI Customization (36.4.26).
- 2 View the contents of the Business Component drop-down menu. This menu contains an entry for each customization that exists.
- 3 View the contents of the Customization Level field. If this field displays Role, then loading the customization delivered with the Poland Internationalization Extension overwrites existing customizations in the system.

Fig. 11
Exporting UI Customization, Customization Level

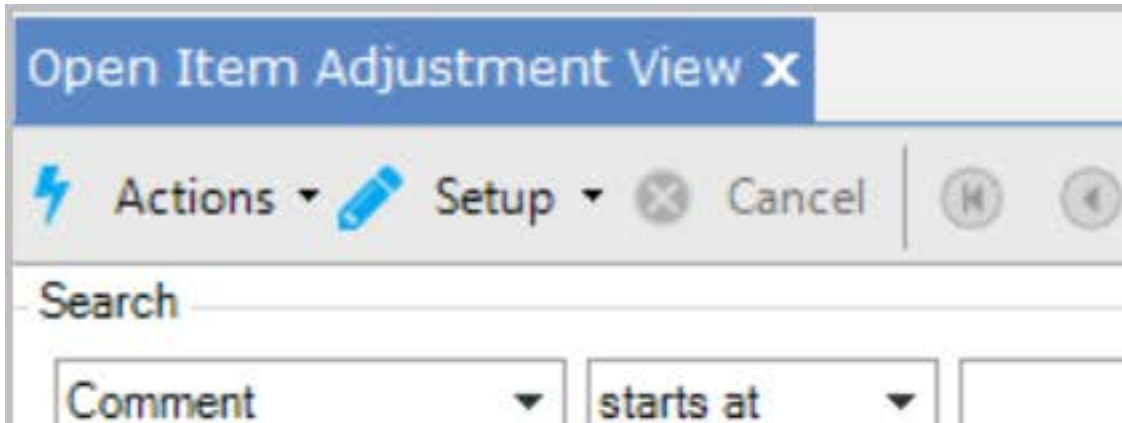


Adding UI Customizations Manually

Open Item Adjustment Customization

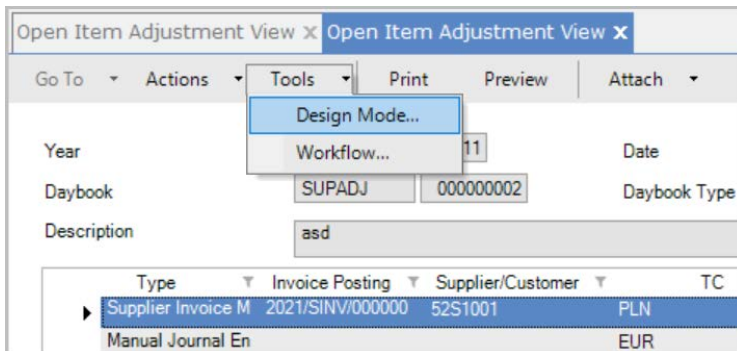
- 1 Access Open Item Adjustment View (25.13.6) and then select a record from the list.
- 2 Right-click the selected record and then select View to open the record in a full-screen mode, as shown in Figure 12.

Fig. 12
Open Item Adjustment View Customization



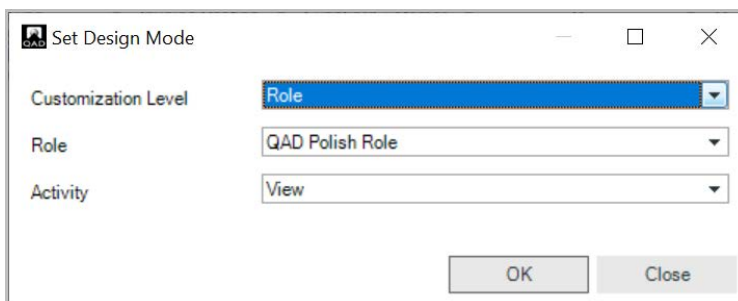
- 3 In the window that opens, click Tools and then select Design Mode, as shown in Figure 13.

Fig. 13
Open Item Adjustment View Customization, Design Mode



- 4 Set Customization Level to Role and then select QAD Polish Role, as shown in Figure 14. Click OK.

Fig. 14
Open Item Adjustment View Customization, Set Design Mode



- 5 In the BusinessFieldLabel section on the right side of the screen, select Settlement Date, and drag it to the General tab, as shown in Figure 15.

Fig. 15
Open Item Adjustment View Customization

Type	Invoice Posting	Supplier/Customer	TC	TC Orig Balance	TC Movement	TC Payment Disc	TC Tax Disc
Supplier Invoice M	2021/SINV/000000	52S1001	PLN	-1,000.00	1,000.00	0.00	0.00
Manual Journal En			EUR	0.00	-237.64	0.00	0.00

- 6 Close the properties window and then select Role as the customization level.
- 7 Check if QAD Polish Role is selected. Save the customization for all activities.

Supplier Invoice Customization

- 1 Open Supplier Invoice View (28.1.1.3) and then select an invoice.
- 2 Click Tools and then click Design Mode.

Fig. 16
Design Mode

- 3 Set Customization Level to Role and then select QAD Polish Role as the role.
- 4 In the General tab, add the following fields:
 - Correction Reason
 - Corrected Invoice Number
 - Period of Corrected Invoice
 - Invoice Receipt Date
 - Split Payment

Note Check if you create values for the Product Group Code field first. For more information about creating group codes, see “Generalized Codes” on page 6.

Fig. 17
Supplier Invoice Customization

- 5 In the Tax tab, add the following fields:
 - New Tax Point Date
 - Retained Tax Date

Fig. 18
Tax Tab, Supplier Invoice Customization

Tax Class	Tax Usage	Tax Environment	Tax Type	Tax Code	Domain
PL-PL	NON-TAX			00000000	50PL

- 6 Close the Field list/properties window and then select Role as the customization level.
- 7 Check if QAD Polish Role is selected. Save the customization for all activities.

