

## Product Release Information

<b>Product:</b>	<b>CORESense Application Software</b>
<b>Version Number:</b>	Versions 5.15, 7.4 and higher
<b>Release Dates:</b>	Beta Release: February 2, 2016 Release Candidate: February 16, 2016 General: April 26, 2016
<b>Customer Support:</b>	<a href="mailto:support@coresense.com">support@coresense.com</a>

## What's New?

Following is a summary of the enhancements and new features added in this software release. Unless you requested to be a Release Candidate, the features listed below are not available until the General Release date noted above.

**Enhancement: PS-3850: Connect Receipt Headers**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Updated the order and return receipts to have a center header of "Sales Receipt" or "Return Receipt".

**Note:** When viewing them in Connect POS, text will not be centered. Centering only applied to printed receipt.

**Enhancement: PS-4299: Connect POS Receipt Comments**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Added the following new functionality for Connect POS receipts comments:

- Add order comment in from Checkout screen.
- Order comment display under Customer > Order History > Order.
- Order comments can be configured to print on sales and return receipts.
- Two new POS configurations were added to manage print display:
  - salesReceipt.printPublicComment
  - returnReceipt.printPublicComment

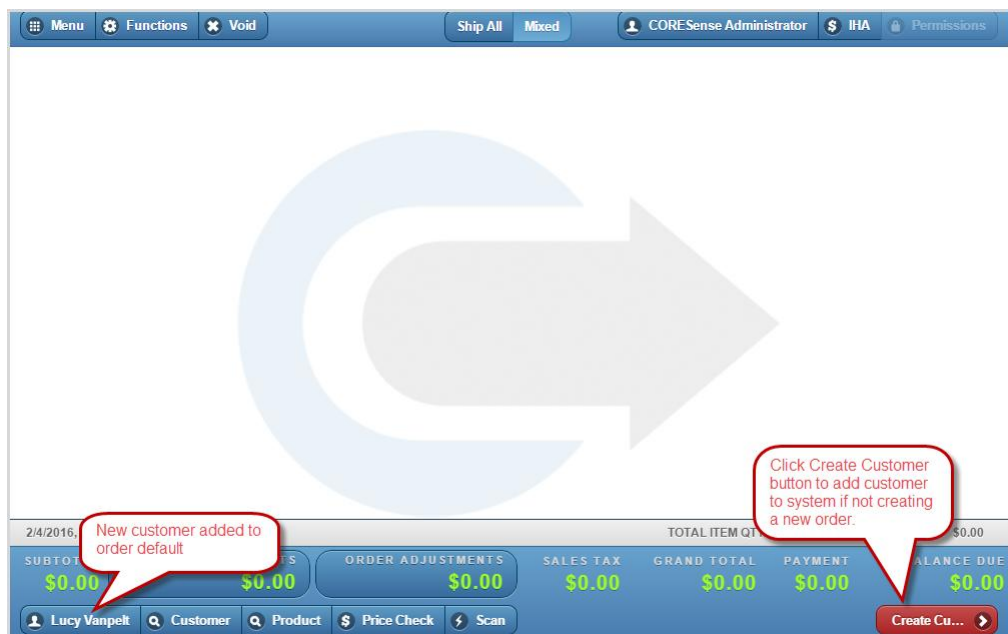
**Enhancement:** PS-4300: Connect POS Add New Customer

**Version:** 7.4

**System Path:** Connect POS

**Description:** Updated how customers and contacts are managed inside Connect. If the customer account is being modified (new contact, edit contact, edit default billing and / or shipping contact), the changes are made in the current session only and then replicated upon order creation or clicking save customer button.

- The Checkout button will change to display "Create Customer" if no items are in the order yet, providing the ability to save the customer data without placing an order. Once system replication occurs, the updated or new customer is available.



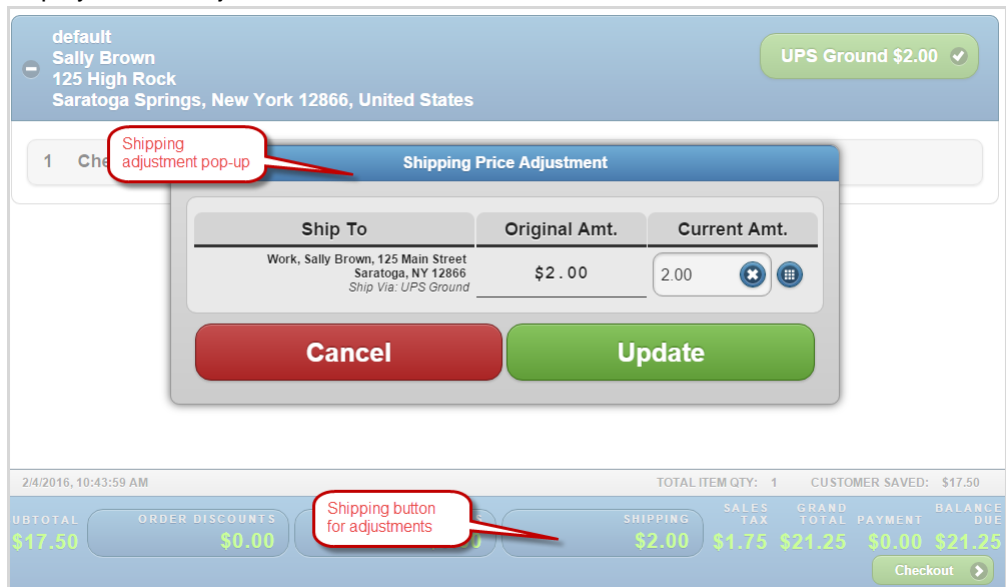
- If the new customer is placing an order the Create Customer button turns to the standard Checkout button once products are added to the order.

