

Product Release Information

Product:	CORESense Application Software
Release Number:	Versions 5.15, 7.4 and higher
Release Dates:	Release Candidate: May 24, 2016 General: August 3, 2016
Customer Support:	support@coresense.com

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.

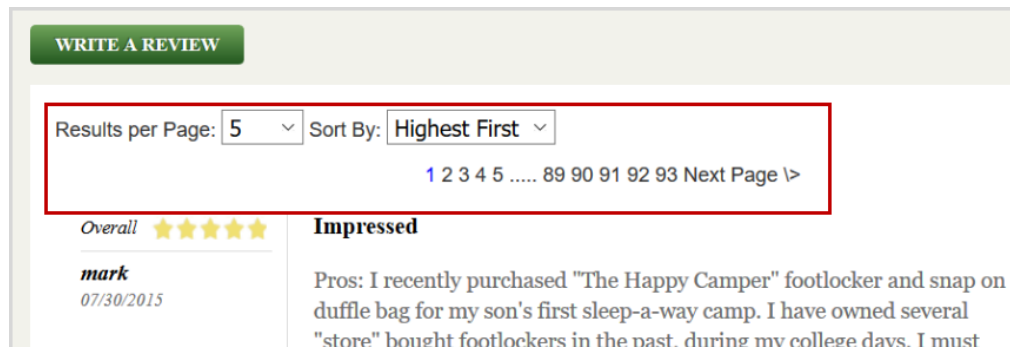
Enhancement: **PS-4416: Product Reviews Sort and Pagination**

Version: 7.4

System Path: CORESense Power Review Plug-in

Description: Added pagination to the "Product Reviews" plug-in. Additionally, users have the ability to sort by highest, lowest, etc. and decide how many reviews to display per page. Numbers show - at client discretion - how many pages of reviews, which user can use to navigate with.

Please reference the CORESense Product Reviews in the plug-in list page of the online documentation for template details.



The screenshot shows a user interface for product reviews. At the top left is a green button labeled "WRITE A REVIEW". Below it, there are two dropdown menus: "Results per Page:" set to "5" and "Sort By:" set to "Highest First". Below these is a pagination link "1 2 3 4 5 89 90 91 92 93 Next Page >". Underneath, there is an overall rating of five stars and the word "Impressed". A review by user "mark" dated "07/30/2015" is shown, with the text: "Pros: I recently purchased 'The Happy Camper' footlocker and snap on duffle bag for my son's first sleep-a-way camp. I have owned several 'store' bought footlockers in the past, during my college days. I must

Enhancement: **PS-4490: Pre-Order Club Membership Import**

Version: 7.4

System Path: Tools > Data Import

Description: Created a new Club Membership import, with the ability to assign the customers to the appropriate Membership. The import contains the following fields:

1. Customer ID
2. Membership ID
3. Shipping Method ID
4. Shipping Contact ID - If blank, assign Default Shipping Contact to Membership
5. PreOrder Frequency
 1. Weekly
 2. Every Two Weeks
 3. Every Four Weeks
6. Credit Card - Last 4 digits of the card to be assigned to the Membership.
Card must already exist on the customer

This import is only feasible for Pre-Order memberships (which do not require an initial purchase), and will display an error if the Membership ID is not the pre-order type.

Enhancement: **PS-4493: Specify Club Delivery Products per Membership**

Version: 7.4

System Path: Tools > Data Import

Description: Added the ability to deliver different products to different club memberships on the same delivery day for a club. Under Club Manager > Deliveries Tab, when adding a product to a delivery, a user has the ability to specify which club membership the product is to be delivered for.

NOTE: This specific to pre-order management with multiple brands.

Enhancement: **PS-4517: Connect Customer Contact Required Fields**

Version: Connect POS

System Path: POS Replication Manager

Description: Added POS terminal setting **noCustomerFieldsRequired** to bypass the required check when creating a new customer or contact. This setting is set to off by default.

1. To turn it on, go to Office > POS Replication Manager, choose a particular POS to edit or change Global Settings.
2. In the setting dropdown, choose **noCustomerFieldsRequired**. Set value to 1 to turn it on.
3. Create a new customer or use an existing customer to add new contact to verify setting change.
4. You must log out and log in again to reload the setting changes.

Enhancement: **PS-4518: Connect Coupon Code in Back Office**

Version: Connect POS

System Path: Order Manager

Description: Enhanced the Connect POS coupon entry to post the entered coupon code against the order in the Back Office. Coupon codes now display in the Order Manager for each order and under the Accounting > Financials > Order Report as a comment against each order listed.

