

Channel Islands Release Notes

San Miguel 1 — March 2018

These release notes include information about Channel Islands — San Miguel 1 Release (March 2018).

Review this document *before* proceeding with any phase of an implementation.

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Previous Releases

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Installation and Configuration Information

The following summarizes installation and configuration changes for this version of Channel Islands, now available for Early Adopters.

The QAD Document Library (<http://documentlibrary.qad.com>) offers a complete set of all QAD user guides, training guides, and other materials.

Release Summary

Channel Islands UI Version: San Miguel 1, March 2018

QAD Enterprise Applications versions required:

- 2015 EE, 2016 EE, or 2017 EE (cloud customers only)

Operation Patches:

- 2015 EE Cloud Patch 6 mandatory
- 2016 EE Op Patch 4 mandatory
- 2017 EE Op Patch 1 recommended

Enterprise Financials (EF) versions required:

- 2017.1 EF (backward compatible)
- 2017.1 EF Patch 1 (mandatory, latest patch recommend)

QAD .NET UI versions required:

- QAD .NET UI 3.2 Cumulative Patch 6 for 2015 EE and 2016 EE
- QAD .NET UI 3.3 for 2017 EE

QRA version required: QRA 3.3

YAB version required: YAB 1.7

QXtend: the latest QXtend release and patches are recommended:

- QXtend 1.8.7, qxtend-bundled-patch 1.8.7.3 is mandatory

Enterprise Asset Management (EAM) versions needed for requisitions:

- EAM 2016.1 is the minimum version required
- EAM Requisition Approvals (as of Santa Rosa 2) requires EAM 2017 Patch 1
- EAM 2017.1 is recommended but not mandatory

QAD Action Center App versions required:

- Requisition and PO approvals requires mobile QAD Action Center App version 1.3.0 and above (iPhone and Android)

Browsers supported:

This release has been optimized to support the latest version of Chrome and Safari web browsers. Although other web browsers can be used for Channel Islands, you may experience differing levels of performance and user experience. Browsers supported include:

- Chrome 63+
- Safari 11+

Note For tablet use, this release has been optimized for the iPad Pro with the Safari web browser; on other tablets, the user experience and performance levels may be different.

Tablets supported:

- iPad Pro - iOS 11
- Samsung Galaxy Tab S2 - Android 6
- Google Pixel C - Android 7
- Minimum screen size: 9.7 inches

Mobile phones supported:

- iPhone 5SE - 10, iOS 11
- Samsung Galaxy S7 - Android 6 - 8
- Google Pixel - Android 6 - 8
- Minimum size: 4 inches

Technology versions:

- Java Runtime: 1.8.0_161 (Compile: 1.7.0_80)
- Tomcat: 7.0.82
- Apache Web Server: 2.4.27
- OpenEdge Min Version: 11.4; Supported: 11.6.3
- Progress DLLs: 11.6.3
- Spring Framework: 4.3.2
- Spring Security: 4.1.3
- Kendo UI: v2017.3.1018
- MongoDB: 3.0.3
- AngularJS: 1.2.10
- Typescript: 1.8.10
- Log Stash: 5.4.0.1
- Kibana: 5.4.3.0
- .NET Framework Runtime: 4.5 (Compile 4.0)
- Visual Studio 2017 Professional for framework development; 2010 Professional or greater for plugin development

Note Windows 10 can automatically scale displays by 150% for high-resolution screens. For best results, change the automatic 150% scaling factor to be from 125% to 100%.

Installation Considerations

When installing QAD Enterprise Applications - Enterprise Edition for use with this release Channel Islands, please note the following.

SECCOMP Warning Message

During installation, you might encounter the following message:

```
[WARN ][o.e.b.JNANatives      ] unable to install syscall filter:
java.lang.UnsupportedOperationException: seccomp unavailable: CONFIG_SECCOMP not compiled into
kernel, CONFIG_SECCOMP and CONFIG_SECCOMP_FILTER are needed
```

This warning message can be safely ignored and requires no action during the installation process: there is no impact to the installation or any ElasticSearch functionality.

