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Autologue eProducts

iTrack#53418_58.0_PW_eDelivery_BarCode_Option_FSD_R1.0

Currently, there is a Barcode option called AUTOLOGUE eOFFICE BAR CODE ON INVOICE FORM for a store running the PW Add-ons: eOffice and/or eDelivery. This Barcode option prints the Autologue eProducts (eOffice and eDelivery) Barcode on all store invoices instead of printing the existing PW Barcode on all invoices.

The purpose of this enhancement is to provide users with another Barcode option for a store using the PW Add-on, eDelivery. This option will enable the eProducts (eDelivery) Barcode to only print on invoices sent to eDelivery, and to continue printing the existing PW Barcode on all other invoices.

iTrack#54262_58.0_PW_Send_Truck_Route_to_eDelivery_FSD_R1.0

Previously, users could maintain customer account "truck routes" on the INVOICE & DELIVERY SETUP pop-up on the MAIN ACCOUNT ENTRY screen. However, users could also maintain customer account "delivery zones" in the eDelivery add-on application. Maintaining the same information (truck routes and delivery zones) in the two systems was double effort for users.

The purpose of this enhancement was to continue to enable users to maintain TRUCK ROUTEs on the MAIN ACCOUNT ENTRY screen and then to send this information to eDelivery any time a customer account is added or updated. **Note:** The truck route values sent to eDelivery will be displayed in eDelivery as delivery Zones.

iTrack#55510_58.3.2_PW_eOffice_Invoices_Statements_FSD_R1.0

The purpose of this enhancement was to enable users to control what PartsWatch information is sent to eOffice, depending upon which eProduct was used. **Note:** eOffice is the "central hub" for all eProducts and will distribute the information accordingly.

iTrack#57002_58.3.2_PW_eRewards_FSD_R1.1

The purpose of this enhancement was to add a Loyalty Program to PartsWatch (PW). This is a subscription fee-based feature using the Autologue eProduct eRewards. Contact Sales if interested.

iTrack#57180_58.4_PW_eOrder_Billing_Store_FSD_R1.0

The purpose of this enhancement was to enable eOrders to be processed in a billing store and fulfilled (sourced) from another store.

User Interface

iTrack#55478_58.3.1_PW_Control_Screens_Navigation_Buttons_FSD_R1.0

Provided users with a way to quickly navigate between two Control screens, one at the system level and one at the store level, that both contain switch options for the same Module or Sub-module. Control screens at the enterprise level are also included in this enhancement.

The purpose of this change was to enable users to more easily find, view and edit control switch options. Existing user security will determine if a user can navigate to any screen from any other screen.

Popular examples of this are General Setup, Source Setup, Invoice Options and Catalog Options screens. **Note:** The system and store Purchasing Setup screens already contain both navigation buttons.

iTrack#55710_58.3.1_PW_Employee_Setup_Screen_Changes_FSD_R1.0

The purpose of this enhancement was to make the EMPLOYEE SETUP screen more user-intuitive. Also, to make navigating between this setup screen and security screens quicker and easier.

Invoicing

Catalog

iTrack#54184_58.1_PW_ACES_Catalog_Enhancements_FSD_R1.1

The purpose of these changes were to enhance the PW CATALOG screen when displaying WHI/ACES vendor catalog data (e.g. displaying thumbnails and other options).

iTrack#54317_58.3_PW_Fedlink_Catalog_FSD_R1.0

The purpose of this enhancement was to implement a new PW integration with the vendor Federated's catalog data. The catalog data is displayed within a Federated webpage embedded within the PW CATALOG screen. This option requires a Chrome embedded add-on browser installed on the desktop.

iTrack#52047_57.4_PW_Tec_Alliance_Catalog_Integration_FSD_R5.0

The purpose of these changes was to implement a new PW integration with a European catalog from TecAlliance. The PW CATALOG screen was enhanced to support displaying this vendor's catalog data. There are a few screen differences because European vehicle searches only use MME instead of a YMME search.

iTrack#54881_58.3_PW_ePartConnection_Epicor_Catalog_FSD_R1.2

This new option enables using Epicor catalog data embedded within an Autologue ePartConnection web page within the PW CATALOG screen. **Note:** The application refers to this catalog option as "ePart".

Contact Sales if you desire to use this feature, as setup and configuration by Autologue/PWS are required before use, and there is a monthly subscription fee.

This catalog option also requires a Chrome embedded add-on browser installed on the desktop. Contact Customer Support for details downloading the Chrome add-on browser.

iTrack#57146_58.3.2_PW_Alliance_AST_Catalog_Integration_FSD_R1.0

This new option enables the display of the Alliance AST (Accessories, Supplies, and Tools) catalog data within an Alliance web page embedded within the PW CATALOG screen.

Contact Sales if you desire to use this feature. Setup and configuration by Autologue/PWS is required before use, and there is a monthly subscription fee.

This catalog option also requires a Chrome embedded add-on browser installed on the desktop. Contact Customer Support for details downloading the Chrome add-on browser.

iTrack#56514_58.30_PW_Add_Thumbnails_To_Epicor_Catalog_FSD_R1.1

This new option enabled using Epicor catalog data embedded within the PW CATALOG screen.

Thumbnail images are now available in Epicor catalog results.

Contact Sales if you desire to use this feature. Setup and configuration by Autologue/PWS is required before use, and there is a monthly subscription fee.

iTrack#54561_58.4_PW_Catalog_Part_Type_Display_Order_Region_Select_FSD_R1.0

Provided sellers the flexibility to customize the order in which selections display for the 'Part Types' drop-down in the PartsWatch catalog screen displaying WHI ACES, Epicor and TecAlliance data.

Also provided the ability to select more than one region for PartsWatch catalog returns when displaying WHI ACES data.

iTrack#57338_58.4_PW_Remove_WHI_ACES_Catalog_Release_Notes_FSD_R1.0

The purpose of this enhancement was to remove the 'CATALOG RELEASE NOTES' button from the CATALOG screen when the WHI ACES catalog is displayed because the release notes are no longer publicly available.

Point of Sale

iTrack#55375_58.3.1_PW_Import_Parts_Into_Sales_Order_FSD_R1.0

The purpose of this enhancement was to provide users, via a right-click menu item on the existing INVOICE screen, the ability to import a list of parts from an input file into an existing sales order.

There is a configurable limit, currently set to 100, that determines how many parts can be imported using one input file. Multiple files can be used to import more than 100 parts. The import response time continues to increase for each additional 100 parts imported into the sales order.

iTrack#51067_58.3_PW_Prompt_For_Replacement_Parts_FSD_R1.0

Previously, when a user entered a part on the sell line at POS, there were five situations where a pop-up might have been helpful to the user. These include:

1. Seeing a list of all alternate parts and their quantities available.
2. Seeing a list of all substitution parts and their quantities available.
3. Seeing a new supersede or VCO part and their quantity available.
4. Seeing an old superseded part that still has quantity available to "sell down".
5. Seeing a list of Kits that the part is contained in as a component.

The purpose of this enhancement was to provide users with an option to see an informational pop-up when any of the five situations above occurs; after a user has entered a part on the sell line.

Note: Currently, alternates, supersedes and VCO parts (with their quantities available) display in a list below the sell line but the list is "compressed" and sometimes unnoticed by the user, especially if the PART NOTE pop-up is also displayed.

iTrack#53794_58.0_PW_Reprint_Resend_Finalized_Invoices_FSD_R1.0

Previously, a user could select and reprint a "batch" of open sales orders. This function was useful if a printer had jammed or the printed paper was not legible. However, a user could not select and reprint a "batch" of finalized invoices, or select and resend a "batch" of finalized invoices via email to customers.

The purpose of the change was to enable users to select and reprint or resend a "batch" of finalized invoices.

iTrack#55750_58.0.3_PW_POS_Modifiers_Setup_Option_FSD_R1.4

Previously, all modifiers were available for usage at POS.

This enhancement defines the changes needed to the PartsWatch application to enable users to have more control over which modifiers are available for usage at POS.

Note: Any report profile that was saved with report criteria that contained a specific modifier (that is no longer allowed at POS) now defaults to ALL MODIFIERS when the report is run with that profile.

iTrack#55781_58.3_PW_Limited_Support_For_Selling_Fractional_Quantities_FSD_R1.0

PW_58.3.1_Fractional_Quantities_Overview

Previously, the PartsWatch application only supported selling parts in whole quantity units.

This enhancement defines the changes made to provide support for selling and maintaining parts in fractional quantity units (e.g. 1.5 feet of hose or 2.25 gallons of oil). The system also supports selling kit component parts in fractional quantity units as well.

Note: In a store or warehouse, the majority of parts will still use whole quantity units.

The changes are considered limited because only those functions deemed important to selling, maintaining and reporting parts with fractional units are being enhanced in this release.

Important Note: *PWS will advise all customers that they can use this new feature "as is" and "at their own risk"; knowing in advance that the application will have limited functionality to support fractional units in this release. In subsequent future releases, every function across the entire PartsWatch application will be modified to support fractional units.*

iTrack#54266_58.1_PW_Optimize_Invoice_Print_Finalization_FSD_R1.0

Previously, after a user clicked the ON ACCOUNT button on an INVOICE screen, the user could not open another INVOICE screen (for another customer) during finalization and invoice printing of the current sales order. The application appeared to "freeze" for a few seconds until the finalization tasks were completed and the current INVOICE screen was closed.

The purpose of this enhancement was to close the current INVOICE screen more quickly after a user has clicked the ON ACCOUNT button. The same change will occur after a user has clicked the OK button on the tender processing complete pop-up as well.

This enhancement provided a new option for users that will perform the invoice print related finalization tasks "in the background" of the desktop PC after the current INVOICE screen closes. **Note:** This "background" printing does not use the existing Background Processor (BGP).

If the new option is selected, after a user clicks the ON ACCOUNT button, the current INVOICE screen will close after finalization tasks not related to printing are completed, and right before the “background” printing tasks begin. This change will result in closing the current INVOICE screen more quickly.

However, while performance improvements may be noticeable on older, less powerful, desktop PCs, they may not be noticeable on newer, more powerful, desktop PCs.

iTrack#53787_58.3.1_PW_PW_as_a_Seller_EDI_FSD_R1.0

The purpose of this enhancement was to enable sellers (stores or warehouses) running PartsWatch (PW) to sell to any buyer (running any system) that buys their parts via the gCommerce Gateway. All inbound EDI purchase orders (850) received by PW are processed as sales orders, and PW sends outbound EDI ASNs (856) and eInvoice (810) documents to the buying system.

In addition, PW, as a selling system, has been enhanced with a manual shipping integration with national carriers (e.g. FedEx, UPS, etc.) A new SHIP pop-up at Point-of-Sale (POS) enables the entry of shipping information (e.g. carrier tracking #) obtained by using third-party systems (e.g. FedEx Shipping Manager). The shipping information, entered on the PW sales order, is included in the EDI ASN (856) and eInvoice (810) documents sent from PW when the sales order is finalized.

Finally, this enhancement also included an outbound EDI inventory file (846) sent daily from the PW system to provide the buying system (via the gCommerce Gateway) with all of the parts being offered for sale by the selling system.

iTrack#53342_58.0_PW_Multi-Rebates_FSD_R1.3

Previously, although there were four different “modes of rebates” that could be set up (e.g. enterprise, store, account and group), only one rebate mode could be applied as a “rebate adjusted” part cost optionally used for the calculation of gross profit margin % (GPM %) on the INVOICING screen sales transaction, and on all sales reports that contain GPM.

