2016.10.31 RELEASE NOTES

CONTENTS

NEW FEATURES

COMPANY

NS-1411: Added the Attribute Type of Quality Test Class

The Attribute Type of Quality Test Class was added to the Attribute Classes list view and the Attributes page to allow users to create Quality Test Classes to then be assigned to Items and Production Batches.

INVENTORY

NS-1394: Created shipments on Transfer transactions

The concept of Transfer shipments was created to allow users to track the shipment of product from one site to another. This concept was added with some additional functionality and fields. The following fields were added to the Transfer transaction header: Reference, BOL, and Export Details, which displays as a hyperlink that will open the Export Details window for the user to enter the details of the shipment if desired as these fields are not required. In addition, the Transfer transaction

now creates a single shipment for the transaction upon saving and the shipment will update to a status of Shipped once the transaction is approved or posted. Transfer shipments do not send to the logistics module. In addition, when a two part transfer is created, the second part of the transfer will pull the information from the first part's BOL field and export details page but will be editable.

NS-1403: Created the Lot Certifications master file

In order for users to setup lot certifications that can be assigned to specific items and/or sites, the Lot Certifications master file was created. Each certification created in the list view can be assigned a 'Type' of either Site Only, Item Only, or Item & Site. If a lot certification is assigned a 'Type' of Site Only, whenever production is completed for a Site with the certification, the certification is assigned to the Production Lot regardless of the items. If a lot certification is assigned a 'Type' of Item Only, whenever production is completed for an Item with the certification, the certification is assigned to the Production Lot regardless of the site at which it was produced. If a lot certification is assigned a 'Type' of Item & Site, when production is completed for an Item with the certification at a Site with the same certification, the certification is assigned to the Production Lot. The Lot Certifications master file is located under the Quality sub-menu of the Inventory module's navigation menu.

NS-1405: Created the Certifications tab on the Item record view

The Certifications tab was added to the Item record view so that users can assign certifications to an Item to drive whether or not lots produced for that item are certified. This tab will display all active lot certifications with a 'Type' of Item Only or Item & Site, allowing the user to select the certification(s) to assign to the Item. See NS-1403 for how lot certifications are controlled.

NS-1413: Added the ability to assign Certifications to Production Batches by default on new and manually

In order for lots to be flagged as meeting specific certification requirements, Production Batches can now be assigned Certifications, visible on the new Certifications on the Production Batch record view. When a new Production Batch is created, its Certifications will default according to its assigned site and item certifications. If a site is assigned a Site Only certification, the certification will automatically be added to the production batch and if an item is assigned an Item Only certification, the certification will automatically be added to the production batch. However, both the production batch's item and site must be assigned the same Item & Site certification for the certification to be automatically added to the production batch. Users can also manually add or remove certifications from the production batch. After the initial save of a production batch, the production batch's certifications must be assigned or removed manually as updating the corresponding item's or site's certifications will not affect the production lot's certifications. All certifications assigned to the production batch will automatically be assigned to any lots to which the production batch belongs.

NS-1414: Added new properties to the Item record view

The Production Batch Class and Quality Test Class fields were added to the Item record view in order to allow users to assign these classes to the item so that these classes will default on production

batches created for the item. Neither of these fields are required and the Production Batch Class field can only be edited for lot tracked items.

NS-1416: Added the Quality Test Results list view and inquiry

The Quality Test Results list view was created to display all quality test results for each combination of Test Class and Test ID with their corresponding begin and end dates as well as the status of the test. The Quality Test Results list view only displays quality test results in a status of Open. Therefore, the Quality Test Results inquiry was created to display all test results that are both open and closed.

