

# 2016.12.10 RELEASE NOTES

## CONTENTS

New Features .....	1
Sales Order .....	1
Improvements .....	1
Inventory .....	2
Sales Order .....	4
Bug Fixes .....	5
Sales Order .....	5
Framework .....	5

## New Features

### SALES ORDER

#### NS-1419: Added lot certification logic on the Sales Order transaction

With the ability to assign certifications to lots, sites, and items, the ability to track and ensure these certifications were being met when selling items was added to the Sales Order transaction. This was done by adding the Certification column to the Sales Order item grid in conjunction with adding the Certifications field to the Sales Order Properties tab. The Certifications field on the Properties tab provides the user the ability to set the default certifications that will be applied to items added to the sales order, so long as the certification is assigned to the item on the item record view. This field is multi-select and will include all active certifications. The Certification column on the items grid was added so that the user can manually select or deselect the certifications to assign to the item on the sales order. This list is multi-select and will include all certifications assigned to the item on the item record view. By assigning certifications to the item on the sales order, the lots that display for the item when allocating the item will be limited to lots that meet the item's certifications.

#### NS-1506: Added journal details to Sales Orders

The Journal Details window was added to the Sales Order transaction in order to display the journal entry that the transaction will create as well as the details behind how/why the journal entry was created as it was. This window includes details regarding the accounts, the line type, whether the effect to the account is a debit or a credit and for how much, the description of the distribution, and the account source, showing where the account that was affected was grabbed from. Then, the details are summed by account to display the resulting entry.

## Improvements

## INVENTORY

### NS-1505: Standardized inventory transaction headers

Inventory transaction headers were standardized to be consistent and have additional features. These updates include the following:

- Added the Print icon to each of the inventory transactions where it was missing
- Added the Properties and Attributes tab to each of the transaction headers
- Added the following properties to each of the transaction's Properties tabs
  - 'Auto-Create New Lots' with the options Allowed and Not Allowed
  - 'Negative Available Balances' with the options Allowed and Not Allowed
- Added the following properties to the Production transaction's Properties tab only
  - 'Auto-Create New Lots' – Inputs with the options Allowed and Not Allowed
  - 'Negative Available Balances' – Inputs with the options Allowed and Not Allowed
- Verified all transaction Properties tabs included the following fields in the following sequence:
  - Auto-Create New Lots
  - Negative Available Balances
  - Auto-Create New Lots - Inputs
  - Negative Available Balances – Inputs
  - Created By
  - Created
  - Last Updated By
  - Last Updated
- Verified the following properties default correctly for each transaction type:
  - Auto-Create New Lots
    - Adjustments – Default to 'Allowed'
    - Receipts – Default to 'Not Allowed'
    - Transfers (only applies to Transfer Outs)– Default to 'Not Allowed'
    - Production (only applies to Production Outputs) – Default to 'Allowed'
  - Negative Available Balances
    - Adjustments – Default to 'Not Allowed'
    - Receipts – Default to 'Not Allowed'
    - Transfers (only applies to Transfer Outs)– Default to 'Not Allowed'
    - Production (only applies to Production Outputs) – Default to 'Not Allowed'
  - Auto-Create New Lots – Inputs
    - Production (only applies to Production Inputs) – Default to 'Not Allowed'
  - Negative Available Balances – Inputs
    - Production (only applies to Production Inputs) – Default to 'Not Allowed'

### NS-1508: Updated the Adjustment transaction grid

The Adjustment transaction items grid was updated for improved ease of use and display. These updates included adding the Label Code field to enter the label data for the production batch and the

read-only lot tracked field to display whether the corresponding item is lot tracked or not. In addition, the Production Batch field's functionality was improved so that users can create new production batches from within the record view, using the site's naming conventions. This logic can be used by entering '+' in the Production Batch field and saving, indicating the next production batch should be created from the site, using the site's Production Batch Prefix and Next Production Batch # settings to name the batch. In addition, the Allocate Item and Find Lots icons were added to the grid toolbar icons.

#### **NS-1509: Updated the Receipt transaction grid**

The Receipt transaction items grid was updated for improved ease of use and display. These updates included adding the Label Code field to enter the label data for the production batch and the read-only lot tracked field to display whether the corresponding item is lot tracked or not. In addition, the Production Batch field's functionality was improved so that users can create new production batches from within the record view, using the site's naming conventions. This logic can be used by entering '+' in the Production Batch field and saving, indicating the next production batch should be created from the site, using the site's Production Batch Prefix and Next Production Batch # settings to name the batch. In addition, the Allocate Item and Find Lots icons were added to the grid toolbar icons.