The purpose of this enhancement was to enable users to optionally include two different modes of rebates in the “rebate adjusted” part cost optionally used for the calculation of gross profit margin % (GPM %) on the Invoicing POS sales transaction as well as all sales reports that contain GPM.

iTrack#53625_58.0.1_PW_Selling_NIF_Parts_FSD_R1.4

Previously, when a NIF part was returned at POS (that was sold with a P “purchase” modifier), before adding the part to a manifest, the system added it into the store’s inventory with “incomplete” information.

The purpose of this enhancement was to enable users to avoid adding NIF parts into their inventories altogether, and to provide an option that will “force” users to enter a part cost during the sale of NIF parts, in case the part is added into the store’s inventory.

iTrack#54682_58.0.1_PW_Order_Confirmation_Email_FSD_R1.0

Some stores require the ability to email order confirmations to their customers, and even though PartsWatch provides the ability to email finalized invoices, it did not allow email notifications for order receipt.

This enhancement defines the changes to the PartsWatch application in order to allow counterpersons to optionally send email notifications for order receipt to their customers.

A NO SALE or an order CONFIRM button can be optionally enabled to provide the related functionality at Point-of-Sale.

iTrack#55191_58.10_PW_UPC_Scan_Quantity_Control_FSD_R1.0

Previously, as UPCs were scanned, the system entered the item directly into the grid at Point-of-Sale, without providing the user with the ability to enter the scan quantity.

This enhancement defines the changes made to the application, by store setup, to either automatically sell the scanned item to the grid or to stop at the SELL field to first enter the quantity being sold.

A control has been added and used to determine, per store, whether each quantity of the same item must be scanned or whether the user can enter the quantity to be sold without scanning each quantity.

iTrack#54972_58.12_PW_Expand_Undo_Cases_FSD_R1.0

Provided the ability for the application to allow additional cases where an invoice can be undone at POS. One use case is for a credit invoice where a part is returned to the shelf.

iTrack#57267_58.4_PW_Expand_Undo_Cases_FSD_R1.0

Provided the ability for the Invoicing function to allow additional cases where an invoice can be undone at POS. One use case is for a credit invoice where a part is returned to a manifest.

iTrack#53822_58.4_PW_Show_Vehicle_in_Open_Reference_FSD_R1.0

The purpose of this enhancement was to display vehicle information in the 'EXISTING INVOICE REFS' pop-up to make it quicker and easier for the counterperson to find the appropriate open reference to add line items or finalize the sales order.

iTrack#54390_58.4_PW_Enhance_Delivery_Surcharge_Option_FSD_R1.1

The purpose of this enhancement was to provide the ability to apply delivery surcharges in Invoicing to offset the cost of delivery.

A surcharge might be applied to all parts delivered to customers within a specific geographic area because of the additional distance traveled to those customers from the selling location.

A surcharge might be applied for all customers to deliver specific types of parts that are extremely large or heavy and require extra labor to deliver.

A surcharge might be applied if the seller has multiple stores or warehouses and different delivery routes might apply for each of these different selling locations.

Finally, different surcharge percentages might be applied based on the type of delivery. For example, a higher percentage for a special expedited "shotgun" delivery versus a regular delivery. Or, as another example, there might be a surcharge to support additional selling staff required at a pickup window.

An existing function supporting the four capabilities above has been modified to enable this feature.

iTrack#55553_58.4_PW_Add_Invoice_Line_Item_Note_FSD_R1.0

Previously, a part note could be added under a part line item in the invoice by typing an "*" in the Line field, pressing the Enter key and adding the note in the 'Line Item Note' pop-up. This option was not intuitive and may not be well known.

The purpose of this enhancement was to provide an additional, more intuitive option for adding a line item part note by right-clicking on the part line item and selecting 'Add Line Item Note'.

iTrack#55764_58.4_PW_Invoicing_Add_Item_Restocking_Fee_FSD_R1.0

Previously, at POS there was no option to add a Restocking Fee to a return "on the fly".

1. Provided POS flexibility by adding a right-click option to add or edit a Restocking Fee to a return line item.
2. At POS, provided a prompt when voiding items from the right-click menu and removing highlighted invoice body items with the Delete key.

Note: Restocking fees added through the setup in the STORE INVOICE OPTIONS screen, 'FEES/MARGINS' tab can be edited with this added option subject to a Manager Approval pop-up.

iTrack#56765_58.4_PW_Split_Items_From_Open_Sales_Order_FSD_R1.1

Previously, line items on an open sales order could not be moved to another order as can be done on return purchase orders and manifests.

The purpose of this enhancement was to allow an open sales order to be "split up", moving one or more line items to a new order. The feature is useful when a sales order has "sourced" parts that must be acquired and parts in stock for immediate sale by moving the in-stock parts to another order allowing invoice completion.

Multi-Store

iTrack#51365_58.1_PW_Store-to-Store_Transfer_Sales_Part_1of2_FSD_R1.0

Most multi-store companies consider the transferring of parts between stores as "merchandise transfers" as opposed to "merchandise sales".

Previously, the application still considered "part transfers" as sales between a selling and buying store using the POS screen to process incoming orders between these stores.

The purpose of all changes within this, and all future releases, is to improve the setup, processing and viewing of "transfers" of merchandise between stores.

Below is a list of changes for this release:

1. Enabled stores to process incoming orders from TRANSFER accounts (a/k/a "transfer requests from stores within the same database") using different documents to process shelf replenishment requests versus sourced order requests. For example, provide an option to print pick tickets when processing incoming shelf replenishment orders, and to print finalized invoices when processing incoming sourced orders.
2. Added two new date fields for parts: "Last Transfer In Date" and "Last Transfer Out Date". Update these fields when "selling" (a/k/a "transferring") parts between stores within the same database. These new transfer dates are in addition to the existing "Last Received Date" and "Last Sold Date", both of which are not being impacted in this release.

3. On multiple application screens (e.g. Stocking Level Edit), enabled stores to view "Last Transfer In Dates" and "Last Transfer Out Dates".

iTrack#54322_58.3.1_PW_Add_Transfer_Button_To_Invoicing_FSD_R1.0

Previously, in a multi-store environment at POS, to transfer a part with no quantity available in the current store, you had to bring the part down to the invoice body, right-click on the line item and select QTY AVAILABLE IN ALL STORES. You could view quantities in other stores and then click the TRANSFER PARTS button bringing up the TRANSFER PARTS pop-up. Enter LOCATION FROM & LOCATION TO stores, enter XFER QTY and click the XFER button.

The purpose of this enhancement was to streamline the process of transferring parts from store to store at POS.

iTrack#54931_58.0.2_PW_Enable_Sister_Store_Sales_Default_FSD_R1.0

Previously, PartsWatch configuration enabled one store to easily "spin off" items requested by a customer onto sales order(s) in one or more other stores when the items were not available in the current store. This is different from sourcing in that the items are being sold directly out of the other stores, and the stock is not being delivered into the current store. Refer to the *iTrack #47632 56.0 WHI PartsWatch Sister Store Selling FSD* for details.

The purpose of this enhancement was to allow users to set up the sister store selling functionality for each store.

Sales Order Status

iTrack#57443_58.4_PW_Enhance_Sales_Order_Status_Screen_FSD_R1.0

The purpose of this enhancement was to add 'eORDER SALES' filters to the 'SALES ORDER STATUS' screen to facilitate review of eOrders like filters found in the 'LISA TRANSACTIONS REPORT'.

Tender

iTrack#52603_57.11_PW_Single_Credit_Card_Icon_FSD_R1.0

Previously, when a store was using the single credit card icon as set-up in the TENDER SETUP screen, the counterperson still had to select a separate icon for Debit Cards. Now users are able to click a single icon on the INVOICE or ROA TENDER screen and the credit card process will determine the type of card scanned. This will reduce the number of errors in processing credit/debit card transactions.

iTrack#53997_57.13_PW_Lock_Payment_Cards_FSD_R1.0

Previously, stores could determine whether to accept checks and COD for every account.

The purpose of this enhancement was to provide an option for stores to decide whether to accept cards (e.g. credit, debit and gift) for every account.

iTrack#54196_57.13_PW_Allow_Pay_Now_Button_FSD_R1.2

The purpose of this enhancement was to provide stores the ability to limit specific accounts to pay for all invoices "on account" with no option to tender payment using any other method (e.g. cash, checks or cards).

Forms

iTrack#52490_58.1_PW_Print_Only_Store_Invoice_for_Account_FSD_R1.0

Previously, users could choose to print only a store copy or a customer copy for all PW Standard invoices that print in the store.

The purpose of this enhancement was to extend the printing choices further by enabling users to print only a store copy of all PW Standard invoices for specific accounts. This option might be especially useful when selling parts via eCommerce websites like eBay or Amazon where the buyer might receive an electronic invoice from the website.

iTrack#54027_58.1_PW_Send_UNDO_Invoice_Copy_FSD_R1.0

The purpose of this enhancement was to provide a new option to prevent UNDO invoices from being sent to customers (via email or fax) who are set to be sent all invoices (via email or fax).

iTrack#54004_58.1_PW_POS_Signature_Capture_FSD_R1.0

Previously, stores that needed to capture customer signatures were printing and asking the customer to sign the invoice, then were scanning the signed invoice, and saving it to a file. Not only was this time-consuming, but it was also difficult to retrieve the invoice should the signature be needed.

The purpose of this document was to define the functionality needed in order to scan customer signatures at POS and to re-display the signature if needed.

The following enhancements are defined:

- Invoicing signature capture for both Topaz signature pads and ChargeItPro PIN pads.
- The ability to optionally display the customer’s signature in Invoice Image.
- Customer’s signature placement on printed documents.

iTrack#56011_58.3_PW_Invoice_Form_Options_Barcode_Total_Units_FSD_R1.0

Previously, on the PW standard forms, when a barcode was printed, the barcode always printed at the center bottom of the invoice. Also, the total units sold was not printed anywhere on the invoice.

The purpose of this enhancement was to provide users with two new options for PW standard forms (only):

- To print a barcode at the top right of the form
- To print the total units sold at the right bottom of the form; directly above the subtotals.

Note: Both new options above apply to full and half page invoice forms and do not apply to cash slip receipts.

iTrack#54264_58.0_PW_Pick_Pack_Part_Sorting_FSD_R1.0

Previously, the default rule for part sorting on all invoice, pick and pack forms was basically a mix of item # (e.g. the order parts were added to the form) combined with catalog vehicle (if applicable). This sorting method indicated “the specific parts that were purchased for each vehicle”.

Users also had the ability to override the part sorting default on the INVOICE & DELIVERY SETUP pop-up on the MAIN ACCOUNT ENTRY screen. However, this override rule required users to update every customer account in the store using the ACCOUNT MASS UPDATE function.

The purpose of this enhancement was to enable users to set store override rules for part sorting on all pick and pack forms. **Note:** The store and account override settings will work together at POS.

iTrack#54678_58.0.1_PW_Invoice_Resequence_FSD_R1.0

Two new enhancements were needed for pick, pack and invoice output:

This enhancement defines the changes to the PartsWatch application in order to output items on invoices and pick and pack tickets in the desired order.

- A new resequence sort control has been added:
  - Per Customer
  - Per Store
- A new control has been added per store to sort by catalog vehicle or not.

iTrack#56764_58.4_PW_QRCode_and_Survey_FSD_R1.0

The primary purpose of this enhancement was to print a QR Code and Survey URL at the bottom of a cash slip receipt.

Two new print options were added to the PW Standard cash slip receipt. They are:

- The ability to print any one of five different images (e.g. QR Code) at the bottom of the cash slip.
- The ability to print 20 cash slip footer text lines of 40 freeform characters each (e.g. a website URL) at the bottom of the cash slip (directly above any printed image).

iTrack#52898_58.4_PW_Vehicle_Tab_Info_Printed_On_Invoice_FSD_R1.0

Previously, vehicle information from a catalog lookup displayed in the 'VEHICLE' column on the right side of the invoice body.