Enhancement: **PS-4521: eBay & Amazon Warehouse Selection**

Version: 7.4

System Path: System Settings > Channels

Description: Added ability to specify in Channel System Settings what warehouses an Amazon Channel or eBay Account should be limited to for fulfillment and availability. The setting is labeled, "Limit Available Warehouses."

Limit Available Warehouses: **eBay Account** **Limit Available Warehouses**
Limit inventory availability and assignment to specified warehouses. If no warehouses are specified, all warehouses that are available for fulfillment will be used.

Enhancement: **PS-4524: Power Reviews Product Variant Feed**

Version: 7.4

System Path: Data Feed Manager

Description: Created a new **Power Reviews Variant Feed** that outputs a row for every product variation (e.g., Size: 10, Width: M) with the following fields.

- Page Id => Product Id
- Product URL => Product Website URL
- Name => Product Name – Variation (e.g., Timberland Boot - 10M)
- Image URL => Product Large Image URL
- Description => Product Description
- Category => Product Category Name
- In Stock => Product Variant Availability
- Price => Product Price
- Brand => Manufacturer Name
- UPC => Product Variant SKU UPC
- Manufacturer Id => Product Part Number
- Page Id Variant => Product Variant Id (Product Id-Variant, e.g 1234-10M)

Enhancement: **PS-4529: New Payment Processor Integration**

Version: 7.4

System Path: Payment Processors

Description: Integrated with Vantiv Credit Card Processor for card present and card not present transactions.

Enhancement: **PS-4532: PO and Transfer SKU Import**

Version: 7.4

System Path: PO and Transfer Managers

Description: Modified the existing PO SKU Import functionality under PO Manager > Assignments as follows:

1. Changed SKU to not be SKU Id, but SKU Label
2. Added a Cost Column at the end. If no Cost is specified, default cost is used.

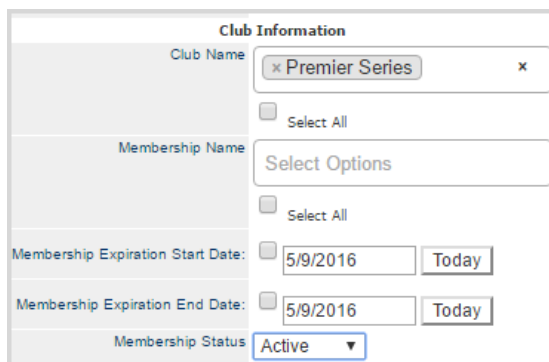
Added this same import functionality to Transfers, so that users can add SKUs to transfers via UI or file upload, as they can with purchase orders. Added the ability to add SKUs to transfers on the Assignment tab of the Transfer Manager. This is only available if the transfer is in a status of 'Opened'. You can add them individually like the PO Manager or upload in batch via a file.

Enhancement: PS-4537: Connect Return Reason Code Search
Version: 7.4
System Path: Connect POS > Returns
Description: Added ability to filter for Return Reason Codes on Connect POS similar to State and Country lookup fields.



Enhancement: PS-4544: Club Membership Search Criteria
Version: 7.4
System Path: Customer and Deal Managers
Description: The following were added to enhance customer searches for club membership participants.

1. Added Club Membership and Club search criteria to the Customer Manager multiple select fields.
2. Added a Club Membership Status search criteria field to the Customer Manager with possible values of Active, Inactive or Any. Searching by status of Inactive will return any customers that were a member of a club, but have no active memberships. Searching by status of Active will return any customers that have an active club membership.
3. Added Club Membership Status field to the Customer Criteria tab of the Deal Manager so that deals can apply to customers based on their membership status. Values and behavior is consistent with #2 above.



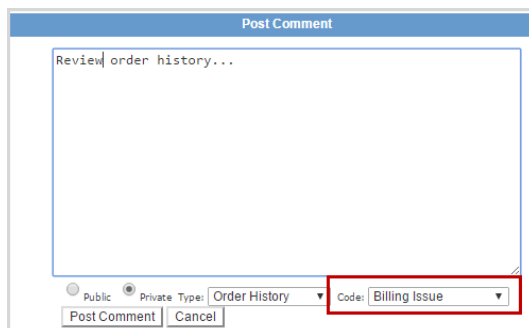
Enhancement: PS-4545: Club Membership Timestamps
Version: 7.4
System Path: Club Manager
Description: Added timestamps to the following club membership actions:

- Cancel Membership
- Suspend Membership
- Join Club Membership.