**Enhancement:** PS-4301: **Connect Shipping Cost Override**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Added the ability to override shipping cost for both Ship All and Mix Item modes. A "Shipping" button has been added to the interface footer that is clickable that displays a cost adjustment screen.



**Enhancement:** PS-4302: **Connect Offline Indicator**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Added the information to the Menu > Info display on the POS:

- Connection to CORESense (Online or Offline)
- Connection to Payment Processor (Online or Offline)
- Updated the Checkout page to disable the credit card option if the connection to the payment processor could not be made.

**Note:** This Info display is only available if running in Thick Client POS mode.

**Enhancement:** PS-4303, 4306: **Connect Order Details in Footer**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Enhanced the Order Footer to include:

- Subtotal
- Order Discounts (clickable to add coupons)
- Order Adjustments (clickable to apply adjustments)
- Shipping (Net of any discounts and/or adjustments)
- Sales Tax (includes shipping tax)
- Grand Total
- Payments
- Balance Due

Added an information banner directly above the footer on Order Items and Checkout screens that includes:

- Quantity of items on order
- A "Customer Saved" value, which is the sum of :
  - Item Discounts
  - Item Adjustments
  - Order Discount
  - Order Adjustments
  - Shipping Discount
  - Shipping Adjustments



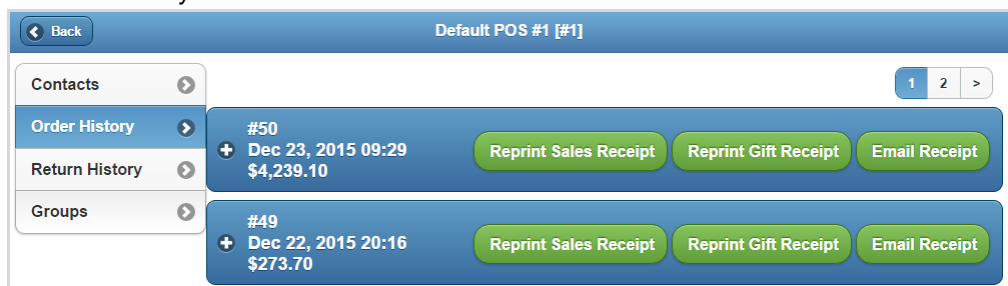
**Enhancement:** PS-4304: **Connect Reprint Receipts**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Added the following Connect POS receipt features:

- Ability to reprint order/return receipts from Customer Order and Return History sections. User can print the appropriate receipt document but action does not open the drawer.
- Added ability to view Return details and comments in Customer Return History section.

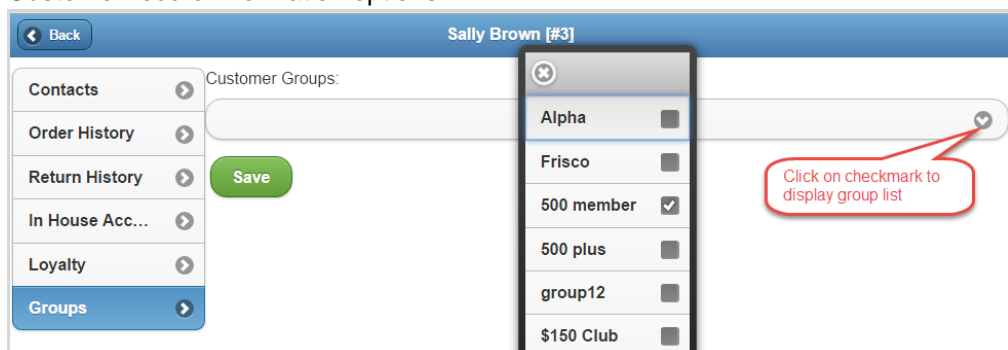


**Enhancement:** PS-4308: **Connect Customer Group**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Added the ability to add or remove a customer to a Customer Group from the Customer record information options.



**Note:** If the customer is not applied to the order, the data is pushed to replication immediately for saving. If the customer is assigned to the order, this is saved in session and either created when the customer clicks save/create customer or completes checkout.

**Enhancement:** PS-4334: Do Not Allow Duplicate UPCs

**Version:** 7.4

**System Path:** System Settings

**Description:** Added a new System Setting "SKU - Consider UPC Unique" under **Products/Labels > Products** to manage the unique value between UPC and SKU. It determines whether the same UPC should be prevented from being added to two or more SKUs.