The purpose of this enhancement was to display the vehicle information located in the 'VEHICLE' tab that was entered using the 'VEHICLES' button, in the 'VEHICLE' column on the right side of the invoice body in the INVOICE screen. That vehicle information also prints on the invoice form.

iTrack#55731_58.4_PW_Print_Promotions_On_Invoices_FSD_R1.0

The purpose of this enhancement was to provide the option to print Promotional descriptions and 'You Saved' amounts associated with an invoice line item on finalized PW standard invoice forms.

Note: This Promotional information is based upon promotions set up on the PROMOTIONS SETUP screen, and not those set up on the PRICE PLAN SETUP screen.

Returns

iTrack#55278_57.18_PW_Free_Replacement_Warranties_FSD_R1.2

PW_58.3.1_Warranties_Overview

This document defines the changes made to the application to introduce a new defective exchange “action” modifier, and the changes to process a free part replacement for defective parts returned with warranties.

A new defective exchange modifier has been added to the application for use at Point-of-Sale; including Mode 2. This new “action” modifier allows the return of a defective part and the sale of a replacement part in a single step without requiring any tender (as the price will always be the same for both parts).

When using the new exchange modifier for parts with warranties, a new user setting can be selected so that the automatic “exchange” will only occur if the returned part has a warranty that is not expired, and only contains a “free part replacement” option (with no other proration or refund credit options).

Also, instead of only using the current date as the date that the new replacement part’s warranty begins, there is another new user setting that, when selected, uses either the date of the original sales invoice of the returned part (if a receipt exists) or a date entered by the user at the time of the returned part (if there is no receipt).

iTrack#53876_57.30_PW_New_Defective_Battery_Switches_FSD_R1.0

Some users have set up warranty records for batteries and then elected not to use them.

The purpose of this enhancement was to enable store users at POS to bypass viewing the BATTERY ADJUSTMENT pop-up when a store customer returned defective batteries. It also enables store users to instead enter defective credit amounts more easily for returned batteries and tires.

This enhancement added four new switches to the application; ENABLE BATTERY WARRANTIES, PROMPT FOR DEFECTIVE BATTERY CREDIT AMOUNT, ENABLE TIRE WARRANTIES and PROMPT FOR DEFECTIVE TIRE CREDIT AMOUNT.

iTrack#27567_57.11_PW_Returns_to_Unidentified_Customers_FSD_R1.0

Previously, cash customers had to be identified in order to return merchandise at Point of Sale. Since not all stores use this business rule and allow returns from unidentified customers, the ability to optionally prompt to identify customers during the return process is now available per store.

A new setup field per store is used to determine whether or not unidentified retail customers must be identified before allowing returns to be completed. Previous functionality forced the retail customer to be identified in order to continue with the return.

The Point of Sale return process has been modified to look at the value of the new setup flag to determine how to handle unidentified retail customers when items are returned.

The receipt number has been enhanced to allow less than five numbers and letters.

iTrack#56179_57.20_PW_Invoice_Credit_Control_FSD_R1.0

Previously, on any invoice, the invoice could include returned parts from multiple original sales invoices, as well as returned parts not found in the sales (purchase) history file.

This enhancement defines the changes made to restrict returned parts on an invoice to only parts purchased on the same original invoice. **Note:** Returned parts that are not found in the sales (purchase) history file are considered "not" on the original invoice.

iTrack#55755_58.0.3_PW_Prevent_NIF_Parts_on_Returns_FSD_R1.2

Previously, when customers returned NIF (not in file) parts at POS, if the part's sales invoice was not contained in the system's sales history, the system added the returned part "to the shelf".

This enhancement defines the changes to the PartsWatch application to provide a new option to add resellable and clearance NIF parts returned to a return buyout manifest instead of adding to the store's inventory.

iTrack#56848_58.30_PW_Return_P_F_Modifier_Item_Not_Received_FSD_R1.0

When a store did not receive the item from a vendor that was invoiced to the customer using the P or F modifier, the store had to credit the customer. The purpose of this enhancement was to provide integrity for returns, where the invoiced item was not obtained and therefore can't be placed on a manifest or back on the shelf, consistent with functionality similar to BO or DS modifiers.

1. Added a new override security proc.
2. Added a setting to address return of an item sold with a Purchase (P) or Forward (F) modifier but not received from a vendor.

iTrack#56852_58.30_PW_Shrink_Manifest_for_Do_Not_Manifest_Line_FSD_R1.0

Provided an option to add all returned items from a line code to a shrink manifest rather than a return manifest if the vendor no longer accepts those items for return.

Closeouts

Statements

iTrack#53208_58.0_PW_Auto_Statements_Via_Task_Scheduler_FSD_R1.2

Previously, users had to manually run statements every week and/or month.

The purpose of this enhancement was to enable users to set up the system to generate weekly or monthly statements automatically.

Added a PROFILE button to the STATEMENTS screen and enabled users to create statement "profiles". Enabled users to assign statement "profiles" to a Task Scheduler "batch".

Based upon completing a closeout period event, (e.g. EOW or EOM) or based upon a user specified time, enhanced the Task Scheduler program, the BG Processor and the Statement Print logic to automatically run, generate, and even distribute the statements (via email).

iTrack#54481_58.0_PW_Statement_Discount_Amount_Calculation_FSD_R1.0

Previously, a payment terms discount amount would not be calculated for any balance amount due on a statement, on the ROA pop-up, or on the AR Posting screen, if the account was "Past Due".

The purpose of this enhancement was to provide users with a new option to calculate a discount amount for the CURRENT balance amount due on the statement even if the account is "Past Due".

iTrack#54683_58.0.1_PW_Calculate_Statement_Discount_if_Past_Due_Change_FSD_R1.1

The ability to optionally auto-calculate a prompt payment statement discount on accounts with a past due amount was added in the 58.0 release. A change was needed to that functionality so that the system only considers amounts past due more than 60 days outstanding.

The purpose of this change was to define the enhancements made to statement processing in order to auto-calculate prompt payment discounts on the correct balance.

iTrack#54946_58.0.2_PW_Statement_Tax_Changes_FSD_R1.1

Taxing authorities want to know tax sums not yet collected from the end customer. Because the statement tax totals previously included all sales and returns regardless of whether they were paid in full or not at the time of statement print, a change was needed to only include necessary transactions in the statement tax totals. Commercial customers with a Pay Type of OI-STANDARD are now able to provide the taxing authorities a calculated total of all taxes from unpaid invoices and unapplied credits for the statement period.

This enhancement defines the changes needed to the end-of-period statement process in order to exclude the tax already collected from fully paid invoices and fully applied invoice credits, providing customers with the necessary tax totals for their taxing authorities.

Pay Type OI-STANDARD customer statements - no longer include paid and applied transactions in the tax totals.

iTrack#54009_58.1_PW_Statement_Term_Text_Only_FSD_R1.0

Previously, if an Available Discount amount was printed on a statement, and either the terms text did not offer a prompt paying discount (e.g. NET 30), or the calculated amount eligible for discount was zero, the zero amount was printed on the statement.

The purpose of this enhancement was to hide the Available Discount amount on the printed statement if the calculated discount amount is zero, or if the Terms (e.g. NET 30) does not include a discount.

iTrack#56795_58.4_PW_Statement_Column_Option_Enhancement_FSD_R1.0

Provided users the ability to choose from one of four options to define a column and its contents on account statements when using a PW Statement-Logo form.

Users have the option of choosing one of the following selections: 'DEFERRED', 'CHECK OR PO NUM', 'CHECK', or 'PO NUM' to be used as the 4th column when using any of the following statement forms: 'PW-STATEMENT-LOGO-RIGHT', 'PW-STATEMENT-LOGO-LEFT', 'PW-STATEMENT-LOGO-RIGHT- W/PO', and 'PW-STATEMENT-LOGO-LEFT-W/PO'.

Note: These statement forms were previously known as: 'STATEMENT-LOGO-RIGHT', 'STATEMENT-LOGO-LEFT', STATEMENT-LOGO-RIGHT- W/PO', and 'STATEMENT-LOGO-LEFT-W/PO'.

G/L Export

iTrack#55758_57.20_PW_GL_Export_Consignments_Transactions_FSD_R1.1

Previously, the GL Export did not handle any consignments transactions.

This enhancement includes the changes made to the GL Export (“standard” only) to support all consignments transactions.

For part and core cost edits to be included on the GL Export, the PART LEDGER COST EDITS REPORT must be turned “on” for usage and auditing.

iTrack#55599_58.4_PW_GL_Export_Company_Code_FSD_R1.0

To support multi-store companies, the GL Export function contained a Company Code field that is used to differentiate each store in the export file.

This field was on the STORE INFORMATION tab of the STORE INFORMATION screen, and has been moved to the GL EXPORT tab (on the same screen) to make GL Export setup a bit easier.

End-of-Period

iTrack#51985_57.11_PW_Force_Virtual_Drawers_Closed_for_Auto_EOD_FSD_R1.0

The ability to allow the system to automatically close the end-of-day (EOD) was added in the 50.4 release for stores using VIRTUAL cash drawers. This functionality has been enhanced in order to be used to force drawers closed for automatic end-of-day.

This enhancement includes the changes needed in order to handle open drawers during the automated end-of-day process for VIRTUAL drawers only.

The existing FORCE EOD DRAWERS CLOSE flag is used to determine whether or not the system will close drawers during the automated end-of-day process if any have been left open.

A new control on the SYSTEM CLOSE SETUP screen determines when the automatic end-of-day is run.

iTrack#51987_57.11_PW_EOD_Paid_In_Out_Notes_FSD_R1.0

Previously, the DAY / CASH CLOSE screen displayed a list of all Paid In and Paid Out transactions, and even though a description was optionally entered for each one, the screen did not display it with the transactions.

Displaying the Paid In and Paid Out description is now available on the DAY / CASH CLOSE screen.

If a Description is added when a Paid In or Paid Out transaction is created, it will display on the Day / CASH CLOSE screen with the transaction.

iTrack#51959_58.0_PW_Leap_Year_EOM_Close_Schedule_Date_Defaults_FSD_R1.3

Previously, the end-of-year process automatically created the monthly close schedule for the new year if one did not already exist by copying the schedule from the previous year. Stores that wanted to close on the last day of the month normally closed on February 28th, since that date was copied from the previous year, even though during a leap year, the last day of February is the 29th. Although some stores noticed and changed the date of the close to February 29th manually, and closed as expected, unless they remembered to edit the date for the new year, stores that expected to close on the last day in February actually closed on March 1st instead.

This enhancement defines the changes needed for the end-of-month close schedule process in order to make sure all end-of-month closes occur on the day expected.

A setup has been added to the SYSTEM CLOSE SETUP screen and used to determine how the monthly scheduled close dates will be updated at the end of each year.

The system now allows the end-of-month to be manually run on demand without forcing the user to change the scheduled close date first.

iTrack#56935_58.4_PW_Closeout_Queue_Run_Now_Enhancement_FSD_R1.0

Previously, if a user attempted to manually run the End-of-Month or End-of-Week close and the system prompted with an error, and the user overrode the prompt so that the close continued, the close dates were not changing, causing confusion and possibly a second manual close.

This enhancement improved the Closeout Queue close process so that only one close can be manually run per period.

Both the End-of-Month and End-of-Week processes for manually closing the period now update the ‘LAST’ and ‘NEXT CLOSE’ dates.

Customer

Maintenance

iTrack#19258_58.1_PW_Delete_Account_Contacts_FSD_R1.0

Previously, users could not delete account contacts.