Enhancement: PS-4547: Connect POS Static Sales Tax Percentage
Version: Connect POS
System Path: POS Replication Manager
Description: Added new POS terminal setting "staticSalesTax", which can be configured within POS Replication Manager under System Settings. This allows users the ability to specify per POS terminal, a static sales tax percentage that will be charged for ALL transactions processed at the POS, regardless of delivery timing and shipping address.

The value of this setting is empty by default. If the value is greater than 0, sales tax amount will be charged based on the percentage of this value to the order.

Enhancement: PS-4548: Comment Codes
Version: 7.4
System Path: Comments in Back Office
Description: Added the ability to attach a code to comments and report on that code. Codes are specified when posting a comment on an entity (customer, order, po, vendor, etc) from a drop-down list.



Added the comment codes as a multiple select filter option on the Comments Report.

Enhancement: **PS-4550: Magento Connector Update**

Version: 7.4

System Path: Product SKU

Description: Provided the ability for the Magento Connector to update products/SKUs based on Magento SKU, not Unique Identifier in Magento. This provides clients with multiple Magento installs, to utilize CORESense and have a single product/SKU created for similar items based on the SKU, not the internal Magento identifier. The system will now, when syncing Magento products inbound, look for an existing CORESense SKU that matches, and then link that existing record instead of creating a new one.

Enhancement: **PS-4552: Multiple FTP Transports on a Single Data Feed**

Version: 7.4

System Path: Data Feed Manager

Description: Provided the ability to send a single data feed format to multiple recipients, and specify multiple transport methods on a single feed.

- From the Data Feed Manager, upon successfully creating a data feed, the user is now taken to the data feed edit page, where multiple transport methods can be added.
- User can add/edit/delete any existing transport methods on the data feed edit page.
- When data feed runs, data file is transported using each of the methods defined.

Enhancement: **PS-4553: Connect POS Transfer From Functionality**

Version: Connect POS

System Path: System Settings > POS Replication Manager

Description: Added the Transfer From feature to Connect POS. Individual or all POS IDs can be assigned this feature by activating the POS terminal settings "transferFrom.enabled" and "transferFrom.shippingMethodId" found in the POS Replication Manager. Please refer to the Connect POS > Order > Transfer From instructions in the online documentation.

Enhancement: PS-4554: Amazon Inventory Threshold**Version:** 7.4**System Path:** System Settings > Channels > Amazon**Description:** In order to reduce the risk of overselling items on Amazon, a new channel system setting for Amazon has been added that allows a user to specify a number of percent for *Inventory Availability Threshold*. This setting accepts an integer value or percentage, and limits the inventory quantity sent to Amazon via the Amazon Inventory Feed.

- If an integer is specified (i.e., 2) and the available inventory for a SKU is equal to or less than the integer, a quantity of 0 will be sent to Amazon for available inventory.
- If a percentage is specified (i.e., 95%), the available inventory for a SKU will be adjusted by the percentage specified. For example, if a SKU has a quantity of 100 available, and the setting is 95%, the available quantity will be sent as 95.

Enhancement: PS-4558: Connect POS Inventory Reservation**Version:** POS Connect**System Path:** POS Replication Manager**Description:** Provided the ability for the Connect POS to reserve inventory from the warehouse attached to it, if inventory is available and the item is specified as Ship Later. Added a new POS terminal setting "shipLater.reserveInventory". This setting can be configured via POS Replication Manager.

If the settings is turned on (value = 1), inventory is reserved for ship later items at the POS warehouse, if the warehouse has sufficient inventory.

Enhancement: PS-4560: Transfer Manager SKU Import**Version:** 7.4**System Path:** Transfer Manager**Description:** Provided the ability to upload SKUs via .CSV file to create a transfer. This feature allows a user to create a Transfer without any items and then add SKUs to the transfer order via an import or individually. This process is to be used for non-grid transfers only.