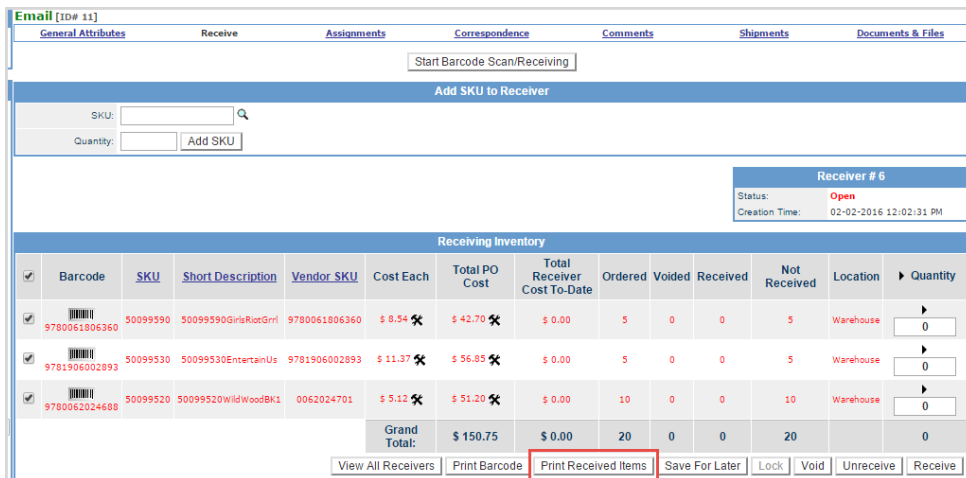
- If No, system will work as-is.
- If Yes, users are prevented from applying the same UPC to more than one SKU record, rendering an error, "This UPC is already associated to SKU <SKU ID> SKU Label: <SKU\_Label>."
- The areas of the Back office that are impacted include:
  1. ProductSKU import
  2. SKUOnly import
  3. Inventory Manager
  4. UPC / Barcodes import

**Enhancement:** PS-4335: Print Labels for Received Items

**Version:** 7.4

**System Path:** PO Manager > Receiver

**Description:** Added a new button "Print Received Items" to the PO Manager > Receiver that provides the option to print labels for just the quantity of SKUs that have been received.



The screenshot shows the 'Receiving Inventory' screen. At the top, there are tabs for 'General Attributes', 'Receive', 'Assignments', 'Correspondence', 'Comments', 'Shipments', and 'Documents & Files'. Below the tabs is a search bar and an 'Add SKU to Receiver' section with fields for 'SKU' and 'Quantity', and an 'Add SKU' button. A 'Receiver # 6' summary box shows 'Status: Open' and 'Creation Time: 02-02-2016 12:02:31 PM'. The main table has the following data:

Barcode	SKU	Short Description	Vendor SKU	Cost Each	Total PO Cost	Total Receiver Cost To-Date	Ordered	Voided	Received	Not Received	Location	Quantity
9780061806360	50099590	50099590GirlsRocGril	9780061806360	\$ 8.54 ✘	\$ 42.70 ✘	\$ 0.00	5	0	0	5	Warehouse	0
9781906002893	50099530	50099530EntertainUs	9781906002893	\$ 11.37 ✘	\$ 56.85 ✘	\$ 0.00	5	0	0	5	Warehouse	0
9780062024688	50099520	50099520WildWoodBK1	0062024701	\$ 5.12 ✘	\$ 51.20 ✘	\$ 0.00	10	0	0	10	Warehouse	0
<b>Grand Total:</b>					\$ 150.75	\$ 0.00	20	0	0	20		0

At the bottom of the screen, there is a toolbar with buttons: 'View All Receivers', 'Print Barcode', 'Print Received Items' (highlighted with a red box), 'Save For Later', 'Lock', 'Void', 'Unreceive', and 'Receive'.

**Enhancement:**

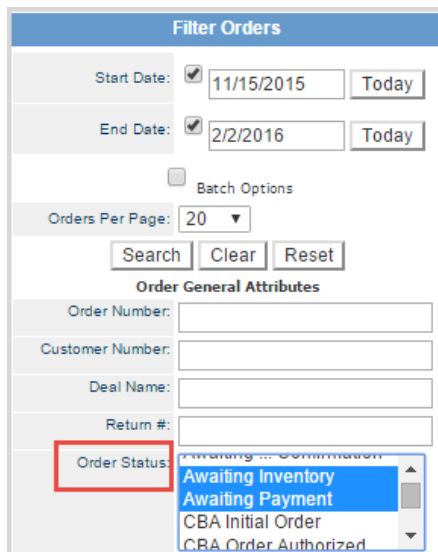


**PS-4338: Order Manage Multiple Status Selection**

**Version:** 7.4

**System Path:** Order Manager

**Description:** Updated the Filter Orders >> Order Status criteria to allow the selection of multiple order statuses for searches.



