



What's New in Infor SyteLine Version 9.00

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What's New in Infor SyteLine version 9.00

This topic briefly lists the new features in this release of the product.

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Highlights

These are some highlights of Infor SyteLine version 9.00:

- We improved financials for global companies, as described in the [Financial Controller](#) section below.
- Single instance multi-site databases are supported.
- We enhanced the advanced planning system (APS).

- You can now account for fluctuating commodity prices and surcharges, across any number of commodity exchange services, on customer and vendor orders.
- We added forms to define and track promotional pricing and rebates to use as customer incentives.
- We added forms to define and track your company's compliance with hazardous materials programs such as REACH and ROHS.
- You can now use multiple dimensions and attributes to analyze the Chart of Accounts and posted ledger transactions. Use our predefined dimensions and attributes, or create your own.
- Many former add-on products are now included as optional modules in the base SyteLine installation. (Most modules still require separate licensing.) This reduces the installation steps required for optional modules and allows Infor to more easily provide issue fixes for these modules.
- If you develop forms, you can provide a more consumer-oriented user interface with features such as Drag/Drop, better image handling, multi-device layouts, tiling, and styles/themes.
- We enhanced support for Cloud deployments and development.

For details about these and other new features, see the sections below.

General

SyteLine 9.00 includes these new general features.

Compatibility with related products

This version of SyteLine is compatible with these product versions:

- Servers: Windows Server 2008 R2 and 2012, Microsoft SQL Server 2008 R2 and SQL Server 2012 support for VMWare and Microsoft Hyper-V in production environment
- Clients: Microsoft Windows XP, 7, and 8
- Microsoft Office 2010 and 2013, Microsoft Projects 2010 and 2013
- Internet Explorer 9 and 10, Firefox, Chrome and Safari
- Microsoft SharePoint 2010
- Mobile: iPhone, Android, Blackberry

Integration with other Infor products

This version of SyteLine integrates with these products:

- Infor BI for SyteLine 9.00 (integrated cubes and reports with Application Studio 10.1)
- Infor Business Analytics and Infor Reporting (using Business Vault 10.3)
- Infor CPM 10.3
- Infor eCommerce 14.8.0.1
- Infor EAM 10.1.2

- Infor ION 11
- Infor SyteLine Enterprise Financials (SunSystems 6.1)
- Infor Global Financials (Varial) 2.15
- Infor Ming.le 11
- Infor Motion - Road Warrior 10.2.4
- Infor PLM 8.4
- Infor Product Configurator 8.0 (BuyDesign Configurator)
- Infor Time Track 3.00
- Infor Warehouse Mobility 3.02.01
- Infor XM 8.3.1.21
- Inforce 10.7.1

User interface and Web rendering changes

We made these changes:

- **Colors, Fonts, Explorer Styles, Required Field Indicator, Group Box and Tab Styles:** The look and usage of these areas is now determined through the selected theme. For more information about themes, see the help topic [About Themes](#).
- **Clients:** There are now three types of clients available:
 - **Smart Client:** includes Design mode and runs in a Windows environment. Installed from a CD/download or with click-once.
 - **Smart Client via Browser:** includes Design mode and runs in Internet Explorer. Installed with click-once. Can be used with Infor Ming.le.
 - **Web Client:** HTML5 client that can run in all common browsers on all popular devices. Can be used with Infor Ming.le.

For more information, see the Installation Guide.

- **Updated icons:** The icons used on forms and toolbars were updated to current Infor standards.
- **No More Web-based Inbox:** You can now open the standard Inbox form using Web rendering to send and receive messages. The specialized Web-based version of the Inbox form no longer exists.
- **Timer Use:** The Timer event response type now works in Web-rendered forms as well as in WinStudio.
- **Closed gaps between client types:** We closed most of the remaining functional gaps between the Web client and the Smart clients.

DataSearch

Click the new **DataSearch** button on the toolbar to open the **DataSearch** form, where you can search for information stored anywhere in the application. The search results are listed numerically or alphabetically by data source. For example, you could search for all instances of the text string "Young" across all data sources. The results list every data source in the system where "Young" is found, for example in customers, orders, items, vendors, purchase orders, and so on. You can

expand the data source to see a list of every occurrence within that data source. For more information, see the help topic [Searching the System with DataSearch](#). An administrator can use the **DataSearch Source Setup** and **DataSearch Source Filter Setup** forms to configure additional data sources (IDOs) to search. To use the DataSearch feature, you must be assigned a SyteLineWB (Workbenches) license.

Copy an item, customer, or vendor to selected sites

In the **Multi-Site Items**, **Multi-Site Customers**, and **Multi-Site Vendors** forms at a master site, select an existing item, customer, or vendor record that you want to duplicate in other sites. Then select the new **Actions > Multi-Site Copy** option to display the modal **Multi-Site Selection** form. On this new form, you select the sites to which you want to copy the record. When you return to the parent form, a duplicate of the item, customer, or vendor record is created for each of the selected sites.

New Workflow Wizard for general users

The forms used to define Application Event System (AES) event handlers and actions are administrator forms that require training and orientation to AES. Now end users, such as purchasing managers or executives, can use the **New Workflow Wizard** to quickly create workflows (event handlers and actions) for some basic notification scenarios. For example, a purchasing manager can build a workflow to "Notify me when a PO line is created for more than \$1000." Users can later view the workflows they created in the new **My Workflows** form.

As users make simple choices in the wizard, behind the scenes the system is creating the same event handler and event actions metadata as via the standard AES forms. The handlers and actions created through the wizard can be viewed and edited in the standard AES forms, if more customization is required.

In addition, these fields were added to the **Event Handlers** form to support this feature: **Purpose**, **Triggering Property**, and **Method To Call**.

Set default ending value to starting value

If you select this new check box on the **General Parameters** form, then in forms where the **Starting** and **Ending** fields are blank, users can just specify the **Starting** field value, and that value is automatically set as the default value in the **Ending** field. This saves time if you often run reports, utilities, or activities for a single record instead of a range of records.

Tiles in forms

The **Customers**, **Vendors**, **Items**, and **Employees** forms now display tiles on the left side instead of a grid. The tiles provide a quick, easy to read summary of key information. To see the full grid view, drag the splitter bar to the right. (If you prefer to see the grid view when the form opens, you can set the **Tile When** attribute in Design mode to a value less than 20.)

Right-click paste

With the new **Paste** option on the StdDetails right-click menu, users can paste text from the Clipboard using the menu.

Multi-site views on several Home forms

You can now view information from multiple SyteLine sites on these Home forms: **Buyer Home**, **Controller Home**, **Customer Service Home**, **Inventory Control Home**, **Production Planner Home**, and **Project Manager Home**. On the Navigator tab on those forms, select a site group in the new **Multi-Site Group** field. Then most of the sub-tabs of the Navigator tab will display information for all of the sites in that group. An Earth icon is displayed in the top left corner of sub-tabs that have the ability to display multi-site data. The Earth icon is displayed even if you are not viewing multi-site data. For tabs that can not display multi-site data, no Earth icon is displayed.

On the **Customer Service Home** form's Navigator tab, the Price/Availability and Interactions sub-tabs have a new **Site** field. In this field, you can only select sites that belong to the selected multi-site group. Data on these sub-tabs is then limited to the specific site.

Concepts and Overview forms

A new set of forms allows you to navigate SyteLine through the use of conceptual and logical charts. To see a list of these forms and to access them, select **Master Explorer > Optional Modules > Concepts and Overview**.

Gathering contextual data

We added code to SyteLine to make it easier for other applications, for example In-Context BI or Ming.le, to collect contextual data.

Help changes

Previously, online help for WinStudio developers was accessed as a separate Help system, under a the **Help > Customizing Forms** menu option. Now the WinStudio help is combined with the SyteLine help and can be accessed through the standard help contents, index, and search. In the help Table of Contents, find WinStudio topics under "Developing Forms."

We removed the Javascript menus at the top of help topics; now you can find any Related Topics at the end of each help topic. We removed the long lists of field topics and placed more emphasis on creating related topics that explain how to use each new form. Field-level help is still available on most, but not all, forms through right-clicks, F1 or the **Help > Current Field** menu options. The **Show Help in Internet Explorer** option in **User Preferences** is no longer available.

Help now always displays in your default browser instead of in the Help Viewer window.

Linked and child form usage

A linked form opened from a parent form no longer is displayed under the **Forms > Most Recently Used** menu. Also, when a child form, such as a linked form or a modal form, is closed, the focus

now returns to the parent form, that is, the form from which the child form was launched. Formerly, the focus would return to the most recently active form, regardless of whether it was the parent.

Loading indicator

All forms, windows, or dialog boxes that formerly used a "Loading" modal window, including the login dialog box, now simply display a "working-in-background" cursor.

Accounts Payable

We added this feature.

EFT file name format change

For **A/P EFT Posting**, if the EFT format is ABAFILE, the filename format is now EFT + day + month + year + hour + minutes + seconds + the file extension (.aba), so the file is never overwritten.

Accounts Receivable

We added these features.

Import electronic A/R payments from bank files

After customers' payments are deposited in your bank, use the new **A/R Payment Import** utility to import electronic files from your bank that provide a record of the A/R payments. Then use the **A/R Payment Import Workbench** form to view, modify, and validate the payment and distribution information so that it is ready to post.

The system supports the import of NACHA CCD formatted bank files, which do not require any user-defined mapping. To import other types of delimited or non-delimited bank file formats, set up mappings between the bank files and SyteLine tables with the **A/R Payment Import Mappings**, **A/R Payment Import Field Mappings**, and **A/R Payment Import Conversions** forms. The **A/R Customer Bank Account** form links customers with their bank routing and account numbers.

Bank files are saved to an archive path specified on the **Accounts Receivable Parameters** form in case they need to be reimported or referred to later. You can also use the **A/R Payment Import Mappings Query** and **A/R Payment Import Field Mappings Query** forms to find specific mapping information.

For more information, see the help topic [Importing A/R Payment and Distribution Data from Bank Files](#).

Centralized invoicing with Invoice Builder

You can now generate, print, and post invoices and credit memos in multiple target sites from a base site, crossing a multi-site intranet that is defined in the base (login) site.

Use the new **Invoice Builder** form to create invoices and credit memos for the base site and the other target sites for customer order shipments and returns. The invoice and credit memo generated by the Invoice Builder are only from shipped and returned customer order lines/releases. The invoice and credit memo are generated based on the target site configurations such as invoice numbering, currency code, etc.

Use the new **Multi-Site Invoice Posting** form to post invoices for both the base site and the target site.

