

# **QAD Customer Management Reports Bundle Release Notes**

**March 2015**

<i>Release Notes for Current Release</i>	<b>2</b>
<i>Release Notes for Release 1.6</i>	<b>3</b>
<i>Release Notes for Version 1.5</i>	<b>4</b>
<i>Release Notes for Version 1.4</i>	<b>6</b>
<i>Release Notes for Version 1.3</i>	<b>10</b>
<i>Release Notes for Version 1.2</i>	<b>12</b>
<i>Release Notes for Version 1.1</i>	<b>14</b>

# Release Notes for Current Release

**Customer Management Reports and Browsers Bundle Version:** 1.7

**Release Date:** March 2015

**QAD Enterprise Applications Compatibility:** QAD Enterprise Edition 2011 and later

**Related Documentation:** The *Reports and Browsers Bundles Installation Guide* is provided on the product delivery media. It is also available in the QAD Document Library, <http://www.qad.com/documentlibrary>.

## New and Changed Features

### New Role-based Centers

Now there are three new centers specifically for the roles of VP Sales, Sales Manager, and Customer Service Manager.

- VP Sales Center, which includes browse collections such as Items and Salespersons
- Sales Manager Center, which includes browse collections such as Customers and Salespersons
- Customer Service Manager Center, which includes browse collections such as Items and Customers

To support the browse collections in the new centers, 128 fields are added to 18 browses. For example,

- ABC Class field added to the Item Browse
- Freight Terms field added to the Customer Browse
- Invoice Number field added to the Sales Order Detail Browse

### CDR Support

Now Currency-Dependent Rounding (CDR) is available for QAD Reporting Framework (QRF) reports. CDR rounds monetary amounts in a manner consistent with a given currency. It affects both the value and presentation of monetary transaction amounts. In some countries, it is a legal requirement.

**Important** If you have this requirement, contact QAD Support.

# Release Notes for Release 1.6

**Customer Management Reports and Browses Bundle Version:** 1.6

**Release Date:** March 2014

**QAD Enterprise Applications Compatibility:** QAD Enterprise Edition 2011 and later

**Related Documentation:** The *Reports and Browses Bundles Installation Guide* is provided on the product delivery media. It is also available on the Documentation area of support.qad.com under the Installation-Conversion topic for your Enterprise Edition version.

## New and Changed Features

Call Print and Call Print with History now include status for call lines and optionally include status history for calls, similar to Call Detail Inquiry.

## Fixes

Issue Number	Fixes
CMRF-1014	A problem with the variance percent calculation in the Customer Ship Schedule Variance browse is fixed.
CMRF-1016	Some problems with the Reporting Framework version of Pending Invoice Register are fixed: <ul style="list-style-type: none"><li>• Previously, if the search started from a sales order, the report displayed only the pending invoice for that order. Now the report displays all pending invoices starting with the order number entered.</li><li>• Previously for a range of sales order numbers, the report displayed only the first pending invoice in the range. Now the report displays all pending invoices in the range.</li><li>• Previously the general ledger transaction summary did not include the receivable accounts. Thus the sum of the debit column did not equal the sum of the credit column. Now the debits equal the credits.</li><li>• Previously the report did not populate values in the pending invoice trailer frame and did not display the trailer charge labels. Now the problems are fixed.</li></ul>
CMRF-1017	Previously, the Sales Orders to Ship tab in the Sales Management Center did not have a Reports button or any child browses. Now the Sales Orders to Ship tab in the Sales Management Center has the same Sales Orders to Ship browse collection as in the Shipping Center and Customer Service Management Center.
CMRF-1020	Previously, the Reporting Framework version of Sales Quote Print did not display the Customer Item. Now the problem is fixed.

# Release Notes for Version 1.5

## Customer Management Reports and Browsers Bundle Version: 1.5

**Release Date:** September 2013

**QAD Enterprise Applications Compatibility:** QAD Enterprise Edition 2011 and later

**Related Documentation:** The *Reports and Browsers Bundles Installation Guide* is provided on the product delivery media. It is also available on the Documentation area of support.qad.com under the Installation-Conversion topic for your Enterprise Edition version.

This bundle includes usability improvements on existing reports and browsers; it also includes some new browsers and new centers.

**Note** Download this bundle from QAD Store and install it independently. But if you are installing Customer Management Dashboard 1.0, the system automatically gets this reports and browsers bundle for you, which means you do not have to install this bundle separately.

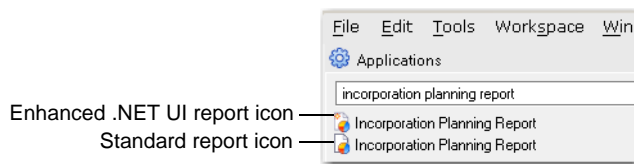
The legacy versions of all reports, browsers, and inquiries are still available, except the following inquiries:

- Call Detail Inquiry; now it is Call Print (11.1.1.3)
- Area Structure Inquiry; now it is Area Structure Report (11.1.3.3)
- Area Holiday Inquiry; now it is Area Holiday Report (11.11.7)
- Material Order ATP Inquiry; now it is Material Order ATP Report (11.15.6)
- Pending Call Inquiry; now it is Pending Call Browse (11.15.10)

You can access the new reports and browsers in several ways:

- By entering the report title in the menu search field. The search result lists two occurrences. The icon differentiates between the standard and enhanced .NET UI versions. Figure 1 shows an example.

