DecorFusion
Intuitive POS software.
Naturally happier customers.
EXCLUSIVELY for decorating retailers

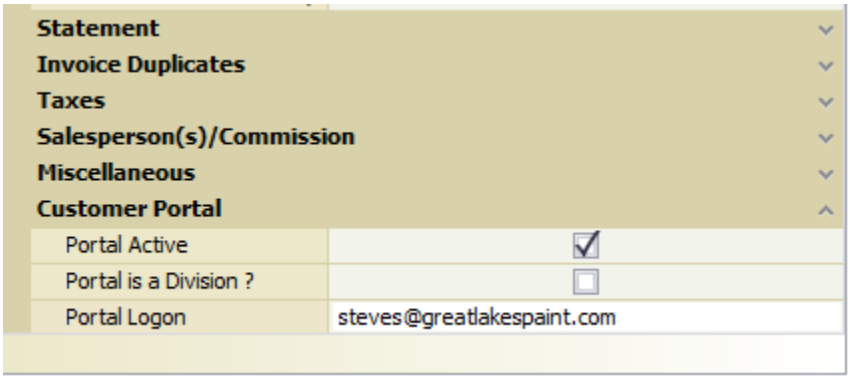
CUSTOMER PORTAL/VENDOR EDI

Version 1.2.9
Release Date 11/6/2017

Release Overview

This major release introduces a series of new features including support for a new WEB Portal for your contractors and ability to send Purchase Orders directly to suppliers with automated confirmations of receipt using standard ANSI X12 Data Exchange formats.

New Features

Issue ID	Description
ENT-2560 ENT-4473 ENT-4457	**Customer Portal** To assist Retailers in competing against Sherwin Williams, Release 1.2.9 introduces a new Customer Portal for your contractors to provide them with a self-service website to access their invoices and statements. While targeted for your Contractor clients, portal access can be provided to any of your customers. When the customer portal feature is turned on in Fusion you'll receive a unique retailer ID and portal website path which you can link to your own website. On Fusion's customer maintenance tab a new properties section becomes available where (subject to security) you can provide a contractor portal access by indicating that portal is active and putting in their email address as their Portal Logon. Overnight their historical data will be uploaded from your system to a CBC cloud server and an email will be sent to your contractor with the portal web link (address) and their password for access. Simple as that your contractors have 24/7 access to their invoices and statements. Not only that, you have not opened your server and database to direct access and potential security issues. Only the invoices and statements for individual contractors are uploaded to a secure Microsoft Azure cloud server and even the upload of data is done using an encrypted connection. 

New Features (continued)

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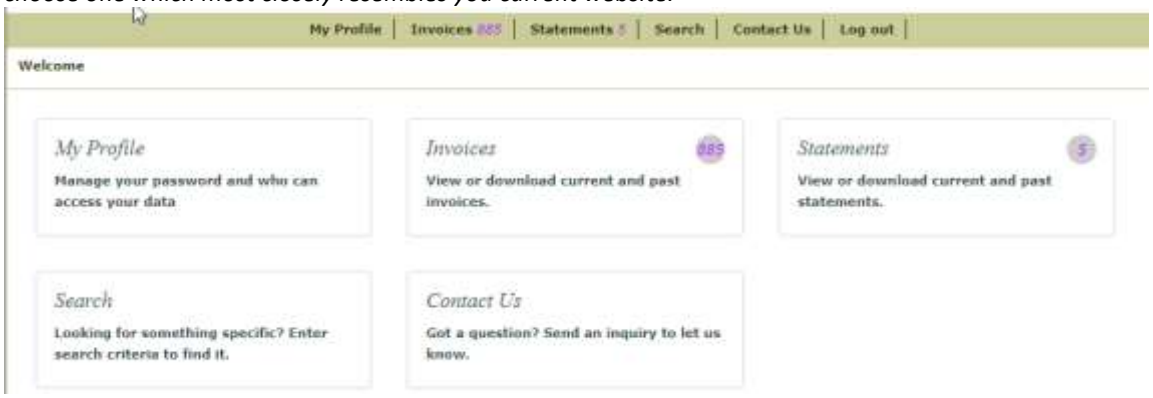
This is ‘Phase 1’ of CBC’s planned Portal Development. In this first phase contractors will be able to search/view and print invoices and statements. Additionally they can export invoice data to Excel and search invoice lines in the same manner as Fusion’s History Search. In phase 2 we are working on the ability to allow contractors to pay their invoices on line and feed payments back to your system. Portal development will be a major focus of CBC’s development team for the next few years. We have currently planned 6 phases of development but this is likely to change as we receive feedback from both our Retailers and their contractors.