These new fields were added to support this feature:

- On the **Order Entry Parameters** form, the **Builder Invoice Prefix** field was added.
- On the **A/R Payment Distributions** form and the **A/R Posted Transactions Detail** form, these fields were added: **Builder Invoice Original Site**, **Builder Invoice**, and **Post Site**.
- On the **Invoices, Debit and Credit Memos** form and the **Invoices, Debit and Credit Memos G/L Distribution** form, the **Builder Invoice Original Site** and **Builder Invoice** fields were added. Invoices and credit memos are printed based on the target site's configurations, reports options and document profiles.
- On the **Invoice Transaction Report** form, the **To Site** field and the starting and ending **Builder Invoice** fields were added.

Customer Service

We added these Customer Service features.

Promotion pricing and rebates

Within SyteLine, you can now define promotion pricing and rebates that give your customers incentives to buy your products. For details, see the help topic [Promotion Pricing and Rebate Programs Overview](#).

These new forms were added for this feature:

- **Price Promotions and Rebates**, for setting up and maintaining the price promotion and rebate programs.
- **Price Promotions and Rebates Query**
- **Earned Rebates**, for maintaining deferred revenue rebate credits created for rebate programs.
- **Earned Rebates Query**
- **Earned Rebate Credit Workbench**, for processing eligible earned rebates.

These existing forms have new fields or functionality used with this feature:

- New **Deferred Revenue Account** field and associated description and unit code fields on the **Accounts Receivable Parameters** form.

- New **Promotion Code** field on **Consolidated Invoices Workbench**, **Customer Order Lines**, **Customer Order Lines Query**, **Customer Orders Quick Entry**, **History Customer Order Lines**, and **History Customer Order Lines Query** forms.
- New functionality on **Invoices**, **Debit and Credit Memos**, **Order Invoicing/Credit Memo**, **Order Invoicing Credit Memo Report** and **Order Verification Report** forms.

Customer shipment approval

You can now allow your customers to approve the shipment of orders, which lets the customer control when revenue is recognized for each shipment. To support this feature, we made these changes:

- The **Shipment Approval Required** check box was added to the **Customers** form, the **Multi-Site Customers** form, the **Customer Orders** form, and the **History Customer Orders** form.
- The **Shipment Approval Required** field was added to the **Customer Orders Query** form, the **Customers Query** form, the **Multi-Site Customers Query** form, and the **History Customers Orders Query** form.
- On the **Order Shipments** form, these fields were added: **Qty Invoiced**, **Qty to Approve**, **Approval Date**, **Cumulative Approval Qty**. The **Approval Log** button has been added to the **Order Shipments** form. The button opens the **Order Shipment Approval Log** form.
- On the **History Order Shipments** form, these fields were added: **Qty Invoiced** and **Cumulative Approval Qty**.
- There is a new **Order Shipments Approval Log** form. If you open the **Shipments Approval Log** form from the **Order Shipments** form, the form displays all shipments for the customer order line viewed there. If you open the form directly, you can filter your results by entering data into any of the fields.
- The **Accounts Receivable Parameters** form has a new Accounts In Process tab which defines the accounts and related unit codes for the Accounts Receivable In Process, Sales In Process, and Sales Non Inventory In Process accounts.
- The **Distribution Accounts** form has two new tabs. The Inventory In Accounts tab defines the accounts and related unit codes for Inventory In Process accounts. The Sales/COGS In Process tab defines the accounts and related unit codes for the Sales In Process, Sales Discount In Process, and Cost of Goods Sold In Process accounts.
- The **End User Type** form has two new tabs. The General In Process tab defines the accounts and related unit codes for Accounts Receivable and Sales In-Process accounts. The COGS In Process tab defines the accounts and related unit codes for the Cost of Goods Sold In-Process accounts.
- In Process fields were added to the **End User Types Query** form. In Process accounts and related unit code fields were added to the **Item Stockroom Locations** form.
- On the **Tax Codes** form, the **A/R Tax Acct In Process** account field and related unit code fields were added.
- The new **Shipped Not Approved Report** shows orders where shipment approval is required and orders where the shipped amount does not match the approved amount.
- The new **Approved Not Invoiced Report** shows approved quantities that have not been invoiced.

Including distance in supply sourcing

When you fulfill customer orders, click the new **Multi-Site Source** button on the **Customer Order Lines** form to open the new **Multi-Site Item Sourcing** form. This form lets you determine the driving distance between each site/warehouse and the Ship To address, using the Google Distance and Google Maps APIs. You can use the distance, along with the quantity available at the warehouse and the planned production time, to select the best source site and warehouse for the order. To set up the APIs for use with SyteLine, use the new Integration tab on the **Order Entry Parameters** form.

Built-in Point of Sale features

The Point of Sale (POS) module was formerly a separately-purchased add-on module. It is now included in SyteLine and does not require separate licensing. You can use the forms in the Point of Sale (POS) module to handle walk-in customer transactions such as customer sales orders, service orders, returns, or rentals. POS includes a logical “cash drawer” that the cashier accesses by logging in and out. Separate drawers are maintained for customer orders vs. service orders. The cashier specifies the amount in the drawer when the drawer is checked out and again during end-of-day processing. The balance in the drawer, taking into account all transactions that occurred, must be reconciled when the drawer is checked in. If the drawer is out of balance, an adjustment transaction is created.

POS transactions for new sales are posted to Accounts Receivable as the sale occurs. Balance adjustment transactions, if needed, are posted during End of Day processing. Because POS transactions are normally walk-in sales, the POS module supports transactions only using your domestic currency. For more information, see the help topic [Processing Orders with Point of Sale](#).

These POS forms are now included in SyteLine:

- **POS Setup:** Use this form to set up parameters that are used during Point of Sale transactions. You define the cash drawers here, and cashiers use the Checkout button to exclusively check out a drawer and the Login button to open the **POS Logon** form, where they log into the cash drawer.
- **Point of Sale Entry:** This is the main form used for POS customer order or service order transactions. From this form, you can open these modal forms as needed:
 - **POS Material, POS Labor, POS Miscellaneous Charge, and POS Payment:** These are modal forms that are opened from buttons on the Point of Sale Entry form, so you can enter information about the items, labor, amounts, and payments included in the order.
 - **POS Customer Orders:** Use this modal form to handle a later customer pickup of an item that was already sold.
 - **POS Reverse Lookup Option:** Use this modal form to look up and reverse charges during a customer return of materials from a POS order.
- **POS Inquiry:** Use this form to look up information about past POS orders.
- **POS Checkout/Checkin:** Licensed SyteLine Service users who use service contracts to rent out equipment can use this form to check out and check in rental equipment, and to collect the appropriate rental amount from the renter. Use the Checkout/Checkin button on the Contracts form to open this form.
- **POS End of Day Processing:** Use this utility to reconcile the cash that remains in the cash drawer with the POS transactions that occurred during the day, and to perform any required

balance adjustment before you check in the drawer. All of these forms are included in a new authorization group, Point of Sale.

Freight shipping calculations for credit card orders

For customer orders that are paid with a credit card, we now provide a way to specify a ship method, and then calculate the shipping freight charges based on that ship method. You can then ship and invoice the customer order either through standard SyteLine or through the Pick/Pack/Ship process. These ship methods also apply to orders received from the Customer Portal (see the Customer Portal section of this topic for additional information). These new features are intended for use with the Credit Card Interface.

These new forms are included:

- **Freight Charge Methods:** Set up different methods for calculating freight shipping charges, for example, per item, by weight, minimum and maximum order charges, etc.
- **Ship Methods:** Define and maintain Ship Method codes associated with the freight charge calculations. You can specify minimum and maximum days to ship using each method and whether the method is applicable to Customer Portal users and Customer Portal international shipping.
- **Freight Charge Methods Query** and **Ship Methods Query:** Use these forms to find a specific freight charge or ship method.
- **Ship Method Groups:** Combine ship methods into groups that can be assigned to customers who pay by credit card. Each of the ship methods included in the assigned group is available for selection in the Ship Method list during the order entry process.

These forms have new fields or functionality used with this feature:

- **Customers:** Use the **Ship Method Group** field to determine which ship methods are listed for the customer when a credit card order is entered for or by that customer.
- **Order Entry Parameters:** Use the **Default Ship Method Group** field to determine the list of ship methods that are displayed for a new SyteLine credit card order, if the customer does not have a ship method group defined. For Customer Portal users, this field is set on the **Portal Parameters** form.
- **Customer Orders:** When you select **Pay with Credit Card** for a customer order, you can then select a **Ship Method** from the list that is displayed in the **Credit Card Payments** form. After the card is authorized and payment information is saved for the order, the **Ship Method** field is displayed and enabled on the **Customer Orders** form.
- **Customer Order Lines** and **Customer Order Blanket Lines:** When you save a line for a credit card order with a valid ship method, freight charges are calculated.
- **Items** and **Multi-Site Items:** Use the **Freight** field on the Overview tab to override the default **Charge Per Item** that is set on the **Freight Charge Methods** form.
- **Pick Workbench:** A new **Payment Method** field displays the payment method, so you can sort the grid to show all credit card payments together. You can only pick credit card orders with other credit card orders.
- **Shipment Merging:** If you select a shipment that is for a credit card order, then only other shipments for credit card orders are displayed in the grid.

- **Pack Workbench:** You can only group credit card order pick lists with other credit card order pick lists.

Extended disposition for returned items

The features from the former add-on products for Return Material Authorization Extended Disposition (RMX) and Outside Process Management (OPM) are now built into base SyteLine and no longer require a separate license.

Extended dispositions give you more options after materials are returned from a customer. In the standard process, materials are received from the customer, placed into inventory, and a replacement order is issued to the customer if the item needs to be replaced. After the material is returned to the customer, you record a disposition code for the item that was returned. This disposition code is used mainly for reporting. For more information, see the help topic [About RMA Extended Dispositions](#).

(For more information about OPM, see the Manufacturing section below.)

These new forms were added, many of which are used by both Extended Disposition and Outside Process Management:

- **Item at Vendor Report**
- **Reprint Vendor Packing Slip Report**
- **Vendor Packing Slip**
- **Vendor Packing Slip Query**
- **Vendor Packing Slip Selection**
- **Vendor Returns**
- **Vendor Shipping**
- **Vendor To Be Shipped Report**

These new forms were added for Extended Disposition:

- **RMA Item Dispositions**
- **RMA Item Dispositions Query**
- **RMA Item Serials**

These existing forms were updated to include Extended Disposition features:

- **RMAs:** The Whse field now includes a default warehouse.
- **RMA Parameters:** This form now has two tabs. The General tab contains all of the fields that were previously on this form. On the Extended Disposition Process tab, you can specify the disposition warehouse and location, whether to use the Extended Disposition Process by default for RMA Lines, and the accounts to use for customer owned inventory.
- **RMA Return Transactions:** We added a Cost Detail tab that displays the material, labor, fixed overhead, variable overhead, and outside costs associated with the RMA.
- **RMA Line Items:** On the Disposition tab, we added a **Use Extended Disposition Process** check box and a **Qty Disposition** field, as well as an Extended **RMA Dispositions** button that opens the new **RMA Item Dispositions** form.
- **RMA Line Items Query:** New fields were added to the results grid.