**Fig. 1** Report Icons in .NET UI



- By entering the new menu number in the menu search field. QAD .NET UI-only reports are assigned to menu numbers 75 or greater, so they are hidden on the character UI menus.

**Note** You cannot access a new report by entering a Progress program name.

- By navigating in the menu tree to the functionality area.

**Note** This bundle is cumulative; it includes reports and browsers that were previously introduced. For lists of those reports and browsers, see previous release notes.

**Table 1** New Customer Management Browsers

Menu	Browse Title
11.1.1.27	Open Call Line Browse
11.1.1.28	Dispatch Call Browse
75.7.2.24	Customer Ship Schedule Variance Browse
75.7.2.26	Salesperson Quota Achievement Browse

<b>Menu</b>	<b>Browse Title</b>
75.7.2.28	Sales Quote Gross Margin Browse
75.7.2.29	Sales Order Gross Margin Browse

**Table 2** New Centers

- Tech Support Center, including:
- Service Call Activity
  - Installed Base and Service Items
  - Engineer Availability
  - In-House Repair Activity
- Service Dispatch Center, including:
- Dispatch Calls
  - Engineer Availability
  - Installed Base and Service Items

# Release Notes for Version 1.4

## Customer Management Reports and Browsers Bundle Version: 1.4

**Release Date:** March 2013

**QAD Enterprise Applications Compatibility:** QAD Enterprise Edition 2011 and later

**Related Documentation:** The *Reports and Browsers Bundles Installation Guide* is provided on the product delivery media. It is also available on the Documentation area of support.qad.com under the Installation-Conversion topic for your Enterprise Edition version.

**Note** The new reports are already included in QAD 2013 EE. So, if you use QAD 2013 EE, you do not have to install the reports separately.

This bundle includes a set of enhancements to reporting functions in the Customer Management area within Enterprise Edition. Many reports have been rewritten using QAD Reporting Framework to provide a significantly improved reporting capability to users of the QAD .NET UI. Additionally, the functions of some existing reports have been incorporated into browsers.

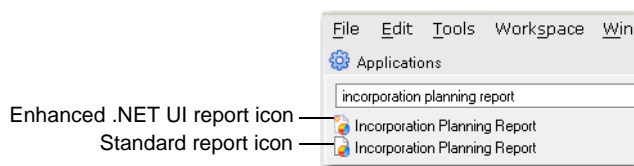
This is part of an ongoing QAD effort to upgrade reports, browsers, and inquiries throughout the system, building on the advanced filtering and report-generation tools available in .NET and QAD Reporting Framework, as well as powerful browse capabilities.

**Note** The legacy versions of all reports are still available in their original menu locations.

You can access the new reports in several ways:

- By entering the report title in the menu search field. The search result lists two occurrences. The icon differentiates between the standard and enhanced .NET UI versions. Figure 2 shows an example.

**Fig. 2** Report Icons in .NET UI



- By entering the new menu number in the menu search field. QAD .NET UI-only reports are assigned to menu numbers 75 or greater, so they are hidden on the character UI menus, as shown in Table 3.

**Note** You cannot access a new report by entering a Progress program name.

- By navigating in the menu tree to the functionality area. The new reports appear in the same part of the menu as their standard report equivalents.

**Note** This bundle is cumulative; it also includes reports in the Customer Management area that were previously introduced. For lists of those reports, see previous release notes.

**Table 3** New Customer Management Reports and Browsers

Legacy Menu	Report Title	Legacy Program	New Menu	New Report Title
7.7.7	Shipping Label Print	rcrp10.p	75.10.13.22	Same
7.9.4	Pre-Shipper/Shipper Print	rcrp13.p	75.10.13.5	Same
7.10.4	Legal Document Print	gpldprt.p	75.10.3.48	Same
7.13.12	Invoice Print or Reprint	soivrp10.p	75.10.6.7	Same
11.3.8	Service Item Inquiry	fsptsriq.p	75.10.23.12	Service Item Report
11.9.4	End User Inquiry	fseuiq.p	75.10.23.13	End User Report

Legacy Menu	Report Title	Legacy Program	New Menu	New Report Title
11.11.7	Material Order ATP Inquiry	fsatpiq.p	75.10.1.9	Material Order ATP Report
11.1.1.14	Call Activity Inquiry	fscariq.p	75.10.1.5	Call Activity Report
11.1.15.3	Service Request Report	fssrrp.p	75.10.1.6	Same
11.13.15.2	Engineer Master Schedule Inquiry	fseshiq.p	75.10.23.7	Engineer Master Schedule Report
11.13.15.5	Engineer Detail Schedule Inquiry	fsegdiq.p	75.10.23.8	Engineer Detail Schedule Report
11.13.15.9	Engineer Diary	fsegrp02.p	75.10.23.10	Same
11.13.15.10	Engineer Calendar	fsegrp01.p	75.10.23.9	Same
11.13.15.11	Engineer Availability Inquiry	fsegwiq.p	75.10.23.11	Engineer Availability Report
			75.10.1.1.3	Contract Billing History Report
			75.10.1.2.6	Contract Renewal History Report
			75.10.1.47	Contract Renewal Browse
			75.10.1.48	Contract Billing Browse
			75.10.1.49	Contract Additional Charges Browse
			75.11.2.17	Customer ISB Browse
			75.10.16.10	Warranty Call Browse
			75.10.16.11	Warranty Returns Browse
			75.10.16.12	Warranty Repair Line Browse
			75.10.16.13	Repair Work Order Browse

**Note** The following reports in the bundle only work with 2012 EE, 2012.1 EE, and 2013 EE.

- Retrobill Report
- Renewal Process/Report
- Pre-Shipper/Shipper Print
- Pre-Shipper/Shipper Confirm
- Invoice Post and Print

An *Enhanced .NET Report* field is available for the first three reports in 2013 EE and the last two reports in 2012 EE and 2012.1 EE, as well as 2013 EE. When you select the field, you get a Reporting Framework report view.