Customer Invoice Customization

- 1 Open Customer Invoice View (27.1.1.3) and then select an invoice.
- 2 Click Tools and then click Design Mode.
- 3 Set Customization Level to Role and then select QAD Polish Role as the role.
- 4 In the General tab, add the following fields:
 - Correction Reason
 - Corrected Invoice Number
 - Period of Corrected Invoice
 - Split Payment

Fig. 19
Customer Invoice Customization, General Tab

The screenshot shows the 'Customer Invoice Modify' window with the 'General' tab selected. The window contains the following fields and values:

Field	Value
Customer	52C1001
Posting	2021/CIM/000000004
Invoice Date	04/08/2021
Description	2021/4/8_18:14:26
Invoice Type	Invoice
Year	2021
Business Relation	52-C100

- 5 Click the Customer Code field and then click the Events tab in the Field list/properties window.

Fig. 20
Customer Invoice, Field List/Properties Window

- 6 Click the three dots in the Code column next to the `LeaveAndValueC` Event. A new window opens.
- 7 In the Custom Code section of the `DebtorCodeTextBox_LeaveAndValueC` method, paste the custom code from the `CustomerInvoice_LeaveAndValueC.cs` file, which is located in `CustomerInvoice_Customization.zip`.

Fig. 21
Custom Code for Event `DebtorCodeTextBox_LeaveAndValueC` of Control `DebtorCodeTextBox`

```
private void DebtorCodeTextBox_LeaveAndValueC(object sender, System.EventArgs e)
{
    // Custom Code Start
    QAD.BLF_IF tUIInputDataSet tUIInputDS;
    QAD.BLF_IF tUIOutputDataSet tUIOutputDS;
    tUIInputDS = new QAD.BLF_IF tUIInputDataSet();
    tUIInputDS.tUIInput.AddtUIInputRow("SplitPaymentComboBox", "Enter", DebtorCodeTextBox.ScValue.ToString());
    tUIOutputDS = this.Adapter.UICustomization("SplitPaymentComboBox", "Enter", tUIInputDS, this.ProcessObject);

    if (this.ProcessObject.HasErrors)
    {
        QAD.UIFoundation.ServiceUtil.GetErrorViewer(this.Form.Site).Show(this.Form);
        return;
    }

    foreach(QAD.BLF_IF tUIOutputDataSet tUIOutputRow row in tUIOutputDS.tUIOutput)
    {
        if (row.toControlName == "SplitPaymentComboBox")
        {
            this.sc_tDInvoice_CustomCombo10.Value = row.toPropertyValue.ToString();
        }
    }
    // Custom Code End
}
```

- 8 To close the Custom Code window, click OK.
- 9 In the Tax tab, add New Tax Point Date.

Fig. 22
Tax Tab, Customer Invoice Customization

Tax Class	Tax Usage	Tax Env	Tax Type	Tax Code	Domain	TC Base Amount (DR)	TC Base Amount
US/NJ		NJ		25	Domain1		0.00
US/NJ		NJ-1		26	Domain1		0.00

10 In the Operational Info tab, add Product Group Code.

Note Check if you create values for the Product Group Code field first. For more information about creating group codes, see “Generalized Codes” on page 6.

Fig. 23
Operational Info Tab, Customer Invoice Customization

Sales Order	Description	Shipper ID	Description
so_p7b4	50-100		

11 Close the Field list/properties window and then select Role as the customization level.

12 Check if QAD Polish Role is selected. Save the customization for all activities.

Customer Customization

- 1 Open Customer Modify (27.20.1.2) and then select a customer.
- 2 Click Tools and then click Design Mode.
- 3 Set Customization Level to Role and then select QAD Polish Role as the role.
- 4 In the Payments tab, add the following field:

- Split Payment

Fig. 24
Payments Tab, Customer Customization

The screenshot shows the 'Customer Modify' window with the 'Payments' tab selected. The 'Customer Code' is 50C1001 and 'Business Relation' is 50C-1001. The 'Payment' tab is active, showing various fields for customization. The 'Split Payment' dropdown menu is highlighted with a red box, indicating the current selection.

- 5 Close the Field list/properties window and then select Role as the customization level.
- 6 Check if QAD Polish Role is selected. Save the customization for all activities.

Supplier Customization

- 1 Open Supplier Create (28.20.1.1) and then select an invoice.
- 2 Click Tools and then click Design Mode.

Fig. 25
Design Mode

The screenshot shows the 'Supplier Create' window in Design Mode. The 'Supplier Code' is 5000 and 'Posting' is 2014. The 'Tools' menu is open, and the 'Design Mode...' option is highlighted. The 'General' tab is selected, showing various fields for customization.

- 3 Set Customization Level to Role and then select QAD Polish Role as the role.
- 4 In the General tab, add the White List Validation field.

Fig. 26
General Tab

The screenshot shows the 'Supplier Create' window. At the top, there are menu items: Go To, Actions, Tools, Print, Preview, and Attach. Below the menu, there are input fields for 'Supplier' (10-200) and 'Business Relation' (10-C1001). To the right, there is an 'Active' checkbox which is checked, and a 'White List Validation' dropdown menu that is open, showing 'Yes', 'No', and 'Yes' options. Below these are several tabs: Business Relation, Accounting, Payment, Banking, Defaults, Tax Info, Comments, and Pending Tax. The main form area contains the following fields:

- Name: MediLogic
- Address: 827 Starview Way
- Postal/City: 08807
- Country Code: USA
- State: NJ
- Telephone: (empty)
- Fax: (empty)
- E-mail: (empty)
- Internet: (empty)

- 5 Save the customization for all activities.
- 6 Click the three dots in the Code column next to the `LeaveAndValueChanged` event. A new window opens.
- 7 In the Supplier Custom Code section of the `businessRelationCodeLabelText` method, paste the custom code from the `Supplier_LeaveAndValueChanged.cs` file, which is located in `Supplier_Customization.zip`.

