

## Summer 2019 Product Release Information

<b>Product:</b>	<b>CORESense Application Software</b>
<b>Release Number:</b>	Versions 5.15, 7.4 and higher
<b>Release Dates:</b>	Release Date: May 8, 2019 <b>Current Release Type: Beta 1(Henry)</b> General Release: July 30, 2019
<b>Also Includes Items from Release(s):</b>	NA

### What's New?

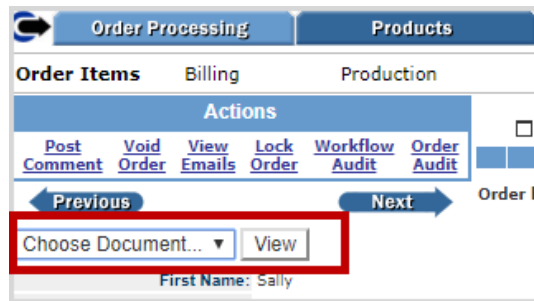
Following is a summary of the enhancements and new features added in this software release. Unless you requested to be a Release Candidate, the features listed below are not available until the General Release date noted above.

**Enhancement:** **SS-2862: Choose Document Selection View**

**Version:** 7.4

**System Path:** Order Manager

**Description:** Updated the Order Manager > Choose Document drop-down list to truncate document labels less so that they are easier to read when selecting.



**Enhancement:** **SS-2860: Connect POS Return Setting**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Updated Connect POS terminal setting 'hideReturnRefundMethods' so that it also restricts what payments are pre-populated for returns.

**Enhancement:** **SS-2856: Connect POS Return Setting**  
**Version:** 7.4  
**System Path:** Connect POS  
**Description:** Updated the 'payments\_array' template tag to no longer list voided payments.

**Enhancement:** **PS-5418: Shipment Manager Label Printing**  
**Version:** 7.4  
**System Path:** Shipment Manager > Search Results  
**Description:** Fixed code concatenation for "Print FedEx Label" / "Print Shippo Label" buttons.

**Enhancement:** **PS-5416: Default Vendor Display**  
**Version:** 7.4  
**System Path:** Inventory Manager > Vendors  
**Description:** Updated the Inventory Manager > Vendors tab to always have the default vendor listed first. The rest of the list is still in alphabetical order by vendor name.

**Enhancement:** **PS-5415: Digital Product Update**  
**Version:** 7.4  
**System Path:** Order Manager > Order Items  
**Description:** Updated the Order Manager so you can add digital products without any file formats to the order.

**Enhancement:** **PS-5411: IHA Exchange Process**  
**Version:** 7.4  
**System Path:** Connect POS  
**Description:** Disabled applying an IHA to an order while on the 'order' side of an exchange.

**Enhancement:** **PS-5409: IHA Auto-Populate**  
**Version:** 7.4  
**System Path:** IHA Manager > Departments > Hammer / Wrench > 'Auto-Populate' button  
**Description:** Added the ability to set whether an IHA Department's product attributes were joined together via 'ors' or 'ands'.

**Enhancement:** **PS-5408: Category Auto-Populate**  
**Version:** 7.4  
**System Path:** Category Navigation  
**Description:** Updated the Category Navigation 'Auto-Populate Category Products' section as follows:

1. Can now have multiple Product Attributes.
2. A single category can now use criteria in any of the types at once.

**Enhancement:** **PS-5407: Product Manager Inventory Display**

**Version:** 7.4

**System Path:** Product Manager > Inventory

**Description:** Added the ability to display custom fields in Product Manager > Inventory. Note that the fields are displayed dynamically, so where the field is displayed depends entirely on which fields are chosen to display.

Note that any field can have a section of 'model\_inventory' to show up here.

**Enhancement:** **PS-5406: Datamart Vendor Style Field**

**Version:** 7.4

**System Path:** Datamart

**Description:** Updated Datamart so that custom fields can use multiple filters.

**Enhancement:** **PS-5402: Shippo Label Button**

**Version:** 7.4

**System Path:** Shipment Manager

**Description:** Duplicated the "Create Label" button on the Shippo Label Generation pop-up.

**Enhancement:** **PS-5400: Shippo Data**

**Version:** 7.4

**System Path:** Shipment Manager

**Description:** When generating a Shippo label, the system now passes the Shipment ID and Order ID into the metadata field.

