

2018.01.12 RELEASE NOTES

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New Features

Sales Order

NS-2809 Updated Sales Order Process to Provide More Visibility to Credit Limits

A new feature was added to the system to provide more visibility to customer credit limits during a sales order transaction entry. The following new fields were added to the Select Items page and Sales Order Transaction record:

- Credit Limit: Displays the Credit Amount from the customer record.
- Avail. Credit: Displays the available credit amount in the customer currency and as a percentage. The available credit is calculated by subtracting the customer open balance (NorthScope and the Host system) from the credit limit. The currency amount and the percentage fields are color coded.
 - Fields are RED when the Available Credit \leq 0%
 - Fields are Yellow when the Available Credit \leq 10%
 - Fields are Green when the Available Credit \leq 30%
 - No color coding when the Available Credit $>$ 30%.

These fields are only populating when the Credit Limit Option property on the customer record is set to 'Specific Amount'. These fields are blank when the customer Credit Limit Option property is set to 'No Credit' or 'Unlimited Credit'.

Improvements

Company

NS-2800 Added AP Transactions to Attributes

The following AP transactions were added to Attributes to allow users to set up attributes and assign attributes values to the transactions:

- AP Purchasing
 - AP Invoice
 - AP Credit Memo
 - AP Purchase Order
- Fisherman
 - Adjustment
 - Balance Transfer
 - Delivery Ticket
 - Sale
 - Tender Resale

Also, Sales Order attribute transactions were updated to include Customer Sale and Employee Sale transactions. The attribute tab will be added to the transactions in future releases.

Inventory

NS-2815 Increased Decimals on Update Costs Mass Update Dialog

Previously, the mass update dialog on Update Costs page supported prices with 2 decimal places. The dialog was updated to support 5 decimal places.

Purchasing

NS-2786 Updated the Properties Tab for AP Invoices/Credit Memo Record Views

The Properties tab of AP Invoice and Credit Memo transaction record views was updated with the following changes:

- Added Transaction Class property.
- Added Currency property.

- Added Vendor ID property.
- Added Transaction SK property.
- Changed Created and Last Updated dates to display date and time.

These properties are not editable.

NS-2787 Added Properties to AP Purchase Order Record Views

A new Properties tab was added to the Purchase Order record views. The tab displays the following properties:

- Transaction Class
- Created By
- Created Date
- Last User
- Last Updated
- Vendor Currency ID
- Vendor ID
- Transaction SK

These properties are not editable.

NS-2789 Updated the Properties tab for AP Sales Record Views

The Properties tab of AP Sales transaction record view was updated with the following changes:

- Added Transaction Class property.
- Added Currency property.
- Added Transaction SK property.
- Changed Created and Last Updated dates to display date and time.

These properties are not editable.

NS-2792 Updated AP Sales List Views and Inquiries

Two new columns 'Transaction Class' and 'Currency' were added to the following list views and inquiries:

- Sales List View
- Sale Lines List View
- Sales Inquiry
- Sales Lines Inquiry

These new columns are not in the system view.

Sales Order

NS-2812 Updated Return and Price Adjustment Attributes

Previously, Sales Order specific attributes were displayed on Return and Price Adjustment transactions. Return and Price Adjustment records were updated to display Price Adjustment / Return specific attributes.

Sales Programs

NS-2794 Added New Sales Program Preferences

The following new Sales Program Preferences were added to the system:

- Default AP Transaction Class for Brokerage Settlement Returns
- Default AP Transaction Class for Brokerage Settlements
- Default AR Transaction Class for Brokerage Settlements

The functionality tied to these preferences will be added in future releases.

NS-2795 Updated Settlement Record View to Allow Settlement Date Editing

The Settlement Date field was enabled on the Sales Program Settlement record view to allow users to assign the transaction date for the Settlement transaction. The field defaults to the current date and the date must be within an open fiscal period.

Bug Fixes

Sales Order

NS-2797 Fixed Required Sales Order Attributes to be Required on Sales Order Transactions

Previously, Sales Order attributes that were assigned to be required, were not forced on Sales Order transactions as expected and users were able save Sales Order transactions as Approved / Ready to Post without entering the required sales order attribute values. The issue is now fixed and users are prompted to enter the required attribute values, before the order can be saved as Approved or Ready to Post.