Note Follow steps 6 and 7 for the `Leave` event as well. Supplier custom code is located in the `Supplier_Leave.cs` file in `Supplier_Customization.zip`.

To check if the customization for Supplier works correctly, create the following record in Generalized Codes Maintenance (36.4.2).

Fig. 27
Generalized Code Maintenance

The screenshot shows the 'Generalized Codes Maintenance' window. It has a title bar 'Generalized Codes Maintenance...' and a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. The main form area contains the following fields:

- Field Name: (input field)
- Value: (input field)
- Comments: (input field)
- Group: (input field)

Field Name. Specify **QAD_I19_PL_CTRY_CODE**.

Value. Specify **QAD_I19_PL_CTRY_CODE**.

Comments. Enter **Country Code**.

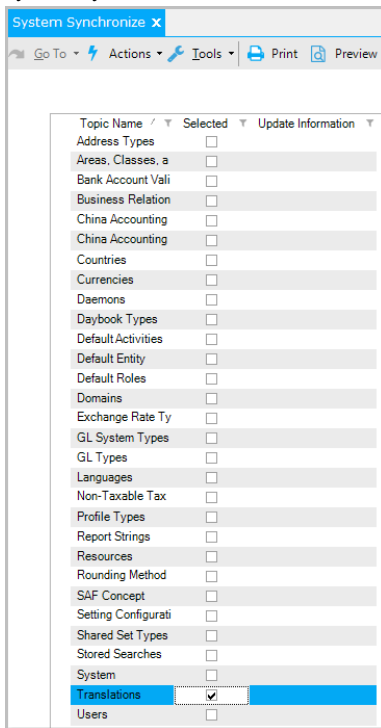
The default value for the Business Relation Code field is taken from Generalized Codes.

Financial Translations for Customizations

To update translation strings, complete the following steps:

- 1 Run System Synchronize by performing the following steps:
 - a In QAD EE, open System Synchronize (36.24.3.2).
 - b In the Translations row, select the check box.

Fig. 28
System Synchronize



- c Click Synchronize.
- 2 Trim the Financials application server.
 - 3 Verify the loaded translations by performing the following steps:
 - a Open Financial Translation View (36.24.11).
 - b Search by project—in this case, i19pl.

Fig. 29
Financial Translation View

Updated	Proj	Text Num	Current Text	Original Text
No us	i19pl	0000000004	Adjusting scheduled Poland White List report is recommended	Adjusting scheduled Poland White List report is recommended
No us	i19pl	0000000002	Bank account isn't on the Poland White List	Bank account isn't on the Poland White List
No pl	i19pl	0000000003	Biała Lista Podatników musi być uruchomiona ręcznie, żeby zweryfikować dostawcę i konto bankowe	Biała Lista Podatników musi być uruchomiona ręcznie, żeby zweryfikować dostawcę i konto bank...
No pl	i19pl	0000000002	Konto bankowe nie znajduje się na Białej Liście Podatników	Konto bankowe nie znajduje się na Białej Liście Podatników
No us	i19pl	0000000003	Poland White List must be run manually to validate supplier and bank account	Poland White List must be run manually to validate supplier and bank account
No pl	i19pl	0000000004	Rekomendowana korekta okresowej Białej Listy Podatników	Rekomendowana korekta okresowej Białej Listy Podatników
No pl	i19pl	0000000001	TEST Dostawca nie znajduje się na Białej Liście Podatników	TEST Dostawca nie znajduje się na Białej Liście Podatników
No us	i19pl	0000000001	TEST Supplier isn't on the Poland White List	TEST Supplier isn't on the Poland White List

Language Record for Customizations

You must create the following record in Generalized Codes Maintenance (36.4.2) to ensure that the customization for Supplier Invoice works correctly. You can use one of the following options to create generalized codes:

Fig. 30
Language Detail Maintenance

Generalized Codes Maintenance

Go To | Actions | Copy | Print | Preview

Generalized Codes

Field Name: QAD_I19_PL_CUST

Value: STHAMS

Comments:

Group: APP

Option 1

Field Name. Specify **QAD_I19_PL_CUST**.

Value. Specify **<Entity Code>**.

Comments. Enter to enable NI.

Option 2

Field Name. Specify **QAD_I19_PL_CUST**.

Value. Specify **<blank value>**.

Comments. Enter to enable NI.

Note Generalized codes are always stored per domain, so this setup allows you to control NI customizations per domain and entity combination or for the whole domain.

Registering Custom Programs

Custom Program for Structure 5 of the JPK Declaration

To produce variant 3 of Structure 5—FA—of the JPK Declaration, you may need to prepare and register a custom program. For more information, see the JPK Declaration section of the *QAD Internationalization Poland Extension User Guide*.

Custom Program for Structure 8 of the JPK Declaration

To prepare variant 1 of Structure 8—V7M—of the JPK Declaration, you must register the `ppptmtpl.p` custom program to access the Product Group Code field in Item Master Maintenance (1.4.1). A detailed explanation of this field is available in the JPK Declaration section of the *QAD Internationalization Poland Extension User Guide*.

To register the program:

- 1 Use Cust Program Entry Point Maint (36.4.28.1) to register the entry point for the custom program in the extended internationalization features package for Poland. Table 7 lists the entry point.