**Table 4** New Collections

**Service and Support Management (SSM) Role-Based Centers**

Contract Administrator Center, including:

- Contracts
- Billing
- Renewals

Warranty Administrator Center, including:

- Repairs and Returns
- Calls and Installed Base
- Customer Activity

**Customer Management Role-Based Center**

Customer Service Management Center, including:

- Customers
- Customer Activity Dashboard
- Items
- Sales Quotes
- Sales Orders
- Sales Orders to Ship
- Sales Order Credit Browse
- Sales

## **Collections under SSM Utilities**

Custom Program Utilities, including:

- Custom Program Insertion Maintenance
- SSM Cust Prog Insert Browse
- SSM Cust Prog Entry Point Valid
- SSM Cust Prog Entry Point Browse

RMA/RTS Utilities, including:

- Del MRP Records for RMA Receipts
- Backout Incorrect Allocations
- Update Ship Type for RTS
- RMA Service Coverage Utility
- RMA Parts Return Flag Repair

ISB Utilities, including:

- Install Config Table Rebuild
- Installed Base Rebuild

Conversion Related Utilities, including:

- Area Code Conversion
- Load User Preferences
- Response Time UM Conversion
- Upd Blank Warr/Service Type
- FSM Type Conversion (Multiling)
- Create Intrastat Rec's for SEO

Call Utilities, including:

- Expense Cost Discrepancy Report
- Pending Call Setup Utility
- J1B6 Utility
- Create Call History Records
- Escalation Master Update
- Update Trans Hist for Calls
- Set Call Item Detail End User
- Rebuild Engineer Schedules

Time Zone Utilities, including:

- End User Time Zone Change Utility
- Multiple Time Zones Startup Utility
- Initialize User TZ from Engineer

Orphaned Records, including:

- Del Orphaned S/S Work Order Recs
- Delete Stranded Inv Hist Records
- Del Orphaned Call Lines
- Del Stranded Detail Allocations

Contract Utilities, including:

- Contract Serialize Detail Repair
- Initialize List Prices

Note: Some of these SSM utilities are collected in the SSM Utility Center.

## **Collections under SSM Administration Center**

Call/Quote Admin, including:

- Closed Call Move to History
- Call/Quote History Delete/Archive
- Expired Quote Move to History
- Pending Call Delete/Archive
- Pending Call Profile Report

Contract Admin, including:

- Contract Delete/Archive
- Contract Next Bill Adjustment
- Recalculate Contract Taxes
- Change Deferred/Accrued Accounts
- Update Contract Revenue Account
- Revenue Delete/Archive
- Service Ctrct Next Bill Adjustmt

SSM Metrics Admin, including:

- Average Visit Closed Browse (metric)
- Engineer Utilization Browse (metric)
- All Call Browse (metric)
- RTS Performance (metric)

Misc Delete/Archive , including:

- Service Request Delete/Archive
- Field Notification Del/Archive
- ISB History Delete/Archive
- S/RO Delete Archive

# Release Notes for Version 1.3

## Customer Management Reports and Browsers Bundle Version: 1.3

**Release Date:** September 2012

**QAD Enterprise Applications Compatibility:** QAD Enterprise Edition 2011, 2011.1, 2012, 2012.1

**Related Documentation:** The *Reports and Browsers Bundles Installation Guide* is provided on the product delivery media. It is also available on the Documentation area of support.qad.com under the Installation-Conversion topic for your Enterprise Edition version.

This bundle includes a set of enhancements to reporting functions in the Customer Management area within Enterprise Edition. Many reports have been rewritten using QAD Reporting Framework to provide a significantly improved reporting capability to users of the QAD .NET UI. Additionally, the functions of some existing reports have been incorporated into browsers.

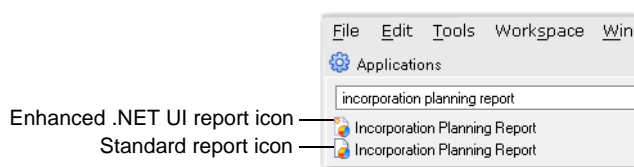
This is part of an ongoing QAD effort to upgrade reports, browsers, and inquiries throughout the system, building on the advanced filtering and report-generation tools available in .NET and QAD Reporting Framework, as well as powerful browse capabilities.

**Note** The legacy versions of all reports are still available in their original menu locations.

You can access the new reports in several ways:

- By entering the report title in the menu search field. The search result lists two occurrences. The icon differentiates between the standard and enhanced .NET UI versions. Figure 3 shows an example.

**Fig. 3** Report Icons in .NET UI



- By entering the new menu number in the menu search field. QAD .NET UI-only reports are assigned to menu numbers 75 or greater, so they are hidden on the character UI menus, as shown in Table 3.

**Note** You cannot access a new report by entering a Progress program name.

- By navigating in the menu tree to the functionality area. The new reports appear in the same part of the menu as their standard report equivalents.

**Note** This bundle is cumulative; it also includes reports in the Customer Management area that were previously introduced. For lists of those reports, see previous release notes.