Below is a sample of the contractor portal screen. CBC has developed several ‘themes’ from which you can choose one which most closely resembles you current website.


The Customer Portal is an ‘add-on’ product for Fusion and requires additional licensing. Contact Mac McKenzie or Reggie Bowles at CBC for details.
</td></tr>
<tr><td>ENT-2434</td><td>
Customer Email Statements – Allow attaching of flyer to be emailed with customer statements
A single file (generally a PDF although any document type is acceptable) can now be attached when generating and sending email statements. File will be received by customer with their other statement attachments.
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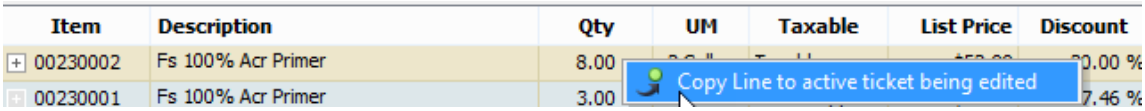
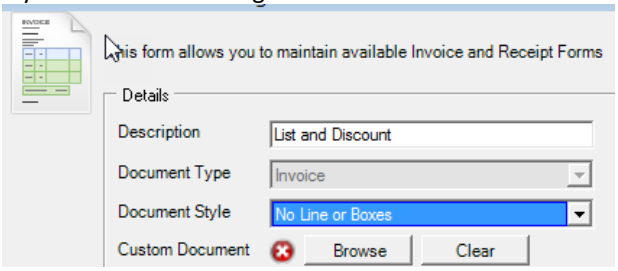
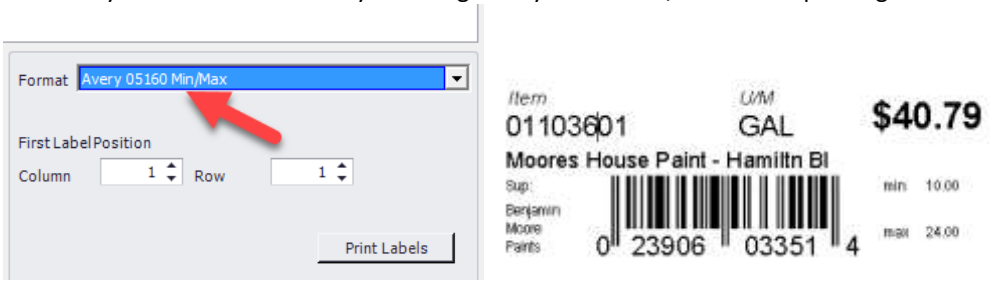
New Features (continued)

ENT-3806 ENT-4452	**Vendor EDI (Phase 3)** Prior to 1.2.9, Vendor EDI capabilities have only been available for cloud retailers. Phase 3 of our EDI development extends support to all Decor Fusion retailers. Vendor EDI works by exchanging data through private Value Added Networks (VANs). CBC has developed EDI capabilities so that all Fusion Retailers transmit their documents under CBC's VAN Trading Partner ID. CBC's EDI services identify individual retailers and forward appropriate documents. This eliminates the need (and cost) for each Retailer in having to set up and pay for their own VAN Trading Partner account. CBC will be covering the costs of EDI under your existing support/subscription accounts. When EDI is active, new tabs appear on the Vendor Maintenance screen (EDI and EDI History) for configuration of trading partner information. Once defined a new button will appear on the Purchase Order screen allowing you to send Purchase Orders by EDI. Advantages of using EDI instead of email/fax include: • Vendor order desk staff do not have to re-key in your order saving time and improving accuracy. Orders are directly loaded into Vendor systems. • Within a short time (generally <1 hour) an EDI confirmation document is sent back acknowledging receipt of order and identifying any product number issues. Fusion has a new Alert which will let you know if a Purchase Order has not been acknowledged by the Vendor within 4 hours (default period which can be over-ridden) Currently EDI is only available for Vendors listed below (CBC has standard EDI documents available to share with other vendors as they request). Each Vendor has their own 'boarding' procedure and data requirements for bringing Retailers on line. Please contact the CBC Technical Support team for further information or to begin your EDI set up. • Benjamin Moore • PPG • Lancaster • pacoa