Table 7
Entry Point for Custom Program in the QAD Internationalization Poland Extension

Program	Sequence
sodcustf.p	10
sodidhcp.p	10
sbdcustf.p	10
sbcustim.p	10
sbdidhcp.p	10

- 2 Use Cust Program Detail Maint (36.4.28.3) to register the custom program for the extended internationalization features package for Poland. Register the program for the domain in which you use the Poland package, as in Table 8.

Table 8
Program and Field to Register for the QAD Internationalization Poland Extension

Program	Sequence	Program to Execute	Used in Function
ppptmta.p	10	ppptmtpl.p	JPK V7M
sodcustf.p	10	sodplpcm.p	JPK V7M
sodidhcp.p	10	sodplpcc.p	JPK V7M
sbdcustf.p	10	sbdplpcm.p	JPK V7M
sbcustim.p	10	sbdplpci.p	JPK V7M
sbdidhcp.p	10	sbdplpcc.p	JPK V7M

Fig. 31
Cust Program Detail Maint

Domain	Program	Seq	Program to Execute
50PL	pptmta.p	10	pptmtpl.pl

Loading Field Help

The extended internationalization features for Poland package includes a help file that you can load by performing the following steps:

- 1 Locate the `fieldhelp.fhd` files.
Note There are two files, one for US English and one for Polish.
- 2 Open Field Help Load (36.4.13.14).

Fig. 32
Field Help Load

Language:

Field: _____

To: _____

Procedure: _____

To: _____

Status: _____ To: _____

Text Type: _____ To: _____

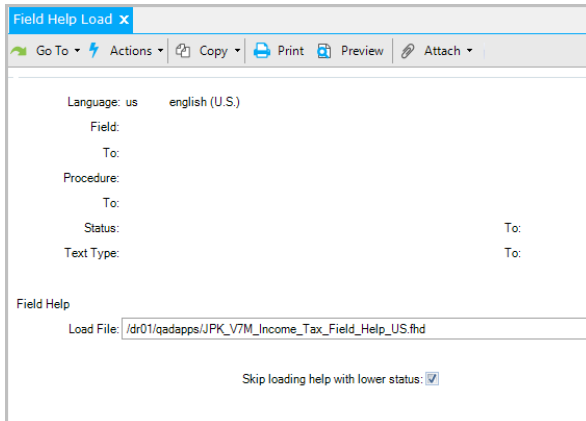
Field Help

Load File: _____

Skip loading help with lower status:

- 3 Click Next twice.
Note By default, the Language field contains the US value.
- 4 In the Load File field, specify the path to the US version of the file.
Note The file name is `JPK_V7M_Income_Tax_Field_Help_US.fhd` and it is located in the `docs` folder of the package. There is no lookup on this field so the path and filename must be exact.

Fig. 33
Field Help Load, Field Help Frame



5 Click Next again.

The help file is loaded, and a frame displays the number of records loaded.

Fig. 34
Field Help Load, Records Loaded

Loaded flhm_mst:	19	Loaded flhd_det:	30
Read flhm_mst:	19	Read flhd_det:	30
Expected flhm_mst:	19	Expected flhd_det:	30

- 6 Repeat the steps to load the Polish version of `fieldhlp.fhd`, setting the language to Polish and providing the path to the Polish version.

Note The file name is `JPK_V7M_Income_Tax_Field_Help_PL.fhd` and it is located in the `docs` folder of the package.

Installing into QAD Web UI

This chapter describes the procedure of installing the extended internationalization features for Poland into a QAD Web UI environment.

Overview 28

This section describes the QAD name changes.

Requirements 28

This section describes the requirements for the Poland extended internationalization features.

Procedure 28

This section describes the procedure for installing the Poland Internationalization Extension.

Overview

This chapter provides instructions for installing the extended internationalization features for Poland into a QAD Web UI environment. For information about QAD Enterprise Edition installation, see “Installing into QAD Enterprise Edition” on page 1.

Product Name Changes

Starting from September 2019, the new name for QAD’s complete portfolio of products is QAD Adaptive Applications, and QAD Adaptive ERP is the name for QAD’s flagship ERP solution. QAD Adaptive ERP includes the functionality previously associated with QAD Cloud ERP and QAD Enterprise Applications – Enterprise Edition (EE).

Requirements

The internationalization extension features for Poland require Adaptive UX March 2021 and Adaptive UX September 2021.1.

If you use QAD Adaptive ERP 2018, you must have Financials Patch 2 (QAD Financials FIN 2018 Patch 02) and YAB 1.6 or higher installed.

Requirements for the White List Web Service

The following software must be installed on the server as a prerequisite to using the Web service for White List validation:

- OpenSSL (the latest version or at least version 1.0.2h)
- cURL (version 7.20.0 at a minimum)

Procedure

Installing the Extension in a YAB Environment – Cloud Installation

For information about installing Poland Internationalization Extension into a cloud environment, contact QAD Cloud Operations.

Installing the Extension in a YAB Environment – On-Premise Installation

If you install the Poland Internationalization Extension in an on-premise environment of Adaptive UX March 2021 or Adaptive UX September 2021.1, you must use YAB.

YAB is a deployment and management toolset that covers all products installed into an environment. You can use it to start, stop, reconfigure, and maintain the consistency of your environments. Your environment is defined in terms of discrete units, or packages, which you can replace and add, as needed.

For more information about using YAB, see *QAD Configuration and Administration Guide YAB 1*.



To install this extension using YAB, perform the following steps:

- 1 Set the downtime for the environment.

Note Installation lasts from one to two hours, depending on the location of the server and on the number of packages to be downloaded.

- 2 Download the add-on file from the QAD Store or from QAD Release Fulfillment.
- 3 Move the file to a file system that is accessible from the UNIX host where your YAB environment is installed.
- 4 Change to the directory where YAB is installed.
`cd directory`

- 5 Install the extension by entering the following command:

```
yab install zip file
```

where *zip file* is the name of the file you received from QAD.