Access to User Domain/Entity Access Maintain and Role Membership Maintain

After installation, you must manually assign two resources to the qadadmin role. The resources are:

- User Domain/ Entity Access Maintain
- Role Membership Maintain

On the QAD .NET UI, open Role Permissions Maintain. Select the qadadmin role, and right-click to select Permissions. In the EE Menu tab, expand the “Secured items on menu” section, expand System Administration, and then System Security Menu. Check on User Domain/Entity Access Maintain. Next, expand Role Menu, and check on Role Membership Maintain.

Inbox Links to Reports after Channel Islands Upgrade

When upgrading to the Channel Islands - San Miguel 1 release, please note that Inbox notification links to reports that were generated with the previous Channel Islands - Santa Rosa 2 release will no longer be valid due to a change in the report storage location. If you encounter an error with a previously generated report, please re-run the report.

Role Permissions Management

Unless permissions for standard functionality are found to be missing, users should not modify Channel Islands permissions for standard, QAD-provided roles. If you want to change the permissions in a standard role, instead of modifying the existing role, create a new role, copy the role menu of the standard role to the new role, and change permissions on the new role.

Tablet Usage Guidelines

Please note the following guidelines for using Channel Islands on a touchscreen tablet.

Interaction Guidelines

- Only the most recent operating system version and most recent browser version of Chrome and Safari (on iPad) are recommended for using Channel Islands.
- Channel Islands is optimized for landscape mode: most tablets in portrait mode are not quite wide enough to fit all of our fields and full menu.
- For data entry tasks, an external keyboard is highly recommended.
 - If using the tablet's virtual keyboard, consider using an alternative keyboard app for improved functionality and view area usage.
 - If using the tablet's virtual keyboard, use the tablet's settings to make the keyboard smaller so that it does not cover too much of the view area.
 - On some tablets, such as the Samsung Galaxy S2, the virtual keyboard can obscure the view area, especially when used in landscape mode.
- On a tablet, Channel Islands views do not offer a hybrid mode where you can simultaneously access browse and form data.
- Configuring views and stored views is best done on a larger desktop or laptop screen.
- Double-click actions are not supported on tablets.

- The browse grouping (Group By) feature is not yet available for tablet use.
- The Design Layout mode for extending forms is not available on tablets. This feature requires more screen area and so is only available for laptop or desktop use.

Note Although the Surface Pro has a touchscreen, the Channel Islands UI works on the Surface Pro as it does with regular laptop and desktop devices. These interaction guidelines do not apply to the Surface Pro.

Performance Guidelines

On a tablet, for performance reasons, open no more than five levels deep of drill down modals. If you need to drill-down more than five levels deep, open the next drill-down modal in new browser tab.

For high-speed broadband connection performance, the following is recommended:

- Minimum download speed 16 mbps
- Maximum latency 150 ms

New Features in San Miguel 1 (March 2018)

User Interaction Features

- Platform - Extra Conditions on BE Relations
- Swagger Styling Updates
- View Builder
 - Add Non-Entity Fields, Labels and Buttons to Layout
 - Add Grid to Layout
 - Field Groups (Nested Grids)
 - Conditional Grid Column Styling
 - Typescript Handlers
 - Element Properties
- Browsers and Forms
 - Multi-select and Append
 - Site Context on Browsers and Forms
 - Group-By Enhancements
 - Create New from Drill-Down List
 - Disallowed Messages Styling Update
 - Sort Icon Styling Update
- Security
 - User Access
- Inbox and Approvals
 - Inbox Keyboard Navigation
 - Alternate Approvers
- Alerts
 - Alerts Redesign
 - Alerts Delay

- Miscellaneous
 - Context-Sensitive Help
 - Cancel Modal for Tasks in Reporting Framework Queue
 - Supplier Portal - External Link