The purpose of this enhancement was to enable users to delete account contacts.

iTrack#51656_57.11_PW_Customer_Price_Sheet_Prevent_Export_FSD_R1.0

The purpose of this enhancement was to provide the ability to allow or deny the saving of the Customer Pricing Sheet report output into a spreadsheet file.

A new security proc has been introduced that, when a report output is previewed on the screen, specifically denies saving the previewed report output into any file format. Therefore, the report output can still be previewed or printed to paper. To prevent users from previewing or printing the report output, the existing screen security should still be used.

iTrack#51981_57.11_PW_Enforce_Credit_Card_Encryption_FSD_R1.0

Users are no longer able to capture and store a customer’s full credit card number by unchecking the Require EFT checkbox, thus eliminating a security issue.

This enhancement closes the gap so full credit card numbers can no longer be stored when EFT functionality is enabled.

iTrack#56615_58.3.1_PW_Require_Customer_PO_Option_FSD_R1.0

Previously, to require customers to provide purchase order numbers at point-at-sale (POS) for sales orders, you had to define a PO / AUTHORIZATION NUMBER “account profile” on the PROFILE PARAMETER SETUP screen by clicking the ACCT PROFILE button on the MAIN ACCOUNT ENTRY screen.

The purpose of this enhancement was to make the setup simpler by adding a new REQUIRE PO option to the INVOICE & DELIVERY SETUP pop-up on the MAIN ACCOUNT ENTRY screen.

Also, now the REQUIRE PO field can be "batch updated" for multiple accounts at once in DFIU.

Note: There are now two different methods to force an account to enter a PO# at POS. Either method can be used to achieve the same result. Requiring a PO# was the most common "account profile" used, and often the only "account profile" used, and if so, with this new setup method, the more difficult to use PROFILE PARAMETER SETUP screen can be avoided.

iTrack#55786_58.4_PW_Customer_Internet_Setup_Name_Change_FSD_R1.0

Since internet setup on the MAIN ACCOUNT ENTRY screen, per customer, is used for every eCommerce website the store sells on, as well as PartsWatch store-to-store ordering for transfer accounts, and even PWMobile (and not only for internet setup), the purpose of this enhancement was to change the name of the 'INTERNET SETUP' pop-up controls on the MAIN ACCOUNT ENTRY screen to 'eORDER SETUP'.

Price Plans

iTrack#55640_58.3.1_PW_Markup_Discount_Sell_Price_Option_FSD_R1.0

Previously, to provide an "overall" discount or markup (with a few exceptions like Contract or Promotional Pricing) on all parts on all invoices, for one or more customer accounts, users could define a default discount or markup % in the OVERALL PRICING % field on the PRICE PLAN SETUP screen.

Users could override this default on the OVERALL DISCOUNT field on the INVOICE screen. This discount or markup would also appear in the INVOICE DISCOUNT sub-total section displayed on both the INVOICE screen, as well as the printed invoice. **Note:** The printed invoice contained only a label of DISCOUNT because it would not be desirable to display invoices being "marked up" however the marked-up value prints on the invoice as negative.

The purpose of this enhancement was to provide the ability to:

- Add a discount or markup to the sell price on all invoices for any line items using Price Plan setups in the Account and Model tabs (exceptions include, for example, Contract Price, Sale Date and Promotional Pricing).
- Avoid displaying any discount or markup in the INVOICE DISCOUNT sub-total section displayed on both the INVOICE screen and the printed invoice.

Use of this option might be for a seller to offset the loss of profit when a customer pays their monthly statement with a credit card (e.g. 3%) for parts sold using Price Plan setups.

The seller might consider adding a "hidden" matching overall markup percent (e.g. 3%) that would be calculated into Price Plan sell prices for this customer so that the location would retain their normal gross profit margin with this customer. **Note:** This option has the risk of losing the customer if the increased sell prices are no longer as competitive as they were without this "hidden" markup.

A/R

iTrack#54938_58.0.2_PW_Statement_Discount_Setup_Changes_FSD_R1.0

Previously, users were able to edit the prompt payment statement discount to any amount regardless of whether or not the SHOW ROA DISCOUNT field on the Controls, Store, AR Control Setup, AR CONTROL SETUP screen is checked or not. Some stores did not allow a discount to be given that is greater than the customer's terms allow.

This enhancement maintains the correct discount posting rules across all stores.

- The last statement discount displays on the POST ENTRIES screen with the statement terms, for information only.
- The existing SHOW ROA DISCOUNT field has been changed to control manual posting on the POST ENTRIES screen only.
- A new field has been added to the AR CONTROL SETUP screen to control payment receipt on the ROA window.

iTrack#56845_58.30_PW_Post_Entries_Screen_Display_Age_Store_FSD_R1.0

The purpose of this enhancement was to display 'AGE STORE' on the following screens: POST ENTRIES, VIEW ENTRIES, APPLY PENDING and RECURRING CHARGE.

Consignments

iTrack#55675_58.0.3_PW_New_Consignment_QOH_Update_Option_FSD_R1.3

Previously, during the setup of a new consignment in PartsWatch, when a user clicked the Update Stock button, the consigned quantity was incremented, and the quantity available was decremented for each consigned part.

However, if the consignment was already set up in another legacy system, and the user wanted to set up the consignment in PartsWatch, when the user clicked the Update Stock button, the only desire was to increment the consigned quantity for each consigned part since the decrement of quantity available already occurred in the other legacy system.

Therefore, this enhancement provides users with a new option to decide the update impact to quantities available for all consigned parts.

iTrack#55722_58.3_PW_Consignments_Name_and_Reports_FSD_R1.0

Previously, only one consignment could be entered for an account or account/ship to combination.

Also, while there were several existing consignment reports, there was no report that specifically was targeted for the consignee to review and sign off on the consignment.

This enhancement allows a user to enter multiple consignments for each account or each account/ship to combination.

Also, changes were made to add two new consignment reports; one of which can be reviewed and signed by the consignee.

Promotions

iTrack#54598_57.15_PW_Stackable_Coupons_FSD_R1.0

Previously, the system could only apply one promo "tender" coupon to a sales order. **Note:** The system could apply multiple line item coupons to the same sales order.

The purpose of this enhancement was to enable the system to apply multiple promo “tender” coupons to the same sales order, as well as enabling users to configure two limits: 1) the maximum number of “tender” coupons that can be applied to an invoice, and 2) the maximum coupon amount that can be applied and deducted from the sales order.

Note: When the system is evaluating multiple “tender” coupons to apply, the system will always apply the coupons that provide the store’s customer with the “best deal”; the best price outcome for the customer.

iTrack#53850_57.30_PW_Promotions_Enhancements_FSD_R1.1

The purpose of this enhancement was to improve the promotions functionality in a few ways in response to user feedback. They are:

- Display all three tender coupon amounts (coupon 1, coupon 2 and promo tender coupon) on all appropriate screens and reports. Currently, when the Promotions feature is “on”, only the coupon 1 and the promo tender coupon display.
- Added a new switch that determines how the “Each price” is determined for items returned from an original sales invoice that had a promo tender coupon applied to the sale.
- Added a new switch that determines the number of characters for the Promotional ID (PROMO CODE).

iTrack#55719_58.0.3_PW_Store_Groups_for_Promotions_FSD_R1.2

Previously, users could assign a specific list of store locations to a promotional campaign.

This enhancement enables users to both create store groups that are specific to promotional campaigns, and to enhance the Add/Edit Campaign function so that both promo and regular store groups can also be assigned to promotional campaigns, in addition to, or instead of assigning specific store locations.

Enabled users to assign a mix of store numbers, regular store groups (created in the enterprise setup screen), or promotional store groups (created in the promotions setup screen) to any promotional campaign.

Purchasing

Order Create

iTrack#50905_58.0_PW_Order_Create_Part2of2_FSD_R1.1

PW_58.3.1_Order_Create_Part_2_Overview

The purpose of this enhancement was to continue the PO Create changes started in R57. The changes in this release primarily focus on purchase and return orders using sales histories.

This enhancement does include other changes as well.

Created four new single or multi-store Shelf Purchase Order methods that use sales histories:

1. Day Sales Order
2. Stock Forecast Mix Order
3. ASPM Order

4. Stock ASPM Mix Order

Created the following new single or multi-store Shelf Purchase Order method, bringing the total number of Shelf Purchase Order methods in the application to fourteen:

- Customer Backorders Only

Created the following two new Overstock Return methods that use sales histories, resulting in thirteen Return Order Method / Mode combinations available:

- Return to ASPM
- Return to Stock ASPM Mix

iTrack#54333_58.1_PW_PO_Create_Misc_Changes_FSD_R1.0

The purpose of this enhancement was to provide an option to prevent users from creating multi-store orders and to enable users to view each part's ASPM value calculated at the most recent EOM.

iTrack#50925_57.11_PW_PO_Create_More_Methods_and_DNR_FSD_R1.0

The first purpose of this enhancement was to add additional purchase and return order methods into the new PURCHASE ORDER - CREATE screen. These include:

- Stock Adjustment Purchase Order
- Stock Adjustment Return Order
- PDC Return
- Recall Return.

In addition, previously, if a user manually overrode the Do Not Reorder (DNR) flag to "Yes", or forgot to reset the DNR flag back to "No" on the MAIN PART ENTRY screen when they set the part's Min, Max or Order Point, then when users were creating purchase orders, parts may not have been included on the orders as expected.

Therefore, the second purpose of this enhancement was to provide users the option to ignore the value of the DNR flag completely for any specific purchase order to help ensure that all parts are ordered as expected.

iTrack#51548_58.4_PW_New_Purchase_Order_Method_Lowest_Cost_Profile_FSD_R1.0

The purpose of this enhancement was to provide a new order method to create one purchase order for the one supplier with the lowest total cost for all parts being ordered. This supplier might not have the best price for each part on the order but when all parts are ordered together, this supplier has the best price for the total order.

During the Order Create function, the user selects multiple order profiles previously saved, each with a different supplier. Each of these profiles should contain the same criteria, options, sales history periods and stores, with the only difference being the supplier and the part cost field used for the order (e.g. current cost versus vendor cost 1, 2, 3 or 4).

This method enables the system to automatically compare multiple saved profiles for different suppliers to enable the system to create a single purchase order using the saved profile for the supplier with the lowest total cost.

This new order method also supports creating and selecting multiple saved profiles for the same supplier, allowing for the comparison of orders with different criteria.

Note: There is also a new SUPPLIER PART COSTS screen introduced in this release. This screen is mentioned because if this screen is populated with supplier part and core cost values for those suppliers compared with saved profiles, the values on this new screen will be used to calculate the total cost of an order in a saved profile.

iTrack#52960_58.4_PW_Negative_Stock_Ordering_FSD_R1.0

The purpose of this enhancement was to provide an easier method to place an order for only parts with negative stock.

The order quantity for all parts on the order is the part's negative stock quantity at the time the purchase order is created. If a part has a quantity available of -2, the order quantity for the part will be 2 (when the order is created), and when the purchase order is received, the part's quantity available will be set to zero.

This new order method ignores all part's sales histories, even though the part's quantities available have all gone negative due to overselling the parts.

This new order method also ignores all part's stocking levels (Min, Max or Order Point), and is a method often used for inventory without stocking levels.

iTrack#52960_58.4_PW_Negative_Stock_Ordering_FSD_R1.0

The purpose of this enhancement was to provide an easier method to place an order for only parts with negative stock.

The order quantity for all parts on the order is the part's negative stock quantity at the time the purchase order is created. If a part has a quantity available of -2, the order quantity for the part will be 2 (when the order is created), and when the purchase order is received, the part's quantity available will be set to zero.