Enhancement: PS-4566: Sales Report Builder Ship Date

Version: 7.4

System Path: Reporting > Sales Report Builder

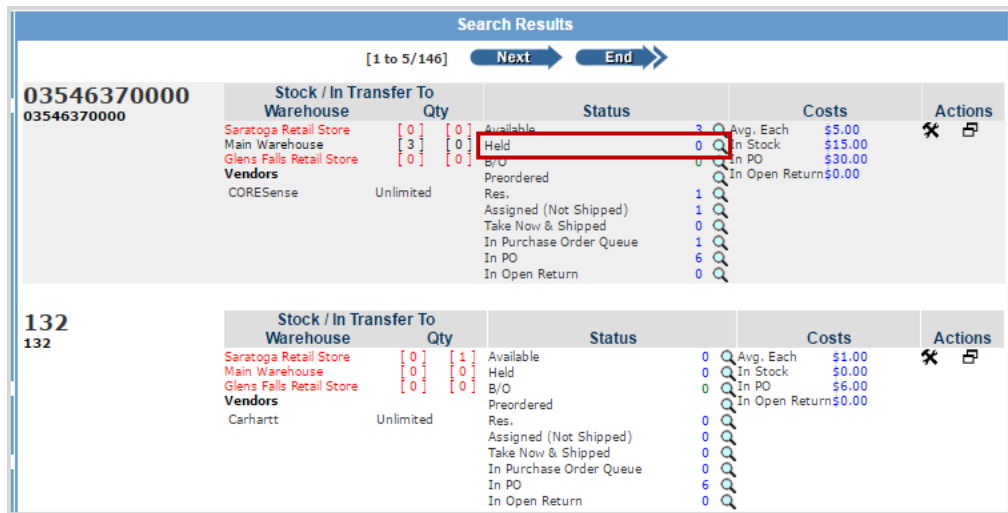
Description: Added the option to select "Shipped Date" as a results display in the Sales Report Builder under the Shipping Information box of the Results section.

Enhancement: PS-4567: New Inventory Status of Held

Version: 7.4

System Path: Products > Inventory Manager

Description: Added a new inventory status, "Held", that represents inventory assigned to a non-fulfillable location. This quantity is not counted in the Available bucket. Examples of this might include items being returned to vendor, damages, or repair items.



The screenshot shows a 'Search Results' window with two main sections. The top section is for item 03546370000. It has a table with columns: Warehouse, Qty, Status, Costs, and Actions. The 'Status' column has a 'Held' status highlighted with a red box. The 'Costs' column shows 'Avg. Each \$5.00', 'In Stock \$15.00', 'In PO \$30.00', and 'In Open Return \$0.00'. The bottom section is for item 132. It also has a table with columns: Warehouse, Qty, Status, Costs, and Actions. The 'Status' column has 'Held' status. The 'Costs' column shows 'Avg. Each \$1.00', 'In Stock \$0.00', 'In PO \$6.00', and 'In Open Return \$0.00'.

Item	Warehouse	Qty	Status	Costs	Actions	
03546370000	Saratoga Retail Store	[0] [0]	Available	3	✖ 🗑	
	Main Warehouse	[3] [0]	Held	0		
	Glens Falls Retail Store	[0] [0]	B/O	0		
	Vendors			Preordered	0	
03546370000	CORESense Unlimited		Res.	1		
			Assigned (Not Shipped)	1		
			Take Now & Shipped	0		
			In Purchase Order Queue	1		
			In PO	6		
			In Open Return	0		
	132	Saratoga Retail Store	[0] [1]	Available	0	✖ 🗑
		Main Warehouse	[0] [0]	Held	0	
		Glens Falls Retail Store	[0] [0]	B/O	0	
		Vendors			Preordered	0
132	Carhartt Unlimited		Res.	0		
			Assigned (Not Shipped)	0		
			Take Now & Shipped	0		
			In Purchase Order Queue	0		
			In PO	6		
			In Open Return	0		

Enhancement: PS-4371: Inactivate Expired Deals

Version: 7.4

System Path: Deal Manager

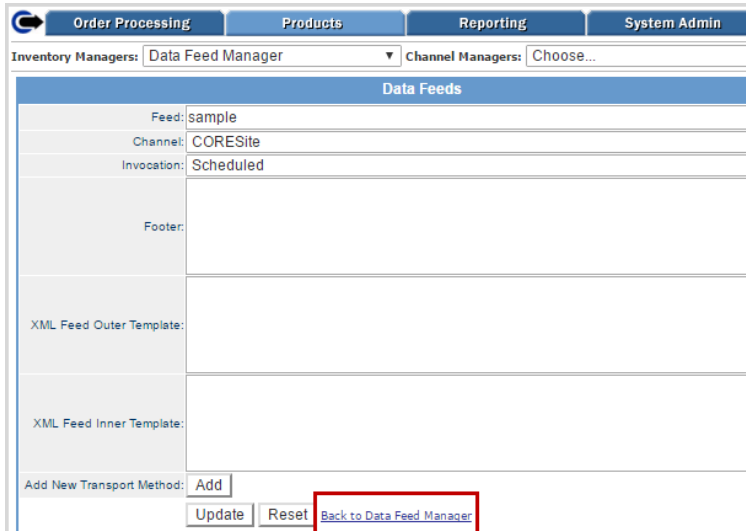
Description: Created a new daily CRON to look for expired deals in the Deal Manager. When run, it finds all active deals where the end date is less than the current date and time. It then sets all deals found to inactive.