For example,

```
yab install i19pl-web-app-image-encrypted-X.X.X.X.zip
```

where X.X.X.X represents the number for that particular package.

The product installs.

Granting User Access

Granting User Access to Menus

A user's access to the QAD Internationalization Poland Extension functionality is determined by the roles assigned to the user. The role that provides access to the Poland reports is PLExt.

The PLExt role is automatically created during the installation procedure. Ensure that all users who need access to the Poland functionality are assigned the PLExt role in Role Membership Maintain (36.3.6.6), which you can access from the .NET application.

To input the required data for Poland Extension, you must have access to the following screens:

- Customers
- Customer Invoices
- Suppliers
- Supplier Invoices
- Open Item Adjustments

Granting User Access to User-Defined Fields

A user's access to the user-defined fields available for Poland in the Web UI is determined by the Design Layout.

Note For more information about using the Design Layout, see *QAD Platform Developer's Guide*, which is available as part of the QAD Adaptive ERP (Web UI) Release documents for September 2019.

A system-level Design Layout, QAD Poland Extension, is automatically installed as part of this extension.

This layout contains some of the fields listed in Table 5 on page 11 as available in the Web UI. These fields appear in Poland Extension panels in the screens that correspond to the components listed in Table 5 on page 11. For example, Figure 35, shows the user-defined fields for the Supplier Invoices screen.

Fig. 35
QAD Poland Extension Design Layout, Supplier Invoices Screen with Poland Extension Panel

The screenshot displays the 'Supplier Invoices' design layout in 'Design Layout' mode. The top navigation bar includes 'Supplier Invoices', 'Design Layout', and a 'More' dropdown menu. A yellow banner at the top reads: 'View or copy only; this data is managed by com.qad and cannot be updated.' Below this, the layout is organized into several sections:

- Currency Details:** Includes fields for 'BC Exchange Rate' (with a dropdown 'BC Exchange Rate. The'), 'SC Exchange Rate' (with a dropdown 'SC Exchange Rate. T...'), 'BC Invoice Amount' (with a dropdown 'Original LC Amount if'), and 'SC Invoice Amount' (with a dropdown 'Original CC Amount if').
- Adjustments:** Includes fields for 'Year' (with a dropdown 'GL Calendar Year. The'), 'Adjustment Daybook' (with a dropdown 'Adjustment. The Journ'), 'Daybook' (with a dropdown 'Daybook C'), and 'Voucher' (with a dropdown 'SA Voucher. Voucher aj').
- Poland Extension:** Includes fields for 'Corrected Invoice Number', 'Correction Reason', 'Corrected Invoice Period', 'New Tax Point Date' (with a date picker), 'Retained Tax Date' (with a date picker), and 'Invoice Receipt Date' (with a date picker).

A right-hand sidebar contains a list of actions: 'Set Layout Properties', 'View Field Properties', 'Add to Layout' (with a checkbox for 'Show Unused Only'), 'Form Elements', and 'Fields' (with sub-options for 'Default' and 'User Defined Fields').

You can access the fields in the QAD Poland Extension layout in a number of ways:

- Copy this layout and set it as the active layout on either a system-wide or domain basis. This approach is useful when you are currently using the default layout, rather than a customized layout that contains additional user-defined fields. For more information, see “Switching from the Default Layout to the QAD Poland Extension Layout” on page 30.
- Add the user-defined fields from the QAD Poland Extension layout to an existing active, customized layout that you are using on either a system-wide or domain basis.

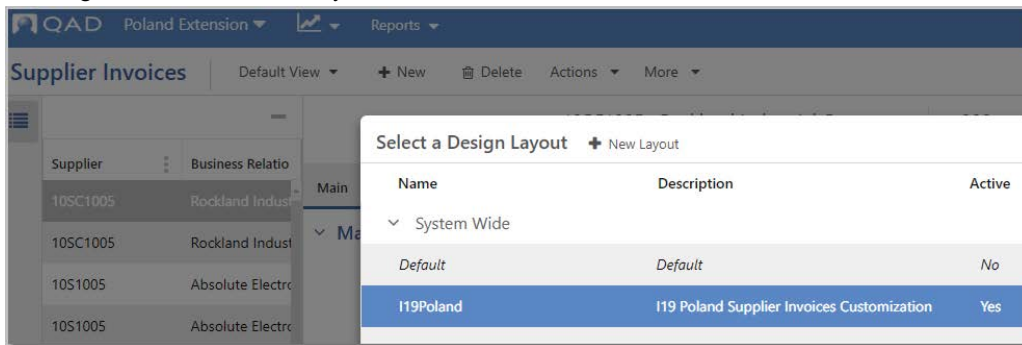
Switching from the Default Layout to the QAD Poland Extension Layout

If you are using the default system layout, you can copy the QAD Poland Extension layout and activate it to make the additional fields visible across all domains, or in a single domain.

Note While it is possible to make the read-only QAD Poland Extension layout active, the recommended approach is to copy and rename the layout, and then set this new layout as Active.

- 1 Access a screen that contains user-defined fields; for example, the Supplier Invoices screen.
- 2 Access Design Layout by clicking More and then clicking Design Layout.
- 3 Select the QAD Poland Extension layout, as shown in Figure 36.