New Features (continued)

ENT-4489	**Point of Sale – New Copy Order ability** When you recall a saved ticket, the F5 Save button will change to F5 Copy and become enabled. Selecting this will bring up a new dialog box requesting POS code (with will be attached as 'order clerk' for newly copied ticket). Clerk must have ability to process ticket type being copied (i.e. if Clerk is not allowed to process quotes then they will not be allowed to copy a quote).
ENT-4505	**Point of Sale – New Copy line from Historical ticket ability** Right click on a ticket line in history and a new menu will be displayed giving you the option to copy the line with all attached prompts and color information to the current Point of Sale ticket being edited. Current pricing and costs will be calculated and assigned as the historical ticket line is copied. For Benjamin Moore cloud users if historical line is attached to a ColoRx formula then the new ticket line will be generated with a new formula number which may be recalled and tinted from the order line formula bar code. 
ENT-4504	**Point of Sale – New invoice document format without lines** A new built in invoice document format is available which is more tailored for special order handling. Document prints your user defined Order Type in the top right while printing the order status in the middle above the customer's name and address. You can try out the new format by selecting the new document style in Software Settings…Point of Sale…Invoice Forms 
ENT-4504	**Inventory Bar Code Labels – New label format available** A new built in bar code label format is available which prints min/max stock levels and primary vendor name. Try out the new format by selecting 'Avery 05160 Min/Max' when printing labels. 

Improvements

Issue ID	Description
ENT-4230	**Price Import/Export – Include support for adding new Alternate Units of Measure via Excel** A new 'Conversion Factor Column' is added to export format. With the additional column new alternate units can be added as separate rows in Excel. This greatly assists in rapid set up of flooring products which are often sold in square feet but stocked in lineal feet (roll width).
ENT-3946 ENT-3580	**Customer Statements – Increase Dunning Message sizes** Running statement message sizes have been increased from 50 characters to 100 characters. Bug in software settings statement form corrected which allowed more than the maximum number of characters to be entered on form.
ENT-4356 ENT-4341 ENT-4338	**Excel Grid Export – Add support for newer 'data aware' format** When you right-click to export a grid there are now two Excel options • Excel Document (default) • Excel Document (data aware) Data aware export automatically puts filters on column headings and groups data in Excel to match grid data groupings
ENT-3861	**Physical Inventory – Excel template cannot be created as Excel is not licensed in cloud** Template generation reprogrammed to not use Excel automation but use Microsoft's OpenXML toolkit.
ENT-4500	**Improve POS cost behavior on Sundry Items and Non Inventory items** Show new display only field in prompt window for Gross Margin % (subject to security) If Sundry item/Non-Inventory department has default gross margin, calculate cost first time when list price is entered, after that if list price is edited update discount field.
ENT-4488	**POS toggle special order messages to 'red' color on items which need to be ordered** Enhance message display in lower left of POS screen
ENT-4327	**POS Screen - When Opening an Existing Order, Put Focus to Customer in the Order Header Grid** Reduces accidental changes to 'order type' on recall if user starts typing
ENT-4220	**Inventory Maintenance UPC Validation** If UPC length is 12 characters (all numeric), then perform UPCA check digit calculation and display warning icon on UPC field if check digit is invalid. Perform check on entry/edit and recall of saved items. Price Import/Export also enhanced to do same check digit calculation.
ENT-4503	**A/P Export - Add PO Number to end of sage 300 export rows**
ENT-3460 ENT-880 ENT-3368	**Customer, Job and Inventory Merges, check for orders currently being edited before allowing merge** Orders, Purchase Orders and Transfers which are being actively edited are checked before allowing merge so that active transactions are not written back to tables with pre-merged ID.
ENT-3550	**GL Export do not close form after export if exporting less than one week of data** Some retailers export each day individually but for an extended period of time (i.e. export two weeks of g/l transactions in one session but daily files for bank reconciliation). Enhancement will keep G/L Report/Export screen open so that only the from and to dates need to be changed when exporting the next day.
ENT-4490	**Inventory Maintenance - Change label on 'Commissionable' to 'Commissionable/Spiffable'** Since flag also controls if clerk spiffs are also paid out on item
ENT-4502	**Benjamin Moore - Locked Master items, better locked message** Currently on Benjamin Moore Cloud version, if retailer tabs through UPC on a 'Master' item they get a warning dialog. With improvement no dialog is displayed and field is locked/read only preventing any editing. (still allow entry into field for cut and paste ability)