**Table 5** New Customer Management Reports and Browsers

Legacy Menu	Report Title	Legacy Program	New Menu	New Report Title
2.1.5	Customer Labels Print	adcsrp02.p	75.10.3.43	Same
7.9.14	Sales Order Shipping Label Print	sosorp14.p	75.10.13.20	Same
7.10.9	Stock Card by Location	soldstcl.p	75.10.3.47	Stock Card by Location Report
7.10.10	Stock Card with Cost	soldstcc.p	75.10.3.45	Stock Card with Cost Report
7.10.11	Stock Card	soldstcd.p	75.10.3.46	Stock Card Report
7.13.3	Preview Invoice Print	sosorp20.p	75.10.6.5	Same
7.23.2	S/RO Print	srsorp.p	75.10.25.1	Same
7.13.13.3	Retrobill Report	rcrbp01.p	75.10.3.44	Same

Legacy Menu	Report Title	Legacy Program	New Menu	New Report Title
7.13.20.1.5	Golden Tax Invoice Report	greport.p	75.10.6.6	Same
11.15.6	Area Structure Inquiry	fssvariq.p	75.10.24.1	Area Structure Report
11.15.10	Area Holiday Inquiry	fsfshaiq.p	75.10.24.2	Area Holiday Report
11.1.3.3	Pending Call Inquiry	fspciq1.p	75.11.2.16	Pending Call Browse
11.5.13.10	Renewal Process/Report	fssaexp.p	75.10.8.16	Same
11.7.1.17	RMA Shipment History	fsrmaq04.p	75.10.17.8	RMA Shipment History Report
			75.10.1.4	Contract Line Browse
			11.1.1.18	Call Labor Browse
			11.1.1.25	Call Parts Browse
			11.1.1.26	Call Expense Browse
			75.7.2.16	Contacts Browse
			75.13.1.1	Price List Detail Browse
			75.14.1.1	Year Browse

**Note** Two reports in the bundle—Retrobill Report and Renewal Process/Report—only work with 2012 EE and 2012.1 EE.

**Table 6** New Centers and Utilities

- Pricing Center, including:
- Analysis Codes
  - Sales Quote/Order Pricing
  - Volume Discounts
  - Customer Schedule Pricing
- Sales Representative Center, including:
- Customers
  - Items
  - Sales Orders
  - Quotes
  - Scheduled Orders
- Sales Management Center, including:
- Salespersons
  - Sales
  - Item Replacement/Up/Cross-sell

# Release Notes for Version 1.2

## Customer Management Reports and Browsers Bundle Version: 1.2

**Release Date:** March 2012

**QAD Enterprise Applications Compatibility:** QAD Enterprise Edition 2011, 2011.1, 2012

**Note** The reports are provided as part of standard installation for QAD 2012 Enterprise Edition.

**QAD .NET UI Versions:** 2.9.3

**Related Documentation:** The *Reports and Browsers Bundles Installation Guide* is provided on the product delivery media for the optional add-on release available for 2011 and 2011.1 EE. That guide is also available on the Documentation area of support.qad.com under the Installation-Conversion topic for your Enterprise Edition version.

This bundle includes a set of enhancements to reporting functions in the Customer Management area within Enterprise Edition. Many reports have been rewritten using QAD Reporting Framework to provide a significantly improved reporting capability to users of the QAD .NET UI. Additionally, the functions of some existing reports have been incorporated into browsers.

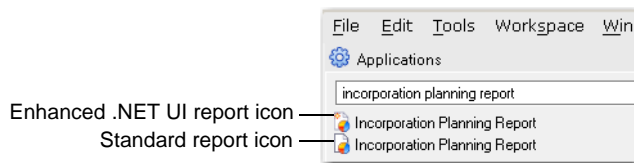
This is part of an ongoing QAD effort to upgrade reports, browsers, and inquiries throughout the system, building on the advanced filtering and report-generation tools available in .NET and QAD Reporting Framework, as well as powerful browse capabilities.

**Note** The legacy versions of all reports are still available in their original menu locations.

You can access the new reports in several ways:

- By entering the report title in the menu search field. The search result lists two occurrences. The icon differentiates between the standard and enhanced .NET UI versions. Figure 4 shows an example.

**Fig. 4** Report Icons in .NET UI



- By entering the new menu number in the menu search field. QAD .NET UI-only reports are assigned to menu numbers 75 or greater, so they are hidden on the character UI menus, as shown in Table 7.

**Note** You cannot access a new report by entering a Progress program name.

- By navigating in the menu tree to the functionality area. The new reports appear in the same part of the menu as their standard report equivalents.

**Note** This bundle is cumulative; it also includes reports in the Customer Management area that were previously introduced. For lists of those reports, see “Release Notes for Version 1.1” on page 14.

**Table 7** New Customer Management Reports and Browsers

Legacy Menu	Report Title	Legacy Program	New Menu	New Report Title
11.1.1.4	Call Print	fscarp.p	75.10.16.5	Same
11.1.1.5	Call Print with History	fscarp02.p	75.10.16.4	Same
11.1.1.10	Call Quote Print	fsqr.p	75.10.16.6	Same
11.19.3	Service BOM Code Report	fsbomr.p	75.10.20.3	Same
11.19.23	Service Std Operation Report	fsopmr.p	75.10.20.2	Same