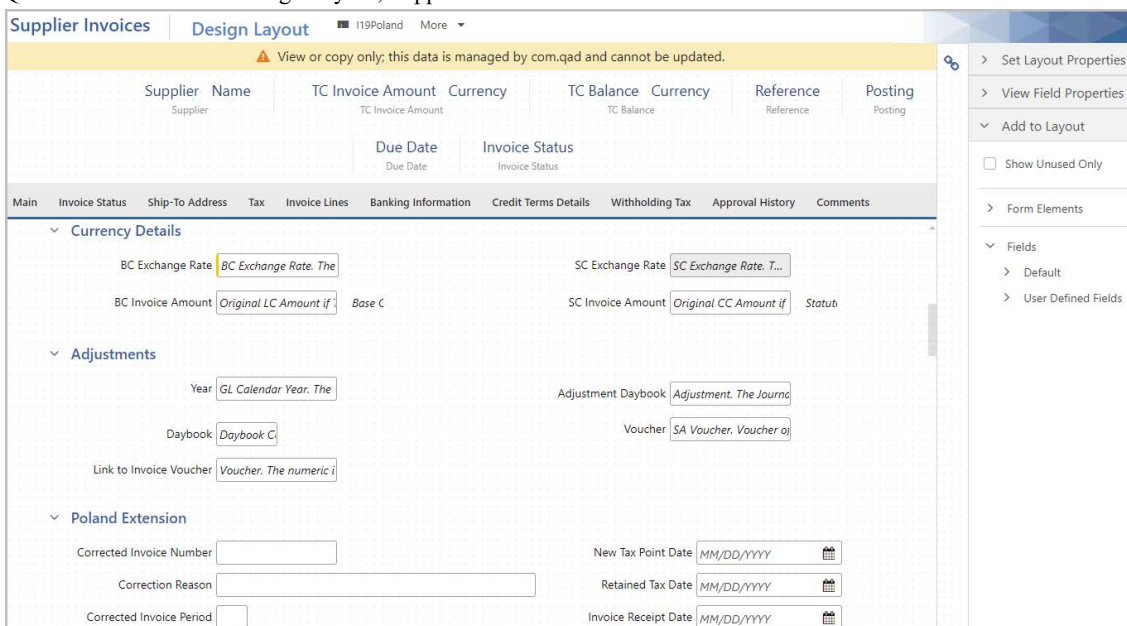
Fig. 36
Selecting the Poland Extension Layout



- Click Continue to open the Design Layout for the screen, as shown in Figure 37. This Design Layout is read only. Scroll or click on the panel title to view the Poland Extension panel.

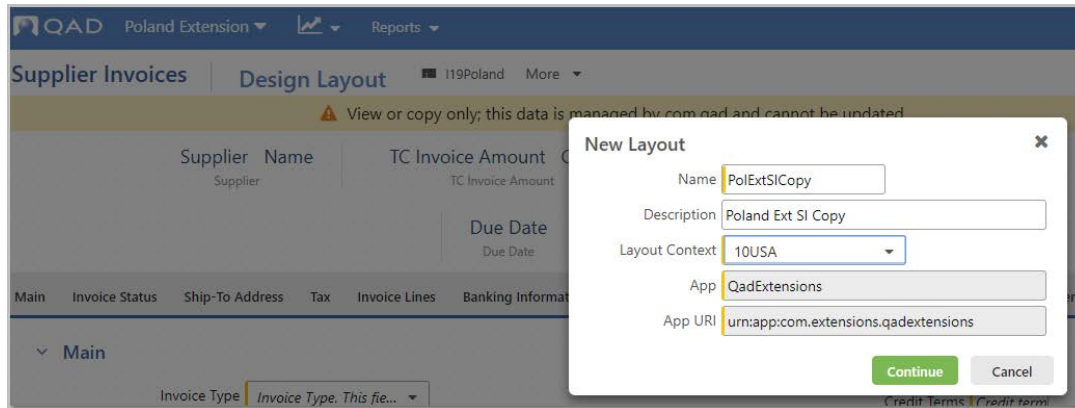
Note You can select the Poland Extension panel to see details of the user-defined fields to the right of the screen.

Fig. 37
QAD Poland Extension Design Layout, Supplier Invoices Screen with Poland Extension Panel



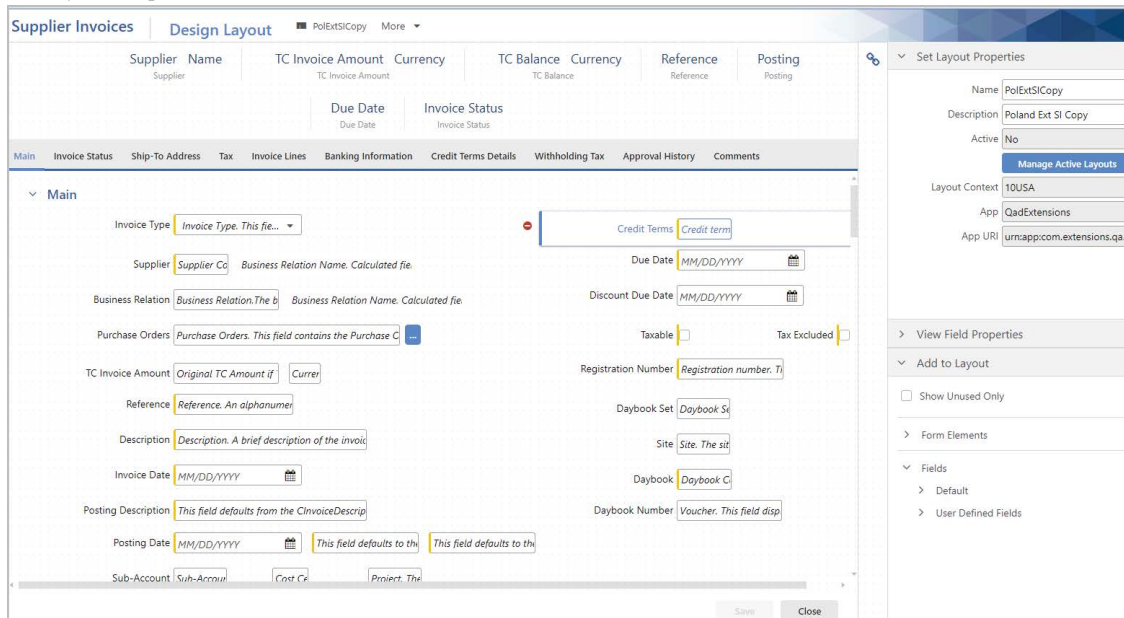
- Click Save As to copy the read-only QAD Poland Extension layout.
- In the New Layout pop-up window, perform the following steps:
 - Specify a new name and description to the layout.
 - Use the Layout Content field to make the layout available in all domains—system wide—or in a single domain, as shown in Figure 38.
 - Click Continue to save the new layout and to return to the Design Layout screen, which now shows the new layout name at the top of the screen.