NS-1417: Added functionality to assign Quality Test information to Production Batches

In order for users to be able to assign certifications and quality test information to production batches, many fields were added to the production batch record view in addition to updated business rules and functionalities. The following fields were added to the Production Batch record view: Item, Quality Test Class, and Quality Test ID. The Item lookup will include only active items that are lot tracked. Production batches are now unique by Item and Site and these values drive many of the production lot's default values. When creating a new Production Batch, the Production Batch, Item, Site, and Production Date fields are required. After saving, the Quality Test Class will default from the Production Batch's item, if assigned, and the Expiration Date will default to the item's number of 'Expiration Days' after the Production Date. Also, the Production Line and Production Shift lookups will default to display the Site's Lines and Shifts for selection. In addition, the Production Batch's Certifications will default according to the logic outlined in NS-1413. If a unique Quality Test ID is entered for the Production Batch's Quality Test Class, a new Quality Test Results record will be created.

NS-1418: Created the Quality Test Results record view

In order to record the test results of a quality test class's specific Test ID, the Quality Test Results record view was created. This record view allows the user to select the Test Class, enter the corresponding Test ID, enter the begin and end dates of the testing, mark the test as open or closed, and enter the test results for all tests assigned to the corresponding test class. These record views can be opened from the Quality Test Results list view or from the Production Batches list view Quality Test ID hyperlink.

NS-1420: Created the ability to mass update Production Batch Quality Test IDs

The mass update functionality was created for the Production Batches list view in order to allow users to update the Quality Test IDs of multiple Production Batches simultaneously. The new Quality Test ID can be entered and applied to either all selected records, as determined by the Production Batches with checked checkboxes, or all filtered records, as determined by the Production Batches that display in the list view.

SALES ORDER

NS-1404: Created the Certifications tab on the Site record view

The Certifications tab was added to the Site record view so that users can assign certifications to a Site to drive whether or not lots produced at that site are certified. This tab will display all active lot certifications with a 'Type' of Site Only or Item & Site, allowing the user to select the certification(s) to assign to the Site. See NS-1403 for how lot certifications are controlled.

NS-1415: Added the Freight Terms master file

The Freight Terms master file was created in the Sales Order module for users to have the ability to create customer Freight Terms that will display in all Freight Term lookups. Previously, Freight Terms were hardcoded in the database and not editable by the user. Via this master file, users can enter the name of the freight term, the description, and determine whether or not the freight term is inactive.

IMPROVEMENTS

COMMODITY PROCUREMENT

NS-986: Prevented inactive UOMs from displaying in the Price List record view's Price UOM lookup

Previously, the Price UOM lookup on the Commodity Procurement Price List record view did not filter out UOMs marked as inactive. The logic for these lookups was improved so that the Price UOM lookup only includes active UOMs.

NS-1288: Disabled the Price List header field on Commodity Tickets after initial save

Previously, the Price List header field was enabled on the Commodity Ticket header although no other price lists would be selectable as each price list is assigned to an individual Farmer. This logic was improved so that after selecting the price list on the New Commodity Ticket window, the Price List header field is disabled on the Commodity Ticket header.

NS-1303: Implemented Commodity Ticket line item Notes and made items multi-select

Previously, the Commodity Ticket Items tab was single select and did not have functioning line item Notes. The logic for this tab was improved so that items are multi-select and can have individual notes assigned to them.

NS-1343: Added footer totals to the Commodity Ticket record view and list view

Previously, footer totals were missing from the amount columns on the Commodity Ticket record view and the Tickets list view. Footer totals were added to the Commodity Ticket record view for the following columns: the Items tab Sample Size, Percent, Total Weight, and Amount columns, the Charges tab Amount column, and the Accruals tab Amount column. Footer totals were added to the Tickets list view for the following columns: Gross Weight, Net Weight, Paid Weight, Unpaid Weight, Net Amount, Charges, Gross Amount, Accruals, Weight In, and Weight Out.

NS-1344: Rearranged the order of the Tickets list view columns

The Tickets list view was rearranged so the column order was more logical. Now, the Tickets list view columns are in the following order: Ticket, Class, Site, Farmer, Crop, Field, Harvest, Delivery, Status, Net Weight, Net Amount, Charges, Accruals, Gross Weight, Gross Amount, Weight In, Weight Out, Paid Weight, then Unpaid Weight.

