

# NORTHSOPE 2.9.0

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## NEW FEATURES

### PURCHASING

#### NS-591: Added Fisherman Activity inquiry

The Fisherman Activity inquiry was created to display an individual or all fishermen and their detailed transactions within the selected date range. By default, this inquiry displays all transactions that are New, Approved, or Ready to Post and excludes those that have been voided.

#### NS-593: Added ability to record payments received on Customer Sale transactions

The ability to record payments received for Customer Sale transactions was implemented by adding new header fields pertaining to payments as well as a new tab on the Customer Sale record view titled 'Payment Details.' With these added fields and functionality, the user can enter payments received from the customer while simultaneously recording the transaction. The payments can be distinguished by type, either Cash, Check, or Credit Card, and the user can select the checkbook for the payment as well.

#### NS-594: Added ability to record payments received on Fisherman Sale transactions

The ability to record payments received for Fisherman Sale transactions was implemented by adding new header fields pertaining to payments as well as a new tab on the Fisherman Sale record view titled 'Payment Details.' With these added fields and functionality, the user can enter payments received from the fisherman while simultaneously recording the transaction. The payments can be distinguished by type, either Cash, Check, or Credit Card, and the user can select the checkbook for the payment as well.

#### **NS-666: Added Ticket Stat Area Details inquiry**

The Stat Area Details inquiry was created to display ticket lines arranged by Stat Area. All the ticket totals are stated based on the percentage that applies to the Stat Area.

## **ENHANCEMENTS**

### **PURCHASING**

#### **NS-569: Improved validations for AP Adjustments**

Previously, AP Adjustments could be saved with a status of 'Approved' without any line items. However, the same transaction could not be saved with a status of 'Ready to Post' without any line items. This inconsistency was corrected so that now, AP Adjustments require at least one line item to be approved or posted.

#### **NS-584, 585, 597, 607, 608, & 609: Improved error messages for user clarity**

- **NS-584: Improved error message for required Purchase Account**  
The error message that displays when a required Purchase Account is missing now reads "A Purchase Account is required for all lines" on AP Invoices, Credit Memos, and Adjustments and reads "A Purchase Account is required for all sale lines" on Tender Resales.
- **NS-585: Improved error message for required Description**  
The error message that displays when a required Description is missing now reads "A Description is required for all line items."
- **NS-597: Improved error message for approving and posting transactions with no line items**  
The error message that displays when a user tries to approve or post a transaction without any line items now reads "Transactions cannot be approved or posted without any lines."
- **NS-607: Improved error messages for required dates**  
The error message that displays when a required GL Date is missing now reads "GL Date is required" while the error message that displays when a required Doc Date is missing now reads "Doc Date is required".
- **NS-608: Improved error messages for required header fields on Tender Resales**  
The error messages for missing required header fields on Tender Resales were improved for clarity and include messages such as "Tender is required," "Fisherman is required," "Doc No is required," and "The Tender and Fisherman cannot be the same."
- **NS-609: Improved error message for required quantities**

The error message for missing required quantities now reads “Quantity is required and...” followed by the requirements for the specific transaction’s quantity – such as must be greater than zero or must be greater than or less than zero.

#### **NS-589: Improved layout and functionality of Fisherman Settlement Pages**

With this release the following changes have been made to the Settlement Balance page:

- Balances are now displayed in single columns with Debit balances showing as positive numbers and Credit balances showing as negative numbers. There are no longer labels for ‘Due From’ and ‘Owed To’
- Added a column to show the balance of Open Purchase Orders
- Added a hyperlink column so users can launch the Fisherman Statement directly from this page
- Added a hyperlink column so users can open an inquiry that shows all the Fisherman activity, not just the open transactions.

#### **NS-610: Improved fiscal period validation**

Previously, the validation for transaction dates being in open fiscal periods only validated for those periods tracked by the fiscal period table in the host system. This caused an issue because it allowed transactions to be entered with dates in closed fiscal periods that were beyond the scope of the tracked fiscal periods, such as 100 years in the future. This issue was fixed so that the validations for transaction dates go beyond those periods tracked by the fiscal period table and assumes that years before or after those in the table are closed periods.

#### **NS-613: Renamed Purchase Order ‘Type’ option to be grammatically correct**

Previously, a Purchase Order ‘Type’ of ‘Allow Multiple Invoice’ existed, which was grammatically incorrect. This ‘Type’ option was renamed to read ‘Allow Multiple Invoices.’

#### **NS-626: Improved validations using Mass Update**

Previously, the Mass Update function did not validate transactions before updating them to the newly selected status. This caused an issue because it allowed transactions to be approved and posted without all required fields. The mass update logic was improved to validate for the required fields at each status. In order to prevent this process from being time intensive, some requirements were moved to be validated at a status of ‘New.’

#### **NS-637: Updated differentiation between AP Vendors**

Previously, NorthScope differentiated between vendors with a ‘Vendor Type’ of Fisherman, Tender, and Fisherman & Tender in regards to their distribution type. In order to proactively prevent any issues that could arise from changing a vendor’s ‘Vendor Type,’ these ‘Vendor Types’ have been grouped under the same distribution type and are now only differentiated from Employee and Project distributions.

#### **NS-643: Corrected typo on Cash Receipts inquiry**

Previously, the 'NS JE' column on the Cash Receipts inquiry was erroneously titled 'NS JS.' This typo was corrected.