This new order method ignores all part's sales histories, even though the part's quantities available have all gone negative due to overselling the parts.

This new order method also ignores all part's stocking levels (Min, Max or Order Point), and is a method often used for inventory without stocking levels.

iTrack#51549_58.4_PW_Best_Price_Ordering_FSD_R1.0

Previously, in addition to a part's cost field, users could maintain four vendor cost fields on the Inventory, Part Entry, ORDER - COST screen. If required, a few more cost fields could be maintained by using price level fields as cost fields on the Inventory, Part Entry, PART PRICING screen.

Different cost and price fields could be used to create different supplier orders; each order using a different cost or price field. Additionally, these orders could then be manually compared to identify the supplier order with the lowest total cost for all parts ordered. However, there were several limitations:

- There was no way to identify a specific supplier code to each cost or price field on either screen noted above. Users had to remember which cost field was used for which supplier.

- There was a limit to the number of cost and price fields that could be used and therefore a limit to the number of supplier orders that could be compared for total costs.
- The system could only generate supplier orders for all parts ordered. The system could not generate supplier orders that only contain those parts where the supplier has the lowest cost for each of those parts.

The purpose of this enhancement was to address all of the limitations above. In addition, this enhancement provided users with an alternative way to maintain supplier part costs instead of using the four vendor cost fields.

This enhancement provided users with the capability to load an unlimited number of supplier part costs, per part, and to identify a specific supplier code to each cost on a new SUPPLIER PART COSTS screen. Therefore, an unlimited number of suppliers can be compared for the lowest cost ordering.

This enhancement also provided users with a new Order Create option called 'Best Price' that evaluates any number of supplier costs per part, (maintained on the SUPPLIER PART COSTS screen), and automatically removes parts from the order if the supplier does not have the lowest part cost; retaining only parts on the order where the supplier has the lowest part cost.

- **Note:** Users can set up and run multiple supplier order profiles (one per supplier), with the same list of parts ordered. Each order created will only contain the subset of parts where the supplier has the lowest cost per part.
- For example, 75 parts are being ordered and the user wants to determine which of eight different suppliers has the lowest cost per part. The user wants to only buy the lowest cost parts from each supplier. Using the 'Best Price' option, if eight different supplier profiles are run, only three purchase orders would be created if three of the eight suppliers had the lowest costs for the 75 parts; 65 parts on one supplier order, nine parts on the second supplier order, and one part on the third supplier order.

Note: There is a separate new order method called 'Lowest Cost Profile' that creates one supplier order for the supplier with the lowest total cost for all parts ordered. Using the example above with 75 parts, since the first supplier had the lowest cost for 65 parts, that would most likely be the supplier chosen by the system for all 75 parts even though that supplier had a higher cost for 10 of the 75 parts.

iTrack#48577_58.4_PW_New_Purchase_Order_Option_Lowest_Cost_Alternate_FSD_R1.0

The purpose of this enhancement was to provide users with a new option when creating a supplier purchase order based upon stocking levels (e.g. order to max or order point). The new option is to replace parts on the order with any part's alternates, but only if the alternate part has a lower price than the original part's price for that supplier.

For this enhancement, keep in mind that alternate parts may be added to the purchase order that are within lines that were not selected on the ORDER CREATE 'Criteria' tab; if alternate parts replace original parts.

Note: The application does not validate whether selected alternate part lines are offered for sale by this supplier. Users have to manually review the parts and lines on the new order after the order is created and before the order is finalized and sent to the supplier.

iTrack#56603_58.4_PW_Auto_Increase_PO_to_Min_Freight_Cost_Threshold_FSD_R1.0

Previously, when users created purchase orders, if an order's total cost was below a minimum cost threshold, users had to manually review and edit the order to reach the minimum threshold.

The purpose of this enhancement was to provide a new Order Create option, for forecast order methods only, to enable the system to automatically reach the minimum threshold.

When the order's total cost is within a user-specified percentage of the minimum threshold, the system continues to incrementally increase the 'Days PO is to cover' (by adding a day, then another day, etc.), to increase the order's total units and costs accordingly, until the minimum threshold is met.

Note: If the order is not queued within the 'Timed Order Queue', users can still manually review and edit the order once it is created, and decide whether or not to send the order to the vendor.

iTrack#55717_58.0.3_PW_Prevent_NIF_Parts_on_Orders_FSD_R1.3

Previously, users had the option to add NIF parts to both purchase and return orders.

This enhancement provides two new options to users; 1) to prevent NIF parts from being added to purchase orders, and 2) to prevent NIF parts from being added to return orders.

iTrack#54849_58.3_PW_Old_PO_Profiles_on_New_Order_Create_Screen_FSD_R1.0

Previously, on the ORDER CREATE screen:

- The only profiles that could be loaded are those saved from the ORDER CREATE screen. Users could not load profiles on the ORDER CREATE screen that they saved on the PURCHASE ORDER PROFILE screen.
- Also, when a user switched suppliers, all of the information presently displayed on the screen was replaced with information for the new supplier.

The purpose of this enhancement was twofold:

- To allow users to load profiles on the ORDER CREATE screen that they saved on the PURCHASE ORDER PROFILE screen.
- To provide an option to prompt users to retain the information on the Criteria tab (only) when the screen has a profile displayed, and the user is attempting to switch to another supplier. **Note:** The Information on all other tabs (e.g. Options and Store) is replaced with information from the new supplier.

Return Orders

iTrack#54119_57.13_PW_Splitting_Return_Orders_FSD_R1.2

Previously, a user could not move any parts from one return order to another.

The purpose of this enhancement was to enable users to "split" up and move multiple parts from one return order to another return order (for the same vendor only) in order to meet that vendor's requirement of having a return order report for each container of returned parts.

Order Transmit

iTrack#55986_58.3_PW_PO_Email_With_Part_Costs_FSD_R1.0

Previously, the PO Email Transmit function could send a purchase order attachment to a vendor/supplier via email. However, the purchase order did not include part or core costs.

The purpose of this enhancement was to provide users with the option to print part and core costs on the attached purchase order.

Order Receive

iTrack#53999_57.13_PW_Order_Receipt_Variances_Screen_FSD_R1.1

When stores were receiving ordered parts, for various reasons, there were sometimes discrepancies between the parts ordered and the parts received, or between the parts recorded as received and those received. The most typical discrepancy is that a part quantity received into stock was less than or greater than the quantity ordered or recorded as received; considered an “overage” or “shortage”.

The purpose of this enhancement was to provide users with the capability to record an “over or short” order receipt variance for a part after receiving the order into stock.

Note: This enhancement does not contain the full solution for processing the discrepancies submitted or even enable users to view their discrepancies after submission.

iTrack#54353_58.10_PW_Order_Receipt_Variances_Changes_FSD_R1.1

When the ORDER RECEIPT VARIANCES screen was introduced (in an earlier release), the screen had limited functionality. Also, there was no report to view any user-entered data on the screen.

The purpose of this enhancement was twofold: to provide users with more functionality on the screen, as well as to include a new Order Receipt Variances Report.

Multi-Store

iTrack#53348_58.0_PW_Transfer_Invoice_Barcodes_FSD_R1.0

Previously, application users could scan barcodes on paper invoices in order to locate the invoice; e.g. for a return of merchandise to the selling store.

For multi-store users, when there was a “transfer sale” of merchandise between two stores, a user at the buying store could not scan the barcode on the paper transfer invoice to identify both the ASN and purchase order for that transfer invoice.

The purpose of this enhancement was for multi-store users, when in the buying store, to be able to scan the barcode on transfer invoices (on the ASN RECEIVE screen) in order to identify the ASN and purchase order. **Note:** In the selling store, a user can still scan the same barcode on the transfer invoice to identify the invoice.

iTrack#57658_58.4_PW_Multi-Database_eORDER_Enhancements_FSD_R1.0

The purpose of this enhancement was to:

- Provide users with a way to disable the automatic creation and transmission of eOrder VI items.
- Provide users with a way to disable the automatic creation and transmission of eOrder Billing Store items.
- Include the ability to transfer ASNs for eOrders between stores within different PartsWatch databases.

iTrack#57706_58.4_PW_Multi_Store_PO_View_Order_Quantities_FSD_R1.0

The purpose of this enhancement was to provide a quicker and more efficient way to view each store's order quantities for a multi-store distributed purchase order. **Note:** This new function is not applicable for multi-store consolidated purchase orders.

Created a new checkbox ('QTY ORD MSDPO STORES') on the PO EDIT LAYOUT screen to enable displaying order quantities for each store in columnar format on the 'PURCHASE ORDER' (PO Detail) screen. This columnar format displayed is similar to the existing checkbox ('QTY AVL IN ALL STORES') and a user can only check one of these two checkboxes at one time. **Note:** Edits to any of the store order quantities on a purchase order are still performed on the 'EDIT PURCHASE ORDER' pop-up.

ASN

iTrack#56913_58.0.4_PW_ASN_Stripped_Part_Number_Matching_FSD_R1.0

Previously, when an EDI 856 ASN was received from an EDI Gateway (VAN) all part numbers were first searched on the associated purchase order using an exact match, and if the part number was not found, then a stripped-match was performed. For example, a FRAM PH8A part number would only match a PH-8A if all slashes, dashes and special characters were first "stripped" from both part numbers before the match is performed.

The purpose of this enhancement was to extend the part number matching rules above for all ASNs received from any selling system. The part number matching rules are the same as those existing rules already used with EDI ASN 856 documents.

iTrack#56851_58.30_PW_Receiving_ASNs_On_Closed_Purchase_Orders_FSD_R1.0

The purpose of this enhancement was to add a third option for when an ASN is received on a purchase order that has already been closed. The new option is to reopen the closed purchase order and apply the ASN. This option has also been added to the SUPPLIER ORDER SPECIFICS screen so that users can override the system setting for any specific supplier within any store.

The closed purchase order can be a single or multi-store purchase order. The closed purchase order can be a stock replenishment order created using any order method, or a sourced order. The primary purpose of this enhancement was the use case where a stock replenishment order containing multiple parts receives multiple ASNs because different part lines are fulfilled from different warehouse locations.

No changes are being made to the PATI Report other than adding more purchase order receipt rows to the output.

Note: The existing two options are to ignore the received ASN or to create a new purchase order and apply the received ASN to the new order instead of the original closed order.

iTrack#57534_58.4_PW_Partial_List_of_Parts_on_Reopened_POs_by_ASN_FSD_R1.0

The purpose of this enhancement was to add a fourth option for when an ASN is received on a purchase order that has already been closed. The new option is to reopen the closed purchase order and apply the ASN but only include the part numbers present on the ASN on the reopened PO.

This option has also been added to the SUPPLIER ORDER SPECIFICS screen so that users can override the system setting for any specific supplier within any store.

The closed purchase order can be a single or multi-store consolidated purchase order. The new option is not supported with multi-store distributed orders. The closed purchase order can be a stock replenishment order created using any order method, or a sourced order.

Manifest

iTrack#53788_57.3_PW_Move_Manifest_Different_Cost_FSD_R1.0

Previously, a user could not move a part from one manifest to another if the PO PART COST LEVEL set for the two different vendor suppliers was different.

The purpose of this enhancement was to enable users to move parts across different manifests with different PO PART COST LEVELs.

iTrack#53880_57.13_PW_Moving_Manifest_Parts_FSD_R1.2

Previously, when a customer returned multiple quantities of a part on an invoice, if all of the quantities needed to go back to a vendor, and POS added the part to a manifest, the return quantity on the manifest was broken up into EACHES.

In addition, if a user added a part to a manifest using the ADD PART button on the RETURN MANIFESTS screen, the RTN QTY on the ADD PART TO MANIFEST pop-up was always broken up into EACHES when the function adds the part to a manifest.