Pick/Pack/Ship and Order Shipping awareness

Previously, the Pick/Pack/Ship and Order Shipping features were completely separate and were not aware of each other. Now, each knows what has been done in the other. Also, the **Qty Ready** field was added to the **Pick Workbench** form to support this update.

In addition, we added some functionality to the **Shipment Master** form for use with Infor QCS, similar to the existing functionality in the **Order Shipping** form. Order Shipping was changed to only use COCs that are not linked to a shipment\line. The Shipment Master now only use COCs linked to a shipment\line.

Alternate calculation method for Extended Net Price

Select the new **Use Alternate Net Price Calculation** option on the **Order Entry Parameters** form to use a different calculation method for extended net price on customer order lines and estimate lines. This alternate calculation rounds before calculating the price, which in some cases could result in less accuracy than the standard method.

Customer credit limit by order

On the **Customers** form, you can now specify a maximum credit amount per order for the customer. When the **Order Credit Limit** value exceeds the total available customer credit, what happens next is determined by the setting of **Allow Over Credit Limit** on the **Customer Order Lines** form:

- If the **Allow Over Credit Limit** check box (which can be updated only on new order lines) is selected, the customer order is saved as-is, with the order line's status set to **Ordered**. The system displays a warning message, alerting you about the credit hold overage. If a reason code is defined in the **Reason** field (on the Credit tab of the **Customers** form), the system places the order on credit hold if it is not already on credit hold.
- If the **Allow Over Credit Limit** check box is *not* selected, the system saves the order line with a status of **Planned** and displays a warning message about the credit overage. The system does not update the customer's **On Order Balance** and does not place the order on credit hold. You can then navigate to that order line later and decide whether to change its status to **Ordered** or delete the order line.

The same logic is applied on the **POS Entry** form for point-of sale orders.

The order credit limit is also displayed on these forms:

- **A/R Posted Transactions Detail**
- **A/R Posted Transactions Summary**
- **Controller Home**
- **Executive Home**
- **Salesperson Home**
- **Multi-Site Customers**
- **Subordinate Customer Listing**

In addition, the **Validate Order Limit** field was added to the **EDI Customer Profiles** form.

Longer customer PO numbers allowed

The Customer Purchase Order number field throughout the system was increased from 22 to 25 characters.

Customer Service Home filter

You can now filter project, job, customer order and RMA transactions by customer on the Transactions sub-tab, under the Navigator tab on the **Customer Service Home** form.

Cross reference from an estimate line to a new PO requisition

You can now create a cross reference to a new purchase order requisition when you create an estimate line. On the **Estimate Lines** form, select **Requisition** in the **Source** field, save the record, and click **Source**.

Warehouse range on Order Status Report

We added a warehouse range to the options on the **Order Status Report**. Use the warehouse range to limit the customer order lines that are displayed on the report. The warehouse is then printed on the report output.

Print reason on RMA Verification Report

We added a **Print RMA Line Reason** option that lets you include on the **RMA Verification Report** the reason why the material was returned. The reason is specified on the **RMA Lines** form.

Increased decimals for order discount percentages

We increased the number of decimal places to eight for discount percentages on customer orders and customer order lines. Previously, the number of decimal places in these areas did not match.

Tax code defaults on Estimates and Estimate Projects

We changed the tax code fields on these forms so that the data defaults from the **Prospects** form now instead of the **Tax Systems** form.

Data Collection

We removed the use of Data Collection license, as well as the Web DC front-end processor and the DCBackground processor. The underlying data collection storage tables are preserved, so you can use another application to place transaction data into the SyteLine tables. In place of the old DCBackground processor, we now allow you to select and run individual background tasks to automatically post different types of data collection transactions from the DC tables. The **Data Collection Parameters** form includes a new Background tab where you can set up and run the

individual background tasks. The data collection error processing forms work the same way as they did previously.

Fields related to the DC front end processing were removed from the **Data Collection Parameters** form, the **Reset DC Shutdown Polling and Background Status** field was removed from the **Crash Recovery** form, and the **DC Web Menu** field was removed from the **Users** form. In addition, these forms were removed: **Barcoded Reader Menu Report**, **Barcoded Intermec Utility Report**, **Generate Antares Configuration**, **Physical Inventory Error Processing**, **Physical Inventory Error Processing Query**, **Reader Configuration**, **Reader Configuration Query**, and **Validate Antares Configuration**.

Financial Controller

We added these financial features.

What-If costing analysis

Use the new costing analysis feature to create "what-if" costing scenarios and analyze the impact of these changes on your business costs. For example, you could evaluate what would happen based on fluctuating commodity costs, changing direct labor rates, changing component material costs, replacement of labor with machines, or replacement of an expensive component with an inexpensive one. For more information about this feature, see the help topic [Costing Analysis Overview](#).

These new forms and reports were added for this feature:

- **Costing Analysis Alternative Copy**
- **Costing Analysis Alternative Current Materials**
- **Costing Analysis Alternative Current Materials Query**
- **Costing Analysis Alternative Current Operations**
- **Costing Analysis Alternative Current Operations Query**
- **Costing Analysis Alternative Inventory Variance Report**
- **Costing Analysis Alternative Roll Costs to Current**
- **Costing Analysis Alternative Roll Up**
- **Costing Analysis Customer Order Margin Report**
- **Costing Analysis Workbench**

Also, **Costing Alternative** fields were added to the **Change Cost Rates** and **Substitute Bill of Material Components** forms.

Multi-Calendars/Multi-Books

SyteLine provides Multiple Financial Sets of Books (Multi-FSB) functionality for businesses that require reporting for one or more ledgers in addition to the General Ledger. Each new ledger can contain any combination of a fiscal calendar, chart of accounts, and currency that are different from those used for the standard General Ledger. Each combination creates a separate financial set of

books, and you can set up as many as you need. For more information about this feature, see the help topic [Multiple Financial Sets of Books Overview](#).

These new forms and reports were added for this feature:

- **Multi-FSB Accounting Periods**
- **Multi-FSB Accounting Periods Query**
- **Multi-FSB Charts**
- **Multi-FSB Charts Query**
- **Multi-FSB Chart of Accounts**
- **Multi-FSB Chart of Accounts Query**
- **Multi-Financial Sets of Books**
- **Multi-Financial Sets of Books Query**
- **Multi-FSB Chart of Accounts Budget and Plan**
- **Multi-FSB Chart of Accounts Budget and Plan Query**
- **Multi-FSB Journal Entries**
- **Multi-FSB Journal Entries Query**
- **Multi-FSB Ledger Posting for Journal**
- **Multi-FSB Copy Balances to Budgets**
- **Multi-FSB Copy Chart of Accounts**
- **Multi-FSB Chart of Accounts Mapping Report**
- **Multi-FSB General Ledger**
- **Multi-FSB General Ledger Check Information Report**
- **Multi-FSB General Ledger Transaction Report**
- **Multi-FSB General Ledger Worksheet Report**
- **Multi-FSB Journal Account Summary**
- **Multi-FSB Journal Transaction Report**
- **Multi-FSB Trial Balance**
- **Compress Multi-FSB Ledger Transactions**
- **Multi-FSB Rebalance Ledger Period Totals**
- **Multi-FSB Refresh Account/Unit Combinations**

Additional dimensions and attributes for G/L accounts

If you assign dimensions to accounts, your G/L data becomes multi-dimensional. For example, not only can you drill down to detail about an account, but you can also drill across to details about the customer or the item involved in a particular A/R transaction posted to that account.

To support this, SyteLine now includes these predefined dimensions that can be attached to an account: Customer, Item, and Vendor. Each dimension has a predefined set of attributes. (Your system administrator can modify or add dimensions and attributes, and set up joins between database tables, to meet your company's needs. For more information, see the help topic [Creating Dimensions and Attributes for Extended Data Analysis](#).) The **Chart of Accounts** form now has a

Dimensions tab where financial personnel can assign one or more dimensions to an account. Use the **Chart of Accounts Dimension Details** form to see a list of the attributes included in a particular dimension. Use the **Chart of Accounts Dimensions** form to see the attribute data that is available for a particular account and dimension. The new **Chart of Accounts Dimension Query** form is also available.

For more information, see the help topic [Specifying Dimensions and Attributes for G/L Accounts](#).

Prevent accidental journal entries to control accounts

Previously, control accounts were removed from the drop-down lists of accounts on transaction forms such as **Job Material Transactions** and **Purchase Orders**, but users could still manually enter the control account numbers in those fields. Now, if the **Secure Control Accounts** field is selected on the **General Parameters** form, users cannot manually enter control account numbers in transaction forms.

However, a user who is assigned the new group authorization **Allow JE to Ctrl Acct** (Allow Journal Entries to Control Account) can enter a control account for a manual journal entry in the **General journal** or a user-defined journal in the **Journal Entries**, **Import Journal Entries**, or **Journal Builder** forms. This allows the correction of Distribution journal entries that were incorrectly assigned to control accounts. Control accounts are included on the drop-down lists of accounts in setup and parameter forms.

Recurring journals

Use the new **Recurring Journal** option on the **Journals** form to designate a user-defined journal as a recurring journal. Entries in this type of journal can be posted every month, or other recurring period, by simply changing the date. For more information, see the help topic [Creating and Posting Recurring Journal Entries](#).

Indicate valid or void payments through the Positive Pay Format Fields form

The Positive Pay file, which can be created through the **Positive Pay File Generator** form, includes a Void field that indicates whether a payment is valid or voided. You can use two fields on the **Positive Pay Format Fields** form to set this value in the file. Use the new **Valid Indicator** field to add a code that indicates a valid payment. The previously-named **Indicator** field was renamed as **Voided Indicator**; use it to specify a code that indicates a voided payment.

Updates to Journal Entries grid

We added two fields to the grid on the **Journal Entries** form: **Customer/Vendor** number and **Name**. These fields show the customer or vendor number and name that are associated with the transaction. You can now export this information with the other grid columns.

Collecting and reporting on item excise tax

You can now indicate on the **Items** form whether a manufactured item is **Subject to Excise Tax**, and what percentage of tax is to be collected. The tax is reported on the new **Item Excise Tax Report**. On the Customer Ship-Tos form, you can indicate whether a customer's orders are to be

included on the report. This feature is intended for use with IRS Form 720, where excise taxes on manufactured medical devices are reported and paid by the manufacturer.

Unit codes updates

Unit code summary/detail can now be printed on the **Total Inventory Value by Account** report, **Total WIP Value by Account** report, and **Project WIP Value by Account** report.

You can now print summary balance amounts for a range of unit codes on the **General Ledger, Unit Code Where Used Report**, and **Trial Balances** forms.

Secondary sort available on General Ledger

On the **General Ledger** form, you can now use these fields to define a secondary sort method: Transaction Date, Transaction Number, Unit 1, Unit 2, Unit 3, and Unit 4.