The screenshot shows a 'Filter Orders' window with the following elements:

- Start Date:**  11/15/2015
- End Date:**  2/2/2016
- Batch Options
- Orders Per Page:** 20 (dropdown)
- 
- Order General Attributes:**
  - Order Number:
  - Customer Number:
  - Deal Name:
  - Return #:
  - Order Status:**  (dropdown menu open showing: Awaiting Inventory, Awaiting Payment, CBA Initial Order, CBA Order Authorized)

**Enhancement:**



**PS-4339: Results per Page Option for Various Managers**

**Version:** 7.4

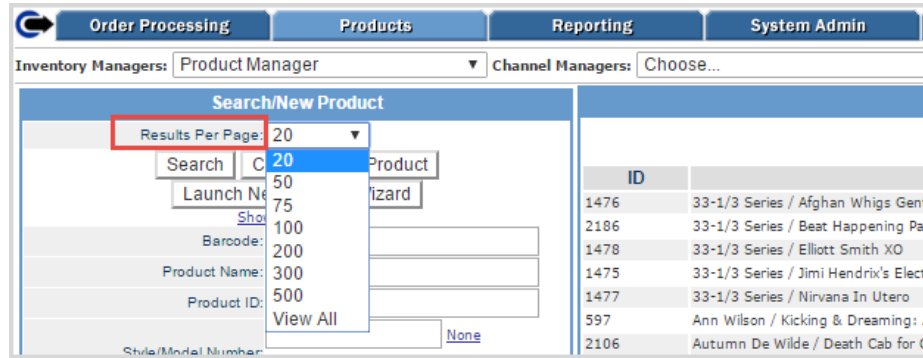
**System Path:** Back office Managers

**Description:** Added the ability to select the number of results to display per page for several Back Office managers:

- Product Manager
- Gift Certificate Manager
- Value Card Manager
- Packing Validation Manager
- Return Manager
- Deal Manager
- Keycode Manager
- Product Manager
- Purchase Order Manager
- Sales Tax Manager

- Transfer Manager
- URL Redirect Manager
- Vendor Manager
- EDI Manager

The drop-down list is located in the top Search section for each manager.



**Enhancement:**



**PS-4343: SOI Partial Part Number Search**

**Version:**

7.4

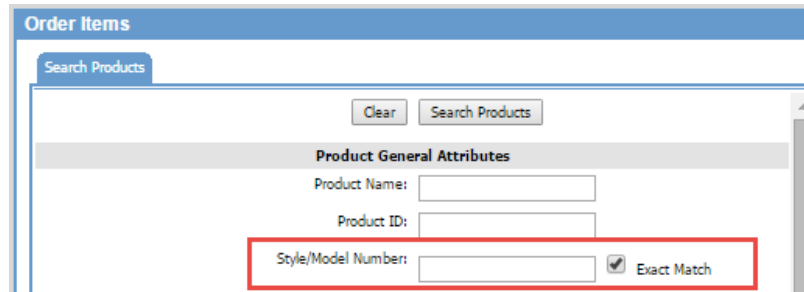
**System Path:**

Sales Order Interface

**Description:**

Added the ability to search by Style/Model Number using either partial or exact matches. There is now a checkbox next to Style/Model Number field to search for exact matches, similar to the Product Manager.

**Note:** If you enter just a zero, the results will return all products.



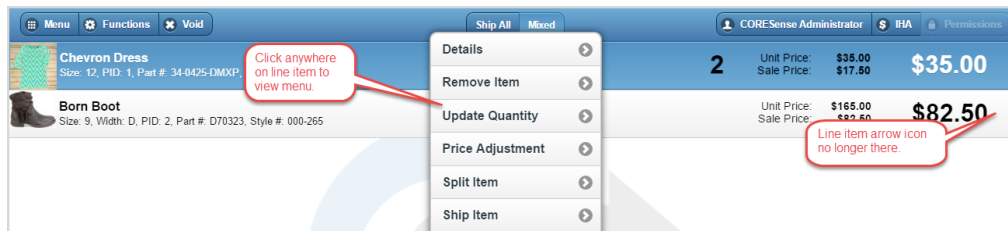


**Enhancement:** PS-4346: **Connect Line Item Menu**

**Version:** 7.4

**System Path:** Connect POS

**Description:** To access the line item options menu, you can now click anywhere on the specific line item in. While the menu is open, the affected row is highlighted. The previous mechanism on clicking on the line item arrow icon has been eliminated.



