



At Pilot ERP, we listen to our customers and work hard every day to improve our software and provide the features that our users need.

Release Notes – Version 1.3.8 7/16/09

- **Bills of Material Cost rollup** (Manufacturing – BOM screen)
This new feature will allow you to have Pilot ERP total the Standard Costs for material and labor routings up through all levels of the bill of material. The utility will then update the Standard costs for the parent item number and all its related subassemblies in inventory.

The Standard costs can be used to compare against actual work order costs and to estimate profit margins for products. The cost rollup should be run any time significant changes are made to purchased material costs, work center rates or the components and quantities on the BOM.

- **Standard Cost Update** (Manufacturing – BOM screen)
Use this utility to automatically update your purchased components Standard Cost with the current Average Cost. After running the Standard Cost update, we recommend also running the BOM Cost Rollup so that the Standard Costs of your manufactured products and assemblies reflect the changes to the component costs.

Previous Versions

Release Notes – Version 1.3.6 7/2/09

- AR and AP invoices now have a reversal option.
- Shipment tracking number can now be edited after the shipment has been posted.
- A new “Where Used” inquiry has been added to Items and under the Inventory reports section. Right click on an item and select the where used option or open the item card and click on the where used button.
- New Project feature added which will allow the following transactions to be charged to a Project for reporting. A Project Register report has been added to the General Ledger Reports section. The Project field has been added to these screens:
 - a. Sales Quotes
 - b. Sales Orders
 - c. Work Orders
 - d. AR Invoices
 - e. AP Invoices
 - f. Purchase Quotes
 - g. Purchase Orders

- Issue with copying notes from Sales Orders has been corrected.
- Added a Date selection to the General Ledger report.

Release Notes – Version 1.3.5 6/1/09

- Added the Reference field to the Bill of Material screen of the Item. It prints on the BOM and the Shop Traveler.
- The system now asks if you want to save unbalanced journals. You can then recall them and complete it. These unbalanced journals will not post.
- Added a Date range selection to reports in addition to period.
- Added a second check format for Canadian checks. Setting under the *System Setup – Your Company – AP Options* screen.
- Changed the column label to read Item no & Description on the Quote/Invoice and Order Summary

Release Notes – Version 1.3.0 5/20/09

- Improved Shop Traveler document for Work Orders. Now has bar coded routings and has been updated to reflect changes to work centers.

Release Notes – Version 1.2.12 5/11/09

- When entering a new inventory item, prices and vendors can now immediately be entered for the item without having to save and exit first.
- Added Purchased, Sold, Manufactured and Material option checkbox to Item screen.
 - Purchased – Inventory Item can be entered on a Purchase Order.
 - Sold – Inventory Item can be entered and shipped on a Sales Order.
 - Manufactured – Work Order can be generated for the Item.
 - Material – Inventory Item is a purchase or sub-assembly item that can be entered as material on another item's Bill of Material.
- Work Orders can now be generated directly from a Sales Order. This will present a popup with Items that are NOT marked as "Complete" and are Manufactured items.
 - 3 ways to launch, from the Sales Orders:
 - "Create WO" button on main toolbar
 - Right-click on order and select "Create Work Order"

- From the sales order itself, there's a "Create Work Order" button
 - Item No, Quantity, Customer, Sales Order No and Purchase Order No are copied into a new Work Order
- Added the Invoice description field to the Customer details – Invoice tab to help identify the invoice when looking at history for a customer.
- Added line item notes to Purchase Order and Purchase Quote.
- New option to post un-printed invoices added to the AR Invoice posting screen.
- Lead Time field added to inventory item detail screen.
- User defined freight methods can now be entered under the System Setup menu. The default freight method can now be assigned to Customers and Vendors and will automatically be added into new Sales Order and Purchase orders respectively.
- Added a new GL account code option to the Vendor screen which will allow a user to define the default account to be used when entering AP Invoices.
- Altered the printed Sales Order form to allow for item numbers up to 20 characters.

Release Notes – Version 1.2.3 3/20/09

- Added new Work in Process (WIP) report to Manufacturing Reports which shows the remaining amount of material and labor charged to open work orders.
- Added new fields to Work Order screen:
 - Header**
 - Qty Received – shows the qty of product received on the work order to date.
 - Qty On Order – shows the qty of product remaining on the work order.
 - Materials**
 - Qty to Date – shows the qty of material issued to the work order to date.
 - Qty Remaining – shows the qty of material remaining to be issued.
- Added new Check Register report to Accounting reports.
- Added an AP Check preview function
- Enabled printing of a single AP Check
- Multiple Ship-To Addresses can now be added to customers, and a default Ship-To Address can also be specified
- Salesperson can now be specified on Quotes/Orders

- Copies Default from Customer
 - Prints on Quote/Order
- Main grids for Quotes & Orders can now be sorted by Salesperson
 - Associated modifications made to Sales by Salesperson Report
 - Items Notes now copy into and print on the Quote & Order
 - New company creation allows company names up to 60 characters
 - Corrected an error totaling AR Invoices
 - Purchase Quote now says "Quote Request"

Release Notes – Version 1.2.0 1/21/09

- Added additional search and sort capabilities to the display grids as well as increased speed on lookups.
- Second description line added to Items for additional searching and display on Quotes, Sales Order Acknowledgements, Invoices and Purchase Orders.
- Customer part reference added to Inventory Items with the ability to search by Customer part numbers. Customer part numbers will now display on Quote and Sales order Acknowledgement.

Release Notes – Version 0.3.10 11/4/08

- Changed "Packing Slip" to "Picking Slip"
- Added Expected Ship Date to Sales Orders & Quotes
- Added a Data Collection menu option
- Deployed bar codes for Items, Sales Orders and Work Orders
- Made changes to the Demo product license logic

Release Notes – Version 0.3.10 11/4/08

Manufacturing

- Added MRP availability drill down to Manufacturing module
- New Bill of Materials screen added
- Displays both Material and Resources on one screen with quantities and costing

General

- Addressed issues with units-on-hand being updated correctly from Inventory Adjustments, Shipments and WO Receipts.
- Updated and improved the DBISAM database engine.

Release Notes – Version 0.3.7 8/25/08

Sales Orders

- Sales Order Acknowledgement preview and print added.
- Subtotal corrected and now does not include Freight charge
 - AR Invoice
 - Sales Invoice Register report
 - Quote
- Convert from quote to order will now refresh Sales Orders listing.

Release Notes - Version 0.3.6 8/7/08

Bill of Materials

- Notes can now be added to Work Centers and Routings.
- We've included an option to also add notes to the Bill of Materials and Routings at the item level. Those notes now copy to Work Orders, and can also be edited at the Work Order Level.

Manufacturing & Accounting

- The Work Order Print and Item Materials and Resources List have been enhanced to display their respective notes fields.

-Edited various menu options to industry standard naming conventions, such as changing “Manufacturing Orders” to “Work Orders”, “Bank Book” to “Bank Accounts”, etc.