Streamline™ ERP

2024.1 Release Notes

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Improvements

Enhancement

Updated Functionality of Sub-Module PUB Product Publishing

The integration sub-module PUB (Product Publishing) has been updated. When this module is enabled, the following functionality is available:

- In Streamline™ ERP:
  - The Product Publishing menu item under Inventory > Inventory Master Files, and the sub-menu items: Product Publishing and Product Attributes.
  - The Product Publishing menu item under Streamline™ E-commerce > Master Files; and the sub-menu items: Product Publishing, Product Attributes and Main Product Attributes.
  - The Processing menu item under Streamline™ E-commerce, and the sub-menu items: Publishing Files Upload, Publishing Files Upload Status and Publish Product Attributes.
  - The Publishing button is available on the Product Master screen.
- On the e-commerce website, on the Product Details page:
  - The carousel of images and/or videos from the Media folder on the Product Publishing screen in Streamline™ ERP.
  - The Overview section from the Short Description on Description folder on the Product Publishing screen.
  - The Details, Specifications, Documents and Notes sections from the respective folders on the Product Publishing screen.
- The following functionality on the Product Details page is no longer controlled by the PUB sub-module:
  - Star Ratings
  - Customer Reviews tab
  - Associated Products
- On the e-commerce website, products designated as base or sub-products via Attributes functionality display differently than regular products on the various products pages.
  - Products designated as base products include the following functionality:
    - On all products pages, pricing and add-to-cart functionality are suppressed.
    - On the Product Details page, in addition to the product publishing data, a panel of multiple dropdown options for selectable attributes is available; the Star Ratings are suppressed and the Customer Reviews tab is unavailable.
  - Products designated as sub-products include the following functionality:
    - On all products pages, they display as regular products.
    - On the Product Details page, in addition to the product publishing data, a panel of multiple dropdown options for selectable attributes (defaulted to its unique settings) is available.
- If the sub-module PUB is disabled, any product designated as base or sub-product and all its functionality will revert to a regular product with regular product functionality.

Enhancement

New/Redesigned Labels

We have added new Shipment Confirmation, P/O Receiving and Warehouse Transfer Receipt labels to Streamline™ERP. These labels have been created using Report Designer, a third-party tool integrated with Streamline™ ERP and can be used to replace the old labels generated by the aging Visual Labels Designer.

1. Shipment Confirmation
   - There are two new labels:
     - Ship Details (Single 3" x 4")
     - Ship Header (Single 3" x 4")
   - Access to these labels can be found via Sales Order Processing > Shipping > Shipment Confirmation
     - On the Packing/Picking Slip details screen, select the Shipping Label button.

2. PO Receiving
   - There is one new label:
     - PO Rcv Detail (Single 3" x 4")
   - Access to this label can be found via Purchase Order Processing > Receiving > PO Receiving Product Labels
     - On the Receiving Labels screen, select the Receiving Labels button.

3. Warehouse Transfers
   - There are two new labels:
     - Transfer Details (Single 3"x 4")
     - Transfer Header (Single 3"x 4")
   - Access to these labels can be found via Inventory > Warehouse Transfers > Receive Transfer
     - On the Receive Transfer screen, select the Print Labels button.

In all cases, a Select Label to Print screen opens. The labels on this screen are color coded:

- Black – indicates that the labels were designed using the original label designer (Visual Label Designer).
- Blue - indicates that the labels have been designed using the Report Designer.

Two new user rights have been created to control the amount of information that can be accessed by the user:

- RGAGL - Report Generator Administrator (G/L)
  - Users with this user right can see all the tables in the Report Designer.

- RGANGL - Report Generator Administrator (without G/L)
  - Users with this user right cannot see the GL or AP tables in the Report Designer.

Both rights allow the user to create, modify, delete, or rename labels in the Report Designer.

If you do not have either of these user rights, you can only generate existing label reports.

Enhancement **New User Right RTPPI Right to Product Publishing Import**

We have added a new user right: RTPPI – Right to Product Publishing Import which allows Streamline users to perform product publishing imports. Previously, the product publishing import functionality was restricted to only Tecsys staff.

- When this user right is assigned to your user ID, the Import button is available on all the folders in the Product Publishing program.
- We strongly suggest that this utility be run by Tecsys staff only or arrange for training before you use the import.

Enhancement **New Web Site Option for Session Timeout added to E-commerce Site Administration**

We have added a new Web Site option to the e-commerce Site Administration page to allow site administrators to modify the session timeout parameter on their own site.

The Session Timeout parameter has the following functionality:

- Displays in minutes.
- Allows a maximum of 1440 (which are the number of minutes in 24 hours).
- Takes effect the next day.

Enhancement **Additional Information added to A/P Browse Invoices**

We have added the following non-sortable columns to the A/P Browse Invoices screen:

- Entered By – displays the user ID that created the invoice.
- Entered Date -displays the date on which the invoice was created.
- Time – displays the time at which the invoice was created.

The invoice must contain detail records for these fields to be populated.

Enhancement **Additional Information added to G/L Transaction Entry**

The following new fields have been added to the G/L Transaction Entry screen:

- Entered By – displays the user ID that created the G/L transaction.
- Posted By - displays the user ID that posted the G/L transaction. This field is only visible for transactions that have been posted.

Update

Call for Pricing added as Importable Field

In a previous release (2023.3), the Call for Pricing feature was introduced allowing pricing for specific products to be requested by the web user and then quoted by the distributor before the product can be sold on the website. An Override Pricing in E-commerce with Instruction to Call flag was added to the Product Master program (under the Additional Info button) to identify the call for price products.

The Override Pricing in E-commerce with Instruction to Call has been added to the list of fields that can be imported via the Map Import functionality accessed from the Inventory > Global Changes > Import Data > Import Products menu option.

The Override Pricing in E-commerce with Instruction to Call has the following functionality:

- Is accessible in the Mapping Details screen.
- Is available to Import Mappings of Mapping Type: Products.
- Is identified as Call For Web Price in the Database Column Name drop list.
- Uses pre-existing validation that is associated with all other checkbox fields:
    - Any value starting with Y (Y, Yes, yes, *case-insensitive*) will be interpreted as True.
    - Any other value, except blank, will be interpreted as False.
    - A blank value will not change the existing value.

Update

Customer P/O Number added to E-Commerce Orders and Order Details

Both orders and order details on the Quotes, Orders and Held Submissions page on the e-commerce website now include the customer P/O number.

Update

Batch Printing of Orders: Option to Filter by Date Range

The Batch Printing of Orders screen displays ALL open orders. The date range entered is used to identify orders that are automatically tagged.

A new *filter* checkbox on the Batch Printing of Orders screen allows you to additionally filter the list of orders displayed by the date range entered. This checkbox only displays when BR OP24 (Enable consolidated picking module) is OFF and BR OP28 (Date on which date range is based for batch order printing) is set to Required Date.