Customer Management Features

Sales

- Spare Parts Orders
- Credit Check Action
- Global Order Management
 - ATP/EMT Visibility
 - EMT Tracking
- Sales Quote Copy
- Sales Quote Release Attachment Workflow

Service

- RMA Completion
- RMA Replacements
- Service Order Completion
- SAR Transaction Processing
- Installed Base
- Material Orders
- ISB Move

Manufacturing Features

Inventory

- Enhancements to Inventory Action Center
- New Inventory Manager module and role menu

New Inventory Manager role menu includes the following drop-down menus:

Value

- Inventory Days On Hand browse
- Inventory Depreciation Rate browse
- Inventory Value by Item browse
- Inventory Scrap by Account report

Usage

- Inventory Activity by Item browse
- Inventory Transactions browse

Inventory

- Inventory by Item browse
- Inventory Detail browse
- Inventory Serial Detail browse
- Inventory report
- Inventory Detail report
- Inventory Allocations report

Validation

- Cycle Count browse
- Inventory Tags browse
- Inventory Transactions browse

Warehouse

- Inventory Locations browse

Traceability

- Lot Groups browse
- Packaging Codes browse
- Packaging Structures browse
- Item Packaging browse

Costing

- Support for PO Receipts and PO Returns

Transaction History

- Support for PO Receipts and PO Returns

Engineering

- Production Lines (for Production Orders)
- Production Line Items (for Production Orders)

Financials Features

No updates for the San Miguel 1 release.

Supply Chain Features

Purchase Order Enhancements

- Cancel PO
- Taxes: Update Tax Records
- Unit of Measure Conversion

Generic Approvals Enhancements

- PO Approval when Generic Approval Fails
- Approval Currency for PO Approvals

Purchase Requisition Enhancements

- Buyer Out of Tolerance Control
- Unit of Measure Conversion

Purchase Order Receipts

- Basic Receipt Functionality
 - Error Messaging
 - Create Inventory Records
 - Create Unmatched PO Receipts
 - Update PO Document at Receipt
 - Create Unposted GL Transactions
 - Create Transaction History
 - Update MRP
 - Multi-level Detail for Receipts
- Supplier Consignment Receipt
- Accrue Taxes at Receipt
- Cancel Backorder
- Support UOM Conversion
- Feed into ERS process
- Dynamic locations
- Reports and Browsers
 - Purchase Order Receipt Print
 - Receipt Transactions

Base Features

- Dock (create and update only)
- Reminder & Remittance Address (create and update only)
- Carrier (create and update only)
- Employee (create and update only)
- Combined Static and Analysis Group into one menu item called Analysis Groups, which has been extended to include Ship-To in addition to Item and Customer.

Foundation Features

Foundation enhancements include many structural enhancements, along with the following:

Web UI

- User Experience and Styling Improvements
- Context-Sensitive Help
- View Builder Enhancements

Platform

- REST Service Generator and Swagger Documentation

Security

- EAM (Site) Security
- Role Permissions Enhancements

Action Centers

- You can now export and import a KPI from one environment to another environment, using the Action menu for the KPI's view.
- You can now create KPIs from Business Entity browses in the same way as you can create KPIs from Financials and Manufacturing browses.

Features in Santa Rosa 2 (September 2017)

User Interaction Features

Action Centers

- Action Centers with KPI Builder and Gallery - new action centers with expanded analytics capabilities

Platform

- Platform development features: View Builder and Business Entity Create

Forms

- Summary panel layout enhancements with primary image
- Expandable form grids (Max Height setting)
- Expandable configuration panel
- Improved form panel layout (less padding between panels allows more panels on screen)
- Scrollbar enhancements for improved usability
- Color enhancements for improved readability

Browses

- Browse totaling included with browse grouping (Group By with totals)
- Export browse data to Excel files, Comma-Separated (.csv) files, and more
- Color enhancements for improved readability

Inbox

- Inbox design and layout enhancements for improved usability and coordination with Action Center mobile app
- Inbox Mass Approvals: you can now select and approve multiple tasks
- Inbox Archive: you can view tasks that have been acted upon & notifications that have been archived.
- Notification preferences setting on User Profile, so you can specify how you want to receive notifications

Alerts

- Alerts: you create and configure alerts, including integrating with the existing activity feed.