**Enhancement:** **PS-5397: Avalara Tax Exemption**

**Version:** 7.4

**System Path:** Avalara

**Description:** While adding order item, added the ability to check whether item is tax-exempt or not. If the item is tax exempt, a tax exemption certificate would be added if it does not already exist. The certificate then would be added to the corresponding order. The already-existed certificate is sent to Avalara.

**Enhancement:** **PS-5395: Avalara Tax Refund**

**Version:** 7.4

**System Path:** Avalara

**Description:** Updated the Tax Refund process to also refund to Avalara (if Avalara is enabled and the order was committed to Avalara).

**Enhancement:** **PS-5393: Picker/Packer Department Field**

**Version:** 7.4

**System Path:** Shipping > Defaults

**Description:** Added a new field in the System Admin > System Settings Manager > Shipping > Defaults labeled 'Picker / Packer Department'. If this system setting is set, the options for 'Picker' and 'Packer' in the Shipment Manager are further sorted by the department in the system setting.

**Enhancement:** PS-5383: Centralized Distribution Updates

**Version:** 7.4

**System Path:** Purchase Manager

**Description:** Updated the Distribution tab of the Purchase Manager as follows:

1. Changed "Total Available DC" column heading to read "Total Available (All Receivers)".
2. Updated "Total Available (All Receivers) calculation to limit to the DC warehouse.
3. Added two new columns to the left of "Total Available (All Receivers)"
  1. Total Available (Last Receiver)
    - This column will output the quantity of inventory unassigned in the DC from the last receiver received on the purchase order.
  2. Qty In Stock DC
    - This column will output the quantity of inventory in stock at the distribution center for this SKU and should match the quantity output on the Inventory Levels tab of the Inventory Manager for the SKU / Warehouse combination.
4. Removed triangle icons in Quantity header and column that is used to put the fill the quantity input with the Total Available (All Receivers) quantity.
5. Added triangle icons for the Total Available (All Receivers) and Total Available (Last Receiver) columns, so that the user can choose if they want to populate quantity based on all receivers or the last receiver.
6. Changed Distribute All link to Distribute (All Receivers).
7. Added new link Distribute (Last Receiver).

**Enhancement:** PS-5374: XML Capability in Shipment Manager Search Results

**Version:** 7.4

**System Path:** Shipment Manager

**Description:** Upgraded the Shipment Manager to use CORESense XML file system. Update will allow Shipment Manager search results to display information unique to your company.

**Enhancement:** **PS-5370: Packing Email Notification**

**Version:** 5.15, 7.4

**System Path:** Shipping

**Description:** Created a new system setting labeled 'Default Packed Email Template' under System Settings Manager > Shipping > Notifications with a description of 'The email template that will be sent to customers when a shipment is in a status of "Packing".' This allows a confirmation email to be sent out to the customer whenever their order's shipment goes into 'Packing' status.

Created a new cron that will run for all clients at XX:20 every hour during business hours. It will go through pending\_pack\_confirmation\_emails and send out emails based on the template id.

**Enhancement:** **PS-5368: Club Membership Updates**

**Version:** 7.4

**System Path:** Club Membership

**Description:** Updated the Customer account Club Membership tab as follows:

- Added Join date in dates column.
- added empty check in resume date.
- added another column for shipping method.

**Enhancement:** **PS-5361: Connect POS Customer Search**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Add a new Connect POS terminal setting labeled 'customerSearch.keywords.billingContacts' to the System Admin > POS Replication Manager. This will provide customer search option for the Connect POS > Customer Search; when doing a keyword search, to return only billing contacts. If doing a search under the 'Simple' or 'Advanced' drop-downs, it will continue to look at all contacts.

If not set, the default is to look at active contacts. If it is set, the default is to look at active billing contacts.

