2017.03.10 RELEASE NOTES

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New Features

FINANCIAL

NS-1746 Created Account Format List and Record Views

A new list view 'Account Format' has been added in the Financial module. This list view allows users to create new account formats and update existing ones. When the segment name is clicked, the segment record view opens, where the account format numbers can be added/modified. Note that duplicate segment names are not allowed and at least one segment must be a natural account and only one natural account is allowed.

SALES ORDER

NS-1685 Created Auto-Allocate Feature for Sales Orders

This new feature allows users to auto-allocate items on sales orders without opening the 'Allocate Item' window. A new icon "Auto Allocate" has been added to the items grid toolbar, which selects lots to be allocated based on sales order preferences. If 'Auto Allocate by?' preference is set to:

- Smallest Quantity: The lots with the smallest quantities are being allocated first.
- Date Produced: The lots with the earliest production date are being allocated first.

Users can select the allocation method on the sales order by clicking the caret icon ▼ on the Auto Allocate toolbar icon. This opens the Auto Allocation menu with the options:

- Auto Allocate
- Auto Allocate by Lot Produced Date
- Auto Allocate by Lot Balance

If the option 'Auto Allocate' is selected, the allocation method selected in preferences is used.

Users can allocate several items simultaneously by checking the check box next to the item name. If the site does not have any available balance for the item or the item cannot be fully allocated, a prompt message is displayed for the user.

NS-1753 Added Security Control for Sales Order Auto Allocate Feature

As part of releasing the new Auto Allocate – feature, a new security control 'Items Toolbar: Auto Allocate' was added to the security controls.

Improvements

INVENTORY

NS-1743 Updated the Transfer Record View to Add Gross Weights and Prod Batch Attributes

This change added a new column 'Gross Weight' on Inventory Transfer Transaction Record view and also a new Inventory Preference. The preference is 'Default Gross Weight from Item Setup on Transfer Transactions' and it has options Yes / No. If the preference is set to Yes, the new column 'Gross Weight' displays a gross weight based on the formula (Ext. Net Weight) + (# Units * Item Tare Weight). The gross weight is only calculated for items that are managed by units & weight or units only. The gross weight defaults to zero for items that are managed by weight only.

As part of this change a new property 'Driver' was added to the transfer transaction properties and also all production batch attributes were added to the column list. Note that the new column 'Gross Weight' and the production batch attributes are not part of the system view and a user can add them manually.

NS-1752 Updated the Messaging for Duplicate Production Batches

A prompt message is displayed if a user tries to create a duplicate production batch. This message has been updated to include the Production Batch ID and the Item ID besides the error message: 'Duplicate Production Batches are not allowed (*ProductionBatchID, ItemID*).

SALES ORDER

NS-1761 Auto Save New Line Items when Users Try to Allocate

Previously, if a user added additional line items on a sales order record after the initial save and then clicked on 'Allocate Item' toolbar icon, a blank window was displayed. This improvement saves the additional line items even if the user doesn't Save the record before navigating to the Allocation window and the 'Allocate Item' window is displayed correctly.

Bug Fixes

INVENTORY

NS-1758 Fixed Issues with Find Lots Feature

Due to a bug, the find lots feature was not entering new line items when a user filtered and allocated several items. Only the last item was creating a new line item and also intermittently some line items were being duplicated. These issues have been fixed and as part of this change, the Find Lots toolbar icon is disabled until the Inventory Transaction Record is save the first time to generate a transaction ID.

RECORD VIEWS

NS-1759 Updated the Record View Framework to Update the Totals Based on the Filters

Due to a bug, the footer total values were not being re-calculated if the line items on the record were filtered and the footer totals were always displaying the totals of all line items. This has now been fixed and the footer totals are re-calculated when the columns are filtered.

SALES ORDER

NS-1764 Sales Order Allocation Error when Lot has Zero Units and Negative Weight

Previously, if a sales order transaction had an item that had any lots with zero available units, but negative available weight, users were getting an error 'Allocation for units or weight greater than the available quantity of a lots is not allowed'. This error was incorrectly displayed on the Allocate Item window even before any allocations were made. This issue is now been fixed and the validation is ignoring lots that the user is not trying to allocate.