Attachments

- Keep with Workflow option
- Primary Image option

Administration and Security

- Menus management
- Users management
- Role Permissions management
- Logging settings

Customer Management Features

Sales

- Sales Order Auto Allocations
- Confirmation and Repricing
- Copy Orders
- Copy Order to Quotes
- Quote Bulk Release

Service & Support Management (SSM)

- SSM BL Services for MFS
- Return Material Authorizations (Maintain Return Lines only)
- Service Activity Reports (Call Activity Recording)

Manufacturing Features

Automation Solutions

- Inventory and Production Transaction Services
- Supporting Cost Services
- Production Order Transactions

Financials Features

- Supplier Invoice Approval
- Action Center enhancements

Supply Chain Features

Purchase Requisitions

- Essential features (Close)
- Keep attachments through purchase requisition workflow

Purchase Orders

- Essential features (Delete, Cancel, Re-open)
- View Tax Records
- Intrastat
- Print and Email Purchase Orders

Generic Approvals Enhancements Adaptations

- Mass approvals with new Inbox styling
- Activity Feed and Attachments links for PO Approvals
- Approval Currency for PO Approvals

Base Features

- Item Copy
- Maintain End Users
- Creation of Static & Dynamic Analysis Groups for Item and Customer
- Added support to add specific Customers/Suppliers to Blocked Transactions

Features in Santa Rosa 1 (March 2017)

User Interaction Features

- Form Design Layout - modify layout and properties of panels and fields on a form.

The Design Layout option is available by default only to users in the QAD Admin role.

On a form, from the ellipsis icon (...) for more options, choose **Design Layout**, and then select + **New Layout** to get started. In the Design Layout view, you can directly click on panels and fields and move them using drag-and-drop. For fields, you can view and edit the field properties to set the default value, whether the field is required, and other options. Note that field changes apply to the Business Entity that the form layout is using, and these changes can affect all other layouts using the same Business Entity.

- Browse Group By - display browse data hierarchically based on selected columns.

On a browse, from the ellipsis icon (...) for more options, choose **Show Group By**. For Group By to take place, all the records of interest must be on the page.

Apply browser filtering using the **Search** option as needed and make sure that all the browse records are on the page by setting **Records per page** to be greater than the number of records being displayed (that is, in the lower right corner, check the **Viewing page 1 - n**: where *n* should be less than Records per page).

- Inbox Enhancements - extended Inbox interaction, including commenting and archiving.
- Keyboard Shortcut Enhancements, including a shortcut (**Alt + R**) to go to the right-hand options such as attachments, activity, and drill-down links.
- Process Maps - Process Viewer, Process Editor, and example, demo maps for Channel Islands. From the menu bar help option (question mark icon), you can choose Process Maps to open the home process map for Channel Islands. This map's nodes link to some example maps for Channel Islands processes. Nodes that launch Channel Islands UI views have Links that start with the QAD_CI process properties variable that points to the Channel Islands UI server. Further, these nodes must have the Target node property set to New Window, which opens the Channel Islands UI view in a new tab.

Note Currently it is not possible to launch the Channel Islands UI from a process map in the QAD .NET UI.

Security Features

- Cross domain/entity calls
- Process map Veracode certification and process map integration
- Process map Veracode certification
- Google analytics
- Role Permissions Sync

Base Features

- Create/Maintain Suppliers
- Create End Users
- Create/Maintain Business Relation within Customer and Supplier
- Create static Analysis Groups for Items/Customers for TAM
- Product Line Copy
- Implement Easing of Backwards Compatibility Changes
- Support for User-defined Fields for Item and Customer
- Approved Vendor List (AVL) — for defining information about Supplier Certification and Item Certification in the system, so that an extra control on the Suppliers or Items that can be entered in Purchasing is provided.