<b>Legacy Menu</b>	<b>Report Title</b>	<b>Legacy Program</b>	<b>New Menu</b>	<b>New Report Title</b>
11.5.1.3	Contract Quote Print	fsqorp.p	75.10.16.8	Same
11.5.13.4	Contract Print	fssarp.p	75.10.16.9	Same
11.7.1.3	RMA Print	fsrmp08.p	75.10.17.7	Same
11.3.19	Classification Inquiry	fsclsfiq.p	75.10.16.7	Classification Report
7.9.11.15	Shipper Validation Err Report	sosverp.p	75.10.8.14	Shipper Validation Err By Profile Report
			75.10.8.15	Shipper Validation Err By Shipper Report
7.9.17.15	Shipment Performance Report	soshprp.p	75.10.8.12	DO Shipment Performance Report
			75.10.8.13	SO Shipment Performance Report
7.9.17.17	Reason Code Analysis Report	soshprp1.p	75.10.8.10	DO Reason Code Analysis Report
			75.10.8.11	SO Reason Code Analysis Report
7.9.17.18	Item Analysis Report	soshprp2.p	75.10.8.8	DO Item Analysis Report
			75.10.8.9	SO Item Analysis Report
7.9.17.19	Customer Analysis Report	soshprp3.p	75.10.8.7	DO Customer Analysis Report
			75.10.8.6	SO Customer Analysis Report
29.22.19	Intrastat Declaration Print	iehrp.p	75.10.10.3	Same
29.22.20	Intrastat Declaration Reprint	iehrp.p	75.10.10.4	Same
11.19.14	Service Work Center Inquiry	fswciq.p	75.11.2.1	Service Work Center Browse
11.21.2	Work Code Inquiry	fsfwkiq.p	75.11.2.2	Work Code Browse
11.21.6	Invoice Sort Inquiry	fsfisiq.p	75.11.2.3	Invoice Sort Browse
11.21.10	Service Category Inquiry	fsfsciq.p	75.11.2.4	Service Category Browse
11.21.18	Return Status Inquiry	fsfpstiq.p	75.11.2.5	Return Status Report
11.21.21.2	Charge Code Inquiry	fsfegiq.p	75.11.2.6	Charge Code Browse
11.21.21.6	Charge Product Line Inquiry	fsfcciq.p	75.11.2.7	Charge Product Line Browse
11.21.22.2	Multiple Time Zones Inquiry	fstzoiq.p	75.11.2.8	Multiple Time Zones Browse
11.19.18	Service Routing Inquiry	fsroiq.p	75.11.2.9	Service Routing Browse
11.25.10	Expense Cost Discrepancy Report	utglcexp.p	75.11.2.10	Expense Cost Discrepancy Browse

# Release Notes for Version 1.1

**Customer Management Reports Bundle Version:** 1.1

**Release Date:** September 2011

**QAD Enterprise Applications Compatibility:** QAD Enterprise Edition 2011 and 2011.1

**QAD .NET UI Versions:** 2.9.3

**Delivery Method:** This bundle ships in a stand-alone installation CD.

This optional add-on package includes a set of enhancements to reporting functions (including inquiries and browses) in the Customer Management area within Enterprise Edition. Many reports have been rewritten using QAD Reporting Framework to provide a significantly improved reporting capability to users of the QAD .NET UI. Additionally, some existing inquiries were converted to browses or viewers, and/or added to collections.

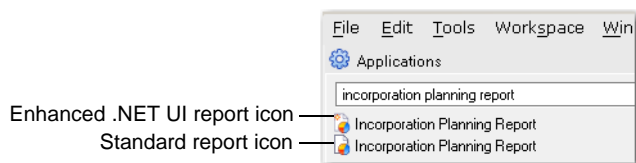
This is part of an ongoing QAD effort to upgrade reports, browses, and inquiries throughout the system, building on the advanced filtering and report-generation tools available in .NET and QAD Reporting Framework, as well as powerful browse capabilities.

**Note** The legacy versions of all reports are still available in their original menu locations.

You can access the new reports in several ways:

- By entering the report title in the menu search field. The search result lists two occurrences. The icon differentiates between the standard and enhanced .NET UI versions. Figure 5 shows an example.

**Fig. 5** Report Icons in .NET UI



- By entering the new menu number in the menu search field. QAD .NET UI-only reports are assigned to menu numbers 25 or greater, so they are hidden on the character UI menus, as shown in Table 1.

**Note** You cannot access a new report by entering a Progress program name.

- By navigating in the menu tree to the functionality area. The new reports appear in the same part of the menu as their standard report equivalents.

**Table 1**  
New Customer Management Reports and Browses

Standard Menu Number	Standard Menu Title	Standard Program	New Menu Number	New Menu Title
1.10.1.5	Price Lists by Customer Inq	pppiiq02.p	75.10.9.7	Price Lists by Customer Report
1.10.1.6	Price Lists by Item Inquiry	pppiiq03.p	75.10.9.8	Price Lists by Item Report
1.10.1.17	Sales Order Price Inquiry	soppiq.p	75.10.3.38	Sales Order Price Report
1.10.1.15	Cust Orders by Price List Inq	pppiiq04.p	75.7.2.25	Sales Order Price List Browse
1.10.1.15	Cust Orders by Price List Inq	pppiiq04.p	75.3.16	Invoice Price List Browse
1.10.1.18	Sales Quote Price Inquiry	sqppiq.p	75.10.19.5	Sales Quote Price Report
1.2.19	Sales Account Report	ppplsrp.p	75.10.3.24	
1.8.8	Analysis Code Link Inquiry	ppaciq02.p	75.10.2.6	Analysis Code Link Report
1.8.9	Analysis Code Where-Linked Inq	ppaciq07.p	75.10.2.7	Analysis Code Where-Linked Report