Fig. 38
New Layout Pop-Up Window



- 7 Set the new layout to Active by clicking Manage Active Layouts in the Set Layout Properties section to the right of the layout, as shown in Figure 39.

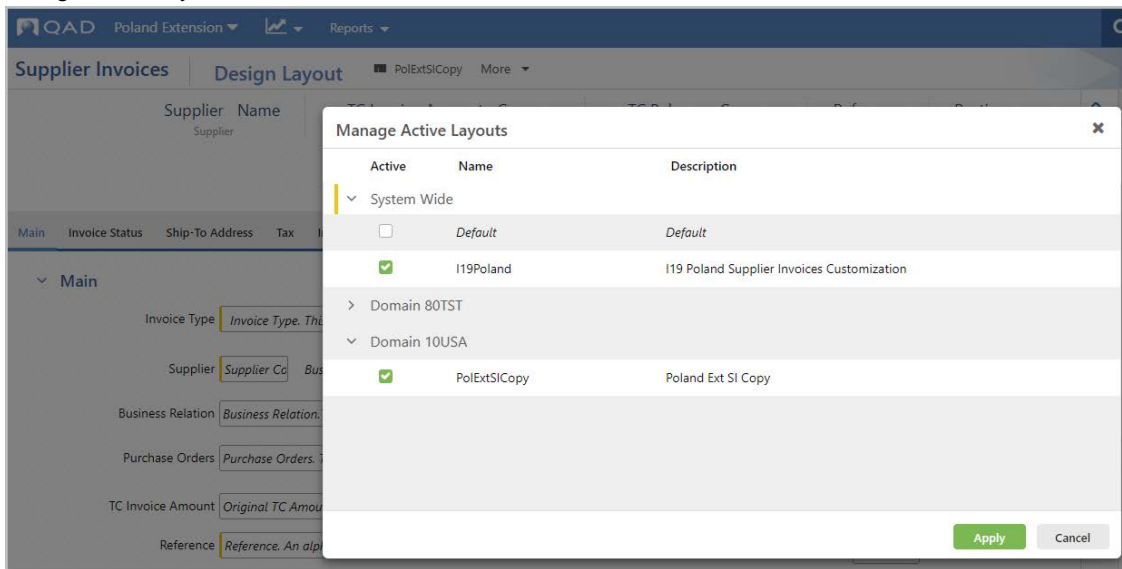
Fig. 39
Set Layout Properties



- 8 Ensure that you make your selected layout active by setting the Active field to Yes, as shown in Figure 40, and clicking Apply.

Important An active domain-level layout takes precedence over the system-level layout.

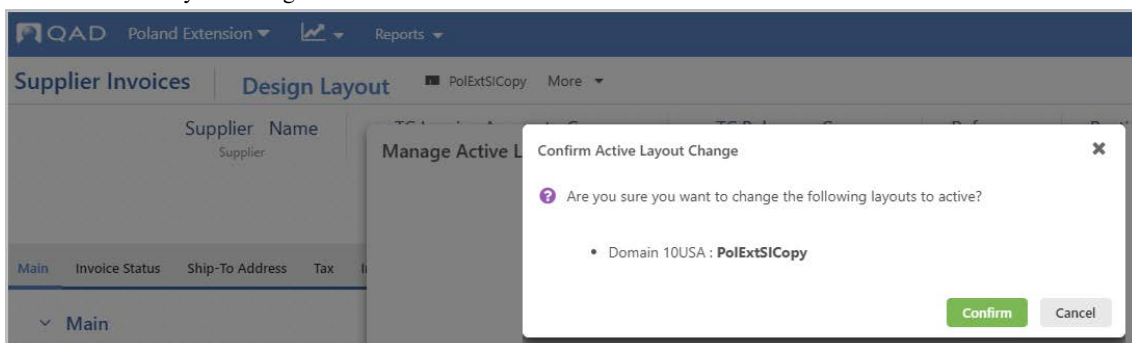
Fig. 40
Manage Active Layouts



- 9 In the Confirm Active Layout Change pop-up window, click Confirm if you want to make the change, as shown in Figure 41.

Note After each update to the layout, refresh the screen to see your changes.

Fig. 41
Confirm Active Layout Change



Adding the User-Defined Fields from the Extension Layout to an Existing Customized Layout

If you are already using a customized layout, you can create a new layout that includes the functionality in both your existing layout and the QAD Poland Extension layout. You can create this layout at the system level or at the domain level, using one of the existing layouts as a template.

It is not possible to merge two or more layouts automatically—you must create a new layout that contains the elements of the other layouts. To create a new layout on an existing layout, perform the following steps:

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- 1 Access the screen that contains the user-defined fields; for example, the Supplier Invoices screen.
- 2 Access Design Layout by clicking More and then clicking Design Layout.
- 3 Select New Layout.
- 4 Complete the name and description fields, as shown in Figure 42. In this example, the layout is at the domain level, and is based on an existing customized layout named Customized Layout A. Click Continue to create the layout.