Customer Management Features

Sales activity from prospect to services, with new features supporting:

- Service Orders (Calls)

- Action Requests (Pending Calls)
- TAM Integration for Channel Islands
- Action Center Performance Improvements for Customer Service Manager

Financials Features

- Supplier Invoice Approval
- CFO Dashboard Enhancements
- More Financials APIs Available in QRA

Manufacturing Features

Making Engineering users more effective with new product structure features:

- Configured Items
- Formula/Process BOM
- Alternatives Grid
- Related Structure Grid

Supply Chain Features

Purchase Order enhancements, including:

- Create Purchase Orders
 - Master data defaulting
 - Totals and tax details visibility
 - Add CI Requisition lines to CI Purchase Orders
- Purchase Order documents
 - Feed into the Consignment process
 - Feed into the ERS Process
 - Feed into the Subcontract process
- Submit a Purchase Order for approval
- Overview of the PO documents created in a Domain

Purchase Requisition enhancements, including:

- Request items for different sites on the same requisition
- Add notes to my requisition

Supplier Certification (new):

- Certified Suppliers
- Certified Supplier Items

Supplier Portal in QAD Reference Architecture (QRA), with:

- Sign In, Menus
- Purchase Order View
- Receipts View
- Schedules View

- Activity Feed

Features in Santa Cruz 2 (September 2016)

User Interaction Features

User interaction features now include:

- Search across menu items
- New icons for menu item types
- Favorites settings and management
- Role-based menus, with discontinuation of the Show All option
- Browse drill-down feature, like the drill-downs on browse rows on the QAD .NET UI
- Ability to add and edit records from lookups
- Actions drop-down on certain browses for taking actions on selected or all browse records (batch selection)
- Globalization: local data and currency formats, language support
- Responsive design enhancements

Browses

All QAD browses available on QAD Enterprise Applications are now available on the Channel Islands UI (includes approximately 600 browses on the menu, with a total of up to 1,900 including lookups and drill-downs).

Reports and Report Viewer

All QAD Reporting Framework reports are available from the Channel Islands UI (includes approximately 450 reports). The Channel Islands UI includes a new Report Viewer for running and scheduling reports. Note that the report design features are available only on the QAD .NET UI.

Action Centers

Action Centers are next generation analytics dashboards, now available along with the current dashboards. The new action centers provide role-based actionable insights. This release includes action centers for Chief Financial Officer (CFO), Customer Service Manager (CSM), and Purchasing Manager.

Note that the Enterprise Financials 2016.1 module will also be required to use the Chief Financial Officer (CFO) Action Center.

New Role-based Menus

This release includes many new role-based menus.

Note The Show All option is no longer included as a role menu drop-down option. In the Santa Cruz 2 release, most of the Base Module functions are not assigned to specific role menus. These functions can only be accessed by searching for them in the new search feature on the menu bar.

Customer Management Roles

New Customer Management roles include:

- Sales Manager
- Sales Representative
- Pricing Manager
- Customer Service Representative
- Customer Support Representative
- Customer Support Manager
- Technical Support Representative
- Vice President of Services
- Marketing Manager
- Vice President of Marketing
- Executive Vice President of Sales and Marketing

Finance Roles

- AP Clerk
- Financial Controller
- Fixed Assets Manager
- AR Clerk
- Chief Financial Officer (CFO)
- Operational Controller
- AP Supervisor
- AR Supervisor
- Accounting Clerk
- Treasury Manager
- Tax Manager
- Consolidation Manager
- Accounting Manager

Manufacturing Roles

New Manufacturing roles include:

- Chief Operating Officer
- Master Scheduler
- Production Scheduler
- Production Material Planner
- Purchase Material Planner
- Production Manager
- Production Operator
- Warehouse Manager
- Material Handler