FRAMEWORK

NS-1308: Updated the Preferences pages to be in the new framework

In order to improve the functionality and ease of use, the Preferences pages were moved to the new framework. Along with their move into the new framework, the Preferences pages were updated to have all preferences grouped by their preference group.

INVENTORY

NS-1125: Re-implemented red text for Items missing required attributes

Previously, items missing required attributes would display at the top of the Items list view in red text. When the Items list view was updated to the new framework, this functionality was lost. With this release, the functionality has been re-implemented so that any item missing an attribute value for a required attribute will display at the top of the Items list view.

NS-1376: Removed Payroll Deduction from the Item record view

Because the Employee Sale transaction now has the Deduction header field to select the payroll deduction code to be used for the items on the transaction, the Item Payroll Deduction field was unnecessary. Therefore, the Payroll Deduction field was removed from the Item record view.

NS-1408: Replaced all name references to Production Lots with Production Batches

Because differentiating between a Lot, Warehouse Lot, and Production Lot can be confusing, Production Lots were renamed Production Batches and all references made to production lots or related properties, such as attribute classes, were renamed as well.

NS-1412: Updated the Production Batches list view

In order to reflect all of the changes being made to Production Batches (previously Production Lots), the Production Batches list view was updated with multiple columns, an updated System View, and an updated column sequence. The updated Production Batches list view now displays the Produced date, the name, the item description, the site name, the country of origin, the expiration date, the batch class, the quality test class, the quality test ID, all batch attributes, and all assigned certifications of each Production Batch by default. The Quality Test ID field will display as hyperlinks that open the corresponding record view. The user also has the ability to display the item ID and description, the site ID, the production line, production shift, the vendor purchased from, the batch comment, and the created date of all production batches.

NS-1422: Added Status to production batches and created a production batch inquiry

In order to allow users to close production batches, the status field was added to the Production Batch record view. The Status field displays the options Open and Closed and defaults to Open. If the user saves a Production Batch as Closed, all fields other than status get locked down. Additionally, only Open production batches will display in the Production Batches list view. In order to allow users to view all production batches, including those that are closed, the Production Batches Inquiry was created, which displays all production batches. By default, this list view displays open production batches but the user can choose to display closed production batches via the Inquiry Criteria.

PURCHASING

NS-606: Disabled GL Date on AP Invoices and Credit Memos in a status of Approved or greater

Previously, GL Date was still editable on AP Invoices and Credit Memos when the transaction was Approved or greater. Because the GL Date acts as the posting date of the transaction to the GL, this field was locked down on statuses of Approved and greater.

SALES ORDER

NS-748: Applied consistent business rules to the Customer and Customer Address record view Catalog, Favorites, and Price List tabs

The Catalog, Favorites, and Price List tabs on the Customer and Customer Address record views were made consistent by adding a delete button to each tab, allowing the user to delete any unnecessary records, displaying the editable fields within each tab in edit mode at all times, improving the ease of use for editing purposes, and adding a business rule that prevents duplicate entries from saving.

NS-1352: Improved the Customer and Customer Address save processes

Previously, there was inconsistent behavior regarding the speed of saving a Customer or Customer Address record view. This inconsistency was improved so that the Customer and Customer Address record views save consistently without any speed issues. In addition, the improvement of this process also included adding the ability to manually sort the Favorites and Price List tabs on each of these records, determining the order Favorites will display when creating an SO transaction for the Customer or Customer Address and determining the price list that takes priority for the Customer or Customer Address.

NS-1398: Added the Phone, Fax, and Email fields to the Carriers list view

The Phone, Fax, and Email fields were added to the Carriers list view so that users can record contact information for their carriers. These additional fields are not required and can always be edited.

NS-1421: Updated the Export Details page

The Export Details page was updated for efficiency and additional data entry capabilities. The updates to the export details page include added columns for Dunnage and Total Weight, added functionality for the total weight field to auto-calculate the total weight as the sum of the Weight, Container Tare, and Dunnage values, updated date fields to include date pickers, and updated column widths.

