

# 2016.04.05 RELEASE NOTES

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## ENHANCEMENTS

### SALES ORDER

#### **NS-887: Improved the functionality of the Actual Ship field on the Home tab of Sales Orders**

The functionality of the Actual Ship field on the Home tab of Sales Orders was improved so that once all shipments on the order have been 'Shipped,' the Actual Ship field on the Home tab pulls the latest Actual Ship date of its shipments. Along with this improvement, the Actual Ship date on the Home tab was made read-only so that the dates do not get out of sync.

#### **NS-890: Removed the Cancel button from the Catalog Items page**

In order to improve the functionality of the Catalog Items page, the Cancel button was removed. Now, in order to exit the Catalog Items page without adding items to an order, the user can click the X in the upper right hand corner of the window.

#### **NS-893: Improved the logic of the Freight Rate field on Sales Orders and Invoices**

Previously, when the Freight Rate Type was set to 'Use Freight Programs,' the Freight Rate field remained editable. Since the Freight Rate does not affect the freight on a shipment when Freight Programs are used, this logic was improved so that the Freight Rate field becomes disabled once a Freight Rate Type of 'Use Freight Programs' is selected.

#### **NS-895: Improved the Program Details Quantity column logic**

Previously, the Quantity column on the Program Details window displayed the number of units on which the dollars per UOM program calculation was being made. However, when the program calculation is based on percentages, nothing would display in the quantity field. This logic was improved so that when the calculation is based on a percentage of the amount, the line item amount displays in the Quantity field.

**NS-897: Enabled the Program Details window on statuses of Approved and greater**

Previously, when a Sales Order or Invoice was saved with a status of Approved or greater, the Program Details toolbar icon became disabled, preventing the user from viewing the Sales Programs applied to the order or invoice. Therefore, this logic was improved so that the Program Details toolbar icon remains enabled throughout all transaction statuses but the window fields will become read-only at statuses of Approved and greater.

**NS-904: Improved the process of 'Shipping' a Sales Order to be automatic**

The process of shipping a Sales Order was improved so that as soon as the last shipment on the order has been marked as shipped and saved, the Order automatically gets updated to a status of Shipped.

**NS-905: Renamed the 'Logistics' tab 'Shipment's**

To better reflect the functionality of the 'Logistics' tab on Sales Orders and Invoices, the tab was renamed 'Shipments'.

**NS-928: Improved the relationship between the header, shipment, and line item statuses on a Sales Order**

The relationship between the status of the header, shipment(s), and line item(s) on a Sales Order was improved to adhere to the following:

- Shipments or loads moving from new or scheduled to shipped will update their line items to a status of shipped regardless of the current line item status.
- Shipments or loads moving from shipped to new or scheduled will update their line items to inherit the order header status.
- Headers moving from new to released will update all line items currently in a status of new to released.
- Headers moving from new to shipped will have no impact on line items since the header status can only be shipped if all shipments are shipped.
- Headers moving from new to approved will update all line items to a status of approved.
- Headers moving from shipped to new will have no impact on the line item status.
- Headers moving from shipped to released will have no impact on the line item status.
- Headers moving from released to new will update all line items currently in a status of released to a status of new.
- Headers moving from approved to shipped will update all line items to a status of shipped.

**INVENTORY**

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**NS-924: Added properties to the Item record view**

The following updates were made to the Item record view to improve the functionality of managing items:

- Updated the 'Valuation Method' choices to be 'Item' and 'Lot' and made 'Item' the default value
  - Made the Valuation Method editable only if the Item is Lot Tracked
- Added the property for 'Cost UOM,' which defaults to the first unit UOM if the item is managed by units only, otherwise it defaults to the first weight UOM.
- Renamed the property 'Current Cost' to 'Actual Cost.'
- Added a new property for 'Market Cost.'
- Added a property for 'Default Reporting UOM,' which defaults to the first unit UOM if the item is managed by units only, otherwise it defaults to the first weight UOM.

## BUG FIXES

### SALES ORDER

**NS-711: Fixed the Settlement Balance Excel export**

Previously, a bug existed that produced an error when the user tried to export the Settlement Balance page. This bug was fixed so that the page exports correctly.

**NS-888: Allowed the line item Carrier to be cleared**

Previously, a bug existed that prevented the line item Carrier to be cleared. This bug was fixed so that the line item Carrier can be cleared so long as the Sales Order preferences are setup so that the Carrier is not required.

**NS-889: Added the requirement of a line item Carrier when the corresponding preference is set to require a Carrier on Sales Orders**

Previously, when the Sales Order preferences were setup to require a Carrier, the requirement was only enforced at the header level. This caused an issue because it allowed for sales orders and invoices to be approved without line item carriers. This bug was fixed so that the requirement is also enforced at the line item level.

**NS-891: Corrected the default 'Freight Rate Type' on Sales Orders and Invoices**

Previously, there were instances when the Freight Rate Type for Sales Order shipments would default to 'Fixed Amount'. This issue was fixed so that the Freight Rate Type always defaults to 'Use Freight Programs'.

**NS-894: Moved the calculation of Sales Order Programs to be based on the line item Carrier instead of the header Carrier**

Previously, the calculation of Sales Programs was based on the header Carrier of a Sales Order or Invoice. This caused a problem with multi-shipment orders and invoices with shipments that shipped via multiple carriers. This issue was fixed so that the calculation of applicable Sales Programs are now based on the line item Carrier.

**NS-896: Fixed the Sales History inquiry**

Previously, there was an issue with the Sales History inquiry that prevented it from opening correctly. This bug was fixed.

**NS-898: Allowed shipments not managed by Logistics to be editable on the Shipments tab of Sales Orders**

Previously, the Load Status, Actual Ship, and Deliver On fields for shipments on Sales Orders with single shipments were not editable. This issue was fixed so that all shipment fields are editable so long as the shipment is not managed by logistics.

**NS-900: Fixed backwards distributions for Sales Program Brokerages**

Previously, the brokerage distributions on Sales Orders and Invoices were being sent to the host system backwards. This bug was fixed so that brokerage distributions are sent correctly, according to the item account setup.

**NS-903: Fixed issue with Sales Orders not evaluating potential logistics shipments before allowing an Order to be 'Shipped'**

Previously, Sales Orders could be shipped prior to its logistics shipments being shipped if the loads had not yet been built. This bug was fixed so that before an Order is 'Shipped,' the validation process validates that each sales inventory item on the order exists on a shipment.

**NS-926: Fixed the Sales Order Transaction History inquiry**

Previously, a bug existed that caused an issue with the Sales Order Transaction History inquiry displaying incorrectly. This bug was fixed.