- Manufacturing Engineering Manager
- Product Engineering Manager
- Quality Manager
- Cost Accounting Manager

Supply Chain Roles

New Supply Chain roles include:

- Vice President of Supply Chain
- Director of Materials
- Buyer - Direct
- Buyer - Indirect
- Vice President of Logistics
- Logistics Manager
- Logistics Analyst

Base Module Features

New Base Module features include:

- Customer (create and update only)
- Customer Type
- Supplier Type

Note In the Santa Cruz 2 release, most of the Base Module functions are not assigned to specific role menus. These functions can only be accessed by searching for them in the new search feature on the menu bar.

Customer Management Features

New Customer Management features include:

- Release Sales Quote to Sales Order
- Quick Ship, Quick Pick, and Quick Invoice from Sales Order
- Confirm Pre-shipper
- Confirm Shipper

On Sales Order, 'Ship-To' lookup includes New and Edit options.

Financials Features

Financials features include Supplier Payment Selection Approvals.

Note For the Supplier Payment Selection Approval functionality, the Enterprise Financials 2016.1 module is required.

Manufacturing Features

Manufacturing features include Product Structure for discrete items, with one level drill down.

Supply Chain Features

Supply Chain features include the following:

- Purchase Requisition Approvals, which includes new Actions drop-down for bulk transactions.
- Requisition Approvals and Supplier Payment Selection Approvals included within Activity feed.

Security Features

QAD Channel Islands has achieved VerAfied certification (see <http://www.veracode.com/ratings/qad>). VerAfied certification means that Channel Islands met or exceeded the security score outlined in the Veracode Risk Adjusted Verification Methodology for an application at the assurance level specified above. Veracode's risk adjusted verification methodology is based on respected industry standards including MITRE's Common Weakness Enumeration (CWE) for classification of software weaknesses and FIRST's Common Vulnerability Scoring System (CVSS) for severity and ease of exploitability and NIST's definitions of assurance levels.

Additional security features included in this release:

- Background caching to improve performance of menu loading.
- Resource data loader to automatically add all browses and reports as secure resources and available to be added to a role menu.
- New `gra-sync` YAB command to call the resource data loader to synchronize menus and reports.
- New `sec-role-menu` YAB command to provide a list of secure resources associated with a role menu.
- Updated Role Permission Maintain (requires Financials 2016.1) to include URI in secure resource menu items (in Secured Resources tab).
- Added proxy layer to centralize security for Action Center, Configurator and Process Maps.
- Added a secure downloader for reports which ensures users are authorized before the report is downloaded.
- Updated `sec-resource-bom` YABcommand to support drill down dependencies in browses.
- Secure mobile login with Touch ID to support the new Mobile Action Center.
- New QAD Security Administration Guide that covers Channel Islands security topics.

Features in Santa Cruz 1 (March 2016)

Santa Cruz 1 is only for use with QAD Enterprise Applications — Enterprise Edition 2015 Cloud ERP.

Base Module Features

The Santa Cruz 1 release introduced the following Base Module functions:

- Attribute
- Attribute Category
- Attribute Category Link
- Attribute Profile
- Attribute Validation
- Blocked Transaction
- Default Daybook

Customer Management Features

The Santa Cruz 1 release introduced the following Customer Management features:

Sales Orders Enhancements

The Sales Order view now includes:

- Intrastat — support for inter-EC orders (including DE, IT, and NL)
- Line Pricing and Price Details form grid — ability to turn off best pricing when first creating order; grid shows pricing history on how net price was calculated.
- Quality Attributes — filter detail allocations based on attribute profiles for customer and item.
- Installed Base — ability to record service data prior to invoicing.
- CRM Integration — orders creating in the Channel Islands UI now included in CRM (version 6.7.2).

Sales Quotes

In Anacapa, Sales Quote was a read-only browse grid. In this release, Sales Quote a full view so that you can create and edit sales quotes in the Channel Islands UI. Sales Quote specifics include Release flag, Recurring, Released Count, Reason Lost, and Expire Date.