Enhancement: PD-1203, 1214: Data Feed Manager Option

Version: 5.15, 7.4

System Path: Data Feed Manager

Description: Added a "Back to Data Feed Manager" link within the Data Feed manager so that users can return to main screen after updating or creating a data feed.



The screenshot shows the 'Data Feeds' management interface. At the top, there are navigation tabs for 'Order Processing', 'Products', 'Reporting', and 'System Admin'. Below these, there are dropdown menus for 'Inventory Managers' (set to 'Data Feed Manager') and 'Channel Managers' (set to 'Choose...'). The main area is titled 'Data Feeds' and contains several input fields: 'Feed' (value: sample), 'Channel' (value: CORESite), 'Invocation' (value: Scheduled), 'Footer', 'XML Feed Outer Template', and 'XML Feed Inner Template'. At the bottom left, there is an 'Add New Transport Method' section with an 'Add' button. At the bottom right, there are 'Update', 'Reset', and a highlighted 'Back to Data Feed Manager' link.

Additionally, widened the Data Feed Manager input fields for greater usability.

Enhancement: PD-1209: Connect POS Receipt Printing

Version: 7.4

System Path: Connect POS

Description: Added the ability to print receipts on Connect POS to a network enabled receipt printer, instead of via USB or parallel. To facilitate this, there is now the ability to specify an IP address for each terminal that is the IP address of the receipt printer.

Connect POS supports printing directly to network-capable Epson printers. Edit the pos_terminal_settings, in the POS Replication Manager, as follows:

```
receiptPrinter.enabled = 1
receiptPrinter.device = epson
receiptPrinter.type = network
receiptPrinter.epson.remote.host = <ip>
```

Enhancement: PD-1238: Financials Report List

Version: 7.4

System Path: Accounting > Financials

Description: The list of reports under Accounting > Financials is now in alphabetical order.

Enhancement: PD-1245: Order Manager Quick Info Addition

Version: 7.4

System Path: Order Manager

Description: Enhanced the Quick Info section of the Order Manager to display the Cashier for POS Orders.



Enhancement: PD-1246: Vendor Manager Custom Fields

Version: 7.4

System Path: Vendor Manager > Custom Fields

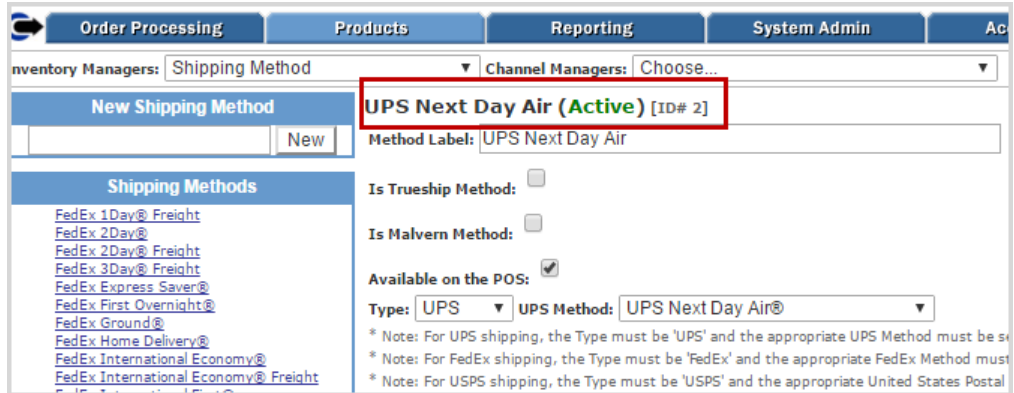
Description: Increased the height of the text area for custom fields in the Vendor Manager to make editing large blocks of text easier, without having to expand the text area.

Enhancement: PD-1247: Shipping Method ID

Version: 7.4

System Path: Products > Shipping Method

Description: Added the display of the ID to the Shipping Methods Manager similar to other managers after the label of the Shipping Method.



Enhancement: PS-4323: New Data Feeds

Version: 7.4

System Path: Data Feed Manager

Description: Created two new data feeds.

- The "Receiver Data Export" export grabs all receivers, and their corresponding information, that were received or unreceived the previous calendar day.
- The "Lock Receiver" import takes each receiver row, grabs the first column and sets the receiver number's status to 'Locked'.