<b>Standard Menu Number</b>	<b>Standard Menu Title</b>	<b>Standard Program</b>	<b>New Menu Number</b>	<b>New Menu Title</b>
2.1.4	Customer Data Report	adcsrp01.p	75.10.3.32	
2.1.9.6	Detail Alloc Inventory Report	iclrp.p	75.10.3.25	
2.15.2	Logistics Charge Code Inquiry	lalciq.p	75.10.14.4	Logistics Charge Code Report
28.17.17	Logistics Charge Variance Report	laaprp01.p	75.10.14.2	
29.22.12	Order Intrastat Data Report	ieordrp.p	75.10.3.34	
7.1.19.3	ATP Enforcement Exception Report	soatrp.p	75.10.3.33	
7.10.2	Legal Document Report	soldrpt.p	75.10.3.42	
7.13.2	Pending Invoice Register	soivrp.p	75.10.6.4	
7.13.9	Invoice Bill of Material Inquiry	soivbiq.p	75.10.3.40	Invoice Bill of Material Report
7.13.10	Sales Order Tracking Inquiry	soiviq01.p	75.10.3.39	Sales Order Tracking Report
7.13.13.2	Retrobill Inquiry	rcrbiq.p	75.10.3.41	Retrobill Data Report
7.13.13.4	Retrobill History Report	rcrbp02.p	75.10.3.36	
7.17.2	Salesperson Quota Inquiry	sasphiq.p	75.10.18.6	Salesperson Quota Report
7.17.3	Salesperson Margin Inquiry	sasphiq1.p	75.10.18.7	Salesperson Margin Report
7.18.4.7	Aging Inventory Report by Order	socnairp.p	75.10.3.30	
7.18.4.8	Aging Inventory Report by Part	socnair1.p	75.10.3.29	Aging Inventory Report by Item
7.18.4.13	Inventory Usage Report	socnrp04.p	75.10.3.27	Consignment Inventory Usage Report
7.18.4.16	Usage Report by Order	socnrp02.p	75.10.3.28	Consignment Usage Report by Order
7.22.11	Container Inquiry	ccpiq.p	75.10.5.1	Container Item Report
7.3.8	Dock Report	addkrp.p	75.10.3.26	
7.5.11	Schedule Comparative	rcrp02.p	75.10.3.37	
7.5.12	Schedule Authorization Report	rcrp03.p	75.10.3.35	
7.5.4.10	Sequence Pre-Shipper Automatic	sosqsl.p	75.10.13.18	
7.5.4.14	Sequence Cross-Ref Report	rcsqsrp.p	75.10.3.31	
7.5.4.17	Plan/Ship Sequence Variance Rpt	rcsqrp02.p	75.10.23.6	Plan/Ship Sequence Variance Report
7.7.2	Container Inquiry	rciq03d.p	75.10.13.19	Container Report
7.9.1	Picklist/Pre-Shipper Automatic	sososl.p	75.10.13.17	
7.9.19	Fill Rate Report	soshprp4.p	75.10.3.23	
8.2	Configured Structure Inquiry	fopsiq02.p	75.10.2.2	Configured Structure Report
1.10.1.5	Price Lists by Customer Inq	pppiiq02.p	75.7.2.14	Price List Browse
1.8.2	Analysis Code Inquiry	ppaciq01.p	75.3.7	Analysis Code Browse
1.8.5	Analysis Code Selection Inquiry	ppaciq03.p	75.3.8	Analysis Code Selection Browse
1.8.14	Analysis Code Detail Inquiry	ppaciq04.p	75.3.9	Analysis Code Detail Browse
1.8.15	Analysis Code Where-Used Inquiry	ppaciq05.p	75.3.10	Analysis Code Where-Used Browse
29.22.7	Item Intrastat Data Inquiry	ieptiq.p	75.3.11	Item Intrastat Data Browse
7.18.16	Usage Inquiry	socnuiq.p	75.3.12	Consignment Inventory Usage Browse
7.22.2	Charge Type Inquiry	cctiq.p	75.3.13	Charge Type Browse
7.3.25.2	Sales Order Batch Shipment Inq	soisbtiq.p	75.3.14	Sales Order Batch Shipment Browse
7.5.4.2	Customer Controls Inquiry	adcciq.p	75.3.15	Customer Controls Browse
7.7.3	Container by Item Inquiry	rcctiq.p	75.3.6	Container by Item Browse

## Earlier Reports

The bundle also includes a group of reports that were delivered as part of QAD 2010.1 EE. These are listed in Table 8.