G/L account information on additional forms

General ledger account information now displays on the **Generate A/P Transactions** and **Voucher Builder** forms. The accounts that are displayed were entered on the General tab of the **Purchase Order Lines** form.

Fixed Assets

We added these fixed assets features and enhancements.

Partial depreciation of fixed assets

You can now set up a fixed asset with partial depreciation; that is, when an asset is placed in service in the middle of a calendar year or fiscal year, part of the full-year depreciation can be taken in the first year, and the rest in the last year of the depreciation. To support this, the **Date to Start Depreciation** field was added to the **Fixed Assets** form, and the **Partial Depreciation Type** was added to the **Fixed Asset Depreciation Tables** form. The **Fixed Asset Cost Report**, **Fixed Asset Current Depreciation Report**, and **Fixed Asset Disposal Report** now include the date to start depreciation. For more information, see the help topic [About Partial Depreciation](#).

The **Asset Class** field is now displayed on the **Fixed Asset Costs** form, **Fixed Asset Depreciation** form, and related query forms.

When the **Useful Life** value is changed on the **Fixed Assets** form, the system now asks if you also want to update the **# Units to Depr** field on the **Fixed Asset Depreciation** form.

Links between fixed assets and purchase orders

Fixed assets and purchase orders are now linked. You can specify that a PO is for a fixed asset. Then on the PO line, you specify the fixed asset code for a non-inventory item. When a fixed asset item is saved on the PO line, a record for that item is automatically created in the Fixed Assets form,

with the available information from the PO line. The fixed asset related to the Class Code is used for G/L accounts. You can also create a purchase order using information that you already specified on the **Fixed Assets** form.

To support this feature, these forms now include a Fixed Asset Number field, an FA Class Code field, and a Department field: **Purchase Order Lines**, **Purchase Order Builder**, **Purchase Orders Quick Entry**. The **Fixed Asset Costs** form has a new Create Purchase Order button which opens the **Purchase Order Quick Entry** form.

Inventory Control

We added these inventory control features.

Multi-site copy of item BOM

With the new **Multi-Site Bill of Material Builder** form, you can easily copy an item's BOM from one site to other sites. This requires a replication rule between the sites using a new replication category called Multi-Site BOM Builder. The builder copies current and single level BOMs.

HAZMAT compliance

You can now define hazardous material (HAZMAT) compliance programs on the new **Compliance Programs** form. For each low-level item, you can now specify this information on the **Items** form: **Compliance Program ID**, **Compliance Program Description**, and **Compliance Changed**. When a specification is changed, the new **Item Compliance Assignment Utility** form processes each item's indented bill of material and sets the item to non-compliant if any item in its bill of material is non-compliant. The **Item Detail Report** now includes **Compliance Program ID** and **Compliance Status** fields.

For more information, see the help topic [Managing Item Compliance](#).

Infor PLM integration enhancements

The BOM Bulk Import utility now processes manufacturer and manufacturer item data. Multi-level BOMs can now be imported and exported. You can update the U/M or operation number for imported materials.

To support these new features, these fields were added:

- On the **BOM Bulk Import Parameters** form, **Manufacturer Tag Name** and **Item Manufacturer Tag Name** were added.
- On the **BOM Bulk Import Mappings** form, **Item Manufacturer** and **Manufacturer** were added as options in the **Table Group** list. If either of these options is selected, the **Table Name** and **Column Name** fields contain new choices.

Resource sequence sorting

Use the new **Resource Sequencing Sort Setup** form to predefine sort criteria that you can use on the **Resource Sequencing** form. The **Resource Sequencing** form also has new **Select** and **Frozen** fields, and new **Freeze**, **Unfreeze** and **Sort** buttons.

Transfer order batch shipping and receiving

You can now process multiple transfer order lines at one time. Additionally, you can split one line into multiple line parts, to allow one line to ship to, or receive from, different locations.

These new forms and fields were added to support this feature:

- New forms: **Add Transfer Ship Line**, **Add Transfer Receive Line**, **Add Transfer Loss Line**, and **Add Combined Transfer Line**
- Enhanced grid and new fields on the **Transfer Order Ship**, **Transfer Order Receive**, **Transfer Order Loss** and **Combined Transfer Order Ship/Receive** forms include **Starting** and **Ending Scheduled Ship Date**, **Status**, **TO Line Item Status**, **Last Ship**, and **Ref Type/Number/Release**.

More control over non-inventory items

You now have greater control over items not maintained on the **Items** form. You can specify information about these items on the new **Non-Inventory Items** form. Non-inventory items can be used in many areas of the system, including customer and vendor orders, jobs, estimates, and service orders. The new **Non-Inventory Items Query** form was also added.

Product code change updates account code on Item Stockroom Locations

After you change an item product code on the **Items** form, if you have the proper permission, a popup window gives you the option to automatically update the **Account Code** field on the **Item Stockroom Locations** form to match your product code change. If you do not have the proper permission, the popup window reminds you to update the **Item Stockroom Locations** form manually.

Printing non-inventory item descriptions

The **Material Transactions Report** now prints the item description for non-inventory items. (Previously, only descriptions for items defined in the **Items** form were included on the report.) If a non-inventory item is specified on a purchase order line, customer order line, job material, project resource, or RMA line, you can specify an item description.

The system determines which item description to use based on the type of item:

- For an inventoried item, the item description is displayed. If the description is blank, the line item description is displayed.
- For a tracked non-inventoried item, the non-inventory item description is displayed. If the description is blank, the Line Item description is displayed.

- For a non-tracked, non-inventoried item, the Line Item description is displayed. For Customer Order Line/Release and Purchase Order Line/Release, if the description is blank, the History Line Item description is displayed, if available.

Print item overview on reports

We added a **Print Item Overview** option to these reports: **Order Verification Report**, **Packing Slip**, **Reprint Packing Slip Report**, **Consolidated Invoicing**, **Order Invoicing/Credit Memo**, **Print Price Adjustment Invoice**, **RMA Verification Report**, **RMA Credit Memo**, **Print Delivery Order Packing Slip Report**, **Print Delivery Order Pro Forma Invoice Report**, and **Estimate Response Form Report**.

If you select this field, the **Item Overview** value from the [Items](#) form prints on the report for each item. Only the first 100 characters are printed. The **Item Overview** field is supported as a multi-lingual field, so that it can be printed in the customer's language, if a string has been identified in that language on the **Multi-Lingual Item** form.

Change log for transfer order lines

Previously, when information related to a transfer order line was changed, a record of those changes was not maintained. The new **Transfer Order Lines Change Log** provides a list of information related to a transfer order line. When a change is made to the ordered quantity, U/M, scheduled ship date, scheduled receive date, or transit location, the change is recorded.

The **Transfer Order Line Items** form and **Transfer Orders Quick Entry** utility now have the Actions menu and right-click menu option **List Change Log**, which launches the change log as a linked child form.

Use the new **Delete Transfer Order Line Item Log Entries** utility to delete log records within a specified data range. Optionally, create an initial log entry for each item after deletion.

Manufacturing

We added these manufacturing features.

Outside Process Management (OPM)

Use this feature to track and ship materials from a standard SyteLine job that are sent to an outside vendor for plating, finishing, painting, or any other service. Previously, OPM was a separately licensed add-on product. Now this feature is built into base SyteLine. For more information, see the help topic [About Outside Process Management](#).

In addition to the new forms listed in the Customer Service section above (under Extended Disposition for Returned Items), these existing forms were updated to include OPM features:

- **Shop Floor Control Parameters:** We added an Outside Process Management tab with these new fields: **Enable Outside Process Management**, **PO Item Xref Method**, **PO Status**, **PO Due Date Calculation**, **Base Job Consolidation**, and **Check for Consecutive Operations**.

- **Job Operations:** We added an **OPM Shipped** field on the Accum Values tab.

Planned and actual yield on Job Operation Status Report

The **Job Operation Status Report** form now displays the Planned Yield and Actual Yield values for each operation.

Material Use Up Report

This new **Material Use Up Report** helps you determine the best date to change a part in a bill of material. In many cases, you might want to use up the current inventory of a part before you replace it with a new part. With this report, you can either calculate when the quantity will reach zero, or calculate the remaining quantity at a selected break date.

To support this, we also added information and buttons on existing forms:

- **Items** form: new Matl Use Up tab
- **Engineering Change Notice Items** form: new **Est Break Date**, **Date of Last Rpt**, **Matl Req Date**, **Change Type**, and **Notify Customers** fields
- **Current Materials** form: new **Est Break Date** and **Date of Last Rpt** fields, and a new **Matl Use Up Report** button

Units forms in base SyteLine

The Units forms that were previously in the Field Service (FS-Plus) optional module were moved to the Shop Floor Control area of SyteLine and no longer require a separate license.

These forms are now included in base SyteLine:

- **Indented Unit Configuration Report**
- **Item Where Used On Configuration Report**
- **Search For Unit Registration Posting**
- **Unified Transaction Report**
- **Unit Configurations**
- **Unit Configuration Create**
- **Unit Configuration Removal Reasons**
- **Unit Configuration Search**
- **Unit Registration Posting**
- **Units**
- **Units Query**
- **Unit Status Codes**

Those forms are now included in the Shop Floor Control default authorization group, as well as the SyteLine Service group. They can be accessed either from the Shop Floor Control area or the Optional Modules > Service area of the Explorer. Use of the Units forms is described in the help table of contents under **Optional Modules > Service > Units**.

Material Planning (APS/MRP)

We added these material planning features.

What If planning updates

These new APS forms let you better analyze alternative planning scenarios: **Alternative Summary APS**, **Alternative Summary Scheduler**, **What If Scheduler Setup Matrix**, and **What If Planner Order Priority**.

In addition, a new **Alternative** field was added to the **Delete Shift Exceptions** and **Planning Detail APS** forms, and a new **ATP/CTP** button was added to the **What if Demands** form.

Improved plan consolidation

The new **Consolidated Plans APS** form enhances the consolidation process and the view of consolidated PLNs in the output data for APS planning.

In addition, two new fields were added to these forms: **Planning Parameters**, **What If Planning Parameters**, and **What If Items**. The **Sequenced Component Plans for Mfg Item Safety Stock** field eliminates the need for the mfgss2.txt file. If you select **Days Supply Planning**, planning takes place in two phases. PLNs are consolidated between the phases, and the consolidated PLNs are added to the original requirements for the second planning logic phase.

CTP for estimate job orders

The Capable to Promise (CTP) process now allows the calculation of projected completion dates through a new **CTP** button on the **Estimate Job Orders** form.

Change how XFDs are planned

In a multi-site SyteLine environment, APS plans each site according to its planning priority. During this process, planned transfers between sites (XFDs) may be generated. Previously, in some cases, these transfer orders were created at sites that had already been planned during the multi-site run. The XFDs were handled by incremental planning, but only after supply swapping, safety stock preservation, and exception logic had already completed - so the XFDs were not accounted for in these actions.

