



Streamline™ ERP

2023.3 Release Notes

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Improvements

Enhancement

E-commerce Call for Price

There are times when pricing for a product must be requested by the web user and then quoted by the distributor before the product can be sold on the e-commerce website. We have added an option that identifies specific products as Call for Price products. These products show no pricing and cannot be ordered from the website until the customer is quoted a price. The web user must call so that a CSR can create a customer quote for the product.

The Product table has been updated with a new field. Specifically:

- From the Product Master page, click **Additional Info** to open the View Product Additional Information screen.
- We have added the **Override Pricing in E-commerce with Instruction to Call** check box.

The effect in e-commerce for Call for Price products is as follows:

- The price is replaced by a Call for Price message on all applicable product pages (List, Tiles Details, Associated and Favorites).
- The add-to-cart functionality is suppressed on all applicable Products pages.
- Once the Call for Price product is put on a valid quote in Streamline™ for the customer, the quoted price displays on the customer's e-commerce website for the product and the add-to-cart functionality is restored.

Enhancement

E-commerce Quantity Break Pricing Restored

We have added Quantity Break Pricing information to products with quantity breaks set up in Streamline™ ERP. A quantity break  icon denotes the setup of quantity breaks for the product. This icon displays in the cart control section (above the **Add to Cart** button) on the Products pages and on the Shopping Cart page with the following functionality:

- When you click on the icon, the quantity break pricing displays on the screen.
- Each row includes the UOM, Quantity, Discount Percent and Sell Price.
- If you click on any row, the UOM and Quantity will be returned to the cart controls.

Enhancement

E-commerce Handling Disabled Login Accounts

The logic has been modified to allow web users to reactivate their disabled accounts via the Forgot Your Password functionality.

The system has a counter that tracks successive failed login attempts in the web user table. An unsuccessful login increments this counter while a successful login resets the counter. After 5 successive failed attempts, the following logic is triggered on the next failure:

- The password is changed to a random password, unknown to anyone.
- An email is sent to the Default E-Commerce Admin Email address, found in the Company Info program, advising of the password reset.

- A message appears on the e-commerce website: *"There have been 5 invalid login attempts made to your account. Your account has been disabled. Please use the Forgot Your Password link to regain access to Web Services."*
- The web user will encounter this message until either the Forgot Your Password functionality is invoked, or the password is manually changed in Streamline™ ERP.

Note: The Forgot Your Password functionality has not been modified.

Enhancement

Password Handling in Web User Maintenance

The handling of passwords for the web user in Streamline™ ERP has been modified. Specifically, the Web User Maintenance program has been updated as follows:

- The Password field has been removed.
- A new **Password** button has been added at the bottom of the screen. When you click on this button:
 - The web user's current password is rendered invalid.
 - An email is sent to the web user with instructions on how to set their new password on the e-commerce website.
- When a new web user is created, the **Password** button is disabled; the **Save** button initiates the email to the web user with instructions on setting up their new password on the e-commerce website.

Note: An upgrade script has been written for the 2023.3 release which assigns a globally unique identifier (GUID) to each web user. No email will be sent to the web users; the web users will use the Forgot Your Password or follow the prompts after 5 unsuccessful login attempts.

Enhancement

E-commerce Change Shipping Address Confirmation Required

We have modified the workflow when changing the shipping address (deliver to address) on the e-commerce website for logged in users.

- We have added 2 new buttons to the Shipping Address page: **OK** and **Cancel**.
- When you change the shipping address, you must select **OK** to confirm the change or **Cancel** to cancel the change transaction.

Enhancement

Ship To Option Added to E-commerce Quotes, Orders and Held Submissions

We have added a Shipping Address filter to the Quotes, Orders and Held Submissions pages in Account Management on the e-commerce website.

- The Shipping Address filter is a drop list with the following options: Current and All.
- This option is based on the existence of multiple shipping addresses for the current web user.
- When set to All, the Quotes, Orders and Held Submissions page displays documents for all shipping addresses that the web user has access to.

Note: The **Order Again** button tries to put the items from the document in the shopping cart for the current shipping address, regardless of the original address on the document. Some items may be disallowed if they do not meet the inclusion filters for the current shipping address. In this case, an alert message will display advising the web user of the items from the document that were not put in the shopping cart as they are not accessible to the current shipping address.

Enhancement

Ship To Added to Sales Report Excel Spreadsheet (E-commerce)

We have added the Ship To Code column to the exported Sales Report spreadsheet.

- The exported file contains separate records for each applicable ship to code.
- The file is sorted by ship to code, then by product or product line (depending on the Report By setting).

Enhancement

Web Page Footer Redesign

The webpage footer has been redesigned to display the following columns of information:

- My Account – contains a list of clickable options identical to those presented to the user when clicking on the User icon. Depending on the type of user (guest or logged in user) and user setup, this list includes the following options: Login, Quotes, Orders and Held Submissions, Shipping Addresses, Sales Reports, Budget Reports and/or Logout.
- Company Information – displays a list of static pages maintained by the site administrator. See the [Edit Custom Page Enhancement](#) update (below) for more information.
- Contact Us – contains the Company phone number, taken from the Company Info program in Streamline™ ERP.
- Company Address/Email Information – there is no section heading above the company address/email information. This information is taken from the Company Info program.
- Version – the current e-commerce version number, found in the bottom right corner of the footer section.

The appearance and content of some of these elements depend on the web user setting. The size, location and text wrapping of the columns depend on the type/size of device the website is launched from (desktop, tablet, mobile device).

Enhancement

E-commerce Site Administration Custom Page Enhancement

We have given site administrators more control over the footer section on the e-commerce website. Now custom pages appear in the footer section of the website as well as in the original location on the menu bar in the header section or on the side-panel menu launched from the ☰ icon, depending on the device type used to access the website.

The Edit Custom Page in Site Administration has been updated as follows:

- Active – this checkbox remains unchanged. For the page to display in either the menu or the footer, the Active check box must be selected.
- Show in Menu – when selected, this checkbox assigns the custom page to the menu.
- Show in Footer – when selected, this checkbox assigns the custom page to the footer.

The order in which the custom pages display in the menu and in the footer section match the order in which they appear on the Site Administration > Custom Pages.

Enhancement

E-commerce Account Management Monthly Budget Panel

We have added a new monthly budget 💰 icon to the Product, Product Details and Your Cart pages on the e-commerce website. When you click on this icon, a Monthly Budget window opens on the web page. In order to see this icon, the following set up is required:

- Sub-module BUD (Budgets) must be enabled.
- Your web user ID must have the Allow Access to this Function check box selected on the Budgets folder.

The Monthly Budget window initially displays the following information:

- The budget report for the current month and current shipping address, including sales with no budgets.
- The current month displays in the header section with right and left navigation arrows allowing you to move to future or previous monthly budgets.

Update

Correct Inconsistencies between E-commerce Sales and Budget Reports

The Sales and Budget Reports have been examined and have been updated with a similar look and consistent functionality.

- The name (label) and functionality of the following filters have been standardized on both reports: Report Date, Number of Months and Shipping Address.
- The left and right indentations were removed on smaller devices where real estate is an issue.
- The spacing between detail rows has been significantly reduced.
- Additional changes were made in the detail section to ensure both reports present information in a consistent manner.

Update

E-Commerce Checkout Process: PO Number Always Visible

The PO Number field is always visible on the Shipping information page in the Cart Checkout process on the website for both guest users and users who are logged in.

Certification

Streamline™ ERP

Windows Server 2022 and SQL Server 2022

Streamline™ ERP 2023.3 is certified on Windows Server 2022 and SQL Server 2022.