Once parts were contained on a manifest, a user could only move one part at a time, from one manifest to another.

The purpose of this enhancement was twofold:

1. To record all parts on a manifest without breaking up any return quantity into EACHES.
2. To enable users to more easily and quickly move multiple (or even all) parts from one manifest to another. Users can even move a portion of the return quantity for a part on a manifest.

Now record all parts on a manifest without breaking up any return quantity into EACHES. Therefore, any part moved from an invoice to a manifest will always contain the same return quantity.

Provided users with the option to "move" or "split" multiple parts from a manifest.

- When multiple parts are "moved" from a manifest, provided users the same choices as single part moves; to move the parts to other new or existing manifest types, vendors and return points.
- When multiple parts are "split" from a manifest, ensured that the new manifest created contains the same manifest type, vendor and return point. However, provided users with the additional options to transmit the new manifest, and to print a manifest detail report immediately after creating the new manifest.

iTrack#54167_58.1_PW_New_Security_Proc_for_Manifests_FSD_R1.0

The purpose of this enhancement was to provide a new security proc for controlling the adding of parts to manifests. In addition, this enhancement makes it easier to search for Return Points on the BROWSE RETURN POINTS pop-up.

iTrack#54558_58.1_PW_Change_Return_Point_FSD_R1.0

The purpose of this enhancement was to provide users with options for how to handle changing a manifest return point to another return point with a different cost level.

iTrack#57106_58.12_PW_Manifest_and_RO_Reports_Multiple_Copies_Option_FSD_R1.0

Provided users with the option to print two copies of the manifest or return order reports; one copy for the store and one copy to be sent with the returned parts to the vendor/supplier/warehouse.

Also, added a 'Last Count Date' to the inventory Report Generator.

Also, defaulted the store column to the current store on the CYCLE COUNT REPORT screen (for a multi-store company).

iTrack#56850_58.30_PW_Prevent_NIF_Part_Creation_FSD_R1.0

The purpose of this enhancement was to prevent the application from adding a NIF part into the store's inventory when transmitting a manifest, containing NIF (not in file) parts, to a vendor or warehouse.

Reports

iTrack#51609_58.1_PW_PO_Report_Exclude_Total_ Prices_FSD_R1.0

Previously, there was a user option on the PO Reports pop-up to exclude prices printing on purchase order reports. However, this option did not also exclude grand totals or the total PO Cost at the bottom of the report in the "PO Totals box".

The purpose of this enhancement was to provide another user option to exclude the total price.

Scanning

iTrack#53159_57.12_PW_Scan_Session_Receive_FSD_R1.0

Previously, the wireless RF Gun "Add-on" had a Scan Session function. In this release, the application has added a new Scan Session function so that users with a wired ("tethered") scanner have the same functionality at the desktop.

The purpose of this enhancement is to enable users to select a list of parts, previously scanned using the wireless or wired Scan Session function, and then assign those parts to POs/ASNs in order to receive those parts into stock.

Enhanced the existing Scan Receive function by enabling a user to populate the scanned parts grid with a list of parts previously scanned from one or more scan sessions. **Note:** The user is still able to perform all existing functions on that screen including scanning more parts.

iTrack#53112_57.12_PW_Scan_Session_FSD_R1.0

Previously, the wireless RF Gun had a Scan Session function.

The purpose of this enhancement is to add a Scan Session function to the application so that users with a wired ("tethered") scanner can use the same functionality at the desktop.

Created a new application screen called SCAN SESSION with functionality leveraging the existing functionality from the RF Gun Scan Session function.

Inventory

Labels

iTrack#55228_57.20_PW_Print_Default_UPC_Price_Labels_FSD_R1.1

Previously, if a part had multiple UPC barcodes set up in the PART UPC ENTRY screen when a part shelf label was printed, each UPC barcode would be output on a separate label. For example, if the user was printing labels for one part with 7 UPC barcodes, seven labels would be printed, one for each UPC barcode. This is because the default for the PRINT BAR CODE drop-down was “ALL”. There was another drop-down override value of “EACH ONLY” but often users were not aware of this option, and there could even be multiple “EACH ONLY” UPC barcodes.

This enhancement enables users to print only one label (with only one UPC barcode) instead of printing many labels (with multiple UPC barcodes) for each part’s shelf label printed.

iTrack#56045_58.10_PW_Label_Enhancements_FSD_R1.0

The following enhancements are documented in this FSD:

1. To meet regulatory guidelines in the town of Erie, New York, a new shelf label has been included in the application that displays the retail price at a height of ¾”.
2. The default label quantity and label type are now located on the same screen.
3. Now allows the user to control whether a label should be printed if only the list price changes.

Maintenance

iTrack#53023_58.1_PW_Available_Matches_Popup_Qty_Avail_FSD_R1.0

Previously, the Available Matches pop-up, displayed on both the INVOICING POS (F7) screen and the MAIN PART ENTRY (F8) screen contained a Quantity on Hand (QOH) value for each part. Some customers would prefer to see a Quantity Available value instead of, or in addition to, the QOH value.

The purpose of this enhancement is to add a Quantity Available, Quantity Reserved and On Order Quantity value to this pop-up; as well as to the Quantity Available in all stores pop-up.

iTrack#54159_58.1_PW_Supersedes_Displayed_for_NonSku_Parts_FSD_R1.0

The purpose of this enhancement was to display on the MAIN PART ENTRY screen any supersede for a part in the store’s virtual inventory (NonSku Parts).

However, this enhancement did not attempt to address the PART ASSOCIATION SETUP screen with respect to the handling of NonSku parts. A future release will address those changes.

iTrack#54614_58.0.1_PW_255-Character_Part_Desc_FSD_R1.0

Some manufacturer lines, for example, paint lines, use a long description to identify the part. Since the existing part DESCRIPTION 1 and DESCRIPTION 2 fields stored up to 40 characters only, the part table description field length has been increased to accept up to 255-characters.

iTrack#55779_58.3_PW_Weighted_ASPM_on_Part_History_Screen_FSD_R1.0

Previously, on the PART HISTORY screen, the following fields were displayed, Sales History Period, Total Units Sold and ASPM.

The purpose of this enhancement was to display the Sales History Multiplier and the Weighted ASPM.

iTrack#55489_58.4_PW_New_Security_Proc_Disable_Qty_Available_FSD_R1.0

Previously, PartsWatch allowed access to edit the Qty Available in the Part Entry screens, MAIN PART ENTRY, PART PRICING and ORDER / COST. The purpose of this document was to restrict the ability to edit the Qty Available in those screens.

iTrack#56813_58.4_PW_New_Part_Attributes_Entry_Screen_FSD_R1.0

The purpose of this enhancement was to provide the ability to maintain attributes for parts related to shipping (e.g. weight, volume, height, length, and width dimensions).

iTrack#56884_58.4_PW_New_DNR_Setting_FSD_R1.1

The purpose of this enhancement was to introduce a new setting to enable users to determine whether the 'DNR' setting is automatically updated when stocking levels are updated.

Added a new configuration setting to allow users to decide whether they want the 'DNR' checkbox to be updated automatically, or to be prompted for the update when stocking levels change.

Counting

iTrack#51386_57.19_PW_Inventory_Count_Adjustment_Screen_FSD_R1.1

PW_58.3.1_Inventory_Count_Adjustment_Overview

Previously, the Add-on wireless RF Gun application provided the ability to scan parts for a cycle count; including generating a cycle count report that compares scanned quantities to QOH in the store's inventory file for all parts scanned.

However, it is a time-consuming process to review and correct all discrepancies, and then update stock. No screen can be used to quickly and easily update all part quantity corrections "at once".

This enhancement enables users to complete the cycle count process more quickly and easily by loading cycle count scanned part results into a new Inventory Count Adjustment (ICA) screen.

On the new ICA screen, users can review the cycle count results, edit corrections and update all corrected stock quantities within the store's inventory file with one button click.

iTrack#54945_58.0.2_PW_Qty_Adjust_Cycle_Count_Entry_FSD_R1.0

Finance Departments needed the ability to differentiate inventory stock adjustments and cycle count adjustments for audit purposes.

This enhancement provides the necessary information including:

- A system level control is used to force or hide Quantity Adjust reason codes.
- Optional / forced reason code selection tracks inventory changes from the QUANTITY ADJUST screen.

- The Part Ledger Report outputs the reason codes as needed.

Utility

iTrack#50368_58.3_PW_Part_Move_and_Fix_Utilities_FSD_R1.0

The purpose of this enhancement was twofold:

- When using the Part Move Utility, to successfully move parts when there are part histories in both the old and new lines. Currently, that condition will result in a failed move for a part.
- When using the Part Fix Utility, to explain the end result in Part Ledger.

Kits

iTrack#33685_58.3_PW_Kits_FSD_R1.0

PW_58.3.1_Kits_Overview

The purpose of this enhancement was to enable users to create and sell kits using parts from multiple different lines and manufacturers.

Selling kits from the INVOICE and CATALOG screens is available for all users using all catalogs. **Note:** There are special kit selling opportunities when using the ACES, Epicor or TecAlliance catalogs that are not currently available when using the embedded Nexpart, ePartConnection and Fedlink catalogs.

Selling kits from all eCommerce websites is available for all users (using all catalogs) but kit components are not currently available for viewing on all eCommerce websites.

iTrack#57032_58.3.2_PW_Contract_Pricing_for_Kits_FSD_R1.1

Provided users with the ability to set contract pricing for kit parts on the customer PRICE PLAN SETUP screen. At POS, any kit part's eligible contract price setup is now used as the sell price for the kit. Using contract pricing enables fixing the price of a kit part for special customer accounts or account groups (which can also be accomplished by using a kit 'Pricing Rule' of 'Kit Plan Price'). However, using contract pricing also prevents any changes to the kit's sell price at POS.

In addition, on the customer PRICE PLAN SETUP screen, provided users with the ability to define any discount using 'SETUP TYPE' (e.g. 'CONTRACT PRICE', 'MSG', 'SALE DATE' or 'QUANTITY BREAK') at the 'LINE', 'PN CODE' or 'GROUP' level that are only applied to kit parts (and not to regular parts).

If a discount applied to kits uses a 'SETUP TYPE' of 'MSG', 'SALE DATE' or 'QUANTITY BREAK', the discount is now only applied to kits with a 'Pricing Rule' of 'Kit Plan Price'. However, if a discount uses a 'SETUP TYPE' of 'CONTRACT PRICE', the discount is applied to a kit regardless of the kit's 'Pricing Rule'.

For example, if you wanted to define 30 different premium kits (with three different pricing grades), you could use the 'PN GROUP' part attribute and set each of the kit parts to a 'PN GROUP' value of 'PREM1', 'PREM2' or 'PREM3'. Then define three discount records with 'SETUP TYPE' of 'CONTRACT PRICE' for each of the three 'GROUP' values, and then you can more easily, quickly, and accurately maintain your contract pricing for the 30 different kit parts.

iTrack#57292_58.4_PW_Calculate_Kit_Component_Fees_and_Taxability_FSD_R1.0

Previously, taxes were calculated and displayed on the printed invoice for the Kit part regardless of whether Kit component parts were taxable or non-taxable. In addition, fees had to be set up for the kit part even if fees were already set up for kit component parts.

The purpose of this enhancement was to process fees and taxes using the Kit component parts instead of the kit part on a kit part sale.

Note: This enables setting up kits that might have a mix of taxable and non-taxable components; displaying the appropriate tax settings on the printed invoice for each component. This also avoids users having to set up fees for the kit part when kit components already have fees set up.

