



Streamline™ ERP

2023.2 Release Notes

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Improvements

Enhancement

E-commerce Customer Reviews (Site Administration)

The Customer Reviews option on the Site Administration page on the e-commerce web site allows the administrator to:

- Enable/disable the customer review functionality for the web site.
- View unapproved reviews with the option to approve or delete.
- View approved reviews for a specific date or product, with the option to delete.

Enhancement

Manual Shipping Address Indicator in Quote/Order Entry

In Quote/Order Entry, customer and shipping addresses are displayed in side-by-side group boxes labelled Customer and Ship To. These addresses are taken from the customer and ship-to tables.

The shipping address for a quote and/or order can be manually changed as follows:

- In Streamline ERP, you can change the address by clicking on the folder in the Ship To section.
- In e-commerce, you can manually enter shipping information during the checkout process.

When the shipping address has been manually changed, the Ship To section in Quote/Order Entry will be re-labelled to Ship To (Manual).

Enhancement

E-commerce Forgot Your Password

Originally, when you executed the Forgot Your Password functionality, the system immediately created a temporary password and sent an email to the user. The user's original password was disabled and the only password that could be used to log into the user's account was the temporary password.

Now when the Forgot Your Password functionality is executed, the original password is not disabled by the temporary password, allowing the user to log in using either their original password or the temporary password. The forgot password logic has been re-designed to work as follows:

- Logging in with the original password renders the temporary password invalid.
- The email sent to the user ID has been modified and now includes an expiry time in addition to the temporary password.
- Logging in with the temporary password before the expiry time launches the Change Your Password functionality ensuring the user creates a permanent password.
- Logging in with a temporary password after the expiry time will result in a failed login.

Enhancement**E-commerce Checkout includes Multiple Ship Via Codes**

In the Delivery Method section on the Shipping Information page of Cart Checkout, we have replaced the Ship Via radio button with a drop list.

- When BR SO 134 is not enabled, the drop list will contain only the default ship via, if web-enabled, for the current shipping address, as assigned on the Ship-To Details screen.
- When BR SO 134 is enabled, the drop list will contain all web-enabled ship via codes for the current shipping address, as assigned in the Ship Via Accounts screen launched from the Ship-to Address browse screen.
- Quotes or orders cannot be submitted if the drop list is empty (the web-user is alerted).

Update**E-commerce Google Analytics (Site Administration)**

We have added a Google Analytics to the Site Administration menu. When enabled, Google Analytics tracks and records data on the usage of your website. You can use this information to better understand how your customers are using your website.

- Setup and review of the data collected by this tool requires knowledge and use of Google Analytics.

Update**E-commerce Maintenance (Site Administration)**

The Website Activity now reports activity more accurately.

Update**Associated Products on Product Details Page**

Associated products outside of a web-user's Product Inclusion Filters will be displayed on the product details page, but these products cannot be added to the user's shopping cart.

Enhancement**E-commerce Sales Reports Ship To Option**

We have added a new Ship To Option to the Sales Reports page in E-commerce. You can select either Current or All shipping addresses. When selecting All, the system examines the data for all shipping addresses to which the web user has access.

Enhancement**Customer Pickup in Quote Entry and E-Commerce Web Orders**

We have added a Pick Up option in the following locations:

- In Streamline ERP, in Quote Entry, on the Quote Options screen launched from the Options button.
- In E-commerce, on the Shipping Information page of the Cart Checkout process, in the Delivery Method section.

Selecting the Pick Up check box e-commerce will populate the Pick Up check box in Quote Entry.

- The Pick Up box in Quote Entry will populate the Pick Up box in Order Entry, upon order creation via the Create Order button or auto-creation (BR WEB8).

Note: The functionality of the Pick Up box in Order Entry remains unchanged.

Enhancement

E-commerce Budget Reports

We have added Budget Reports to the My Account menu for users set up to view budgets. The Budget Report allows you to compare actual sales to budgeted amounts starting at any month for up to 11 previous months.

The Budget Report is available to distributors' customers who want to set monthly budgets to which their web orders will be constrained. Budgets are maintained in Streamline ERP and any orders that will cause the budget to be exceeded will be held in e-commerce pending authorization from a web user that has been designated as a supervisor or modification from the original web user.

Update

E-commerce Shopping Cart Quick Order Modification

We have changed the number of rows that initially display on the Quick Order page. The number of rows now honors the value stored in the Business Rule WEB18 Default page size in E-commerce (to a maximum of 6 rows); if there is no value entered in BR WEB18, then the system will display 6 rows.

You can still add additional rows as required.

Update

E-commerce Web Discount

We have added new functionality to allow distributors to offer a percentage discount on any quote or order submitted via the e-commerce web site.

The discount percentage is maintained in a new field in Streamline ERP on the Company Info screen, labelled E-commerce Discount. This field is gated by the WEB integration module.

When a value is entered in the E-commerce Discount field, the results on the e-commerce web site are as follows:

- The discount is displayed in the Totals section on the cart checkout pages.
- The discount field is labelled Discount (x%).
- The discount is calculated as x% of the subtotal.
- Taxes are calculated against appropriately discounted tax bases.
- The discount will dynamically update with any change affecting the totals on the web order.

The E-commerce Discount percentage appears as a Discount Percentage in the Summary section of Web Quotes and Orders in Streamline ERP.

Enhancement**E-commerce Primary Supplier Name Available on Product Details Page**

The Primary Supplier Name is now available to be selected for display on the Product Details page.

Update**E-commerce Request a Login Account Page**

We have updated the layout and labelling of some fields on the Request a login account page for clarity and ease of use. For example, the User Name field is now Full Name and the Email field has been moved to the Customer Information section.