Fig. 42

Creating a New Design Layout Based on an Existing Layout

The screenshot shows the 'Supplier Invoices' screen in the 'Design Layout' mode. A 'New Layout' dialog box is open, allowing the user to create a new layout based on an existing one. The dialog box contains the following fields:

- Name: Customized Layout B
- Description: Customized Layout B (incl Poland Ext)
- Layout Context: 10USA
- App: QadExtensions
- App URI: urn:app:com.extensions.qadextensions

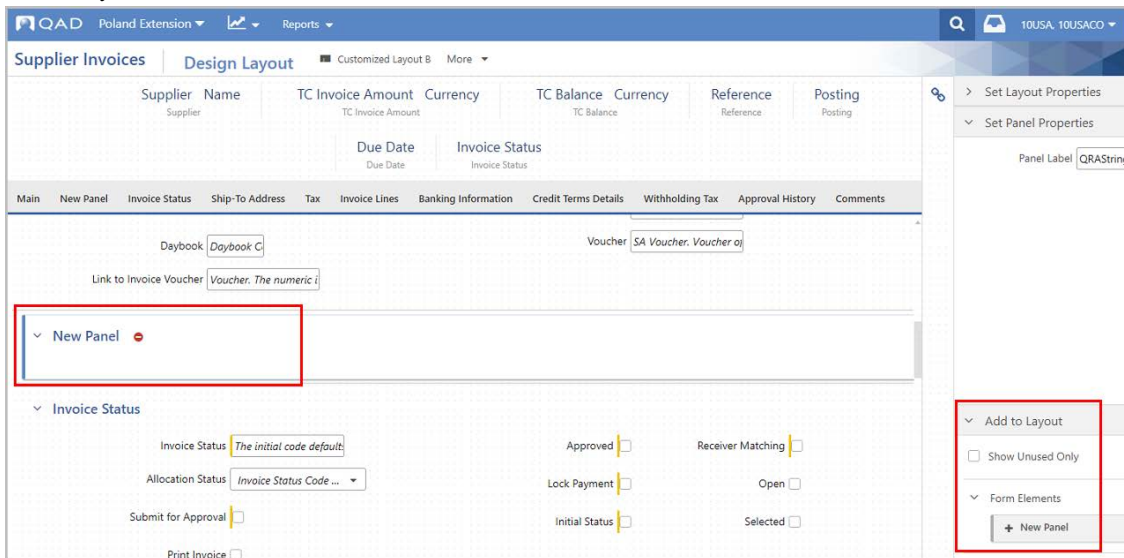
Below these fields is a 'Select Existing Template' section with a table of templates:

Name	Description
<input type="checkbox"/> Default	Default
<input type="checkbox"/> I19Poland	I19 Poland Supplier Invoices Customization
<input checked="" type="checkbox"/> Customized Layout A	Customized Layout A
<input type="checkbox"/> PolExtSICopy	Poland Ext SI Copy
<input type="checkbox"/> I19Poland	Poland Ext Supplier Invoices Customization Copy

At the bottom of the dialog box are 'Continue' and 'Cancel' buttons.

- 5 In the Customized Layout B screen, expand the Add to Layout section and drag the New Panel form element into the layout.

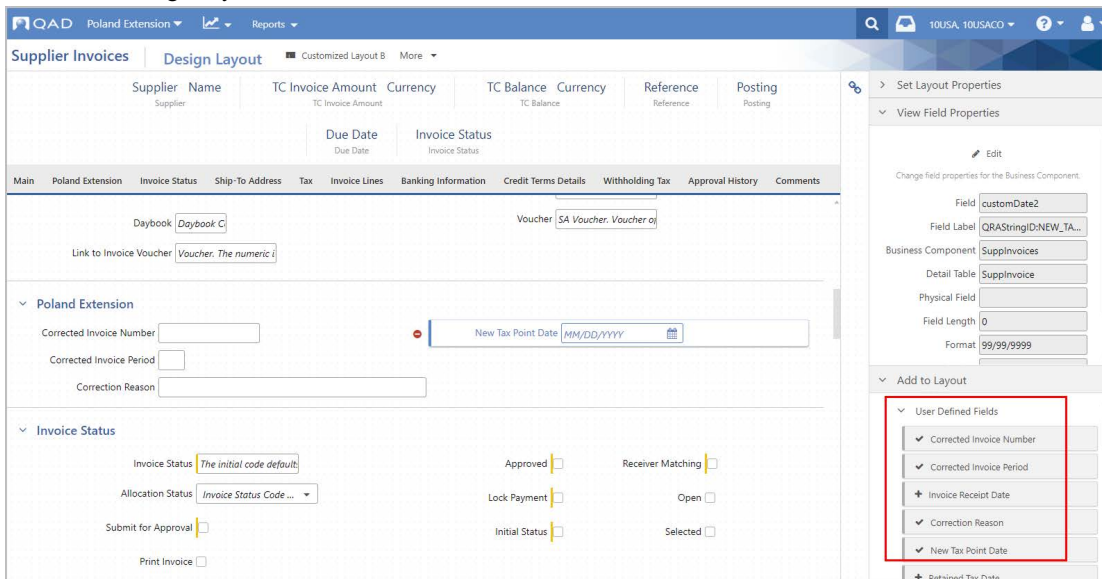
Fig. 43
Add to Layout and New Panel



6 Update the panel label to Poland Extension and drag the user-defined fields for Poland to the panel.

Note You can add the panel title as a hard-coded string, or click the lookup to select a translatable string.

Fig. 44
Customized Design Layout with Poland Extension Content



7 Click Save to save the layout updates.