Returns of kit components continue to process fees and taxes on the kit components.

Multi-Store

iTrack#53255_58.0_PW_IR_Review_More_Columns_FSD_R1.0

For Multi-Store users, the INVENTORY REDISTRIBUTION REVIEW screen's grid contained a "static" list of part attribute columns (e.g. Min, Max and Order Point). In a future release, users will be able to dynamically customize the columns that display in the grid by selecting only those columns they wish to see from a list of available columns. For example, a user may only want to display "Max", and not display "Min" or "Order Point", because all stock ordering only uses the "Order to Max" order method.

The purpose of this "interim" change was to enhance the grid's "static" part attribute list by adding three more columns.

Reports

iTrack#54876_57.17_PW_Reporting_POC_FSD_R1.2

PW_58.3.1_Reports_in_the_Background_Overview

Previously, application users were experiencing a very intermittent but very annoying issue when running reports. The user would see an error message "indicating out of memory" with a large red X displayed, and the user must restart the application.

No one has been able to reproduce the issue "at-will". The issue might occur when running any report because the issue appears to be a memory leak and can be a result of running different reports over a long period of time, or possibly one report will a very large amount of data to be previewed or printed.

The purpose of the changes was to provide a method of running reports that will mitigate or possibly eliminate the issue. The solution is a "proof of concept" (POC) that might only be an interim solution but could possibly result in becoming a long term solution as well.

There is a second benefit to this solution. Currently, a user can only preview one report at a time; and while that report is previewed, the user cannot do anything else within the application. This solution enables a user to preview a report, and then perform another action like displaying a maintenance screen so both the report's output and the maintenance screen can be viewed together; on the same or two different monitors.

iTrack#53938_58.1_PW_Report_All_Override_Tasks_FSD_R1.0

When the Override Report was added in the 54.0 release, only select override tasks were available for output.

The purpose of this enhancement was to enable all override security tasks for output from the Override Report.

Financial

iTrack#51145_58.0_PW_Lisa_Part_Ranking_Account_Types_FSD_R1.0

Previously, the LISA PART RANKING REPORT screen enabled a user to select one or all ACCOUNT TYPEs.

The purpose of this enhancement was to enable users to select multiple ACCOUNT TYPEs on the LISA PART RANKING REPORT screen similar to how users can already select multiple ACCOUNT TYPEs on the LISA TRANSACTIONS REPORT screen.

iTrack#55090_58.3_PW_LISA_Transactions_Report_Changes_FSD_R1.0

Previously, on the LISA TRANSACTIONS REPORT, you could select one or all invoice modifiers, but not a list of invoice modifiers. Also, all internet sales ("eOrders") could be filtered on the screen, but not by the different internet sales order types. Finally, there was no room on the screen to add more filter criteria.

The purpose of this enhancement was to enable users to select a list of invoice modifiers, to enable users to filter sales by different internet order sales types, and to filter by additional "pricing" related criteria.

Enhanced the LISA TRANSACTIONS REPORT screen by:

- Replacing the Invoice Modifier drop-down with a new SELECT MODIFIERS multi-select pop-up.
- Changing the filter INTERNET SALES to eORDER SALES and adding a new drop-down called eORDER TYPE.
- Adding a new PRICING button and pop-up and in addition to moving DISCOUNT TYPE, POS DISCOUNT and POS DISC REASON to the new pop-up, adding several new pricing related filters. **Note:** By moving these three filters, there will be more room for a few more new filters in the future.
- Changing the drop-down value WRITE-IN to NIF in the STATUS drop-down.

iTrack#53456_58.1_PW_Sales_by_Account_Group_Report_Ship_to_State_FSD_R1.0

Previously, the Sales by Account Group Report enabled a user to generate a report by STATE (or PROVINCE), which is actually the BILL TO STATE (or PROVINCE).

The purpose of this enhancement was to add SHIP TO STATE (or PROVINCE) as another reporting option on the Sales by Account Group Report.

iTrack#56763_58.3.1_PW_Aging_Report_Exclude_Zero_Balance_Accounts_FSD_R1.0

The purpose of this enhancement was to add a new option on the Aging Report to exclude accounts with zero balances.

iTrack#53169_58.0_PW_Master_Linked_Account_Report_FSD_R1.1

Previously, users could link a group of accounts to a master account for AR billing. However, once linked, there was no report that a user can use to view all linked accounts to their master accounts.

The purpose of the enhancement was to add a new MASTER / LINKED SETUP Report.

iTrack#50198_58.3_PW_Retail_Account_List_Changes_FSD_R1.0

The purpose of this enhancement was to improve the screen criteria used to run the Retail Account List.

iTrack#55091_58.3_PW_Invoice_Journal_Report_Item_Count_FSD_R1.0

Previously, on the Invoice Journal Report, the # LINE ITEMS amount included line item notes.

The purpose of this enhancement was to exclude line item notes from the calculated # LINE ITEMS.

iTrack#56656_58.4_PW_LISA_Trans_Report_Filter_By_Promotions_FSD_R1.0

The purpose of this enhancement was to provide users the ability to review LISA Transaction Report parts sold that were included within a promotional campaign.

Inventory

iTrack#52556_58.1_PW_Part_Ledger_Report_Dates_FSD_R1.0

The START DATE on the PART LEDGER REPORT UI screen defaults to today's date. Therefore, users will often uncheck the START DATE on the screen in order to search for part sales for an account without providing a START DATE value. This will force the report to search the entire part ledger table from the very first day the store started using PW. In some databases, especially those with multiple stores or with many years of history, this can cause the report to take longer to display the report's output because the report program is searching the entire part ledger table.

The purpose of the change is to help the search results return more quickly for the user by avoiding searching the entire part ledger table.

iTrack#55506_58.3_PW_Inventory_Cost_Report_By_Line_Group_FSD_R1.0

Previously, the Inventory Cost Report could be run for a single Line Code or all Line Codes. There was no way to view a cost summary for a list of Lines Codes "as a group". For example, a single group that consists of all of the multiple AC Delco line codes.

The purpose of this enhancement was to provide a Line Code "grouping" capability for the Inventory Cost Report.

On the LINE CODE ENTRY screen, added a new LINE GROUP field so users can "map" each Line Code into a "group". **Note:** The group names can be any eight-character values.

For the Inventory Cost Report, added a new LINE GROUP criteria so the report can be run for one or all Line Groups, and also add several new options to output the report by Line Groups instead of Line Codes. Made a few other miscellaneous changes to the report (e.g. displaying Line Group, Line, and PN Code on the report output header if the user enters criteria values).

iTrack#53435_58.0_PW_Inventory_Count_Report_Task_Scheduler_FSD_R1.0

The purpose of this enhancement was to provide users the ability to schedule an inventory count.

iTrack#55706_58.0.3_PW_Inventory_Count_Report_Zone_Bin_FSD_R1.1

This enhancement allows Zone/Bin locations to be printed on the Inventory Count Report.

iTrack#38514_58.3_PW_Inventory_Count_Report_Save_Worksheet_FSD_R1.0

Previously, for those using the Inventory Count Report to assist with counting their inventory, after the counting effort is completed, there was no quick and easy way to update the inventory. Separately, you could only enter one Line Code/PN Code or Zone/Bin when running the report.

The purposes of this enhancement were threefold:

1. To provide users the ability to save the output from the INVENTORY COUNT REPORT screen into the INVENTORY COUNT ADJUSTMENT (ICA) screen to simplify part quantity on hand updates after a count has identified quantity on hand differences between the shelf and the system.
2. To add multi-select pop-ups for both Line Code and PN Codes on the INVENTORY COUNT REPORT screen for those counting by line / pn codes.
3. To add a multi-select pop-up for entering Zones and Bins on the INVENTORY COUNT REPORT screen for those counting by zone/bins.

iTrack#53248_58.0_PW_Part_Purchasing_Notes_Report_FSD_R1.0

Previously, the Part Notes Report contained only invoice notes.

The purpose of this enhancement was to add purchasing notes to the Part Notes Report.

iTrack#53419_58.1_PW_Blank_Part_Descriptions_FSD_R1.0

Previously, users had no easy way to see all parts in their inventory with a blank part description.

The purpose of this enhancement was to provide a way for users to see all parts in their inventory with a blank part description.

iTrack#39620_58.4_PW_Hist_Inventory_Cost_Report_By_Line_Type_FSD_R1.0

The purpose of this enhancement was to add two drop-downs to the INVENTORY COST REPORTS screen, 'LINE TYPE' and 'CORE PRICING'. These two drop-downs are available for all three reports on the screen.

iTrack#55248_58.4_PW_Default_Non-Stocked_Criteria_on_Reports_FSD_R1.0

The purpose of this enhancement was to enable users to more easily avoid printing non-stocked and consigned parts on several Inventory report UI screens.

Sometimes, when printing inventory reports to paper, if non-stocked or consigned parts are not desired on the output, and they printed by oversight, extra paper costs could potentially be incurred.

Users are now able to set a default 'EXCLUDE' or 'INCLUDE' drop-down value for non-stocked and consigned parts on only inventory reports because the desired defaults for financial reports might be different.

iTrack#56250_58.4_PW_Count_Report_No_Cover_Page_Option_FSD_R1.0

Provided users the option to preview or print the Inventory Count Report without a cover page.

Note: When previewing the report, the cover page is often unnecessary (and causes extra keystrokes to scroll to see the actual first page of output). When printing, users can save paper costs without a cover page.

Purchasing

iTrack#54816_57.16_PW_Scan_Session_Variance_Report_Changes_FSD_R1.3

The ability to report variances between the ASN quantity vs the quantity shipped was needed by the stores. Quantities shipped against Purchase Orders for vendors that did not send ASNs will continue to be handled by existing scan receipt functionality.

The purpose of this document was to define the changes needed to the Scan Session Variance Report in order to alert the stores to the differences in product shipped vs product received.

iTrack#55294_57.18_PW_Scan_Session_Variance_Report_Misc_Changes_FSD_R1.0

This document defines the changes needed to enhance the heading of the Scan Session Variance Report to support the display of a larger number of Scan Session IDs and ASNs; as well as supporting the user's ability to select all ASNs "at once" from the report UI screen (with a new select all checkbox).

Vendor

Supplier

iTrack#56846_58.30_PW_Block_Supplier_From_POs_FSD_R1.0

Previously, there was no method to delete a supplier; or prevent users from creating purchase orders for any supplier.

The purpose of this enhancement was to allow users to control whether a supplier can be blocked from being used for new purchase orders.

The application still allows parts to be received on outstanding orders from these suppliers for orders placed before they were blocked.

Add-Ons

RF Gun

iTrack#55286_57.19_PW_RF_Gun_Scan_Manifest_and_Return_Order_FSD_R1.0

Previously, the RF Gun function enabled scanning parts received into the warehouse or store from a vendor but there was no capability to scan a list of parts for a manifest or return order to a vendor.

The purpose of this enhancement was to provide a user with a quick and simple way to scan a collection of parts using a wireless RF Gun device that is part of a manifest or return order. The user could process the manifest or return order to completion by using the handheld device.

Also, this enhancement supports splitting a manifest or return order. This "splitting" supports the ability for users to print a paper manifest report, or return order report, to be packaged with and enclosed in the pallet or tote containing the merchandise going back to the vendor.

Note: Functionality regarding the scanning of manifests and return orders using the RF Gun device may not be identical to the desktop application. Discrepancies should be resolved using the application if necessary.

New RF gun menu items and functionality have been added to support scanning all types of manifests and return orders.

iTrack#55437_57.19_PW_RF_Gun_Cycle_Count_Scan_Any_Part_FSD_R1.0

Previously, the RF Gun device enabled a user to perform a cycle count by entering a list or range of Line and PN Codes. This enhancement added a third option to allow the user the flexibility to scan any part in any bin or any tote.