**NS-647: Improved Fisherman Statement report**

The Fisherman Statement report was improved by removing the unnecessary 'Due From' label, increasing the margins to avoid printing issues, resorting the Vendor lookup so that the 'All' option is at the top, renaming the 'All' option to 'All (with activity),' and improving the 'All (with activity)' option to exclude any fisherman with no activity or no balance forward from displaying on the report.

**NS-649: Improved display of Stat Areas master file list view**

The Stat Areas master file list view display was improved by removing the excess blank space at the end of the grid.

**NS-653: Improved logic for status of settlement checks**

Previously, once a NorthScope check batch had been approved, it remained in a status of 'Approved' until it was posted in the host system. This logic was improved so that once the batch is approved, it is automatically updated to a status of 'Ready to Post' until posted in the host system. This improvement corrected the issue of incorrect statuses on the Settlement Balance Detail page and the Settlement Transactions inquiry.

**SALES ORDER****NS-618: Improved process of converting Sales Orders to Invoices**

The process of converting sales orders to invoices was improved by developing an asynchronous conversion process as opposed to the previous real time process. With the development of this asynchronous process, the user is able to continue using the application while the conversions take place behind the scenes. In addition, the orders being converted to invoices will remain visible in the list view with a status of 'Approved' until processing is complete.

**NS-645: Improved logic for Sales Order new transaction options**

The logic determining the options that display in the 'New' drop-down menu from the Sales Order Transactions list view was improved to only include transaction types with at least one status code set to be managed 'Manually' or 'Automatic.' Therefore, any transaction types with all statuses set to 'Not Used' will no longer display in the 'New' drop-down menu from the Transactions list view.

**SYSTEM****NS-620: Updated framework**

The NorthScope framework was updated to reduce the complexity for the web browser in order to present the interface to the user, therefore displaying the application better and faster. This framework update included minor visual changes as well.

**NS-624: Updated NorthScope framework to handle custom record views and list views**

The NorthScope framework was updated to enable custom record views and list views for individual users. If a custom record view or list view is created in the database, it will become the default view, otherwise, if no custom view exists, the standard view will default.

**NS-652: Corrected typo in System preference**

The System preference for 'Email Address(s) to notify if inbound integration error occurs' was corrected for grammatical errors to now read 'Email address(es) to notify if inbound integration error occurs.'

**COMMODITY PROCUREMENT****NS-641: Improved Commodity Procurement Tickets views**

The Commodity Procurement Tickets list view was improved with an updated framework as well as an additional toolbar icon, 'More Actions', allowing the user to reprice and/or correct tickets. Along with the new reprice/correct functionality, a new Ticket Reprice/Correct record view was created. Finally, the Ticket Record View was improved with an updated framework, improved logic, and added Tare tab.

**SALES CONTRACTS****NS-642: Improved Sales Contracts Contracts views**

The Sales Contracts Contracts list view was updated to open new Contract record views while the Contract record view was improved with an updated framework.

**FIXES****SYSTEM****NS-468: Corrected report scrolling issue with Internet Explorer**

Previously, an issue was occurring that prevented the vertical scrollbar to appear when users were viewing reports using Internet Explorer. This issue has been solved, allowing users to scroll through reports within Internet Explorer.

**NS-573: Corrected drop-down menu clearing issue**

Previously, a bug existed that caused the drop-down menu selection to clear when reopened or tabbed through. This issue was fixed so that the drop-down menu selection remains when the drop-down menu is reopened, unless the selection is deleted manually by the user.

**PURCHASING****NS-600: Corrected Excel export for AP Adjustment record views**

Previously, a bug existed when exporting an AP Adjustment grid to Excel that caused the UOM, Purchase Account, and Distributed To fields to export their surrogate key values instead of their user-friendly display names. This issue has been fixed so that the proper display name exports for all fields.

**NS-634: Corrected backing out of settlement transactions for voided AP Invoices and Credit Memos**

Previously, a bug existed that prevented settlement transactions from backing out when their corresponding AP Invoice(s) and/or Credit Memo(s) was voided in the host system. The stored procedure that handles this process was corrected so that when an AP Invoice or Credit Memo is voided in the host system, its corresponding settlement transaction in NorthScope is backed out and the fisherman's applied and remaining amounts are updated.

**NS-646: Corrected posting of AP Credit Memos against Purchase Orders**

Previously, a bug existed that caused AP Credit Memos that were assigned to a Purchase Order to be posted as a positive amount against that purchase order instead of subtracted, therefore summing an erroneous posted amount for that Purchase Order. This bug was fixed so that AP Credit Memos now post as negative amounts against their corresponding Purchase Orders.

**NS-664: Corrected Doc No validation across AP Invoices and Credit Memos**

Previously, NorthScope allowed AP Invoices and Credit Memos with the same vendor to have the same Doc No. However, Microsoft Dynamics GP does not allow AP Invoices and Credit Memos with the same vendor to have the same Doc No, therefore causing integration issues. This issue has been fixed and duplicate Doc No values are not allowed.

**SALES PROGRAM****NS-654: Corrected Sales Program record view display**

Previously, the Carriers grid on the Sales Programs record view did not fill the entire body of the record view. This bug was corrected so that the grid fills the page.

**SALES ORDER****NS-655: Corrected business rules for Sales Order Return transaction**

Previously, there was a bug that disabled the Status and Workflow drop-down menus once a return document was set to 'Approved.' This was an issue because it prevented returns from being integrated to the host system as they could not be set to a status of 'Ready to Post.' This issue was fixed so that now the Status and Workflow drop-down menus remain enabled.