Enhancement: PS-4499: Connect POS Return Number on Receipt

Version: 7.4

System Path: Connect POS

Description: For Connect POS return receipts, the return ID number displays at the top of the receipt. The barcode at the bottom has been updated to show the originating order number, not the return number.

Enhancement: PS-4569: Pre-Order to Reserve Inventory

Version: 7.4

System Path: Club Membership

Description: The following changes have been made to the pre-order inventory reservations:

1. When the club generate order cron runs, it reserves inventory for pre-order items as "temp ordered item". The inventory will be reserved at warehouses defined in **pre_order_warehouses**
2. When the pre order cron runs, it generates real orders for previously reserved items.
3. Pre -order cron no longer drops items if inventory is not available.

If a club delivery item added to the pre-order list doesn't have inventory reserved or available when the pre-order cron hits, the club delivery item in the pre-order list still drops from the pre-order list and is added to an order. The normal process of going on back-order will manage these orders.

Enhancement: PS-4571: Order Shipping by Order Detail

Version: 7.4

System Path: Multiple Ship To > Order Management

Description: Enhanced shipping calculation by order subtotal to occur by order shipping detail. The purpose for this is that when multiple ship to is enabled, and there are multiple ship to addresses on an order, the subtotal and price is determined per shipping detail.

Enhancement: PS-4575: Inventory Report Builder Options

Version: 7.4

System Path: Inventory Report Builder

Description: Additional options have been added to the results section of the Inventory Report Builder so that users can view In Stock inventory quantity for all warehouses in a single companywide value as well as under each warehouse. The Inventory Levels result options now include: Inventory Levels (By Warehouse) and Inventory Levels (All Warehouses).



Enhancement: PS-4583: Connect POS Multiple Sales Receipts

Version: 7.4

System Path: Connect POS

Description: Connect POS can be configured to print multiple sales receipts per terminal using the "salesReceipt.receiptCount" setting in the POS Replication Manager. If a number is not specified, it will default to one sales receipt.

Enhancement: PS-4587: Web Category Label Spacing

Version: 7.4

System Path: Multiple Managers

Description: Removed the condensing of Category Name field within the following Managers:

- Product Manager
- Product Performance Report
- Batch Product Update

This condensing is no longer needed with the new multiple select fields.

Enhancement: PS-4598: Loyalty Reward Creation Timing

Version: 7.4

System Path: Loyalty Management

Description: The Loyalty Reward Creation process has been enhanced to generate upon order creation if a customer has reached a threshold for reward. The reward will be created immediately following creation of the order if the System Settings > OLM > Orders > Issuance Delay is set at 0.

NOTE: For POS orders, this occurs based on the order being posted to the Back Office and replicating down to the POS machine. If there is a latency in the internet connection between the POS machine and the master server, this may not be available immediately after placing the order. Under normal conditions where the internet connection is healthy, any reward created by the master server after creating the order should be available for use within a minute.

Enhancement: Returns Management System Settings Permissions

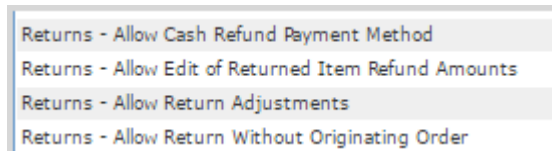
Version: 7.4

System Path: System Settings > User Permissions

Description: The following system settings located under System Settings > Returns Management have been removed and now identified as permissions.

- Allow Cash Refund Payment Method
- Allow Edit of Returned Item Refund Amounts
- Allow Return Adjustments
- Allow Return Without Originating Order

Existing users will have these permissions automatically assigned so no action is needed against user accounts. To enable or disable these permissions, they are labeled as follows.



Enhancement: PS-4570: Inventory by Warehouse on Website

Version: 7.4

System Path: Website Template Plug-ins

Description: Added the ability to display inventory by warehouse on the website product detail page from the *Add to Cart* plug-in. To set up this feature, do the following:

1. Configure Add to Cart plug-in and specify a Check Availability Template.
2. Add a "Check Availability" button to product page (see `check_availability_button` for example).
3. Add `check_availability_results` div tag to the product page.

The presentation is up to the end-user, as it most likely will be client specific.

Enhancement: PS-4606: Receiver Import Fields

Version: 7.4

System Path: Data Feed Manager

Description: Updated the Receiver Data Feed Import to include two new fields.

- Location Id – Not required. If specified, the inventory is received into this warehouse location.
- SKU Label – Not required. If specified, is used to lookup which SKU is to be received. Currently the import looks up SKU by Vendor SKU. If no Vendor SKU can be found, the SKU Label will be used to identify SKU, if provided.