**Enhancement:**

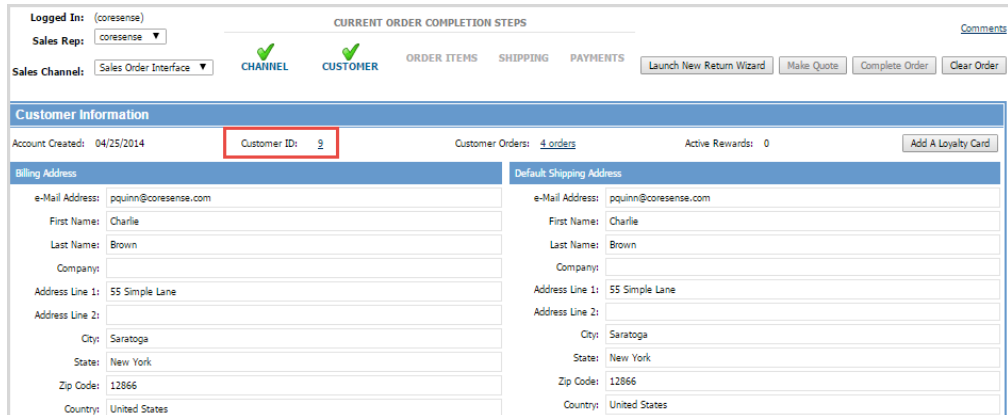


**PS-4349: SOI Customer Manager Link**

**Version:** 7.4

**System Path:** Sales Order Interface

**Description:** Added the ability to link from the SOI Customer Information screen to the Back Office Customer Manager account. Once the customer has been added to an order, click on the **Customer ID link** above the Billing Address header.



The screenshot shows the 'Customer Information' section of the SOI interface. At the top, there are navigation tabs for 'CURRENT ORDER COMPLETION STEPS' including 'CHANNEL' and 'CUSTOMER'. Below this, the 'Customer Information' header displays 'Account Created: 04/25/2014', 'Customer ID: 9', 'Customer Orders: 4 orders', and 'Active Rewards: 0'. The 'Customer ID: 9' is highlighted with a red box. Below the header, there are two columns of address information: 'Billing Address' and 'Default Shipping Address'. Both columns contain fields for e-Mail Address, First Name, Last Name, Company, Address Line 1, Address Line 2, City, State, Zip Code, and Country.

**Enhancement:**



**PS-4352: Edit Back Office Comments**

**Version:** 7.4, 5.15

**System Path:** Back Office

**Description:** Users now have the ability to edit comments, and view past revisions of comments.

- Any revisions on any comments are visible to everyone all the time.
- Editing comments can only occur if:
  1. The new system setting, "Edit All Comments" (under **Company Information**) is on and,
  2. User either is trying to edit their own comment or has the ability to edit all comments (new User Permission added: "**Comments - Edit All**")

**Note:** For 5.15, there is a UI change in that the "Post Comment" function is now in the bottom right instead of top left.

**Enhancement:** PS-4359: **Connect Keyboard Capable**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Connect POS has been updated so that users can use their keyboard number keys when in the Price Adjustment pop-up to make adjustments, instead of using only the touch screen or mouse.

**Enhancement:**



**PS-4362: Inventory Manager Status Links**

**Version:** 7.4

**System Path:** Inventory Manager > Inventory Levels

**Description:** Updated the Inventory Levels tab in the Inventory Manager to include the same links for "In PO" and "In Purchase Order Queue" as it does in the Inventory Manager search results (via magnifying glass).

20000032 - 20000032GreyS[ID# 3793]

[General Attributes](#)
[Shipping](#)
[Vendors](#)
[Reordering](#)
[Inventory Levels](#)
[In Stock](#)
[Assigned \(Not Shipped\)](#)
[Take Now & Shipped](#)
[Products](#)

**Levels**

Short Description:	20000032GreyS	In Stock:	Cloverdale	[ 0 ]	<input type="button" value="+"/>	<input type="button" value="-"/>
SKU:	20000032		Airport	[ 2 ]	<input type="button" value="+"/>	<input type="button" value="-"/>
Default Vendor:	American Apparel		SPHQ	[ 0 ]	<input type="button" value="+"/>	<input type="button" value="-"/>
Default Fulfillment Method:	Stock Inventory	<b>Vendors</b>	American Apparel	Unlimited		
Backordered:	0	In Transfer To:	Cloverdale	[ 0 ]		
Reserved:	0		Airport	[ 0 ]		
Assigned (Not Shipped):	0		SPHQ	[ 0 ]		
Take Now & Shipped	27					
In Purchase Order Queue:	0					
In PO:	0					

