



Streamline™ ERP

2021.3 Release Notes

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Streamline™ WMS Integration - NEW

Integration

Overview

We built a new interface between Streamline ERP and Streamline WMS. Streamline WMS is a modular standard software for inventory management, configurable to each individual company. The interface is built on industry best practices and has all the processes built in to help better manage a warehouse; provides access to accurate data on your operations; increase productivity with efficient picking routines; improved inbound and outbound processes; and better warehouse space utilization.

For additional information, see the Streamline WMS Overview help topic in Streamline ERP's Help system.

Setup & Configuration

The following programs require set up and/or configuration for Streamline WMS:

- Modules include a new integration option, WM7 – Streamline WMS Integration.
- Streamline WMS Integration Setup is a new Company Setup program that allows you to configure the company specific parameters for Streamline ERP to communicate with Streamline WMS.
- Streamline WMS Warehouse Setup program, found in the Warehouse Master, allows you to configure the inventory parameters that are used for the Streamline WMS controlled warehouse.

A Tecsys Professional Service Representative will work with the customer to set up and configure the Streamline WMS interface.

Product

Product creation and modification is sent from Streamline ERP to Streamline WMS.

- Products flagged as WMS Controlled for this Warehouse on the product's Warehouse Inventory program are automatically sent to Streamline WMS upon creation or modification.
- Products imported into Streamline ERP via the Import Products program will also trigger an update to Streamline WMS if they are flagged as WMS controlled.

Purchase Order

Purchase orders are created in Streamline ERP and are processed and received in Streamline WMS.

- Purchase orders are sent from Streamline ERP to Streamline WMS via the Send to WMS check box from the Print option.
- You can modify a purchase order in Streamline ERP as long as it is not being processed by Streamline WMS.
- When the purchase order is received and finished in Streamline WMS, the purchase order in Streamline ERP is closed.

Sales Order

Sales orders are created in Streamline ERP and are sent to Streamline WMS to be picked, packed and shipped.

- If the customer on the order does not exist in Streamline WMS, a customer record is automatically created.
- Once the order is created, the sales order is sent to WMS via the Send to WMS check box from the Print option.
- You can create an order with multiple product detail lines that include more than one Streamline WMS warehouse. In Streamline WMS multiple sales orders will be created, one for each warehouse.
- You can modify the order in Streamline ERP as long as it is not being processed by Streamline WMS.
 - When you recall an order in Streamline ERP, the order must be resent to Streamline WMS when the changes are complete.

Customer Returns

Customer returns are created in Streamline ERP and are processed in Streamline WMS.

- Customer returns are sent from Streamline ERP to Streamline WMS via the Send to WMS button.
- You can modify a customer return in Streamline ERP as long as it is not being processed by Streamline WMS.
- When the customer return is finished in Streamline WMS, the customer RA is flagged as completed, and the credit memo is created for processing in Streamline ERP.

Inventory Adjustment

Inventory stock adjustments are performed in Streamline WMS and are sent to Streamline ERP.

- Quantity adjustments created in Streamline ERP are not sent to Streamline WMS. If a quantity adjustment is created in Streamline ERP for a Streamline WMS warehouse, the adjustment is only to correct a discrepancy.
- Stock adjustments, adhoc counting and planned counting in Streamline WMS will send inventory adjustment transactions to Streamline ERP.

Warehouse Transfer

Warehouse transfers are created in Streamline ERP.

- Outbound transfers are committed in Streamline ERP and are sent to Streamline WMS as a sales order to be picked, packed and shipped.
- Inbound transfers for Streamline WMS warehouses are confirmed in Streamline ERP and are sent to WMS as a purchase order to be received and put away.

You can modify the warehouse transfer in Streamline ERP as long as processing has not been initiated in Streamline WMS or confirmed in Streamline ERP.

Streamline VirtualUI

Enhancement

Idle Time Control

We have added the ability for you to control the length of idle time that will elapse before users logged into Streamline ERP will be automatically logged out. Idle time is defined as the time that a user is logged into Streamline ERP but is not interacting with the application.

- Once the configured idle time is reached, the system will log the user out automatically.
- When a user re-authenticates their session (logs back in), the session will resume exactly as it was left, i.e. all open programs will still be open and all processes that were running will continue to run to completion.
- If the user chooses to exit Streamline ERP rather than re-authenticating, any incomplete or running processes for the session will be lost.

The idle time set up has been added to the Login Parameters option found under the Options menu on the main menu page (also invoked by right clicking in the footer section). Only users with access to the Security Files can see the Options menu.

Enhancement

Task Scheduler

We have added new functionality to the Task Scheduler:

- The Output Folder field on the New/Modify Schedule screen defaults to the root path defined in the .ini file.
- If the schedule is outputting data to a printer, a warning message will display advising that the Scheduler is running in a virtual environment and cannot output data directly to a printer. (You can save the output to a PDF file on your local machine).

The A/R Statement Printing task has been disabled for Streamline ERP running in VirtualUI. The A/R Statement must be run manually and can be saved as a PDF file on your local machine.

Improvement

DevExpress Spreadsheet Controls

We have added the following functionality when clicking Save As from the DevExpress Spreadsheet controls running under VirtualUI:

- The Select File Browsing Location dialog is initially presented so you can choose whether to save files on the server on which Streamline ERP is running (Server option) or locally on the computer from which you are connected to Streamline ERP (My Computer option).
 - The Server option allows you to select a folder within the allowed root path, modify the File Name as required, and save the file.
 - The My Computer option will download the file into the browser, so that it can be opened and/or saved locally.

Improvements

Enhancement

Add Pay Icon to Invoice Preparation Confirmation to Allow Edit to CC Payment Method

In order to change the payment detail during invoicing, we have added a new Pay icon in Invoice Preparation program. You can get a new authorization or change the payment method as required. The Pay icon is found in Invoice Preparation on the Packing/Picking screen under the **Summary** button.

Update

Switch to Query Mode when Browsing RA Records

When browsing through records in Customer RA, the system will automatically switch to query mode to prevent unintentional modification.

Certification

Elite™ WMS

Elite WMS

Streamline ERP 2021.3 is certified on Elite WMS 2021.1, 9.8, 9.6, 9.5.