Now, post-processing is deferred at all sites until after all XFDs have been planned.

Web enablement of some APS forms

When you access SyteLine through a Web browser, you can now use the **Resource Gantt Chart APS**, **Resource Gantt Chart Scheduler**, **Demand Detail Chart APS**, **Demand Detail APS**, **Plan Detail Chart**, and **Plan Detail** forms.

On the **Resource Gantt Chart APS** form, you now perform highlight management, data selection, and operation editing through these new forms: **Gantt Highlights**, **Resource Gantt Chart Selections**, **Select Gantt Data**, and **Gantt Edit Operations**.

The new **Demand Detail Chart APS** and **Plan Detail Chart** forms combine features from the existing **Demand Detail** and **Resource Gantt Chart** forms, to help you better visualize planning data.

Multiple warehouses in a single site

The APS planning process can now consider multiple warehouses within a single site. All manufacturing is associated with the default SyteLine warehouse. The remaining (distribution) warehouses each have a beginning on-hand inventory level by item and a transit time to/from the default warehouse. Demands for items at distribution warehouses are reconciled against existing available inventory and any future supplies. Unsatisfied demand will result in the planner creating planned intra-site transfers to meet the demand. The planner can now consider supplies at distribution warehouses when fulfilling demand. The APS planner maintains safety stock levels for the default warehouse and each distribution warehouse. For more information, see the help topic [About Intra-Site Transfers](#).

To support this feature, these new forms and fields were added:

- **Item/Warehouse** form: new Planning tab that is only used for distribution warehouses
- New **What If Warehouses** and **What If Item Warehouses** forms
- **Planning Parameters** form: new **Plan Intra-Site Transfers** field
- **What If Planning Parameters** form: new **Plan Intra-site Transfers** and **Default Warehouse** fields
- **What If Demands** form: new Warehouse field
- **What If Operations** form: new Work Center field

Source percentages of planned orders

You can now set up rules that automatically split planned purchase orders for a purchased item between multiple vendors. If no rule is found for an item, the system looks for any rules that were defined for that item's product code. The quantity requested from each vendor depends on the percentage specified for that vendor in the source rule. You can also define rules that split planned transfer orders for a certain item (or for the item's product code) between multiple sites/warehouses. Use the new **Source Rules** form to define the rules.

In the **Material Planner Workbench Generation** form, the source rules are consulted when the source for the item is set to Purchased or Transferred and Use Planned Data is set to Yes or No. For more information, see the help topic [Creating Source Rules for Planned Orders](#).

List and filter messages from the APS Planner

Use the new **View Planning Messages** form to generate a list of error, warning and blocked messages. You can filter the messages so that you can easily tell which messages are more important, and you can add any missing messages.

APS exception message enhancements

Previously, SyteLine provided some exception message control parameters that were not fully honored by the APS Planner. Now, when generating all Move In and Move Out exception messages, the APS Planner now uses the existing PO and Job Reschedule Tolerance Factors from the **Planning Parameters** and **Product Codes** forms.

Also, on the **What If Planning Parameters** form, the new **PO Reschedule Tolerance In/Out** and **Job Reschedule Tolerance In/Out** options give you greater control over which exception messages are shown in alternative planning.

On Hand Below Safety Stock exception messages are now generated only for those items that have a defined safety stock. The safety stock level used when determining these exceptions is not adjusted by negative on-hand inventory levels.

Display global planning reload errors

Background task messaging was updated in both single-site and multi-site APS planning. Multi-site planning now reports APS reload errors for all sites, and all planning modes now report the existence of blocked orders.

Freeze APS schedule

For those using APS Scheduler, the **Resource Gantt Chart** form now allows you to use the right-click menu to freeze or unfreeze operations or orders on the schedule. Previously, this feature was only available when the **Use Planning Output for Scheduling** option was enabled; with normal APS Scheduling, the feature was disabled. Now the right-click menu is also enabled for normal APS Scheduling.

You can freeze the entire job, or operations within a job. The frozen operations are reflected in all Scheduling analysis forms and reports.

Microsoft Office Integration

We made these changes to the integration:

- **Excel Financial Reporting Tool:** These new features were added:
 - You can use the new Site Group to consolidate data from multiple sites for reporting.
 - The new GL function SLGLYTDBAL retrieves the year-to-date balance.
 - A drop down list was added so that unit codes can be included in the Excel GL functions.
 - New report header images were added.
- **Outlook Add-In:** The Outlook Add-In was enhanced so that email messages can be attached to interactions on the Vendor Interactions, Prospect Interactions, and Sales Contact Interactions areas in SyteLine. There is a new built-in data grid pane below the email message in Outlook that displays interactions for vendors, prospects and sales contacts. In addition, you can chose to replace the data grid pane in the Outlook Add-In with a custom SyteLine form.

- **Chinese Reporting Pack:** Two new statements were added to this reporting pack: Statement of Cash Flow and Statement of Changes in Owner's Equity (SOCE). The Statement of Cash Flow includes sections for Operating Activities, Investing Activities, and Financing Activities. The SOCE statement shows the increase and decrease in the owner's equity.

For more information, see the *Infor SyteLine Microsoft Integration User Guide*.

Procurement

We added these procurement features.

Change log for purchase order lines and releases

The new **Purchase Order Lines Change Log** form displays the change logs of purchase order lines and releases. A change is recorded if the status, ordered quantity, costs, U/M, due date, or promise date is changed. You can delete these log records with the new **Delete Purchase Order Line Item Log Entries** form.

The forms **Purchase Order Blanket Releases**, **Purchase Order Blanket Lines**, **Purchase Order Lines**, **Purchase Orders Quick Entry**, **History Purchase Order Blanket Lines**, **History Purchase Order Blanket Line Releases**, and **History Purchase Order Lines** now have the Actions menu and right-click menu option **List Change Log**, which launches the change log as a linked child form. Optionally, you can create a log entry for each affected order line.

Minority owned vendors

You can now specify if a vendor is a minority owned business. Use the new **Minority Types** form to add minority types and their descriptions. Then use the new **Minority Owned** check box on the **Vendors** form to specify that a vendor is minority-owned. When this check box is selected, a grid is displayed so you can specify the minority types to which the vendor belongs.

Printing buyer's name on purchase orders

When you print the **Purchase Order Report**, the buyer's full name is displayed on the report. Previously, only the buyer's user ID was displayed. Many vendors require that the name of the purchasing agent is printed on a purchase order as a point of contact.

On the **Builder Purchase Order Report** and the **Change Order Report**, if a user record exists for the buyer and a user description is displayed, that description is printed beside the Buyer label on the report. If a user does not exist or the description is blank, the buyer from the purchase order is printed on the report.

Recalculating cost on purchase orders

A **Recalculate Cost** button was added to the **Purchase Order Requisition Lines**, **Purchase Orders**, **Purchase Order Lines**, **Purchase Order Blanket Lines**, **Purchase Orders Quick Entry**, **Purchase Order Blanket Releases**, and **Purchase Order Builder** forms. Click the button to get the

current vendor contract price or the item cost. The system also prompts you with a Yes/No option to update the costs when the vendor is changed.

Managing fluctuating commodity prices (surcharges)

Use these new forms to account for fluctuating commodity prices and surcharges, across any number of commodity exchange services, on customer and vendor orders:

- **Item Contents**
- **Item Content Prices**
- **Item Content References**
- **Item Content Exchanges**
- **Customer Surcharge Rules**
- **Vendor Surcharge Rules**

Each of these new forms has a matching new query form.

Surcharges are measured by comparing the actual and basis pricing during the purchase or sale of affected items. For more information, see the help topic [About Surcharges](#).

Email on Vendor Interactions

A new area on the **Vendor Interactions** form displays incoming email messages and allows emails to be sent.

Project Management

We made these project management enhancements.

Specifying types of information to copy for a project

Use these new fields on the **Copy Projects** form to specify what information to copy for a project or estimate project: **Copy Tasks**, **Copy Resources**, **Copy Revenue Milestones**, and **Copy Invoice Milestones**.

Project change tracking

You can now track the changes made to a project. To use change order tracking, select **Tracking** on the **Project Types** form, then select **Track Changes** on the **Projects** form when you create a new project. The new **Project Change Orders** form tracks project changes. Use the new **Project Change Order Detail Report** to view a detailed summary report of all the changes made to a project. For more information, see the help topic [Tracking Project Changes](#).

Sales

We made these changes in the Sales area.

Updates to Salesperson Home

On the **Salesperson Home** form, the Prospect Interactions and Contact Interactions sub-tabs on the Navigator tab now behave more like the Customer Interactions tab. You can now choose an interaction in the Interaction field on both tabs. These new read-only fields are now shown on each tab: (Interaction Description), Topic, Prospect or Contact, Company, Status, Interaction Date, Follow-Up Date, Site, and Interaction Salesperson.

On the Receivables sub-tab on the Navigator tab, the right grid only shows accounts receivable data where the current salesperson is tied to the customer order associated with the posted AR transaction.

On the **Salesperson Home** form, links have been added to the Dashboard tab to open the **Sales Forecasts** form, the **Campaigns** form, and the **User Calendar** form. Links have been added to the Tasks tab to open the **Task List** form and the **Inbox** form.

Updates to Prospects

On the **Prospects** form, use the new **County** field to specify a county for the prospect address. The new Codes tab on that form contains tax code fields.

Updates to Interactions

On the **Prospect Interactions Report** and **Sales Contact Interactions Report** forms, use the new **Sort By** field to sort by interaction date, follow-up date, entered by, or topic. We also added range fields for interaction number and date.

The **Prospect Interactions** and **Sales Contact Interactions** forms are now designed to work more like the **Sales Interactions** form.

On the **Delete Prospect Interactions** and **Delete Sales Contact Interactions** forms, we added range fields for interaction number and date. You can now add attachments when sending emails on the **Customer Interactions**, **Prospect Interactions**, **Sales Contacts Interactions**, and **Vendor Interactions** forms. New **Send Attachments** and **Send Internal Attachments** check boxes are added to those interactions forms.

System Administration

We added these features for system administrators.

Sites in a single database

We made changes to the schema and to various areas in the application to allow you to define multiple sites within a single SyteLine database. Now you have a powerful set of options for widely

distributed or very centralized management of your sites. ((If you plan to use multiple sites in a single database, SQL Server Enterprise Edition is required.))

Below is a brief list of the changes that were made. For a more detailed list of changes that you should be aware of if you are currently using a version of SyteLine previous to 9.00 with custom tables or coding, see the white paper *Coding and Schema Changes Made in SyteLine 9.00 for Multi-Site in a Single Database*.