Quick Ship

With Quick Ship, the Channel Islands UI supports ordered items that are fulfilled immediately because of over-the-counter sales or orders entered after inventory processed. This feature is similar to orders created in Pending Invoice Maintenance in the QAD .NET UI.

- New flag on order header only available during create.
- Order must be confirmed.
- Allocated quantity on items will be shipped.
- Lot/Serial controlled items must be detail allocated to ship.
- Shipper will always be created for shipment.
- NRM sequence for shipper numbers & assigned in Shipper Control is required setup for shippers.

Configurator Integration

With Configurator integration, the questionnaire is launched from the Order / Quote Line grid (or detail form). Note that the item must first be set up in Configurable Item Maintenance (on the QAD .NET UI). The variant item created or selection is placed on the order line and priced. To use this feature, Configurator version 5.8.1 is required.

Features in Anacapa (October 2015)

Anacapa, the first release of the Channel Islands, introduced the new web-based user interface: the Channel Islands UI. Along with selected Customer Management functions and Base Module functions, the user interface itself introduced a variety of features:

- Role-based menus
- Dashboards
- Inbox

- Views, grids, and forms
- Follow and tracking capability
- Stored views
- Attachments
- Activity feed
- Keyboard shortcuts

Role-based Menus

Channel Islands provides efficient access to what you need for your job role. The role-based menu bar provides a navigation experience tailored to your needs. QAD provides a default set of role menus, but each role menu can be configured by an administrator to best align with your company's needs. The roles introduced in Anacapa include:

- Customer Service Manager
- Customer Service Representative
- Purchasing Manager
- Sales Manager
- Vice President of Sales
- Administrator

In Anacapa, the Show All option shows all the menu options available across roles.

Base Module Features

The Anacapa release includes the following Base Module functions:

- Address Type
- Commodity Code
- Country
- County
- Corporate Group
- Customer Ship-To
- Daybook Set
- Generalized Code Group
- Generalized Code
- Item Fiscal Class
- Item
- Item Status
- Language Detail
- Master Note
- Product Line
- Reason Code
- Site
- Site Security

- State
- UM Conversion

Customer Management Features

The Anacapa release includes Sales Order, Sales Order Credit, and Salesperson functions, where you can create and modify sales orders, sales order credit settings, and salespersons.

Additionally, the following browses are included:

Sales

- Sales Order Detail
- Sales Order Price
- Orders Not Shipped On Time In Full
- Lines Not Shipped On Time In Full
- Overdue Orders
- Sales Order Gross Margin
- Sales Orders To Ship
- Customer Scheduled Orders
- Customer Schedule Pricing
- Required Ship Schedule
- Customer Ship Schedule
- Customer Ship Schedule Variance
- Sales Quote Detail
- Sales Quote Price
- Sales Quote Gross Margin
- Quotes Not Converted To Orders

Sales Management

- Invoice History
- Sales by Customer
- Sales by Customer/Item
- Customer Order Periods
- Trailer Codes
- Pre-Shipper/Shipper
- Price List
- Volume Discounts
- Customer Item
- Sales by Item
- Salesperson Assignment
- Commission Detail
- Sales by Salesperson

- Salesperson Quote Achievement
- Reserved Locations
- Customer Invoices
- Analysis Codes

Manufacturing Features

The Anacapa release includes Inventory browses, including:

- Consignment Inventory Usage
- Inventory Detail by Item
- Item Replacement Up/Cross Sell
- Stock Availability
- Book Transactions

Supply Chain Features

The Anacapa release includes Requisition Approval and Requisition Line functions, along with the following browses:

- Purchase Order
- Blanket Order
- Supplier Item
- Supplier Performance Data
- Supplier Schedule

Note For the Anacapa release, you use the QAD .NET UI to set up users as requisition approvers (for example, use Vertical Approver Maintenance) and to create requisitions (using Requisition Maintenance).

