

2017.10.27 RELEASE NOTES

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Improvements

FINANCIAL

NS-2393 Updated the Journal Entry and Journal Lines List Views

The Journal Entries and Journal Lines list views were updated to display manually created journal entries with any status (New, Approved, Ready to Post) and to display journal entries created from transactions that integrated to the Host system separately from transactions. These journal entries are only displayed when the status is Ready to Post.

FRAMEWORK

NS-2578 Improved Drag&Drop Behavior

Previously, an error message 'Object File not Found' was displayed when grid lines were dragged off the grid and dropped into the header section of the page. This error message was disabled. *Note: The sequence of the grid section lines is not updated, when a line is dragged&dropped outside the grid section.*

LOGISTICS

NS-2481 Updated LM Inquiries

The Loads inquiry was updated with the following changes:

- Added a new Inquiry Criteria 'Days Back', which defaults to 30.
- Updated the Status Inquiry Criteria to include 'Posted' by default.

A new inquiry 'Load Orders' was also added to the logistics module as a part of this work item.

PURCHASING

NS-2358 Updated Journal Details for Balance Transfer Transactions

The Journal Details page for Balance Transfer transactions was updated to display the debits and credits to the same account when the amounts are the same.

SALES ORDER

NS-2476 Added Sales Order Item Attributes to the Transaction Items List View

Sales Order Item attributes were added to the Sales Order Transaction Items list view. The attribute columns are not in the system view, but users can save the columns to a customized view.

NS-2480 Added a New Transaction Class Property

A new transaction class property 'Require a Ship By Date' was added to the Order type Transaction Class records. When the property is set to Yes, a Ship By Date is required and a user is prompted to enter a 'Ship By' date on the Catalog page and on the Sales Order transaction record when new line items are entered and no Ship By date is provided.

NS-2507 Added Sales Order Item Attributes to Price Adjustment Transactions

Item Attributes were added to Sales Order Price Adjustment transactions. The attributes for the reversing lines default from the source transaction and the attributes for the corrected lines default from the Item Favorites, but the attribute values are editable for all line types. The attribute columns are not in the system view.

NS-2508 Added Sales Order Item Attributes to Return Transactions

Item Attributes were added to Sales Order Return transactions. The attributes default from the source transaction, but the attribute values are editable. The attribute columns are not in the system view.

NS-2544 Updated Transaction Items List View

The following columns were added to the Sales Order Transaction Items list view:

- Load ID: Displays the ID of the load the item is on.
- Ext. Load ID: Displays the External Load ID. The value is pulled from the Shipment record and if the shipment contains multiple legs with multiple External Load IDs, the External Load ID of the first leg is displayed.
- % Filled Units: Displays the % of allocated units (Allocated Units / Ordered Units).
- % Filled Weight: Displays the % of allocated weight (Allocated Weight / Ordered Weight).

These new columns are not in the system view.

NS-2546 Updated Shipments List View

The following columns were added to the Sales Order Shipments list view:

- Load ID: Displays the ID of the load the item is on.
- Ext. Load ID: Displays the External Load ID. The value is pulled from the grid section of the Shipment record and if the shipment contains multiple legs with multiple External Load IDs, the External Load ID of the first leg is displayed.
- % Filled Units: Displays the % of allocated units (Allocated Units/Ordered Units).
- % Filled Weight: Displays the % of allocated weight (Allocated Weight/Ordered Weight).

These new columns are not in the system view.

NS-2547 Updated Sales Order Shipment Inquiry

The following columns were added to the Sales Order Shipments Inquiry:

- Load ID: Displays the ID of the load the item is on.
- Ext. Load ID: Displays the External Load ID. The value is pulled from the grid section of the Shipment record and if the shipment contains multiple legs with multiple External Load IDs, the External Load ID of the first leg is displayed.
- % Filled Units: Displays the % of allocated units (Allocated Units/Ordered Units).
- % Filled Weight: Displays the % of allocated weight (Allocated Weight/Ordered Weight).

These new columns are not in the system view.

NS-2548 Updated Customer and Address Favorite Tabs

The Favorites tab on Address and Customer records were updated with the following changes:

- Added a filtering row.

- Updated the 'Price UOM' field to be always required.
- Updated the 'Unit UOM' field to be required when the item is managed by units only or units & weight.
- Updated the 'Weight UOM' field to be required when the item managed by weight only or units & weight.

NS-2571 Updated the Journal Details to Support Multiple Journal Entries per Transaction

The Journal Details page was updated with the following changes to support multiple journal entries:

- The header section of the page was updated to display all journal entries created from the transaction. A journal entry is created for each invoice.
- New columns 'Journal Currency' and 'Source Trans Currency' were added to the header section. These columns are not in the system view.
- A new toolbar icon Re-Display was added. This allows users to display the JE details only for the selected transaction.
- New columns 'Trans Currency Debit Amount' and 'Trans Currency Credit Amount' were added to the grid section of the page. These columns are not in the system view.

SALES PROGRAMS

NS-2545 Updated Settlement Process Write-Off Account Rules

The write-off account for settlements was updated to default from the item record. If a write-off account has not been configured for the corresponding item, the write-off account saved in the Sales Program Preference will be used as the default write-off account. Users can also change the account on the Process Settlements - 'Edit Amounts' page. The write-off account is always required when a write-off amount is recorded with the settlement.

SYSTEM

NS-2561 Updated the Transaction Last Load Time Logic

Previously, some users were occasionally receiving the 'This transaction has been changed by UserName' message unnecessarily. This was happening in environments where the web and database servers were not the same. The logic for the prompt message was updated to improve the message accuracy.

Bug Fixes

FRAMEWORK

NS-2505 Fixed Favorites Tab on Customer/Address Record View to Display Personalized Views

Previously, when a user had a saved a personalized view on the Favorites tab of a Customer/Address record view, the view was changed back to the System View when New toolbar icon was clicked on the Favorites tab. Once the record was saved, the personalized view was displayed again. The issue is now fixed and the personalized view is displayed when new favorites items are entered.

NS-2534 Fixed a Column Setup Issue on Customer/Address Record View

Previously, when a user changed the column setup on the Favorites tab of a Customer/Address record and saved the view as a personalized view, the page froze when the user tried to toggle back to the System View. The issue is now fixed.

NS-2560 Fixed a Column Setup Issue on Sales Order Transaction Record

Previously, when a user changed the column setup by dragging & dropping columns on a Sales Order Transaction, the record froze and a user had to re-open the record. The issue is now fixed and the column setup can be changed without issues.

SALES ORDER

NS-2573 Fixed an Issue with Item Favorite Attribute Assignment

Previously, an error was displayed when a user added item favorites on a Customer or Address record with Sales Order Item attributes without saving the Favorite Item before adding the attributes. The issue was resolved by disabling the attribute fields until the Item has been saved. Users must save the item favorites before entering attribute values.

NS-2574 Fixed Item Favorite Attribute Deletion

Due to a bug, the item favorite attributes were not deleted when a user removed them from the Favorites tab of a Customer/Address record and then saved the record. The issue is now fixed.

NS-2581 Fixed Shipments List View

Due to recent changes to the Sales Order Invoicing, the Shipments list view was only displaying Sales Order Shipments with printed Invoices. The issue is now fixed.