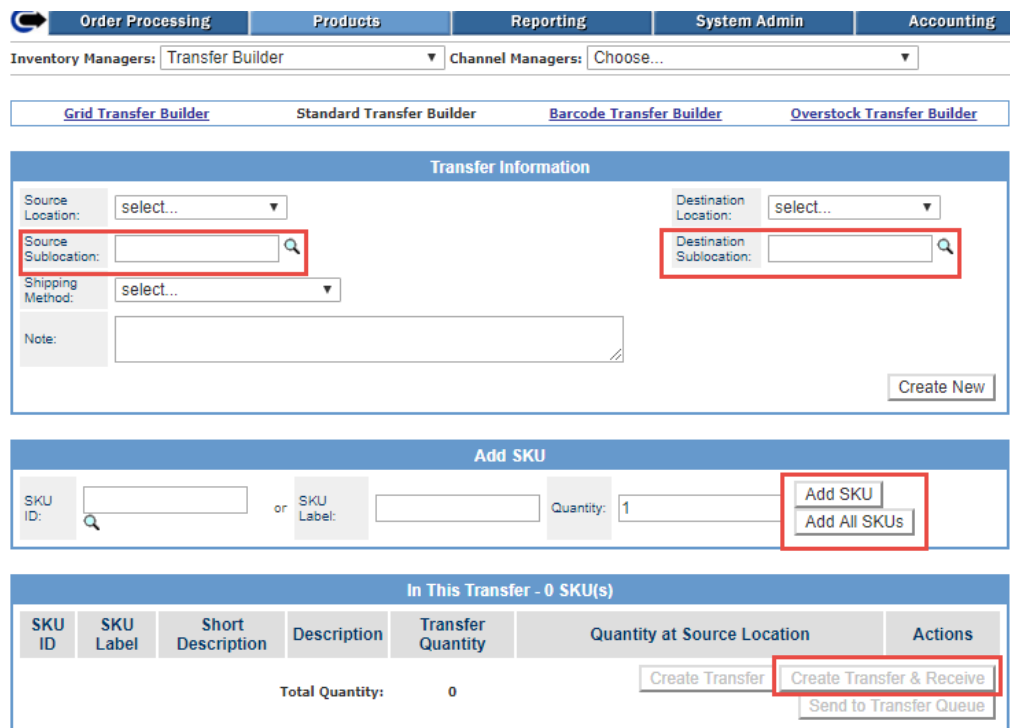
**Enhancement:** PS-5358: Transfer Builder Enhancements

**Version:** 7.4

**System Path:** Transfer Builder

**Description:** Enhanced Transfer Builder to easily move all free inventory in one sub-location to another sub-location.

- Added two new fields labeled 'Source Inventory Location ID' and 'Destination Inventory Location ID' in Transfer Builder > Standard Transfer Builder > Transfer Information.
- Added new button 'Add All SKUs' that adds all unassigned SKUs in the source location and source sub-location to the transfer.
- Added new button 'Create Transfer & Receive' to the right of 'Create Transfer' that creates a transfer as well as receiving the transfer.



The screenshot displays the 'Transfer Builder' interface. At the top, there are navigation tabs: Order Processing, Products, Reporting, System Admin, and Accounting. Below these are dropdown menus for 'Inventory Managers' (set to 'Transfer Builder') and 'Channel Managers' (set to 'Choose...').

The main section is titled 'Transfer Information' and contains several fields:
 

- 'Source Location' and 'Destination Location' are dropdown menus.
- 'Source Sublocation' and 'Destination Sublocation' are text input fields with search icons, highlighted with red boxes.
- 'Shipping Method' is a dropdown menu.
- 'Note' is a text area.
- A 'Create New' button is located at the bottom right.

Below this is the 'Add SKU' section, which includes:
 

- Input fields for 'SKU ID' and 'SKU Label' with search icons.
- A 'Quantity' input field set to '1'.
- Buttons for 'Add SKU' and 'Add All SKUs', both highlighted with red boxes.

The bottom section is titled 'In This Transfer - 0 SKU(s)' and features a table with the following columns: SKU ID, SKU Label, Short Description, Description, Transfer Quantity, Quantity at Source Location, and Actions. Below the table, there is a 'Total Quantity: 0' and three buttons: 'Create Transfer', 'Create Transfer & Receive' (highlighted with a red box), and 'Send to Transfer Queue'.