**Enhancement:**

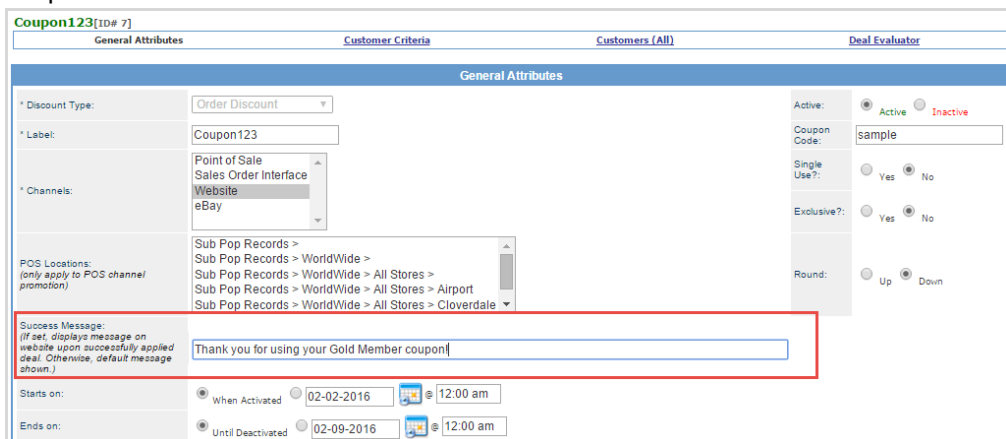


**PS-4363: Custom Coupon Success Messaging**

**Version:** 7.4

**System Path:** Deal Manager

**Description:** Added a text field in the Deal Manager that allows a custom message to display on the website when a coupon code is successfully applied. Currently, the standard message reads as "promo has been applied". As an example of a custom message, once the code is entered it would read as: "Thank you for using your Gold Member coupon!"



The screenshot shows the configuration interface for a coupon. The 'Success Message' field is highlighted with a red box and contains the text: "Thank you for using your Gold Member coupon!". Other visible fields include 'Discount Type' (Order Discount), 'Label' (Coupon123), 'Channels' (Point of Sale, Sales Order Interface, Website, eBay), 'POS Locations', 'Starts on' (02-02-2016), and 'Ends on' (02-09-2016).

**Enhancement:**

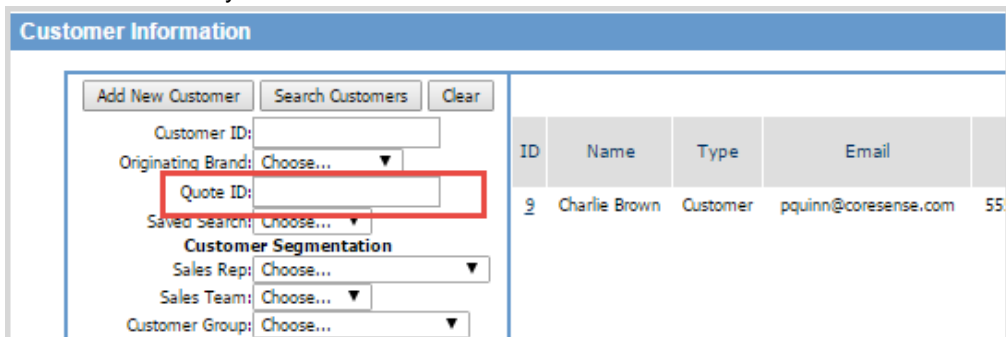


**PS-4365: Quote ID Search in SOI**

**Version:** 7.4

**System Path:** Sales Order Interface

**Description:** Added the ability to search for customer by Quote ID number in the Customer Information screen of the SOI.  
NOTE: Quotes may then be viewed via the Orders link in customer search results.



The screenshot shows the 'Customer Information' screen. The 'Quote ID' search field is highlighted with a red box. The screen includes search filters for Customer ID, Originating Brand, Saved Search, Sales Rep, Sales Team, and Customer Group. A table on the right shows search results for Charlie Brown, a Customer, with email pquinn@coresense.com and ID 55.

**Enhancement:**

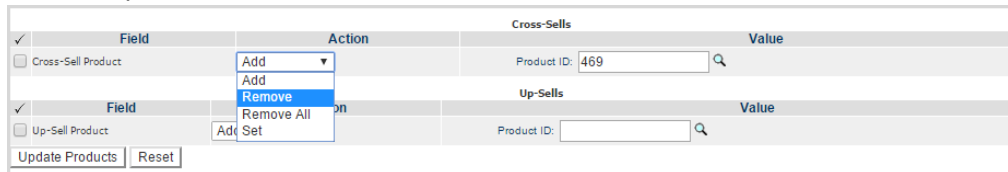


**PS-4367: Batch Product Update for Cross/Up Sells**

**Version:** 7.4

**System Path:** Products > Batch product Update

**Description:** Added the ability to add and remove cross sell and up sell products from the Batch Product Update tool.



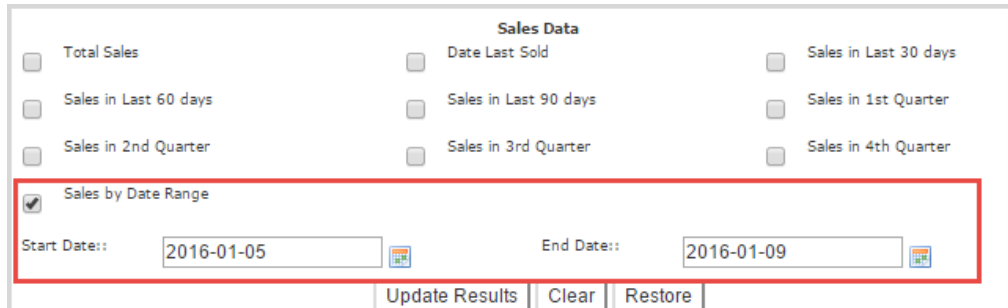
The screenshot shows a web interface for 'Batch Product Update'. It features two main sections: 'Cross-Sells' and 'Up-Sells'. Each section has a table with columns for 'Field', 'Action', and 'Value'. In the 'Cross-Sells' section, the 'Action' dropdown menu is open, showing options: 'Add', 'Remove', and 'Remove All'. Below the tables are 'Update Products' and 'Reset' buttons.