Note: Certain changes made for Cycle Count screens also affect Hole Count screens and will be identified where applicable.

Functionality for Line and Range Cycle Counts has been updated and noted in this document.

iTrack#55449_57.19_PW_RF_Gun_Label_Print_and_Other_Enhancements_FSD_R1.0

Documented below are several enhancements to the RF Gun device app:

- Update Labels for RF Gun Device Switches
- Page Navigation Change
- Updated Part Inquiry Screen

iTrack#56044_58.10_PW_RF_Gun_Scan_Enhancements_FSD_R1.0

The purpose of this enhancement was to provide improvements to the RF Gun Scan process including:

- Clearing the DNR Flag under certain circumstances,
- Providing support for non-SKU parts from the RF Gun,
- Displaying two new costs (current cost and core cost) on the Part Inquiry screen,
- And adding the ability to delete cycle counts in the desktop application.

iTrack#57165_58.13_PW_RF_Gun_Modify_Delete_UI_Enhancements_FSD_R1.0

The purpose of these enhancements was to provide improvements to the RF Gun Scan App including:

- A new manifest variance screen was created to provide an audit for missing parts or part quantities on the manifest.
- The ability to modify a part quantity on a return order has been added.
- Users are now warned if part quantities entered exceed an upper limit of 1,000.
- The ability to delete multiple cycle count or hole count entries has been added.
- Users can now delete a Cycle Count or Hole Count from the RF Gun Scan App.
- When printing a cycle count report, confirmation messages have been updated to reflect specifically which reports are sent to the printer.
- Part prices are now visible on the Label Print Entry screen.

- The part entry field name has been modified to reflect whether using ‘Scan’ mode or direct ‘Enter’ mode.
- Users with permission may now edit stocking levels from within the RF Gun Scan App.
- Any stocking level or part quantity changes made from the RF Gun Scan App are now recorded in the system audit log.
- Users can now print one or more price labels from the Hole Count Entry or Cycle Count Entry screens.

iTrack#49445_58.4_PW_RF_Gun_Scan_Pick_FSD_R1.3

Previously, pick tickets had to be printed to pick the parts needed from the warehouse or other locations to fill customer sales orders. This procedure slowed down the supply process and increased delivery costs.

The purpose of this enhancement was to provide users with the ability to implement a paperless scan-pick process using wireless RF Guns to scan all parts on a sales order.

Note: This function requires users to select a sales order from a list of all open sales orders, and does not assign any open sales orders to a specific user based upon any type of criteria (e.g. users currently working (“picking”) that day, zone locations or order types of emergency versus regular).

iTrack#57263_58.4_PW_RF_Gun_Multi-Zone-Bin_Support_FSD_R1.0

The purpose of this enhancement is two-fold:

1. Previously, when using the Scan Pick feature on the RF Gun, the display identified only a primary or single zone/bin location for the part(s), if configured. This enhancement provided the user with the ability to see overflow locations in addition to the primary zone/bin assigned to a part(s).
2. When using the RF Gun to stock parts, provided the user with the part’s zone/bin location(s) so that the part can be stocked in the correct zone/bin (primary or overflow).

iTrack#57212_58.4_PW_RF_Gun_PO_Receive_Part_Labels_FSD_R1.0

Previously, there was an option to place part labels on part boxes or packs as parts are being manually received on the PURCHASE ORDER screen (without scanning).

The purpose of this enhancement was to provide the same option for users to place part labels on part boxes or packs as parts are being received (with scanning) using the PO / ASN Receipt function on the Add-ons RF wireless device or using the desktop application’s SCAN RECEIVE screen.

DFIU

iTrack#48491_58.4_PW_DFIU_Enhancements_FSD_R1.0

Previously, DFIU was used for the following purposes:

1. To batch update part “price sheets” from vendor suppliers into the store’s inventory.
2. To batch update other part information.
3. To support a Go Live Data Conversion effort by initially loading part inventory information.

The purpose of this enhancement was to expand the usage of DFIU in the following ways:

1. To support batch updating part "price sheets" from vendor suppliers into a store's virtual inventory instead of a store's regular inventory.
2. To expand the part and inventory information that can be batch updated and deleted.
3. To support a Go Live Data Conversion effort by initially loading customer information (including AR) along with inventory information. **Note:** DFIU can continue to be used to batch update customer information after they go live.

There are new DFIU User Guides that describe all of the 39 new record types and all of the column validations for those record types. To see all 40 record types and their rules, click here.

iTrack#50931_58.4_PW_Supersedes_Average_Cost_FSD_R1.0

In PW version R52, business rules were introduced to calculate the average cost for a new replacement VCO part used within a VCO transaction. These changes impacted vendor changeovers transacted on the PART ASSOCIATION SETUP screen, DFIU and the Inventory Feed. These changes were not made for supersede transactions.

In PW version R58.1, the rules were changed for supersede transactions to match the rules for VCO transactions on the PART ASSOCIATION SETUP screen, DFIU and the Inventory Feed.

In this PW version R58.4, the purpose of this enhancement was to revise the rules of calculating the average cost of the supersede or VCO new replacement part to protect the resulting value from being reduced when the old or new part has an average cost of zero.

Controls

System

iTrack#54279_58.1_PW_General_Setup_New_Screens_FSD_R1.0

Previously, there were 14 different sections on the SYSTEM GENERAL SETUP screen with many options per section. Due to the total number of user options that existed on the entire screen, users had to scroll in order to view or change some of the options at the bottom of the screen.

The purpose of this enhancement was to move several of the sections to two new screens in order to enable users to view or change options on the SYSTEM GENERAL SETUP screen without scrolling.

iTrack#51882_58.3_PW_User_Security_Setup_Data_FSD_R1.0

This enhancement addresses changes needed to the setup screen and the report output to help make user security setup faster and easier to use.

And to further assist setup, changes were made to security restriction data to both revise restriction names to make them easier to understand and to remove obsolete restrictions.

iTrack#51882_58.3_PW_User_Security_Setup_Filters_FSD_R1.0

Previously, the columns displayed on the System Security Setup Report did not match the order of columns on the SYSTEM SECURITY SETUP screen.

This enhancement revises security reports so that the columns displayed more closely match the columns on the SYSTEM SECURITY SETUP screen, and to provide improved sorting options and a few other usability options for the reports and the SYSTEM SECURITY SETUP screen.

iTrack#56797_58.4_PW_Enable_Core_Freight_Labor_Tax_Net_Totals_FSD_R1.0

Enabled editing of the system wide settings for Core, Freight, Labor and Tax Net.

Store

iTrack#54147_58.1_PW_Store_Menu_Purchasing_Setup_Screen_FSD_R1.0

The existing Controls, Store, Store Info, STORE INFORMATION screen contained too many tabs and switches, and it took too long to open the screen, keeping the user waiting.

The purpose of this enhancement was threefold:

1. To remove two tabs (PURCHASING and OVERSTOCK) and all of the switches from those two tabs on to a new STORE PURCHASING SETUP screen in order to begin to speed up the time it takes to open up the existing STORE INFORMATION screen.
2. To separate all Purchasing “store control switches” on their own screen.
3. For multi-store users, to enable users to set a purchasing store control switch for one, multiple or all stores “at once” with a new Save Changes pop-up that prompts the user with a store list drop-down.

iTrack#54267_58.1_PW_Invoice_Options_New_Screens_FSD_R1.0

Previously, there were eight tabs on the INVOICE OPTIONS screen with many configuration options and user settings per tab. Due to the total number of options that existed on the entire screen, the screen took longer to open than is expected.

The purpose of this enhancement was to move all of the options on three of the eight tabs to two new screens in order to open all three screens more quickly.

iTrack#55197_58.4_PW_Remove_Obsolete_Field_Default_Retail_Account_FSD_R1.0

The purpose of this enhancement was to remove an unused field called ‘DEFAULT RETAIL ACCOUNT’ from the Controls, Store, AR and Controls, AR CONTROL SETUP screen because the field actually used is ‘DEFAULT ACCOUNT’ found on the ‘Standard’ tab of the Controls, Store, Invoice Options, STORE INVOICE OPTIONS screen.

Data Interfaces

iTrack#52916_57.3_PW_RockAuto_Integration_FSD_R1.0

The purpose of this enhancement was to introduce a PartsWatch integration with RockAuto. If interested in this feature, contact Sales.

This feature also enabled the store to set up a job queue that automatically finalizes and prints all RockAuto invoices without a user involved. The store always has the option to have a user finalize and print RockAuto invoices one, or even several, at a time on the SALES ORDER STATUS screen.

iTrack#54415_58.3_PW_Central_Services_New_Screen_FSD_R1.0

Previously, users of some Central Services could maintain a list of lines excluded from having their part prices and costs updated from the Central Service “part pricing” file.

The purpose of this enhancement was to enable users for all Central Services to maintain a list of lines excluded from having their part prices and costs updated from the Central Service "part pricing" file.

eCommerce

iTrack#55718_58.0.3_PW_Allow_Internet_Orders_When_Over_Credit_Limit_FSD_R1.1

Previously, internet orders created on eCommerce websites, that had an account status check (e.g. Nexpart and ePartConnection), were "blocked" from being sent to PartsWatch when the account status in PartsWatch is "locked", "past due" or "over the credit limit".

This enhancement allows specific internet orders to be received (and always printed as "pick tickets") when the account status is "past due" or "over the credit limit". **Note:** Internet orders will still be "blocked" when the account status is "locked".

iTrack#56076_58.0.4_PW_eOrder_VI_Modifier_FSD_R1.0

Previously, there was "special handling" for a part on a PW pick/invoice when a B2C or B2B customer ordered a part on the Nexpart eCommerce website from a VI source in Nexpart. **Note:** The PartsWatch application introduced this "special handling" in R56.

This enhancement provides the same functionality for parts ordered on a MyPlace4Parts (MP4Ps) eCommerce website. **Note:** This enhancement involves changes to the PartsWatch application's usage of Epicor's Aconnex Gateway. This enhancement required co-development from the Alliance to their MP4Ps eCommerce website as well.

iTrack#56600_58.3.1_PW_Allow_Oversell_For_Unfulfilled_Transfer_FSD_R1.0

Previously at POS:

- When the PWS eCommerce Gateway (PEG) processed a customer account's eOrder, and a part on the order had insufficient quantity available, the part was always recorded on the sales order as an Oversell.
- Also, when a store-to-store transfer inbound order had an insufficient quantity available for a part, the two options were to record it as a Lost Sales or Buy Out on the sales order.

The purpose of this enhancement was twofold:

- To provide an option to record a part, with insufficient quantity available, as a Buy Out when a customer account's eOrder is received and processed.
- To provide an option to record a part, with insufficient quantity available, as an Oversell when a store-to-store transfer order is received and processed.

Utility Options

iTrack#55674_57.20_PW_Inventory_Count_Adjustment_Screen_Record_Retention_FSD_R1.0

This document defines the changes needed to add the Record Retention function to the INVENTORY COUNT ADJUSTMENT (ICA) screen.

iTrack#55192_58.3_PW_Report_Usage_Audit_Part_1of2_FSD_R1.0

The purpose of this enhancement was to improve the identification of reports used in the application so that reports not being used might be removed in the future.

The objective is to capture when users are running reports from the Report UI screens, but additionally when run from the Task Scheduler utility as well. Leveraging the existing Audit Report, every time a user clicks on the PREVIEW, PRINT, DISPLAY or EXPORT button, capture a record in the Audit Report for subsequent reporting and analysis.

Note: This scope item is considered Part 1 of 2 because not every report is being captured.