



## Release Notes – 2024.09

Prima Cloud

### Companies

#### Contact Lookup Expired Cards

A new option to filter on expired cards has been added

You can now remove expired cards even after swapping provider

You can filter on companies that have or do not have a card to find them quickly to prompt them to update their card information

### Contracts

#### Contract Pricing Option

A new option – discount from RSP/List Price – has been created.

The calculated price will show in grid.

Exporting and importing has been updated to allow management of discounts – you can import in either S, M, or D (Standard, Margin, or Discount)

Grid managers have been updated to allow a discount from RSP/List Price

### SOP

#### Orderpad Import

A new orderpad import template has been created for use in the back office

#### ShipStation Write Back Options

When the system keys to pick up webhook and update prices are set to Yes or No:

1 – If the system key is set to Yes, write back the shipping sell price. If the invoice is externally paid and outstanding or posted

2- If the system key is set to No, do not write back the delivery sell to the sales invoice or the sales order

## POP

### **Stock Re-Ordering Filters and Lookup Options**

A filter has been added in the stock re-order grid to for selecting sales (default) or purchase history for the last 12 months to display in the grid

Two new columns – the default batch location and the preferred supplier cost price – have been added into the grid. The default batch location relates to the default for the depot the user is logged into. If the preferred supplier is already selected, the preferred supplier cost price column will be blank.

A new button – Default – has been added. Clicking this allows the user to change the re-order type or values without having to go back into the product record

For any selected lines, the total purchase amount, the “free over” amount, and the “minimum order value” will be displayed for the supplier at the bottom of the grid.

### **Essendant and SPR Stock Re-Ordering**

Multiple accounts for SPR and Essendant are now available to update in the stock re-ordering section

### **Exclude Van Routes from Auto-Allocation**

Under System Keys > Sales System Keys, you can now exclude selected Van Routes from auto allocating stock for Standard and PWL orders.

When selected for a Van Route, if an order has an excluded Van Route, the lines will go into requirements as outstanding lines.

You can still part-allocate or fully allocate stock manually to these lines if you wish

### **New Selling Price Column**

A column has been added into requirements – Unit Selling Price.

## Publications, Stock and Suppliers

### **Mailer Pricing Option**

A new option – discount from RSP/List Price – has been created.

The calculated price will show in grid.

Exporting and importing has been updated to allow management of discounts – you can import in either S, M, or D (Standard, Margin, or Discount)

Grid managers have been updated to allow a discount from RSP/List Price

### **Mailer Minimum/Maximum Price**

A minimum and maximum price has been added to mailers. If either field is filled in and the mailer set to a markup/margin, you can cap the calculated selling price to ensure it doesn't drop too low or go too high



### **Mailer Company List**

In the mailer header, there is now a button that shows the “Companies” that are set to view the mailer. Companies can be added and removed from here

### **Product Grid Manager – Set Re-Order Levels**

The Re-Order type can be changed to a different Re-Order type via the product main grid manager.

### **Product Lookup – Webstore Display**

A new option in the extended search to exclude the selected webstore find products that aren't assigned to your chosen webstore

This is also available in the grid manager

### **Essendant Customer Products Grid manager**

Send multiple CUSTOM items has now been added (previously only for SPR for custom items)

### **Essendant Product Weighting**

1 – 9 product weighting will now be used on Essendant store in the same way as the back office. Type and Brand will be ignored as these are not relevant

## **Movements**

### **POD – Proof of Delivery**

A new option has been added to reduce or delete the quantity of items delivered on the Prima App. This is useful if an item is rejected by the customer if it is damaged or no longer needed, or wasn't on the van for delivery.

This will reduce the need for a customer return once a manifest is completed

### **Dispatch Labels**

When entering the number of boxes into a dispatch header, the same number of labels will be created by default

### **Dispatch Note Grid**

The number of boxes now shows in the dispatch lookup

## **Invoicing**

### **Posting payment after using maintenance to move back to outstanding.**

New payments that are created will be posted and get a Financial ID.



Previously they were ignored on reposting. Cash payments can also be made, and payments can be partial. i.e. multiple payments per invoice but NOT greater than the total value of the invoice.

#### **Sales Invoice Notes**

A read only field – sales order notes – has been added to the header notes section in a sales invoice.

