

2016.12.05 RELEASE NOTES

CONTENTS

| | |
|----------------------|---|
| New Features | 1 |
| Inventory..... | 1 |
| Improvements..... | 1 |
| Inventory..... | 1 |
| Sales Programs | 3 |

New Features

INVENTORY

NS-1488: Created the Allocations and Commitments list view

The Allocations and Commitments list view was created to display the list of transactions affecting the corresponding item's or lot's allocated and committed balances. This list view is accessible via the 'View Open Transactions' toolbar icon on the Item Balances and Lot Balances list views. When opened from the Item Balances list view, the Allocations and Commitments list view will display all transactions affecting the allocated and/or committed balance(s) of the corresponding item and site combination. When opened from the Lot Balances list view, the Allocations and Commitments list view will display all transactions affecting the corresponding lot.

Improvements

INVENTORY

NS-1480: Cleaned up Inventory inquiries and main menu

Multiple inventory inquiries were transformed into list views and/or renamed to improve the clarity of the inquiry's purpose and accessibility of the inquiry. The inquiry changes include the following:

- The Production Balances inquiry was transformed into a list view that is now called 'Item Balances' and lives under the new 'Product Balances' parent menu drop-down in the Inquiry module navigation menu.
- The Lots List View was moved under the 'Product Balances' parent drop-down and was renamed 'Lot Balances'.
- The Lot Cost inquiry was transformed into a list view that is now called 'Update Costs'.
- The Item History inquiry was renamed 'Transaction History - Item'.
- The Lot History inquiry was renamed 'Transaction History - Lot'.

NS-1482: Updated the Item Balances list view

The Item Balances list view was updated with additional inquiry criteria and columns. The additional inquiry criteria include the following:

- Site: Displays a list of all active sites for the current company in a multi-select list. This criterion defaults to select all sites.
- Include: This criterion includes the following options:
 - Products with Any Balance (Default)
 - This will be products with On Hand, On Hold, Committed, Allocated, or Available > 0
 - Products with Available Balances
 - This will be only products that have a > 0 Available Balance
 - Products with no balances
 - This will be products with no On Hand, On Hold, Committed, Allocated or Available balance
- Owner: Displays a list of owners for the current company in a multi-select list. This criterion defaults to select all owners.
- Group By Owner: Displays the options Yes or No. When set to yes, then the data will be displayed separated by the owner values assigned - data and values will be summarized by Item+Site+Owner combination. When set to no, then the data will not contain the owner values at all - data and values will be summarized by Item+Site combination only and the owner column will be empty.

The additional columns include the following:

- Lot Tracked: Because all inventory lots will display in this list view, this means each item in the list is not necessarily lot tracked, so the lot tracked column was added to display whether the item is lot tracked.
- Lot Details: This column was added to display as a hyperlink that, when clicked, opens the list of lots applicable to the corresponding item and site combination, with the item balances list view's filters applied.

NS-1483: Updated the Lot Balances list view

The Lot Balances list view was updated with additional inquiry criteria and updated mass update options. The additional inquiry criteria include the following:

- Site: Displays a list of all active sites for the current company in a multi-select list. This criterion defaults to select all sites.
- Include: This criterion includes the following options:
 - Lots with any balances (Default)
 - Lots that have On Hand, On Hold, Committed, Allocated, or Available
 - Lots with Available balances
 - Lots with an Available Balance > 0

- Open Lots
 - All Open Lots
- Closed Lots
 - All Closed Lots

The Mass Update options were updated to remove the Manufacture Date mass update option since Manufacture Date is no longer a field on Production Batches.

NS-1498: Added the 'Traded' property to the Production Batch record view

The Traded property was added to the Production Batch record view to allow users to mark a production batch as traded. This field includes the options 'Yes' and 'No' and defaults to 'No'. Because this field was added to the production batch record view, it was also added to the Production Batches list view and the Lot Balances list view.

SALES PROGRAMS

NS-1496: Updated the Brokerage Program record view

The record view for Brokerage sales programs was updated with improved logic and consistency. For consistency purposes, the Customers tab was renamed Addresses, as the user is selecting customer addresses to add to the program and not simply customers. In addition, the Addresses tab was updated to filter out addresses assigned address types of 'Billing' or 'Inactive' so that only addresses assigned an address type of 'Both' or 'Shipping' will display.

NS-1497: Updated the Promotions Program record view

The record view for Promotions sales programs was updated with improved logic and consistency. For consistency purposes, the Customers tab was renamed Addresses, as the user is selecting customer addresses to add to the program and not simply customers. In addition, the Addresses tab was updated to filter out addresses assigned address types of 'Billing' or 'Inactive' so that only addresses assigned an address type of 'Both' or 'Shipping' will display.