**Enhancement:** PS-5353: DispatchTrack Integration

**Version:** 7.4

**System Path:** Shipping

**Description:** Created integration from CORESense to DispatchTrack. Added a new section to System Admin > System Settings Manager > Shipping labeled 'Dispatchtrack':

- Inputs include 'Code', 'API Key' and 'Account ID'.
- 'Service Type', with three options: Delivery, Pickup or Service, with a default of 'Delivery'.
- 'Order Statures' (multi-select), a list of all possible order statuses.
- 'Shipping Methods' (multi-select), a list of all possible shipping methods.

Dispatchtrack	
Dispatchtrack Code:	<input type="text"/> <small>The code for Dispatchtrack.</small>
Dispatchtrack API Key:	<input type="text"/> <small>The API Key for Dispatchtrack.</small>
Dispatchtrack Account ID:	<input type="text"/> <small>The Account ID for Dispatchtrack.</small>
Dispatchtrack Service Type:	Choose... <small>The service type to send to Dispatchtrack.</small>
Dispatchtrack Order Statures:	Select Options <span style="float: right;">x</span> <small>The selected order statures to send to Dispatchtrack.</small> <input type="checkbox"/> Select All
Dispatchtrack Shipping Methods:	Select Options <span style="float: right;">x</span> <small>The selected shipping methods to send to Dispatchtrack.</small> <input type="checkbox"/> Select All

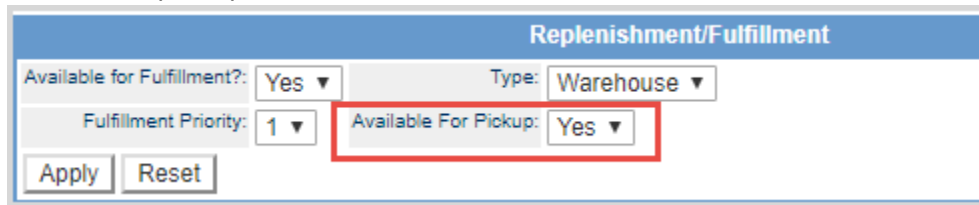
**Enhancement:** PS-5279: Pickup Option in Order Production Tab

**Version:** 7.4

**System Path:** Order Manager

**Description:** Created the ability to have website and SOI orders picked and marked shipped for customer pickup orders in the Order Manager. This is managed in the following managers.

**Warehouse:** added a warehouse setting to define whether or not a warehouse is available for pick-up.



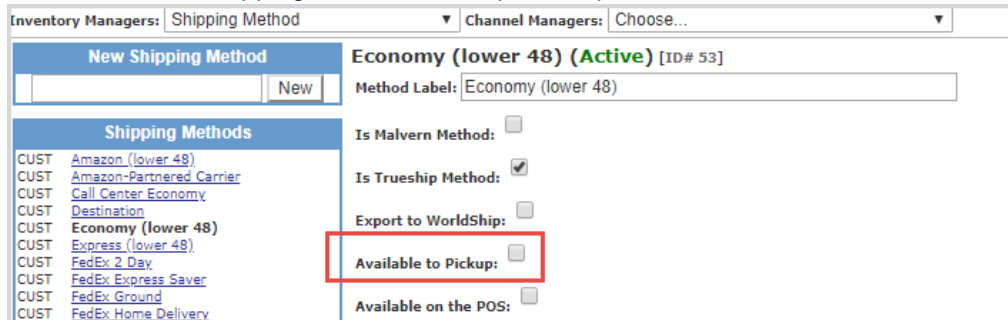
Replenishment/Fulfillment

Available for Fulfillment?: Yes ▾ Type: Warehouse ▾

Fulfillment Priority: 1 ▾ Available For Pickup: Yes ▾

Apply Reset

**Shipping Method:** Added a new pickup setting per shipping method that controls whether or not a shipping method can be picked up.



Inventory Managers: Shipping Method Channel Managers: Choose...