#### **Meter Reading Sales Invoice Reports**

Serial numbers for meter invoices will now show on the invoice report when the invoice does not link to a dispatch note

#### **Invoice Report Delivery Location Name**

The delivery location name has been added to the sales invoice report as an available field. This can be added via the report designer

#### **Support Contract Header Option**

A new field is available on the header of a support contract. This is used when the contract rebills each month, quarter etc. to set the shipping address on the invoice when it is created.

If contracts try to update an invoice (separate invoices unchecked as default) and the tax rate is different to the shipping tax rate, it will not add to the existing invoice but will create a second support contract invoice

### **General Admin**

#### **Contract Housekeeping Automation**

There is a new option in Administration under Auto Housekeeping Setup – “Update Minimum Price on Contracts and Mailers”

When set to Yes, this will automatically update the minimum price on both contracts and mailer to match the current calculated selling price.

If the calculated price goes down, then the minimum price will not be moved down to match. This is to protect your profit.

This task should only be scheduled to run outside of regular hours after catalog updates have been processed.

#### **EDC Stability Improvements**

The EDC will now initiate a timeout for "receipt jobs" if they cannot be completed, allowing the system to continue processing other jobs. In the event of a timeout, a journal entry will be generated.

#### **Payment Journals**

Code has been added to journal entries when complete it checked or the EDC attempts to take payment in batch when the system key is set to Yes



### **ShipStation**

ShipStation keys can now be managed in Admin>General

## **PrimaGo**

### **V2 Synchronization jobs**

The synchronization of PrimaGO V2 has been optimised with over 20 new jobs and enhancements to the web lists

### **SPR Stores – Multiple Images**

SPR store can now have up to three images for customer items. If these exist in the back office, they will be sent as standard

## **Till**

### **Till Report**

The report now includes the total of non-paid transactions on that till. The current report is only payments made (e.g. other sales and total sales)

### **Cash Report**

Returns on the till are now included in the till returns report

## **Third Party Integrations**

### **QuickBooks API**

Business Group is now sent via API to all QuickBooks invoices where populated. If this is not populated, no business group data will send

The PO Number is now sent to sales invoices for QuickBooks

Nominal updates in QuickBooks sales invoices now also send the PO Number

### **Sales-I Improvements**

The sales file will now always include the account manager and regional/area manager

The company location file now sends the account manager as current but includes an extra field with the regional/area manager

## Fixes and General Updates

**Fix:** The ability to take a payment once a deposit has been created has been disabled. If a deposit invoice is created, you can jump to the invoice and take a credit card or cash payment directly

**Fix:** Financial system authentication pop-ups are now prevented during EDC sessions when the token refresh fails.

**Fix:** Optimised invoice status updates in the EDC to return the status more quickly when posting

**Fix:** The preferred vendor was being chosen for stock re-ordering where the re-order was set to use the Cheapest Supplier. This has now been fixed so the cheapest vendor is used

**Fix:** Invoices created on authorization or when an immediate payment for a requested sales order is made now update the delivery cost and sell on creation

**Fix:** When changing a Purchase Order supplier but cancelling this change, the new supplier was still displayed. The system now reverts to the original supplier

**Fix:** Contact dropdown is now in alphabetical order

**Fix:** Purchase credit lookup now returns all records if multiple statuses are selected

**Fix:** The Sales Invoice/Credit Report has been enhanced to display a value of 0 instead of generating an error when no invoices are available for loading.

**Fix:** When selecting items from history to use last price (defined by the system key), this now uses the last price from a sales order for that company

**Fix:** Sales Orders created from Order Pads were not using the relevant cost (e.g. a PACT cost). This has been fixed so it uses the correct cost for the customer

**Fix:** Price Check and Source of Price now shows the discount from mailers as the discount rather than a margin and calculated margin price.

**Fix:** When sending IP Payment information to QuickBooks, an error was produced where there was a reference in the sales invoice. This has now been fixed.

**Fix:** Check address details now only needs this string to appear to stop the order auto authorizing

**Fix:** Product Alternative import template now populates Shared Stock to N and Priority to 0 as per latest development updates

**Fix:** The error in the commission report, which caused it to break when multiple lines existed in the same code, has been fixed.