Enhancement: PS-4608: Order Item Custom Fields in Sales Report Builder

Version: 7.4

System Path: Reporting > Sales Report Builder

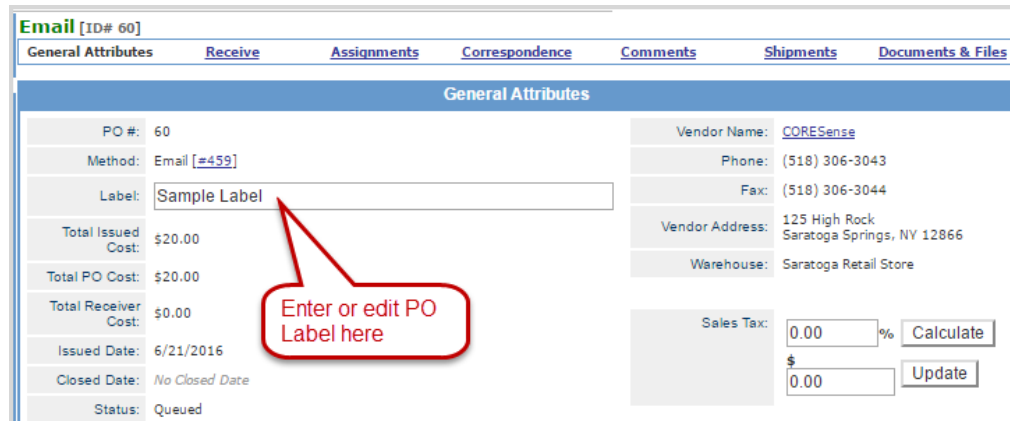
Description: Added Order Item Custom Fields to the Results section of Sales Report Builder.

Enhancement: PS-4609: Purchase Order Label

Version: 7.4

System Path: Purchase Order Manager

Description: Added the ability to set the label when creating a new purchase order and modify it in the Purchase Order Manager.



The screenshot shows a web form titled "Email [ID# 60]" with several tabs: "General Attributes", "Receive", "Assignments", "Correspondence", "Comments", "Shipments", and "Documents & Files". The "General Attributes" tab is active, displaying a table of fields:

PO #:	60	Vendor Name:	CORESense
Method:	Email [#459]	Phone:	(518) 306-3043
Label:	Sample Label	Fax:	(518) 306-3044
Total Issued Cost:	\$20.00	Vendor Address:	125 High Rock Saratoga Springs, NY 12866
Total PO Cost:	\$20.00	Warehouse:	Saratoga Retail Store
Total Receiver Cost:	\$0.00	Sales Tax:	0.00 % Calculate
Issued Date:	6/21/2016		\$ 0.00 Update
Closed Date:	No Closed Date		
Status:	Queued		

A red callout box points to the "Label" field with the text "Enter or edit PO Label here".

Enhancement: PS-4610: Transfer Manager Notes

Version: 7.4

System Path: Transfer Manager

Description: Added notes to the search results screen of the Transfer Manager.

Transfer Manager										
<input checked="" type="checkbox"/>	Transfer #	Status	Source Location	Destination Location	Cost	Date Created	Days Outstanding	Shipping Method	Notes	Actions
<input checked="" type="checkbox"/>	18	Ready For Pick/Pack	Main Warehouse	Glens Fa...etail Store	\$1.00	6/3/2016	27	UPS Ground	Notes now display here	
<input type="checkbox"/>	17	Closed	Main Warehouse	Saratoga...etail Store	\$1.00	5/24/2016	0			
<input checked="" type="checkbox"/>	16	Ready For Pick/Pack	Main Warehouse	Saratoga...etail Store	\$201.00	5/17/2016	44			

Notes column

Enhancement: PS-4611: POS Static Tax in Order Manager

Version: 7.4

System Path: Order Manager

Description: Changed sales tax calculation to check if the order was from a POS terminal that had the staticSalesTax defined. If so, it uses that percentage for recalculation of sales tax.