**New Shipping Method** Economy (lower 48) (Active) [ID# 53]

Method Label: Economy (lower 48)

Shipping Methods

- Amazon (lower 48)
- Amazon-Partnered Carrier
- Call Center Economy
- Destination
- Economy (lower 48)
- Express (lower 48)
- FedEx 2 Day
- FedEx Express Saver
- FedEx Ground
- FedEx Home Delivery

Is Malvern Method:

Is Trueship Method:

Export to WorldShip:

Available to Pickup:

Available on the POS:

**Order Manager:** Added a Pickup button to the Production tab of the Order Manager.



Order Production														
Qty	Product	Status	Fulfillment Type											
1	All-Seasons Heated Bath with 25" Pedestal	Active	Ship Later											
Inventory Requirements						Inventory Status								
Qty	SKU	Short Description	Vendor / Wholesale Cost / QOH	COGS	Fulfillment	Levels	On B/O	Res.	In PO Queue	In PO	Assigned	Shipped	In Opn. Rtn.	Rtn.
✓ 1	1634	Heated Bird Bath W/Pedestal	Miller Manufacturing \$67.08 0	61.88000	Stock Inventory	Mailorder and Web [ 76 ]	[ 0 ]	[ 0 ]	[ 0 ]	[ 0 ]	[ 0 ]	[ 1 ]	[ 0 ]	[ 0 ]
						Retail Store [ 1 ]	[ 0 ]	[ 0 ]	[ 0 ]	[ 0 ]	[ 0 ]	[ 0 ]	[ 0 ]	[ 0 ]
						Vendors								
						Miller Manufacturing Unlimited Company								

Start Fulfillment Process Pickup Deselect All Items Select All Items

When clicked, the Pickup button will open a window that displays the following:

- **Pick / Pack List Template:** This drop-down contains a list of document templates that allows a user to choose a pick/pack list template to generate.
- **Warehouse to pick-up from:** This displays a list of all warehouses that are marked as Available for Pick-up. If only one warehouse is marked as Available for Pick-up, it is automatically selected with order items shown that are available for pick-up.
- **Items Available for pick-up:** The list of items available to be pick-up will be displayed. Items available for pick-up will take into account inventory that is assigned and reserved to items, as well as in stock inventory for the warehouse selected.
- **Items Not Available for pickup:** This will display a list of items on the order that are not available for pick-up from the selected warehouse based on inventory assigned and reserved to the order, as well as in stock inventory.
- **Complete Pick-up Button:** This button does the following:
  - Inventory will be assigned to the order items (if not already)
  - Inventory placed into a shipment from the warehouse to the customer with a shipping method defined by the new System Setting (if not already)
  - Shipment Marked as shipped with a ship date of today
  - Open a pick sheet with a print dialog using the Pick-up Pick List template defined in the new System Setting.

**Enhancement:** **PS-5275: Report Builders Update**

**Version:** 7.4

**System Path:** Reporting

**Description:** Updated Inventory Report Builder and Sales Report Builder to use multiple selects instead of selects for custom product type information fields

**Enhancement:** **PD-1831: Product Search Optimization**

**Version:** 7.4

**System Path:** Multiple Managers

**Description:** Updated searching on product name to allow for wildcard matching and optimized Product Manager searching.

**Enhancement:** **PD-1830: Offline POS Returns/Exchanges**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Updated return/exchange offline process as follows: if replication is turned on and the POS is offline, it will grab all returns from the job system that are in a status of new and review them to identify if any of them have an order number that matches a current return's order number. If yes, it will present a popup with the message, "The POS is currently offline and has detected a duplicate return. Wait until the POS is online again to process this return." Users are then directed back to the main cart screen. It does not detect if a user has only half-returned an order.

**Enhancement:** **PD-1820: Connect POS Loyalty Reward Coupon**

**Version:** 7.4

**System Path:** Connect POS

**Description:** Applying a loyalty reward coupon code in Connect POS is entered in the same spot that applying a deal coupon code works. Note that the display will continue to display only deal coupon codes (a message does say that the loyalty reward has been applied), and you can only remove loyalty rewards at the checkout screen.

**Enhancement:** **PD-1810: Connect POS IHA Override**

**Version:** 7.4

**System Path:** Connect POS IHA

**Description:** Updated the IHA override (which occurs when using a barcode) to take into consideration the 'IHA Override' permission.

**Enhancement:** **PD-1807: Shippo COD & Saturday Delivery**

**Version:** 7.4

**System Path:** Shippo

**Description:** Added support for sending COD and Saturday Delivery requests to Shippo based on the Shipping Method's settings.