- **Schema changes:** Tables that contain site-specific data now include a `site_ref` column, and the names of those tables were changed to include a `_mst` suffix. For example, the item table is now named `item_mst`. A view with the original table name, filtered to each specific site, is placed over the table, so that the context is always set to the current site's data. The views allow existing coding to continue to work without changes. However, if table truncations and table indexes are used in your custom code, then changes to your code are required.
- Most Mongoose core tables and some SyteLine tables are now shared across all sites within a single database. Most SyteLine tables are multi-site. For a list of the exceptions, see the *Multi-Site Planning Guide*.
- The **Application Schema Tables Metadata** form has two new fields, **Site Column Name** and **View Name**, to support the schema changes.
- Use the new **View Management** form to regenerate views to the tables after you make a schema change.
- The **SQL Tables** form has a new **Multi-Site** field. This field determines whether a multi-site column is defined for the base table. A multi-site column indicates that individual records in a table are not shared by every site. If a table does not include a multi-site column, then all sites in the same database share the same records in the table. In base SyteLine, the multi-site column is named `site_ref`.
- **Replication:** Replication of inserts to sites in the same database is handled in the Instead Of Insert triggers generated by **Trigger Management**. Replication trigger regeneration therefore also regenerates Trigger Management triggers. Previously, the generated Instead Of Insert triggers played no part in replication.

The **Replication Categories** form has a new **Retain Site** field. If this field is not selected for a table, then replication triggers change the `site_ref` of the target site to the target site value and set the RowPointer column value as a new GUID.

Also, the To object name from Replication Objects is now supported in transactional replication. Previously, it was only supported in non-transactional replication.

- **Initializing Connections:** SQL Server connections require an initialized context in order to know what user name is associated with database operations. Because most existing tables have been replaced with views filtered by site, the SQL server connection must initialize context and set the site; otherwise, the connection will fail to return data in most cases.

The **Configuration Manager** utility now includes a Site field. Use this field to set the site name, which is then stored in the configuration XML file. If no site is specified, then when a user session is initiated, SyteLine checks to see if there is only one record in the `parms_mst` table. If so, then it defaults a site value, allowing the session to initiate without specifying a site.

Any third party code that makes SQL server connections must include a way to set the site when initializing context.

- **APS:** Changes to support this enhancement include:
 - A new field, AlgSyteLineSite, was added to the MiscIn table in the Planner in-memory database. The bulk reload and gateway processor initialization passes the new site value into those programs. The Planner uses this site name when connecting to the SyteLine SQL database.
 - The Planner was updated to support the new site column and table names used in the multi-site database scheme. The use of TRUNCATE to clear Planner output tables in the SyteLine application database was replaced with calls to a stored procedure.
 - The Scheduler now requires a Site parameter when it is invoked.
 - The ConfigGateway and ConfigServer utilities now include a Site parameter.
 - Creation, deletion, and copying of alternatives in the **APS Sites and Alternative Management** form was modified to take into account alternatives from multiple sites within a database.
- **UETs:** Running Impact Schema on UETs regenerates the view to the base table. UET fields on forms are included in the view if the base table includes them.
- **Background Tasks:** A new background task substitution parameter, BG~SITEID~, was added. The parameter is replaced with the value of the current site when the background task is submitted.
- **Session Management:** A new **Site** field on this form tells which site each session is logged into.
- **Named licenses:** Previously, when a named user license key was in place, a user could log in only once per database. Now each named user can log in once per shared site. This applies to shared sites in a multi-site database (where multiple sites reside in the same database), or shared intranet licensed sites (where sites are in different physical databases, but share one license in a master site). The login counts as one license token against each module to which that user is assigned.
- **Audit Log:** Several audit log messages now show the configuration name in the message.
- **Events:** The **Event Handlers** form now includes an **Applies to Sites** field that you can use in cases where you want an event handler to execute only when the event is triggered at certain sites. This new field also displays on the **Event Handler Revisions** form.
- **Process default values:** Several values that were formerly specified as process defaults, which apply to an entire database, are now specified in site-specific forms. The **Report Output Folder** is now specified on the **Sites/Entities** form. The **Tenant ID** is now specified on the **Sites/Entities** form and/or **Intranets** form; if the value is not specified in either form, the default of 'infor' is used.

Creating dimensions and attributes for extended data analysis

You can now define dimensions and attributes for your SyteLine data. For example, financial personnel might want to use multiple dimensions to analyze the Chart of Accounts and posted ledger transactions. Some dimensions (Customer, Item, and Vendor) and attributes for those dimensions have been predefined, but the system administrator can create additional dimensions and attributes, or modify the predefined versions.

Use the new **Dimension Table Joins** form to link the appropriate primary and secondary tables to the base table (in the example above, the chart table). You can then use the **Dimension Attributes**

form to add columns from the base, primary and secondary tables to the list of attributes for a dimension. (An attribute can be any valid SQL statement used in a SELECT clause within the scope of the table joins.) Use the **Dimension Functions** form to specify constants, SQL functions and math operands that can be used to add calculated fields to the list of attributes. The new **Dimension Attributes Query** and **Dimension Table Joins Query** forms are also available.

For more information, see the help topic [Creating Dimensions and Attributes for Extended Data Analysis](#).

Using Form Sync and Form Control in a Cloud deployment

Within the SyteLine application, we added **Form Sync** and **Form Control** forms that perform most of the functions that were previously available only in the Form Sync and Form Control standalone utilities. This allows administrators in Cloud deployments to use these functions.

Note: The original Form Sync and Form Control standalone utilities are still available. Due to the transactional nature of using the IDORuntime service to execute SQL statements directly, the existing client versions of these utilities are still required to perform some functions.

In the **Form Control** form, the runtime and master are based on the configuration you are currently logged into, and your ability to use SourceSafe is limited by the IDORuntime Service capabilities.

In the **Form Sync** form, you can select both the source and target configurations from the form; your choices for synchronizing non-base level forms are limited to either keeping the customized version or replacing it with the new base level version; and you cannot edit objects such as event handlers or form scripts to merge the two. The **Form Choices** and **Form Sync Log** forms were also added to support this utility.

For more information about how the Form Sync and Form Control utilities are used within the application, see the help on these forms.

Form Control utility updates

For situations where you have a new form or object that you have not yet checked in to the master database, there is now an option to display these, along with an indication that they are new, in the display list on the My Checked Out Objects tab. You can also then check the new forms and objects in from the same list on that tab. In addition, the LockedBy status of a form or global object is now supported for global objects, as well as forms. In addition, LockedBy is now more strictly enforced.

Form Control now recognizes bitmaps and drag images that are in the Images table and add them as global referenced objects. Use the new Utilities tab to synchronize the Device Types information between the development and forms databases. Forms can have multiple layouts for different device types, for example, phone vs. tablet vs. laptop. This data should change rarely; however, if you make a change in either the development or the master forms database, you must synchronize the changes between the databases. Otherwise, Form Control displays a warning message during operations if it detects that the Device Type data is not synchronized.

To handle the new form inheritance feature, Form Control maintains the Base Form Name when checking in or out a form that inherits from another form.

Themes are treated as a new global object. All pertinent styles and attributes are copied when working with a Theme object.

Form Sync utility updates

Form Sync now handles images as a global object type. The Compare Objects tab allows quick comparison of hashes for images, comparison of the Base64 encoded blob or visual comparison of the images. Form Sync now warns you of conflicting overrides or conflicting customized versions of device types. Form Sync allows you to keep or prompt for ImageSize, Tiles, Themes, DragImage and drag events separately.

To handle the new form inheritance feature, Form Sync verifies that BaseFormName is consistent between customized and vendor forms.

Form Sync also now warns if there are any differences between a theme and its underlying objects (styles and attributes), and it lets you keep the customized theme or replace it with a new vendor theme.

Named users and shared sites

Previously, when a named user license key was in place, a user could log in only once, even if multiple sites were shared through the master site shared users and intranet licensing. Now, in that situation, a user can log in once per shared site.

Change to organization of User Authorization Report

We changed the way the **User Authorization Report** can be filtered and organized, so that it is more useful to system administrators and auditors. Now, user and group authorizations for forms and IDOs are grouped together by user ID. Row authorizations are grouped together by user ID and group name, and are sorted by IDO and group name. In addition, new options on the form let you choose the specific forms or IDOs you want to see in the report. You can easily see and compare all authorizations for a single user in the same section of the report. For example, this makes it easier for you to determine whether a user has multiple permissions set differently for the same form, through different groups to which the user is assigned.

New link on System Administrator Home

A link to open the **Recommended Patch Analysis** form has been added to the **System Administrator Home** form.

Saving user record cap overrides

User-defined record cap overrides are now allowed to persist (be saved) from one session to the next, so users do not need to reset preferred record caps every time they log in. System administrators can use the new process default **Disable record cap override save** to enable or disable this feature, which is enabled by default. For more information, see the help topic [Default Name, Process Defaults](#).

Automatic reconnection of services

Session recovery is now available in Mongoose services when an exception happens in a Load Collection or Invoke method during an ongoing open session. This allows the services to resume processing if there is a temporary interruption in communications with the IDO layer.

Initialize all parameter files at once

On the **Replication Categories** form, we added a new default category, Initialize _All Parameters. We also added a new **Replication Category** field and a **Select By Category** button to the **Update _All Tables** form. During replication setup, you can select this category and click the button to quickly select all of the parameter tables. Previously this was a manual step where you had to select each parameter table separately, which was time-consuming and error-prone. For more information, see the section on Setting Up Replication in the *Multi-Site Implementation Guide*.

Process defaults reorganization

Process default names have been updated for a more consistent presentation in the interface.

New minimum timer interval

The Timer now allows you to set an interval as small as one second. The previous minimum, other than zero, was five seconds.

SyteLine Mobile

We updated all of the mobile forms with new icons, and added these features.

Multi-site view

Users of mobile forms can now view data from multiple sites. Because of the implementation used behind the scenes, two access methods are used. Some forms include a Site drop-down where users can switch sites to display data from a different site. Other forms include a drop-down with a Switch Site link. Select a configuration from the drop-down list and click Switch Site to log out of the current configuration and log into another configuration, while preserving the current form and filter, if applicable. A login window is displayed, unless the user is set up for Workstation login; in that case, the switch happens seamlessly. The Site and Switch Site components are not visible when you open the form from a standard client.

Sign off

All mobile Home pages now include a Sign Off button.

Changes to IT and Production Supervisor pages

The IT Home page and Production Supervisor Home page now use icons, similar to those used in the Executive, Controller, and Sales home pages. All other IT and Production Supervisor mobile forms now include a toolbar instead of Next/Home/Prev links.

Larger toolbar buttons

Forms designed to work with mobile devices now use larger toolbar buttons, to accommodate finger taps.

SyteLine Portals

General information about SyteLine portal updates is listed here. For more details about portals, see the *Portal Setup and Administration Guide*.