#### **NS-1510: Updated the Transfer transaction grid**

The Transfer transaction items grid was updated for improved ease of use and display. These updates included adding the Label Code field to enter the label data for the production batch and the read-only lot tracked field to display whether the corresponding item is lot tracked or not. In addition, the Production Batch field's functionality was improved so that users can create new production batches from within the record view, using the site's naming conventions. This logic can be used by entering '+' in the Production Batch field and saving, indicating the next production batch should be created from the site, using the site's Production Batch Prefix and Next Production Batch # settings to name the batch. In addition, the Allocate Item and Find Lots icons were added to the grid toolbar icons.

#### **NS-1511: Updated the Production transaction grid**

The Production transaction items grid was updated for improved ease of use and display. These updates included adding the Label Code field to enter the label data for the production batch and the read-only lot tracked field to display whether the corresponding item is lot tracked or not. In addition, the Production Batch field's functionality was improved so that users can create new production batches from within the record view, using the site's naming conventions. This logic can be used by entering '+' in the Production Batch field and saving, indicating the next production batch should be created from the site, using the site's Production Batch Prefix and Next Production Batch # settings to name the batch. In addition, the Allocate Item and Find Lots icons were added to the grid toolbar icons. Also, the items grid on the Production transaction was split into two grids, one for outputs and one for inputs. On the outputs grid, the line types were updated to include Primary and By-product, allowing the user to distinguish the produced product by line. On the inputs grid, the line type is input. By default, the primary and by-product line items affect inventory balances positively while input line items affect inventory balances negatively.

**NS-1546: Updated inventory transactions to automatically inherit a status of Posted when saved with a status of Ready to Post**

Previously, when inventory transactions were saved with a status of Ready to Post, they would stay in that status forever, as there was nothing that triggered their movement to a status of Posted. Therefore, all inventory transactions would display in the transactions list view despite the fact that some were posted. To improve this logic, inventory transactions now update to a status of Posted when saved as Ready to Post so that they are removed from the transactions list view.

**SALES ORDER****NS-1302: Updated the Sales Order record view**

The Sales Order record view was updated for new features, new design, and improved functionality. The updates to the transaction are listed below.

**Home Tab**

- Ship To address is now editable but edits will not push back to the customer address record view, edits will only apply on that specific sales order.
- Shipped dates are managed per shipment, not the order header
- Hold Codes can be applied on the Home tab – either Credit or Posting hold (posting hold added as a hold type)

**Shipments Tab**

- Certain shipment properties were moved to the shipment/load record view for management. To edit these properties, the Shipment field was updated to display as a hyperlink that opens the corresponding shipment or load record view.
- The Invoice # and Invoiced fields were added to the Shipments tab so the user can manually indicate the date that shipment was invoiced and the shipment's specific invoice number. Any entries made here will override any automatic invoice numbering/date assigning settings on the transaction class record view.

**Properties Tab**

- The previous More Info tab was improved as the 'Properties' tab and new data was added for the user to select and/or edit and to view. The new properties that display include the following: Transaction Class, Salesperson – Inside Sales, Default Certification, Transaction ID, Original Transaction Type, EDI Order, Customer ID, Transaction SK, Master Number, Adjustment Version, Bill To Address ID, Ship to Address SK, Created By, Created, Last Updated, and Last Updated By.

**Attributes Tab**

- The User-Defined tab was renamed 'Attributes'.

#### Item Grid

- Added the Shipment column, allowing the user to select the shipment to assign the item to in or allowing the user to unassign the item from a shipment to edit the item's shipment details.
- Added ability to create new line items within the grid instead of the Catalog Items page, allowing the user to select the specific shipment details for the item at the time of adding it to the order.
- Added the certifications column to assign certifications to the ordered item. This work was done as part of [NS-1419](#).

## Bug Fixes

### SALES ORDER

#### **NS-1526: Removed Single Date Management requirement on non-Order transaction classes**

Previously, the requirement of a Single Date Management value was being enforced on all transaction classes, regardless of the transaction type. This requirement was removed from all transaction classes with a transaction type other than Order.

### FRAMEWORK

#### **NS-1470: Disabled 'All Filtered Records' option on Notes window when page does not have filters**

Previously, a bug existed due to users being able to select 'All Filtered Records' when entering notes for a page that does not have filters. Therefore, when a page does not have filters, the Notes dialog will now disable the 'All Filtered Records' option.