



Update Release Notes for version 5.40 - September 2020

Please be sure to clear the cache and cookies in your internet browser.

New Features

- Relationships
 - Copy Existing Customer: Customer's base information can be copied to a new customer that will generate a new customer account number.
- Campaigns
 - New filter options for qualifiers, rewards and exclusions on campaigns: Users can add Tags, Tag Groups and Suppliers.
 - Qualifier, reward and exclusion item lists can now be filtered and searched.
 - Select All / Deselect All options now available when filtering items to be added to a campaign qualifier, reward or exclusion.
 - "Apply Reward/Discount to Qualifying Items" when selected, now supports an optional setting for "Apply Reward to Lowest Priced Qualifying Item".
- Items
 - Multiple tag along items can be added to a single item.
 - Items marked Inactive at the item master level will remain active at all locations until there is a On Hand quantity of zero (0) at each location, or they have been manually deactivated for each location. Once all locations are deactivated, the master item will be deactivated.
- Merchandising
 - Three-Way Match: Users can now opt-in to a new merchandising module for Three-Way Match. This module allows the input of invoice information against corresponding purchase orders and receivers. The three-way matching of data provides users a clear view of any discrepancies. Differences in quantity and cost across the various forms is highlighted for user action.
 - Receiving: when auto-closing a purchase or transfer order, the system will notify the user of any discrepancies prior to committing the receiver.
- Stored Value - Internal Multi-Location (Gift Cards)
 - Stored Value: Users can opt-in to a new stored value module that can be used for internal gift cards, loaded value cards, or store credit. Gift cards, loaded value cards or store credit can be created using pre-printed / encrypted cards or auto-generated QR codes. Customers can use activated (loaded) cards or codes for future store purchases.
- POS Devices
 - Customer Settings: Additional fields have been added to the Customer Quick Add Fields and Required Fields under Devices.
 - Price Change and Tax Change have been added to the list of Reason Codes that are used on the POS. These can be set to be required in Transaction Settings.

Bug Fixes and Updates

- Physical Inventory dashboard graphs have been corrected to account for the option of "Leave uncounted quantities at current value".
- Transfer Orders can be manually closed when receiving only a portion of the order.
- Adding items to POs by reorder number when multiple items have the same reorder number has been optimized.
- When Item Approvals are enabled, users can now approve specific field changes rather than being forced to approve all or no changes.

- Deactivated Departments and Categories will no longer appear as options for Qualifiers, Rewards or Exclusions in Campaigns.
- “Sync Item Masters with Locations” will no longer allow the Item Cost Method to change in the Item Location Details.
- Item Links while in View Mode are now enabled.
- Updates to the RMS Quantity Discount module include: Percentage fields now displaying correct values, item modal displaying all selected items, and the location picker selections remain through the save of the discount.