**Table 8** Customer Management Reports Added in QAD 2010.1 EE

Legacy Menu	Report Title	Legacy Program	New Menu	New Report Title
1.8.17	Analysis Code Report	ppacrp01.p	75.10.2.1	Same
1.10.1.3	Price List Report	pppirp01.p	75.10.9.2	Same
1.10.3.3	Cust Schedule Price List Report	ppcsperp.p	75.10.9.6	Same
1.10.3.4	Cust Schedule Price List By Item	ppcsper2.p	75.10.9.1	Same
1.23.3	Item Replacement Report	ppptrerp.p	75.10.2.4	Same
1.23.8	Item Up/Cross Sell Report	ppptuprp.p	75.10.2.3	Same
2.5.4	Salesperson Master Report	adsprp.p	75.10.18.3	Same
2.5.13	Salesperson Commission Report	adsprp01.p	75.10.18.2	Same
2.5.14	Salesperson Bookings Report	adsprp02.p	75.10.18.1	Same
2.5.15	Salesperson Shipments Report	adsprp09.p	75.10.18.4	Same
2.5.16	Salesperson Payments Report	adsprp03.p	75.10.18.5	Same
2.18.5	Shipping Group Report	sosgrp.p	75.10.13.7	Same
2.20.12	Freight Charges Report	sofrcrp.p	75.10.12.1	Same
7.1.3	Sales Order Print	sosorp05.p	75.10.3.16	Same
7.1.8	Available Kit Quantity to Ship	sosoktrp.p	75.10.3.19	Available Kit Quantity to Ship Report
7.1.15	Sales Order Credit Report	socrrp.p	75.10.3.7	Same
7.3.15	Customer Scheduled Order Report	rcsorp.p	75.10.23.1	Same
7.5.10	Schedule Report	rcrp01.p	75.10.23.2	Same
7.5.13	Req Ship Schedule Summary Report	rcrp07.p	75.10.13.14	Same
7.5.14	Req Ship Schedule Detail Report	rcrp09.p	75.10.13.13	Same
7.5.20	Shipment History Report	rcrp08.p	75.10.23.4	Same
7.5.21	Ship Schedule Variance Report	rcrp15.p	75.10.13.8	Same
7.5.22	Ship to Plan Variance Report	rcrp16.p	75.10.13.9	Same
7.5.4.7	Sequence Schedule Report	rcrp05.p	75.10.13.11	Same
7.5.4.16	Sequence Schedule Variance Rpt	rcsqrp01.p	75.10.23.5	Same
7.9.6	Pre-Shipper/Shipper Report	rcshrp01.p	75.10.13.5	Same
7.9.9	Sales Order Shipper Print	rcrp11.p	75.10.13.15	Same
7.9.13	Sales Order Packing List	sosopk.p	75.10.13.16	Same
7.9.16	Shipper Report	sososhrp.p	75.10.13.6	Same
7.9.18	Backlog/Missed Shipment Report	soshprp5.p	75.10.13.4	Same
7.9.11.13	Hierarchy Report	sohierrp.p	75.10.13.1.1	Same
7.9.11.14	Rules Report	sorulerp.p	75.10.13.1.2	Same
7.9.12.1	Bill of Lading Print	rcrp12.p	75.10.13.3.1	Same
7.9.12.4	Master Bill of Lading Print	rcmbrp.p	75.10.13.3.2	Same
7.9.17.10	Missing Reason Code Report	soshprp6.p	75.10.13.2.1	Same
7.9.17.17	Reason Code Analysis Report	soshprp1.p	75.10.13.2.2	Same
7.12.3	Sales Quote Print	sqqorp05.p	75.10.19.3	Same

Table 8 — Customer Management Reports Added in QAD 2010.1 EE (1 of 4)

<b>Legacy Menu</b>	<b>Report Title</b>	<b>Legacy Program</b>	<b>New Menu</b>	<b>New Report Title</b>
7.12.13	Sales Quote by Quote Report	sqqorp.p	75.10.3.12	Sales Quote Report
7.12.14	Sales Quote by Customer Report	sqqorp01.p	75.10.3.12	Sales Quote Report
7.12.15	Sales Quote by Item Report	sqqorp02.p	75.10.19.4	Same
7.12.16	Sales Quote Gross Margin Report	sqqorp08.p	75.10.19.1	Same
7.13.6	Correction Invoice Link Report	socilkrp.p	75.10.6.1	Same
7.13.8	Invoice History Report	soivrp09.p	75.10.6.3	Same
7.13.15	Invoice Price History Report	sopirp02.p	75.10.6.2	Same
7.15.1	Sales Orders by Order Report	sosorp.p	75.10.3.11	Sales Order Report
7.15.2	Sales Orders by Customer Report	sosorp01.p	75.10.3.11	Sales Order Report
7.15.3	Sales Orders by Item Report	sosorp02.p	75.10.3.18	Same
7.15.5	Sales Order Gross Margin Report	sosorp08.p	75.10.3.8	Same
7.15.7	Sales Order Pricing Report	sopirp01.p	75.10.3.9	Same
7.15.9	Unconfirmed Sales Order Report	sosorp16.p	75.10.3.10	Same
7.15.11	EMT Tracking Report	sobtrp.p	75.10.3.17	Same
7.15.12	Orders to Ship Report	sotsrp.p	75.10.3.13	Same
7.15.14	Booking Transaction Report	sosorp03.p	75.10.3.2	Same
7.15.15	Booking Trans Summary by Item	sosorp15.p	75.10.3.3	Same
7.15.16	Sales Order Picked not Shipped	sopinirp.p	75.10.3.20	Sales Order Picked not Shipped Report
7.15.18	Shipment Transaction Report	sosorp04.p	75.10.3.21	Same
7.15.19	Shipment Trans by Cust Report	sosorp09.p	75.10.3.22	Same
7.15.20	Sales Order Shipped not Invoiced	sosinirp.p	75.10.3.4	Same
7.15.21	Trans Summary by Item Report	sosorp11.p	75.10.3.6	Same
7.15.22	Trans Summary by Cust Report	sosorp12.p	75.10.3.5	Trans Summary by Cust Report
7.15.23	Trans Summary by Cust by Item	sosorp13.p	75.10.3.5	Trans Summary by Cust Report
7.17.6	Salesperson Ranking Report	sasarp04.p	75.10.8.5	Same
7.17.10	Sales by Site Report	sasarp06.p	75.10.8.4	Sales by Item/Site Report
7.17.14	Sales by Customer Report	sasarp03.p	75.10.8.3	Same
7.17.15	Customer Ranking Report	sasarp01.p	75.10.8.1	Same
7.17.18	Sales by Item Report	sasarp05.p	75.10.8.4	Sales by Item/Site Report
7.17.19	Item Ranking Report	sasarp02.p	75.10.8.2	Same
7.18.4.1	Consignment Inventory Report	ppptrp10.p	75.10.4.3	Same
7.18.4.2	Consignment Inventory by Loc	iclorp02.p	75.10.4.4	Consignment Inventory by Location Report
7.18.4.3	Consignment Inventory by Order	socnrp01.p	75.10.4.1	Consignment Inventory by Order
7.18.4.4	Consignment by Order with Seq	socnrp06.p	75.10.4.1	Consignment Inventory by Order
7.22.19	Container Usage Report	ccurp.p	75.10.5.2	Same
8.3	Configured Structure Report	fopsrp.p	75.10.2.2	Same
8.6	Sales Order Bill Report	fosobrp.p	75.10.3.15	Same
8.9	Sales Quote Bill Report	fosqbrp.p	75.10.19.2	Same