**Enhancement:** **PD-1806: Shippo Carrier Subcodes**

**Version:** 7.4

**System Path:** Shippo

**Description:** Added sub\_code to the rendering of carrier shipping methods in the Shippo area of the System Settings Manager

**Enhancement:** **PD-1803: SOI as POS**

**Version:** 7.4

**System Path:** SOI

**Description:** Updated the SOI, when using a POS-type channel, to not allow setting the fulfillment warehouse when using 'Take Now' or 'Ship Later', as inventory is not reserved for POS-type channels.

**Enhancement:** **PD-1787: Shippo Parcel Templates**

**Version:** 7.4

**System Path:** Shippo

**Description:** Updated Shippo integration to support using Parcel Templates. Specifically, to support USPS flat rate boxes.

**Enhancement:** **PD-1757: Shippo Weight Edits**

**Version:** 7.4

**System Path:** Shippo

**Description:** Added the ability to edit Parcel weight and dimensions.

## Bug List

The bug list is intended for reference only. In an effort to prevent any potential self-misdiagnosis, if you think that you have experienced a cited issue, please contact Support Team to verify. Although a listed bug might sound similar to your situation, it is best to confirm it.

Bug #	Description
BUG-16805	Fixed issue with USPS rates not showing up as shipping options.
BUG-16793	Fixed issue with Warehouse fulfillment rule is not working correctly.
BUG-16788	Updated the reordering process to further be hacked when being used by non-grid products. Reordering points should no longer show exact duplicates after being imported.
BUG-16778	Fixed issue with Shipments including take now items.
BUG-16777	Fixed issue with Category Membership list not displaying in Products > Channels.
BUG-16776	Updated the creation of template tags to set those tags if the shipping detail is ship later OR the order is 100% a take now order.
BUG-16774	Updated the escaping being done for barcode receiving to properly handle both apostrophes and already-escaped apostrophes.
BUG-16769	Updated the processing for adding a club membership and editing a club membership via the Connect POS to do so via a job.
BUG-16766	Fixed issue with Connect POS processing of check returns.
BUG-16761	Updated the Connect POS 'Order History' for an order to list GCs and VCs payments. Updated printed / emailed / viewed receipts to list GC payments
BUG-16751	Updated the Connect POS' grand total calculation for orders that have already been created and that have loyalty rewards applied to calculate the loyalty reward correctly.
BUG-16748	Fixed issue with Message Center message display count and login pop-up.
BUG-16745	Update the Connect POS overpayment issues: <ol style="list-style-type: none"> <li>1. Cannot pay on the credit card more than the balance owed at the time.</li> <li>2. Can only overpay with Cash.</li> </ol>
BUG-16740	Fixed issue with viewing "Assigned (Sold)" tab inventory.
BUG-16739	Stopped pushing tax information to Avalara for partially shipped orders.
BUG-16730	Updated Connect POS Value Card Error to be more user friendly.
BUG-16723	Added the ability to track orders created by membership's deliveries. That way, if it fails in the middle of a delivery again, it won't duplicate orders because it'll find that that delivery for that membership already has an order.

BUG-16719	Updated the data import mapping so that the fields you can choose to add to the mapping don't include fields already mapped.
BUG-16718	Removed the duplicate list of fields under the Models Entity that starts with second ID field id.
BUG-16690	Fixed issue with the reorder level automation where nothing was going into the transfer queue instead all SKUs were going into the PO Queue.
BUG-16684	Updated the Connect POS' create new customer code to set 'residential address' and 'liftgate required' fields.
BUG-16679	Updated our 'find duplicate contacts' code to correctly identify blank date of birth fields.
BUG-16673	Updated template tag creation to set client id directly if a quote is being used.
BUG-16670	Updated the following reports to no longer use TO_DAYS: Adjustments Report, Gift Certificates Report, Order Exception Report, Orders Report, Payments Report, Sales Tax Report, Value Cards Report. All reports can be found under the 'Reporting' tab; no Financials-type reports were changed.
BUG-16657	Fixed issue with returns without an originating order not able to scan the item being returned.
BUG-16425	Users are now prompted for the permission 'POS Price Adjustment' (if they don't have it) when applying a price override.