Improvements (continued)

ENT-4501	**Benjamin Moore CCP Back Cost Update support new format** Support for current format (pipe delimiter surrounded by quotes) maintained and new support for importing pipe delimited file (without quotes) added.
ENT-4312 ENT-4311	**Offline Synchronization** Improve performance by not synchronizing unnecessary entries from various tables: • company store (gl_export_path, gl_closed_thru, etc) • company software settings (next CF number)
ENT-2614	**Offline Synchronization** Allow sites to be set for initialization when they have pending transactions, force pending transactions to synchronize before initializing offline site.
ENT-3050	**Offline Synchronization** Allow database updates to occur on launch of offline if they didn't occur during daily synchronization process.
ENT-4484 ENT-3622	**Inventory Transfer Document – Support printing of weight/volume/on hand** Additional information made available for custom Transfer documents
ENT-4033	**Restoring/Moving Database automatic SQL security recovery** Initial/first user login will come up with dialog stating it has rebuilt missing SQL security and will correct all user accounts defined in Decor database. From that point all other users SQL security will be set up. This eliminates the need during restore of a SQL database to run CBC 'fixlogins' script.
ENT-4003	**Excel Export – On cloud redirect file save dialog to start on client workstation** Default for cloud clients is now \\tsclient\c
ENT-4337	**Benjamin Moore EDI – Validate data before allowing to be sent using EDI** Benjamin Moore requires UPC number and non-zero line quantity.
ENT-4151	**PACOA EDI – Validate data before allowing to be sent using EDI** PACOA requires vendor part number.
ENT-4317	**Customer History Search – If searching (ALL time period) check for record count before executing** New software setting (98) introduced to control maximum rows returned to history search screen when searching 'ALL' dates, default is 10,000 but can be overridden.
ENT-4533	**POS – Show Customer discount card in top of screen** To assist clerks when offering promotions to retail customers.
ENT-4519	**OLAP – expand gallon calculation for other units of measure** Handle 25 gallon, 15 gallon, 3.5 gallon, 3.0 gallon and 2.5 gallon sizes

Bug Fixes

Issue ID	Description
ENT-4485 ENT-4429	**Promotional Discount Cards – Update all saved tickets on change** When a customer attached discount card is updated in customer maintenance any open (saved) tickets are automatically updated with the new card. Additionally, updating a save ticket will now affect all other saved tickets as well as the customer master. This only applies to discount cards which are permanently attached to customers.
ENT-4477	**Point of Sale – RDP CPU spikes on disconnect of Logitech display poles** In conjunction with a new software setting (097) a background thread can be activated to continually monitor a workstation's RDP connection to Logitech USB display poles. When an RDP connection is broken background thread will disconnect from virtual display pole to prevent RDP CPU usage from spiking. Currently only impacts multi-store clients with Logitech USB display poles.
ENT-4488	**Point of Sale – Same ticket can be opened on multiple screens on single workstation** By scanning ticket bar code number or typing in ticket number at POS clerk code prompt, a single ticket can be opened on separate screens for simultaneous edit resulting in error that 'order is no longer locked'. Only impacts users where security allows for multiple POS screens.
ENT-4436	**Point of Sale – Predefined zero price list still requires security override** Rare event when security set to only allow clerks to pick prices from defined price lists. If a defined price list was for $0 clerk could select but would still request override authorization.
ENT-4345	**Promotional Discount Cards – If attached to 'CASH' customer gets applied on all future tickets** If a discount card is put on 'CASH' customer, all POS customers after that point pick up same discount card.
ENT-4405	**Price Update Wizard – Percent from Current price not working with gross margin priced items** Only a problem where current gross margin price is Null (no override margin on the price level)
ENT-4321	**Point of Sale – Expand prompt field size from 50 to 75 characters** To accommodate new Benjamin Moore formulas which can contain 6 tints (ColoRx integration)
ENT-4300	**Inventory Maintenance – Optional 'Other Standard Cost' changes no longer tracked in cost history** Only impacts clients running with optional second standard cost active (normally called 'PO Cost')
ENT-4139	**Inventory Bar Code Labels – Errors when trying to print 12 character bar codes with alpha characters** Correction prints these as Code 3of9 formats instead of attempting to encode as UPCA bar codes
ENT-3885	**Customer Statements – Not properly handling special order deposits canceled as store credit** Rare event where a special order deposit is refunded but not as original tender method but as a credit on the customer's account and later applied to a future purchase. In the one month a customer statement will be generated showing that the customer owes the refunded deposit amount.
ENT-4312	**Point of Sale – Saved Orders can be lost when running with multiple POS screens** Rare event with security setting on to allow multiple POS screens
ENT-4231	**Inventory Transfers – Allows transfers of inactive items**
ENT-4418	**Inventory Maintenance – Cost History building records for non-costing stores** Unnecessary data, all zero values never visible to users. Previously created records deleted during upgrade to 1.2.9
ENT-4406	**Price Import/Export – Import compares prices to wrong store if running multiple pricing stores** Rare event, multiple pricing stores rarely active.
ENT-4346 ENT-4357	**Software Settings – Remove inactive security settings**
ENT-2547	**Offline Synchronization – Can fail getting next offline ticket numbers with large databases** New fields introduced to maintain next offline ticket and credit card trace values in online database.
ENT-4407	**Purchase Order – prompts for Vendor item number on new line if quantity entered first** Occurs if quantity is entered before the item number. Inconsistent with behavior if item is entered first followed by quantity,
ENT-4326	**Purchase Order – Received by clerk not correct** Was recording session sign in clerk not clerk associated with POS code during receiving action.