Multi-Site Support for Portals

The Customer, Vendor, and Reseller portals can now connect to multiple sites in SyteLine, to display and update data from these sites. To set up this feature, configure the primary site in Portal Manager and create a portal site group in SyteLine. The primary site is where key data is maintained by SyteLine users, such as items and item categories. The portal site group includes the primary site and all other sites whose information should be available to the portals.

We also provide a **User Account Management Utility** page in the Customer, Vendor, and Reseller portals. Administrators use this page to create portal user accounts across all sites in the portal site group, copy portal-enabled user accounts from the primary site to all other sites, or troubleshoot problems with portal user account setup.

Customer Portal enhancements

We made these enhancements to the Customer Portal in this release:

- An updated user interface with new graphics and slide-out navigation menus.
- Online ordering, so customers can browse your catalog, add items to an order, submit orders online, check order status, track shipments, and more.
- Credit Card Interface (CCI) support. If you license and activate the CCI optional module and CCI Gateway software, your customers can pay by credit card for online orders.
- Shipping carrier support, so customers can see shipping charges before they submit an order.

These new SyteLine forms were added for the Customer Portal:

- **Portal Administrator Home:** Portal administrators can monitor and manage a wide variety of portal information from a central location. This form displays portal statistics, metrics, and alerts related to executed portal events. It also provides links to associated SyteLine forms for quick access.
- **Portal Parameters:** Parameters for the SyteLine portals are specified on this form.

- **Address Tax Code Defaults:** This form is used to enter default tax codes by location (country, state, and zip) for new customer and vendor records. You can enter tax codes all at once or as needed to do business with customers and vendors in different locations. Although this form has been added as a Customer Portal feature, it can be used for all new customer and vendor records added in SyteLine or the portal.
- **Portal Pricing Pre-Activation, Portal Pricing Review, and Portal Pricing Activation:** These forms are used to set up and activate prices to be displayed with items in your Customer Portal product catalog.
- **Ship Method Groups, Ship Methods, Multi-Lingual Ship Methods, and Freight Charge Methods:** These forms are used to set up and maintain shipping carrier functionality in Customer Portal and SyteLine.

These SyteLine forms were updated:

- **Customer Users:** A new **Can Create Users** setting allows selected Customer Portal users to create and manage additional users related to their customer account.
- **Customer Ship-Tos:** A new **Ship Hold** field is selected automatically if someone registers to use your Customer Portal but a tax code is not available in SyteLine for their shipping address.
- **Customer Credit Cards:** If credit card information on this form originated from the portal, the **Portal User** field automatically displays the customer's user name.
- **Customer Orders:** When an order is paid by credit card using the Customer Portal, a new **Paid By Credit Card** field is selected automatically on this form. A new **Portal Order** field is selected automatically on the **Customer Orders** form when an order is entered using the Customer Portal. The new **Ship Hold** field is selected automatically if someone registers to use your Customer Portal but a tax code is not available in SyteLine for their shipping address.
- **Currency Codes:** The **Active For Customer Portal** field has been added to this form, so you can activate selected currency codes for use on the portal.
- **Ship Via Codes:** The **Active For Customer Portal** field has been added to this form, so you can activate selected ship via codes for use on the portal.
- **Items: Portal Pricing Enabled and Portal Pricing Site** fields have been added to the SyteLine **Items** form to support item pricing setup. A new Pictures tab has been added, so you can load and arrange alternate views of product pictures for display on the Customer Portal.
- **Item Categories:** A new **Banner Picture** field allows you to load pictures to be displayed in the banner on Customer Portal pages.
- **Estimates:** A new **Portal Order** field is selected automatically on this form when an estimate is entered using the Customer Portal.
- **Prov/State:** A new **Country** field allows you to specify a country code that can be then validated when Customer Portal users enter state and country combinations.
- **Pick Workbench and Pack Workbench:** The **Portal Order** field is included on these forms to indicate orders created on the portal.

These new portal pages were added to the Customer Portal:

- The Account Management page, where your customers can maintain shipping, payment, and profile information. Customers with permission can also add new customers to their own user account.

- The Place Order page, for reviewing and submitting orders. It includes Quick Order functionality for business-to-business customers, and it prompts visitors to register and log in before submitting an order.
- The Contract Orders page is provided for business-to-business customers to add contracted items to an order.
- The Service Incidents, Unit Registration, and Service Knowledge Base pages. If you have SyteLine Service installed and running, portal users can access these pages to enter service incidents, register units, and check the knowledge base for service related information.

In addition to the new user interface, these updates were made to portal pages:

- The Product Details page can have options to zoom in or out on product pictures, a QR code for sharing the page using a cell phone, and a link to open a pricing options form if there are break prices for the item. If you also use SyteLine APS, the expected ship date for an order can be displayed.
- Item prices are displayed on the Products, Product Details, Featured Products, Top Sellers, Contract Order, and Place Order pages.
- Fields for finding records by site are included on most pages in multi-site implementations.

These new SyteLine publications for the Customer Portal were added:

- PortalOrderRequestDateBeforeDueDateAlert
- NewCustomerCreatedAlert
- PortalOrderReceivedAlert
- TaxCodeEvaluationAlert

Vendor Portal enhancements

Updates to the Vendor Portal include an updated user interface and multi-site support.

New Reseller Portal

SyteLine 9.0 includes the new Reseller Portal, which has been developed for your customers who are also set up as resellers in SyteLine. In addition to new reseller-specific portal pages, the Reseller Portal includes all of the pages from the Customer Portal, many with additional functionality for reseller tasks. For example, Reseller Portal users can place orders, check order status, and look up estimates for themselves or for their customers by posing as a selected customer.

These new SyteLine forms were added for the Reseller Portal: **Unit Registration Posting** and **Search for Unit Registration Posting**.

These SyteLine forms were updated:

- **Salespersons**
- **Vendors**
- **Customers**
- **Service Parameters**
- **Partners**

These new pages are included with the Reseller Portal:

- Service Orders
- Service Order Transactions
- Customers
- Commissions Due

These new SyteLine publications and workflow event handlers were added with the Reseller Portal:

Event Handlers:

- Notify Portal Incident Created
- Notify Portal SRO Material Transaction Created
- Notify Portal SRO Miscellaneous Transaction Created
- Notify Portal SRO Labor Transaction Created
- Notify Portal Unit Registration Created
- Notify Portal Unit Registration Approved
- Notify Portal Unit Registration Rejected

Publications:

- PortalIncidentAlert
- PortalSROMatTransactionAlert
- PortalSROMiscTransactionAlert
- PortalSROLaborTransactionAlert
- PortalUnitRegistrationAlert

Portal architecture enhancements

The portal architecture includes these enhancements:

- Media-rich user interface, including video, audio, QR codes and bar codes, retina-ready images, touch screen swipe scrolling, embedded PDFs, Google maps, and Fusion charts and gauges.
- Tools for user interface and logic, including client and server scripting in Microsoft Visual Studio, full Intellisense descriptions on all APIs, and automatic tracking of modifications to keep them separate from Infor code, which eliminates conflicts during patches and updates.
- Data flexibility, with SyteLine, SharePoint, Microsoft SQL, and Oracle data sources. A multiplexer automatically merges data from multiple sources without code.

Portal Manager enhancements

The Portal Manager includes these enhancements:

- Real-time portal client and server diagnostics
- Centralized portal configuration
- Version control

- Content development features, including style families, user-defined styles, and access to a new in-browser layout editor for page customization.

SyteLine Optional Modules

We made many changes to optional or "add-on" modules.

Included in base SyteLine

These former add-on products that were separately licensed are now incorporated into base SyteLine and are now accessed with standard SyteLine licensing:

- [Point of Sale \(POS\)](#)
- [Return Materials Extensions \(RMX\)](#)
- [Outside Process Management \(OPM\)](#)

Click on the links above to see overview information about the new features.

Installed with SyteLine but with a separate license

These products still require a separate license but are now installed with SyteLine:

- China Localization
- Credit Card Interface
- SyteLine Service
- Japan Localization
- Mexico Localization
- Plant Maintenance
- Printing Industry Pack
- Tax Interface
- Thailand Localization
- Workbenches Suite

Help for these modules is now available from the SyteLine Help Contents > Optional Modules.

Optional Modules form

This new form lists the licensed optional modules that are available by site. A system administrator must use this form to enable the base SyteLine features of optional modules for a specific site, after the modules are licensed for the database. For more information, see the *Licensing* guide, section on Licensing and Enabling Optional Modules.

China localization updates

The China localization is now installed with base SyteLine but requires a separate SyteLineCN license. The forms are now included in the new China Country Pack authorization group.

Japan localization updates

The Japan localization is now installed with base SyteLine but requires a separate SyteLineJP license. The forms are now included in the new Japan Country Pack authorization group.

Some forms that were in the previous version of the localization were removed, and the relevant fields were added to base SyteLine forms. On the **Customers** form, new fields are: **Consumption Tax Header Line Method** and **Consumption Tax Round Method**. On the **Accounts Receivable Parameters** and **Order Invoicing/Credit Memo** forms, the **Invoice Type** field was added, allowing you to choose a Standard or Japanese invoice.

Mexico localization updates

The Mexico localization is now installed with base SyteLine but requires a separate SyteLineMX license. The forms are now included in the new Mexico Country Pack authorization group. Some forms that were in the previous version of the localization were removed, and the relevant fields were added to base SyteLine forms.

These fields were added to existing forms:

- On the **Bank Reconciliations** form, the **Reconciled Date** and **Transferred VAT** fields were added.
- On the **Chart of Accounts** form, the new fields are: **Apply For IETU**, **Deduction Percent**, **DIOT Transaction Type**, and **IETU Classification**.
- On the **Countries** form, the **Nationality** and **ISO Country Code** fields were added.
- On the **Recurring Voucher Distribution** form, the new fields are: **Tax Reg Num**, **Tax Reg Num Foreign**, and **Vendor Name**.
- On the **Tax Codes** form, the new fields are: **Cash Basis**, **DIOT Rate**, and **Retention Basis**.
- On the **Vendors** form, the **Tax Reg Num Type** and **Vendor DIOT Type** fields were added.
- On the **Voucher Adjustment Distribution** form, the new fields are: **DIOT Transaction Type**, **ISO Country Code**, **Tax Reg Num**, **Tax Reg Num Foreign**, **Tax Reg Num Type**, and **Vendor Name**.

These new forms were added:

- **Mexican DIOT Report**
- **Mexican IETU Report**
- **Mexican DIOT/IETU Voucher Distribution Adjustments**
- **Mexican SAT Parameters**
- **Mexican VAT AP Transfer Utility**
- **Mexican VAT AR Transfer Utility**
- **Mexican VAT AR/AP Transferred Report**
- **Mexican VAT Transfer Detail Distribution Adjustments**

Note that the **Electronic Invoice for Mexico** is still downloaded separately with the country pack.

Thailand localization updates

The Thailand localization is now installed with base SyteLine but requires a separate SyteLineTH license. The forms are now included in the new Thailand Country Pack authorization group. Some forms that were in the previous version of the localization were removed, and the relevant fields were added to base SyteLine forms.