NS-1427: Added two properties to the Site record view

The Production Batch Prefix and Next Production Batch # fields were added to the Site record view to control the improved functionality of numbering production batches. This new functionality works so that when the user creates a new production batch, the production batch ID will default to suggest '(Use Next Number)', which will pull the Production Batch Prefix and Next Production Batch # from the Site assigned to the new production batch to populate the production batch ID. If no Production Batch Prefix exists on the Site, the production batch ID will still populate with just the Next Production Batch #. If no Next Production Batch # exists on the Site, the user must manually enter a production batch ID. These fields are not required on the Site record view. The Production Batch Prefix field on the Site record view defaults to display 'SiteID-' and the Next Production Batch # field on the Site record view defaults to display '10000' and will increment by one as production batches are created with the site's numbering sequence.

SYSTEM

NS-1333: Removed the validation for Attribute Class on the Production Lot, Vendor, and Item record views

In order to improve each use's ease of use, the validation requiring an Attribute Class on the Production Lot, Vendor, and Item record views was removed. Now, the user can create any of these entities without assigning an Attribute Class.

BUG FIXES

COMMODITY PROCUREMENT

NS-965: Allowed blank values in the Default Harvester and Default Hauler fields on the Fields list view

Previously, a bug existed that caused the Default Harvester and Default Hauler fields on the Fields list view to default to the last saved value in the field when the user tried clearing the value and saving instead of allowing the field to be blank, as it is not required. This bug was fixed so that if the user clears the Default Harvester and/or Default Hauler field after previously saving a value in the corresponding field, the field will return blank upon save.

NS-966: Prevented the Fields list view from saving duplicate Fields

Previously, a bug existed that allowed duplicate fields to be saved within the Fields list view. This bug was fixed to require unique fields according to the combination of the field's Field Name, Farmer Name, and Crop.

NS-1113: Enforced requirement of UOM on Accruals and Charges with a Calculated on value of 'Paid Weight', 'Delivered Weight', or 'Unpaid Weight'

Previously, a bug existed that allowed the UOM field to be blank on Accruals and Charges with a 'Calculated on' value of 'Paid Weight', 'Delivered Weight', or 'Unpaid Weight'. This was an issue because the calculations of these accruals and charges did not have the UOM value on which to calculate the totals. This bug was fixed so that UOM is required if a Charge or Accrual has a Calculated on value of 'Paid Weight', 'Delivered Weight', or 'Unpaid Weight'.

NS-1115: Enforced the requirement of the Commodity field on the Crops list view

Previously, a bug existed that allowed the user to save a crop in the Crops list view without a Commodity. This was an issue because Crops are the combination of Commodity and Variety. This bug was fixed so that Commodity is required to save a crop but Variety is optional.

NS-1133: Enforced requirement of Ticket Number on Commodity Tickets and allowed edits to the Ticket Number

Previously, a bug existed that the Commodity Ticket Ticket Number field to not be required and to not save edits made to it. This bug was fixed so that the Ticket Number field is required and editing the field will save the edits unless the ticket number is a duplicate.

NS-1136: Corrected Commodity Ticket validations

Previously, the Commodity Ticket record view did not validate for Site, Price List, Delivery Date, Harvest Date, or Status and it did not allow the Hauler and Harvester fields to be null. These business rules were appropriately implemented.

NS-1215: Corrected missing filter row and System View on the Crops list view

Previously, a bug existed that caused there to be a missing filter row and a missing System View on the Crops list view. This bug was fixed so that the Crops list view now has a filter row and a System View.

NS-1292: Corrected edit of Items on the Commodity Ticket

Previously, the Item grid field on Commodity Tickets displayed in edit mode but editing the Item would not save the edits. Instead, the Item grid field is now disabled so that it is clear to the user the fields that are editable and will save edits, which are the Sample Size and Price Items tab grid fields.

NS-1297: Corrected edit of Charges and Accruals on the Commodity Ticket

Previously, the Charge and Accrual field on Commodity Tickets displayed in edit mode but editing the Charge or Accrual would not save the edits. Instead, the Charge an Accrual grid fields are now disabled so that it is clear to the user the fields that are editable and will save edits, which is the Rate grid field on both the Charges and the Accruals tabs.