Bug Fixes (continued)

ENT-4266	**Inventory Transactions – Shows inactive stores** Inactive stores should not be selectable for inventory transactions
ENT-4297	**Physical Inventory – Can import physical counts to inactive items**
ENT-4187	**Customer Maintenance – Shows inactive customer types** Inactive customer types should not be selectable in customer maintenance
ENT-4212	**Invoice History – Job Contact and Address lost if job made inactive** Rare event. Workaround make job active
ENT-4398	**Customer Statement – spelling mistake on email attachment from aging screen** If statement emailed from single customer aging screen, attachment filename had statement spelt incorrectly
ENT-4414	**Splash Screen – on launch version number displayed over logo writing and can't be made out** Workaround, go to Help…About
ENT-4205	**Price Import/Export – Can time out on larger databases** Increase time out allowed, can occur when exporting contract matrix pricing and analyzing corresponding sales data. Timeout also increased on user queries.
ENT-4147	**Cloud log naming between Fusion Mail and Fusion HandHeld Service can collide** Change naming convention to handle 8 character limitation
ENT-4041 ENT-3881	**Cloud log entries logging UTC times** Should be logging in client aware time zone. Logging in Fusion Mail service enhanced for troubleshooting.
ENT-4273	**Inventory Bar Code Labels – Custom labels not printing vendor information**
ENT-3874 ENT-3875	**Offline Synchronization – Can error with inserting duplicate customer number message** Rare event when multiple renumbers and merges are done to a single customer
ENT-3691	**Inventory Merge – Can fail when retailer has inactive stores** Rare event when inactive store is missing an inventorystore table record
ENT-3821	**Offline Synchronization – Problem updating SignetPlus.ddl file on offline sites** Problem with version number/date handling on dll file from Topaz
ENT-4517	**Topaz Signature Pads – Only allow troubleshoot logging on one workstation at a time** Improve for CBC technical support team usage
ENT-4428	**Software Settings – Tax Jurisdictions when manually adding multiple zip code an exception is thrown** Rare event. Retailers using this feature generally import updates to tax tables and zip codes externally.
ENT-4479	**Monthly Rollup Invoices – Duplicates can be generated if user cancels generation in progress** Automatic recovery/undo code corrected
ENT-4410	**Monthly Rollup Invoices – Can appear on statement as both packing slip and rolled up invoice** Rare case, occurred when customer had statement date set to end of month but was rolling up contractor invoices on the 25th and generating statement for the 25th. Invoices from the previous month 26, 27, 28, 29, 30 appeared on statement as packing slips with amount and also in rolled up invoices for the current month
ENT-4349	**Price Import/Export – Allows new items to be built with item number = UPC number** Also prevent new items being built with cross reference = UPC number
ENT-4183	**POS – Adding customer on-the-fly doesn't format phone number properly** Inconsistent with customer maintenance screen
ENT-4521	**Till Currency Counter list has Nickels spelt incorrectly**