**Enhancement:** **PS-4368: Inventory Report Builder**

**Version:** 7.4, 5.15

**System Path:** Reporting > Inventory Report Builder > Sales Data

**Description:** Added the ability so that any date range can be used for **Sales by Date Range** in the Inventory Report Builder Sales Data results option. Previously limited to 90 days.



The screenshot shows the 'Sales Data' options in the Inventory Report Builder. There are several radio button options: 'Total Sales', 'Date Last Sold', 'Sales in Last 30 days', 'Sales in Last 60 days', 'Sales in Last 90 days', 'Sales in 1st Quarter', 'Sales in 2nd Quarter', 'Sales in 3rd Quarter', and 'Sales in 4th Quarter'. The 'Sales by Date Range' option is selected and highlighted with a red box. Below this option, there are input fields for 'Start Date:' (2016-01-05) and 'End Date:' (2016-01-09), each with a calendar icon. At the bottom are 'Update Results', 'Clear', and 'Restore' buttons.

**Enhancement:**



**PS-4369: Orders Production Tab Links**

**Version:** 7.4, 5.15

**System Path:** Order Manager > Production

**Description:** Added additional links from Order Manager > Production tab. The new cross manager links and changes include:

- New hyperlink from Production tab In PO quantity.
  - When clicked, the PO Queue opens in new tab, filtered for the corresponding Vendor, Warehouse, Fulfillment Type.
  - PO Queue now also includes: Order Num and SKU ID.
- New hyperlinks for the Reserved and Assigned quantities
  - When clicked, it opens the Returns tab of the order in a new tab, for user to remove quantities by existing workflow.
- New hyperlink to the On B/O quantity
  - When clicked, it opens the "Backorders" tab of the corresponding Inventory Manager record, for user to remove quantities by existing workflow.
- New hyperlink to the "In PO" quantity
  - When clicked, it opens the corresponding PO in the Purchase Order Manager
  - NOTE: If more than one PO associated, then the first will be opened.

**Enhancement:**



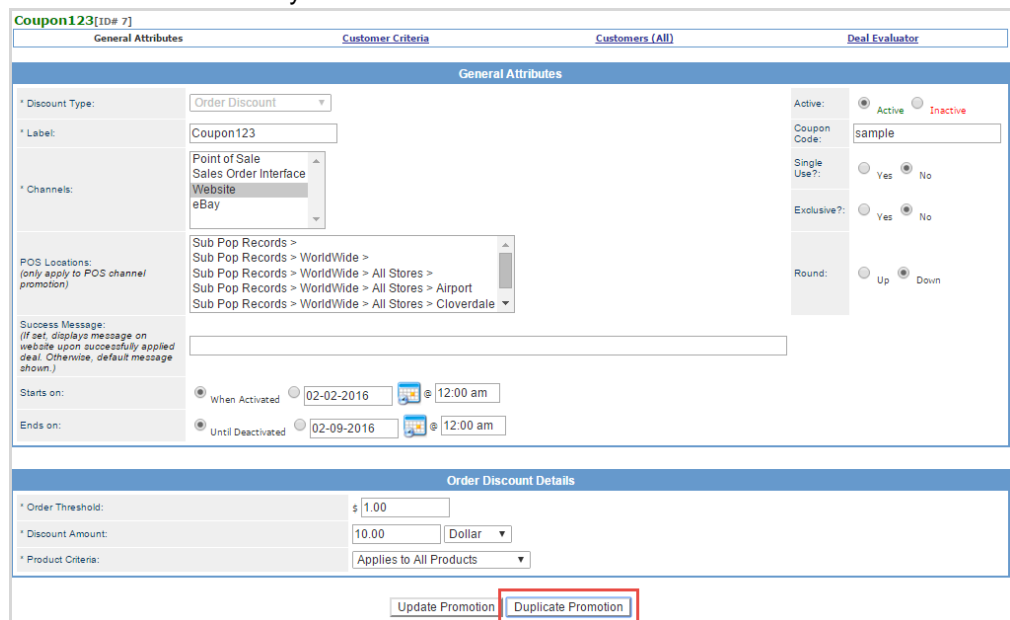
**PS-4370: Duplicate Deals**

**Version:** 7.4

**System Path:** Deal Manager

**Description:** Added the ability to duplicate a deal via a "Duplicate Promotion" button at bottom of a deal. System prompts for confirmation before continuing and then redirects to duplicated product. All attributes and criteria remain the same except for:

1. Label field is populated with "Duplicate Promotion of #".
2. Active field is populated as Inactive.
3. Coupon Code field is not copied because duplicate coupon codes are not allowed in the system.