NS-1301: Corrected the validation for the header Sample Size matching the sum of all item Sample Sizes

Previously, a bug existed that allowed the user to enter a Sample Size that did not equal the sum of the line item sample sizes on a Commodity Ticket and save the ticket as Approved without receiving an error. This bug was fixed so that the validation for equal sample sizes occurs before approving.

NS-1341: Corrected a typo in the Tickets list view

Previously, the Tickets list view displayed the paid weight column as 'Paid weight'. This typo was corrected so that weight is capitalized and the column now displays as 'Paid Weight'.

FRAMEWORK

NS-1382: Fixed Excel export to correctly export values

Previously, a bug existed that caused multiple issues with the Excel export functionality throughout NorthScope. For instance, certain grid values would not export, grouped list views would export without their groupings, and list views could not be exported from edit mode. The Excel export functionality was fixed so that these issues no longer occur.

INVENTORY

NS-1378: Corrected the Production Lot sorting issue

Previously, a bug existed that caused an issue when trying to sort the Production Lots list view by the Production Lot column. This bug was fixed so that the column will sort correctly.

NS-1396: Corrected the delete process for Transfers

Previously, a bug existed that caused the corresponding receipt portion of a transfer to not be voided when its transfer transaction was deleted from the list view. This bug was fixed so that when a Transfer is deleted from the list view, the Transfer transaction and its corresponding Receipt transaction are updated to a status of Void.

PURCHASING

NS-673: Corrected Fishing Began date default

Previously, a bug existed that caused the Fishing Began date to incorrectly default to a date of '1/1/2001' when the field was cleared. This bug has been fixed so that the date field will correctly default to today's date when cleared.

NS-1024: Enforced the requirement that each Vendor have a 'Check Default' address

Previously, a bug existed that allowed a Vendor to be saved without a Check Default address. This was an issue because it caused AP checks to print without any address data for the vendor. This bug was fixed so that each Vendor is required to have a Check Default address on save.

NS-1060: Enforced requirement of a Ticket # on Delivery Tickets

Previously, a bug existed that allowed the user to delete a delivery ticket's Ticket # and save the delivery ticket without an error and without a ticket number. This bug was fixed so that Ticket # is validated and required on save.

SALES ORDER

NS-882: Defaulted UOMs for Favorite items on the Customer Address record view

Previously, a bug existed that caused the default UOMs for a selected item on the Address record view's Favorites tab to not default. This bug was fixed so that once an item is selected on the Customer Address's Favorites tab, its default UOMs will default.

NS-943: Enforced the requirement of at least one 'Billing' or 'Both' Customer Address on the initial save of a new customer

Previously, a bug existed that allowed a new customer to be saved without an address with an address type of 'Billing' or 'Both' on initial save even though at least one billing address is required. This bug was fixed so that the requirement is enforced on initial save.

NS-1355: Enforced 'Default Item Favorites Level' preference

Previously, a bug existed that caused the New Customer Record to default the 'Use Favorites For' value to 'Address' regardless of the preference setting for 'Default Item Favorites Level'. This bug was fixed so that the New Customer Record will default the 'Use Favorites For' value depending on the preference setting for 'Default Item Favorites Level'.

NS-1391: Corrected blank Adjusted Sales Program Rates to be ignored rather than treated as zero values

Previously, a bug existed that caused the Program Details window within an SO Transaction to assume blank Adjusted Rates at zero values instead of blanks, resulting in the program rates being overwritten to 0 instead of staying the same. This bug was fixed so that a blank Adjusted Rate will be assumed as a blank value and will not affect the program rates.

SYSTEM

NS-1401: Corrected delete of a user with login history

Previously, a bug existed that caused an error to occur when a user tried to deleted a NorthScope user with previous login history via the System module. This bug was fixed so that the user's previous login history is deleted before the user is deleted, preventing the original error from occurring.

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