2017.02.24 RELEASE NOTES

CONTENTS

New Features

INVENTORY

NS-1716 Created a New Find Lots Feature for Inventory

This new feature replaced the 'Allocate Item' feature and it's available on all Inventory Transaction records. A new toolbar icon 'Find Lots' has been added to the items grid toolbar, which opens the feature in a new window. The Find Lot feature changes the Inventory Transaction creation process. Previously users completed the header section of the record and added the appropriate line items on the transaction record before clicking the 'Allocate Item' toolbar icon to allocate the added items. This new feature creates line items when the quantities have been entered to Units and / or Weight fields on the 'Find Lots' window. Users should first complete the header section of the record and save it and then click on 'Find Lots' without adding line items.

Find Lots window allows users to search items by Item ID, Item Description, Production Batch and Warehouse Lot. The appropriate quantity is entered to the Units and/or Weight field and the changes can be saved by clicking the Save or Save & Close button.

Note: The 'Allocate Item' grid toolbar icon has been removed since this new feature replaces it.

SALES ORDER

NS-1710 Added a Feature to Allows Users to Change the Customer on an Existing Order

This new feature allows users to change the customer on an existing order. A new toolbar icon has been added to the Sales Order record view called 'More Actions'. When this toolbar icon is clicked an option 'Change Customer' is displayed. The 'Change Customer' button takes the user to a Change Customer window, where the user can select the new customer. When the new customer has been selected, Save & Close toolbar icon closes the window and the customer information is updated on the Sales Order record. This new feature is not available for orders that have status Approved or higher and orders that are EDI orders.

Improvements

INVENTORY

NS-1718 Changed Inventory Transaction Note Types to be Transaction Type Specific

Previously a single note type was supported for all Inventory Transactions. This change created a new note type for each Inventory Transaction type. For users, this means that when 'Notes' dialog is opened from the header toolbar, a new tab 'Header' is displayed.

NS-1719 Added Notes Toolbar Icon to the Transfer Items Grid

The Notes toolbar icon was added to the Inventory Transfer Transaction Record's grid section. The Notes dialog has the following tabs:

- Internal
- Production Instruction
- Shipping Instruction
- Line Item

The notes entered on the transfer record are carried over to the transfer receipt record.

LOGISTICS

NS-1732 Updated the Freight Rate Types on Logistics Record

Previously, the Freight Rate on the Logistics record was calculated from the gross weight. This change allows users to select if the freight rate is calculated from the Gross or the Net weight. The Freight Rate Type menu on the Logistics record has been updated to include the following values:

- $/Lbs – Net Wt.
- $/Lbs – Gross Wt.
- Fixed Amt – Net Wt.
- Fixed Amt – Gross Wt.

SALES ORDER

NS-1688 Updated Date Fields on Sales Order Record View

This improvement changed some of the date fields on Sales Order records to be date pickers. When a user clicks the date field, a calendar is displayed, which can be used to pick a date instead of manually entering the date. The change impacts the following date fields:

- Sales Order: Shipments Tab
  - Ship By
  - Deliver On
  - Shipped
- Sales Order: Items Grid
  - Ship By

SALES PROGRAMS

NS-1684 Removed Sales Order Table Dependencies from Sales Program Settlement Process

Previously, the Sales Program Settlement process had some dependencies on Sales Orders and Logistics, which prevented users who were not using NorthScope Sales Orders from using the feature. These dependencies have now been removed to allow the Sales Program Settlement process to work without NorthScope Sales Orders.

Bug Fixes

INVENTORY

NS-1734 Fixed How Inventory Transaction File Import Handles Blank Lines

Previously, the Inventory Transaction file import was failing if the file included empty rows. This has now been fixed and files with empty rows can be imported successfully. Note that only the line items above a blank row are imported.

SALES ORDER

NS-1736 Updated Sales Order Lot Picker to use Load Status when Calculating Available Balance

Due to previously completed Sales Order Shipment processing changes, the available balance calculation had to be updated to display the available balance correctly on the Sales Order Allocate Item window.