**Enhancement:** **PS-4381: Inventory Report Builder Result Options**

**Version:** 7.4

**System Path:** Inventory Report Builder

**Description:** Added the display options for UPC and Barcode under Results > General Attributes section of the Inventory Report Builder.

**Enhancement:**

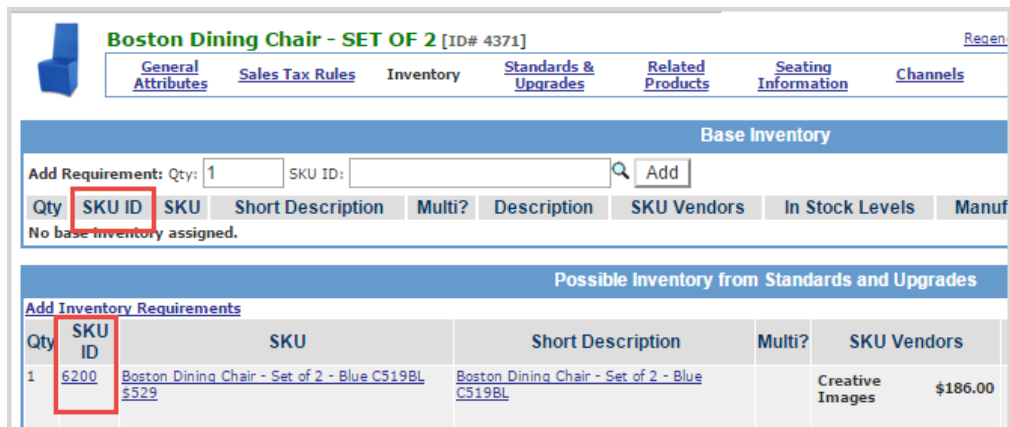


**PS-4402: SKU ID in Product Manager**

**Version:** 7.4, 5.15

**System Path:** Product Manager > Inventory

**Description:** Added the SKU ID column to the Inventory tab of the Product Manager.



**Base Inventory**

Add Requirement: Qty: 1 SKU ID:  Add

Qty	SKU ID	SKU	Short Description	Multi?	Description	SKU Vendors	In Stock Levels	Manuf
No base inventory assigned.								

**Possible Inventory from Standards and Upgrades**

Add Inventory Requirements

Qty	SKU ID	SKU	Short Description	Multi?	SKU Vendors
1	6200	Boston Dining Chair - Set of 2 - Blue C519BL \$529	Boston Dining Chair - Set of 2 - Blue C519BL		Creative Images \$186.00

**Enhancement:**

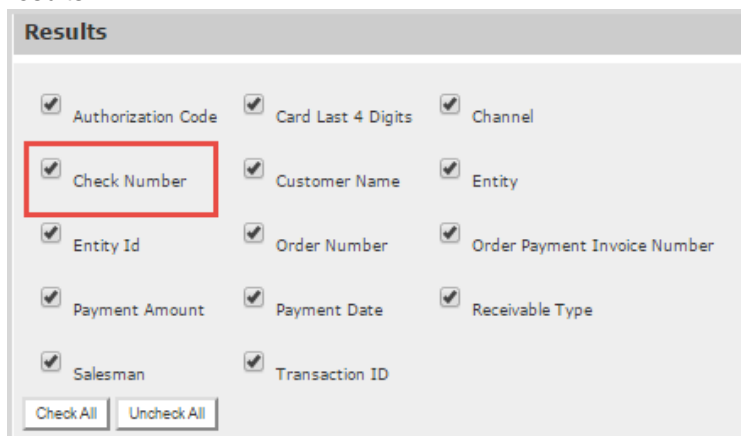


**PS-4403: Check Number in Payments Report**

**Version:** 7.4

**System Path:** Financials > Payments Report

**Description:** Added the option to include Check Number as a column in the Payments report results.



**Results**

- Authorization Code
- Card Last 4 Digits
- Channel
- Check Number
- Customer Name
- Entity
- Entity Id
- Order Number
- Order Payment Invoice Number
- Payment Amount
- Payment Date
- Receivable Type
- Salesman
- Transaction ID

Check All Uncheck All



**Enhancement:**




**PS-4404: Order Manager Shipping Destination Field**

**Version:** 7.4, 5.15

**System Path:** Order Manager > Shipping

**Description:** Replaced the "Destination" field in the Order Manager > Shipping > All Shipments box with new label of "Source." The Source data is based on inventory type as follows:

- Displays source warehouse name for In Stock/JIT shipments.
- Displays vendor name for drop-ship shipments.

All Shipments						
<a href="#">Add A New Shipment</a>						
Id	Source	Method	Ship Date	Cost	Status	Actions
19073	BETA Warehouse	Flat Rate Shipping	No Ship Date	\$0.00	Picking	

NOTICE: These fees do not necessarily represent UPS published rates and may include handling charges levied by Zuri Furniture.

**Enhancement:** **SS-1829: On Account Gift Certificate Emails**

**Version:** 7.4

**System Path:** Website

**Description:** Updated order creation to allow all website orders with a payment type of "On Account" to allow gift certificate emails to be sent, regardless of the balance due.