Enhancement: PS-4615: Product Page 404 Inactive Products

Version: 5.15, 7.4

System Path: Website Template Plug-ins

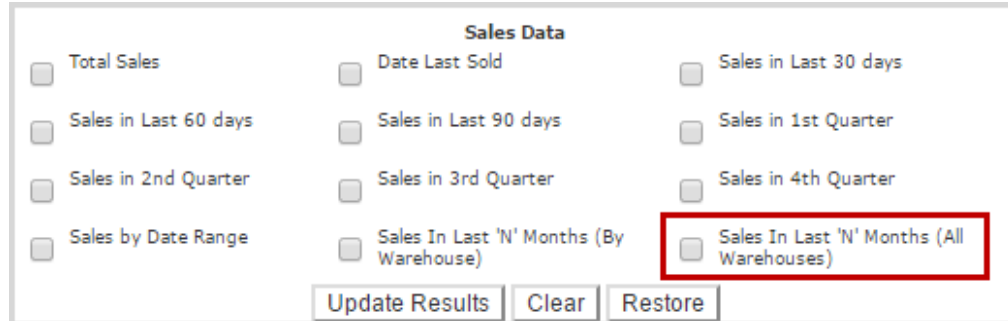
Description: Updated index page of website to display a 404 error if a product is inactive (global or channel), or if the product was not available and the out of stock option was set to "Do Not Display."

Enhancement: PS-4616: Inventory Report Builder Result Option

Version: 7.4

System Path: Reporting > Inventory Report Builder

Description: Added the ability to return "Sales in Last N Months (All Warehouses)" to Inventory Report Builder Results > Sales Data section.



Sales Data		
<input type="checkbox"/> Total Sales	<input type="checkbox"/> Date Last Sold	<input type="checkbox"/> Sales in Last 30 days
<input type="checkbox"/> Sales in Last 60 days	<input type="checkbox"/> Sales in Last 90 days	<input type="checkbox"/> Sales in 1st Quarter
<input type="checkbox"/> Sales in 2nd Quarter	<input type="checkbox"/> Sales in 3rd Quarter	<input type="checkbox"/> Sales in 4th Quarter
<input type="checkbox"/> Sales by Date Range	<input type="checkbox"/> Sales In Last 'N' Months (By Warehouse)	<input type="checkbox"/> Sales In Last 'N' Months (All Warehouses)

Update Results Clear Restore

Enhancement: Online Documentation Additions

Version: 7.4

System Path: Online Documentation

Description: Content has been added to the online documentation for the following topics:
 Physical Inventory Variance Report :
http://help.coresense.com/7.4/Inventory_Management/Variance_Report_Definitions.htm

Inventory Transaction Reason Code definitions:
http://help.coresense.com/7.4/Inventory_Management/Inventory_Transaction_Reason_Codes.htm

Enhancement: PD-1283 Connect POS Special Notes

Version: 7.4

System Path: Connect POS

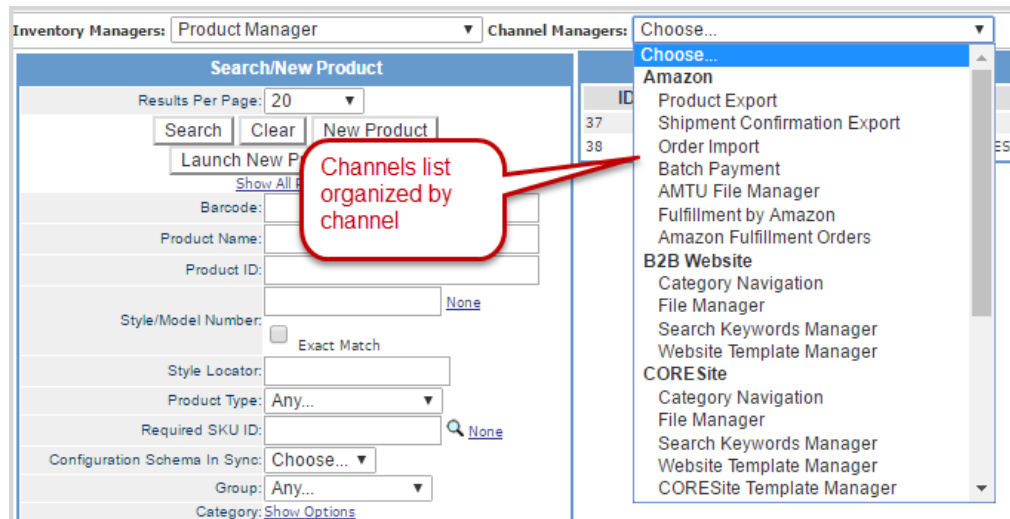
Description: Added the display of Special Notes and Description fields on the Connect POS.

Enhancement: Channel Managers Organization

Version: 5.15

System Path: Product Manager > Channel Managers

Description: Organized the Channels Managers drop-down list by each channel.



Enhancement: Website Template Manager Version Indicator

Version: 5.15

System Path: Product Manager > Channel Managers > Website Template Manager

Description: Added an indicator that displays which template project is currently live.