Table 8 — Customer Management Reports Added in QAD 2010.1 EE (2 of 4)

<b>Legacy Menu</b>	<b>Report Title</b>	<b>Legacy Program</b>	<b>New Menu</b>	<b>New Report Title</b>
11.1.19.5	Warranty Cost Report	fswarrp.p	75.10.16.2.1	Same
11.1.3.5	Pending Call Data Report	fspcrp2.p	75.10.16.1.1	Same
11.1.3.21	Pending Call Profile Report	fspcrp1.p	75.10.16.1.2	Same
11.3.2	Installed Base Configuration Report	fsbmisiq.p	75.10.11.3	Same
11.3.3	Installed Base Report	fsisrp02.p	75.10.11.2	Same
11.3.17	Warranty Type Report	fssvwrp.p	75.10.11.6	Same
11.3.21	Installed Base Marketing Letters	fsletrp.p	75.10.11.4	Same
11.3.12.3	Field Notification Report	fsfnrp.p	75.10.11.1.1	Same
11.5.12	Contract Type Report	fssvsrp.p	75.10.1.3	Same
11.5.13.21.1	Contract Cash Flow Report	fssarp06.p	75.10.1.2.1	Same
11.5.13.21.2	Contract Deferred Income Report	fssarp07.p	75.10.1.2.2	Same
11.5.13.21.5	Limits Consumption Report	fssalrp.p	75.10.1.2.3	Same
11.5.18.14	Billing Detail Report	fssarp08.p	75.10.1.1.2	Same
11.7.1.15	RMA Shipping Report	fsrmp06.p	75.10.17.2	Same
11.7.1.18	RMA by RMA Number Report	fsrmp01.p	75.10.17.4	RMA by Item/Customer/ RMA Report
11.7.1.19	RMA by Customer Report	fsrmp02.p	75.10.17.4	RMA by Item/Customer/ RMA Report
11.7.1.20	RMA by Item Report	fsrmp03.p	75.10.17.4	RMA by Item/Customer/ RMA Report
11.7.1.21	RMA by Completion Due Report	fsrmp05.p	75.10.17.3	Same
11.7.3.15	RTS Picklist Print	fsrtrp08.p	75.10.17.1	Same
11.7.3.18	RTS by RTS Number Report	fsrtrp01.p	75.10.17.6	RTS by Item/Supplier/RTS Report
11.7.3.19	RTS by Supplier Report	fsrtrp02.p	75.10.17.6	RTS by Item/Supplier/RTS Report
11.7.3.20	RTS by Item Report	fsrtrp03.p	75.10.17.6	RTS by Item/Supplier/RTS Report
11.7.3.21	RTS by Completion Due Report	fsrtrp05.p	75.10.17.5	Same
11.9.15	Customer History Report	fscustrp.p	75.10.3.14	Same
11.11.9	MO Pending Return Report	fspenrp.p	75.10.15.5	Same
11.11.11	Open Material Order Report	fseorp1.p	75.10.15.4	Same
11.11.12	Material Order Backlog Report	fseodl.p	75.10.15.3	Same
11.11.13	Material Order Shipment Report	fseorp2.p	75.10.15.2	Same
11.17.3	Service Pricing Report	fsfpcrp.p	75.10.9.3	Same
11.19.7	Service Structure Report	fspsrp.p	75.10.20.1	Same
11.22.1	Accrued Revenue Report	New	75.10.1.1.1	Deferred/Accrued Revenue Report
11.22.2	Deferred Revenue Report	New	75.10.1.1.1	Deferred/Accrued Revenue Report
11.22.3	ISB Item Tracking History Report	New	75.10.11.5.1	Same
28.17.18	Open Logistics Charge Report	laaprp02.p	75.10.14.3	Same
29.22.18	Intrastat Declaration Exchange	iehrpe.p	75.10.10.2	Same
29.22.22	Intrastat History Report	iehhtytp.p	75.10.10.5	Same

Table 8 — Customer Management Reports Added in QAD 2010.1 EE (3 of 4)

<b>Legacy Menu</b>	<b>Report Title</b>	<b>Legacy Program</b>	<b>New Menu</b>	<b>New Report Title</b>
29.22.21.19	Extrastat Declaration Print	iehexrp.p	75.10.10.1.1	Same
29.22.21.20	Extrastat Declaration Reprint	iehexrrp.p	75.10.10.1.2	Same

Table 8 — *Customer Management Reports Added in QAD 2010.1 EE* (4 of 4)