These fields were added to existing forms:

- On the **Fixed Asset Generate Depreciation Calculation** form, the **As of Date** and **Increment Date** fields were added.
- On the **Pack Confirmation** form, the new fields are: **Carton Prefix**, **Dimension/Size**, and **Measurement**.
- On the **Purchase Order Receiving** form, the **Vendor Invoice Num** field was added.
- On the **Shipment Master** form, the new fields are: **FOB Point**, **From Shipping Port**, **Item Category**, and **To Shipping Port**.

These new forms were added:

- **Currency Revaluation Report**
- **Input VAT Report**
- **Inventory Month End Process**
- **Petty Cash Check Printing/Posting**
- **Petty Cash Payments**
- **Petty Cash Payment Distributions**
- **Petty Cash Payment Transaction Report**
- **Petty Cash Payment Transaction Report (Reprint)**
- **Petty Cash Posting**
- **Petty Cash Quick Payment Application**
- **Petty Cash WHT Information Maintenance (after posting)**
- **Void Petty Cash Posted Payments**
- **Withholding Tax Certificate Report**
- **Withholding Tax Certificate Report (Reprint)**
- **Withholding Tax Details Report**
- **Withholding Tax Details Report (Reprint)**
- **Withholding Tax Information**

Credit Card Interface updates

The Credit Card Interface, which was formerly a separately installed add-on product, is now installed as part of SyteLine. However, a SyteLineCC license is required to access the forms. Information about the forms is included in the SyteLine online help.

Use the Credit Card Interface to bill a customer's credit card through a third-party credit card processing service to accept credit cards for payment. The credit card is authorized for validity when an order is placed, but it is not charged until the order is shipped and the invoice is posted. During the invoice posting process, if the credit card charge is successful, the system automatically posts and applies the payment to the applicable invoice.

The interface communicates with a Gateway provider such as Intrix or TGate, which in turn communicates with the credit card processing company such as Visa or Mastercard. (See the *Credit Card Implementation Guide* for a list of supported Gateway options.) To preserve security, this application does not store any credit card information; it only stores a transaction number that links to the Gateway provider's application.

These forms were added to SyteLine but can only be accessed if the site is licensed for the Credit Card Interface:

- **Credit Card Interface Parameters**
- **Credit Card Shipping Authorization Utility**
- **Credit Card Transactions**
- **Customer Credit Cards**
- **Credit Card Payments**

These forms now include a **Pay with Credit Card** button:

- **A/R Posted Transactions Detail**
- **A/R Posted Transactions Summary**
- **Customer Orders**

In addition, the **Distributions** and **Quick** buttons on the **A/R Payments** form are disabled if the site is licensed for the credit card interface and the A/R payment is a credit card payment.

For more information, see the help topic [About the Credit Card Interface](#).

Printing Industry Pack updates

The Printing Industry Pack is now installed with base SyteLine but requires a separate SyteLinePP license. The forms are now included in the new PP Ind Pack authorization group. For more information, see the help topic [About the Printing Industry Pack](#).

SyteLine Service updates

The product name was changed from Infor Field Service-Plus (FS-Plus) to Infor SyteLine Service. We added these new license modules: SyteLineFSP, SyteLineFSP_MS (multi-site), SyteLineFSPM (Plant Maintenance), SyteLineFSPM_MS (Plant Maintenance multi-site), and SyteLineFSP_DC (data collection). The forms in the SyteLine Service optional module, and the SyteLine Service-dependent features in base SyteLine, are assigned to one or more of those licenses.

These replication categories were added to base SyteLine: SRO Copy, Global Incident, Global Service History, Global Units, and Global Scheduling of Shared Partners.

These new default authorization groups were added to SyteLine to include the SyteLine Service forms: SyteLine Service, SyteLine Service Outlook, FS-Plus Sched Public Profiles, and FS-Plus Sched Public Filters.

An additional journal, FS Dist, was added.

The Units forms that were previously in SyteLine Service are now included in base SyteLine. See the [Manufacturing](#) section of this topic for more information.

These form names were changed:

Field Service-Plus	SyteLine Service
Event Codes	Incident Event Codes
Insert Incident Information	Incident Quick Create
Service Inspection Measurement Types	Inspection Measurement Types
Service Inspection Section Codes	Inspection Section Codes
Service Inspections Setup	Inspections Setup
Service Inspection Tasks	Inspection Tasks
Service Inspection Types	Inspection Types
Service Approval Console	Inspector Workbench
Partner Expense Report	Miscellaneous Expense Report
Multi-Site Sro Copy	Multi-Site Service Order Copy
Reimbursement Tax Detail	Partner Reimbursement Tax Detail
Activities	Service Activities
Schedule Appointments	Service Appointments
Appointment Status Codes	Service Appointment Status Codes
Appointment Status History	Service Appointment Status History
Appointment Types	Service Appointment Types
Annual Contract Renewal Listing Report	Service Contract Annual Renewal Listing Report
Contract Invoice Listing	Service Contract Invoice

	Listing
Contract Invoicing	Service Contract Invoicing
Contract Item Availability	Service Contract Item Availability
Contract Lines	Service Contract Lines
Contract Maintenance Schedules	Service Contract Maintenance Schedules
Contract Profit Analysis Report	Service Contract Profit Analysis Report
Rental Contract Agreement	Service Contract Rental Agreement
Contracts	Service Contracts
Contracts Query	Service Contracts Query
Contract SRO Generation Utility	Service Contract SRO Generation Utility
Contract Status Codes	Service Contract Status Codes
Contracts To Be Invoiced Report	Service Contract To Be Invoiced Report
Customer Contacts	Service Customer Contacts
Contact Query	Service Customer Contacts Query
Item/Whse Replenishment	Service Item/Warehouse Replenishment
Operation Codes	Service Operation Codes
SRO Planned v. Actual Report	Service Order Planned v. Actual Report
Automatic SRO Generation	Service Order Automatic Generation Utility
SRO Billing Console	Service Order Billing Console
SRO Close Utility	Service Order Close Utility
SRO Labor Costs	Service Order Labor Costs
SRO Labor Data Collection	Service Order Labor Data Collection

SRO Material Data Collection	Service Order Material Data Collection
SRO Drop Ship To	Service Order Drop Ship To
Service Order Estimate	Service Order Estimate Report
SRO Outstanding Exchanges Report	Service Order Outstanding Exchanges Report
SRO Exchanges To Be Shipped Report	Service Order Exchanges To Be Shipped Report
SRO Inspection Report	Service Order Inspection Report
SRO Invoice Listing	Service Order Invoice Listing
SRO Invoicing	Service Order Invoicing
SRO Labor Accounts	Service Order Labor Costs
SRO Labor Clock Off	Service Order Labor Clock Off
SRO Outstanding Loaners Report	Service Order Outstanding Loaners Report
SRO Loaners To Be Shipped Report	Service Order Loaners To Be Shipped Report
SRO Margin Analysis Report	Service Order Margin Report
SRO On Hold Report	Service Order On Hold Report
SRO Operation Code Cost Report	Service Order Operation Code Cost Report
SRO Packing Slip	Service Order Packing Slip
SRO Packing Slip Generation	Service Order Packing Slip Generation
SRO Packing Slip Maintenance	Service Order Packing Slip Maintenance
SRO Picklist Report	Service Order Picklist Report
SRO Planned Material Requirement Report	Service Order Planned Material Requirement

	Report
SRO Shipment Listing	Service Order Shipment Listing
Quick SRO Create	Service Order Quick Create
SRO Labor Rates	Service Order Labor Rates
SRO Status Report	Service Order Status Report
SRO To Be Invoiced Report	Service Order To Be Invoiced Report
SRO Transaction Posting	Service Order Transaction Posting
SRO Transactions	Service Order Transactions
SRO Transactions Additional Filters	Service Order Transactions Filters
SRO Posting Information	Service Order Posting Information
SRO Types	Service Order Types
SRO WIP Valuation Report	Service Order Wip Valuation Report
SRO Working Status History	Service Order Working Status History
SRO Work Order Report	Service Order Work Order Report
Service Outlook Integration Parameters	Service Outlook Integration Parameters
Sync Enabled	Service Parameters Sync Change
Incident Priority Codes	Service Priority Codes
Reason / Resolution Search	Service Reason/Resolution Search
Color Coding	Service Schedule Color Coding
Schedule Conflicts	Service Schedule Conflicts
Dispatch Scheduling	Service Schedule Dispatch

Preview Email	Service Schedule Email
Label Setup	Service Schedule Labels
Multi-Day Scheduling	Service Schedule Multi-Day
Multi-Day Scheduling Preview	Service Schedule Multi-Day Preview
Scheduling Local Appointments Filters	Service Schedule Local Appointments Filter
Service Scheduling Parameters	Service Schedule Parameters
Scheduling User Permissions	Service Schedule Permissions
Scheduling Filters	Service Schedule Profile Filters
Display Profiles	Service Schedule Profiles
Schedules	Service Schedules
Serials	Service Serials
Incident Status Codes	Service Status Codes
Contract Service Types	Service Types

The EMailer Service previously used in FS-Plus is replaced by calls to the Application Event System in SyteLine Service.

Fields and buttons were modified or added on these base SyteLine forms. New fields and buttons are disabled unless the user has the appropriate SyteLine Service license:

- **A/R Posted Transactions Detail:** The **Source** button now displays the appropriate service orders form if the invoice was derived from a service order.
- **Availability Results:** Service orders are included in the results.
- **Customer Order Blanket Releases, Material Transactions, Material Transactions Report, Delete Material Transactions, Job Orders, Order Shipping, Project Resources, Purchase Order Lines, Purchase Order Receiving, Purchase Order Requisition Lines, Transfer Order Lines, Transfer Order Receive:** SRO is now listed as a source or destination reference type.
- **Customer Document Profile:** Contract and Service-related tasks are now included in the Task Name list.
- **Customer Order Lines, Customer Order Quick Entry, RMA Line Items:** New Incident field.
- **Invoice Register Report, Invoice Register by Account Report:** SRO and Contract are included as source types for invoices.
- **Items:** The Actions menu has new options for List Service Order Lines and List Service Order Transactions.

- **Item/Warehouse:** A Service Item/Warehouse button was added.
- **Purchase Requirements Report:** SRO Status fields were added.
- **Total WIP Value By Account Report:** SRO Operation Status and SRO range fields were added.
- **Warehouses:** The Service Warehouse check box was added.

In addition, many names of tables, IDOs, stored procedures, background tasks, and report (RDL) files were changed to be standardized for SyteLine.

Tax Interface updates

The Tax Interface is now installed with SyteLine but requires a separate **SLTaxInterface** license to use. The names of forms, IDOs, background tasks, and so on have been standardized for SyteLine. A new Tax Interface authorization group was added that includes the forms specific to the interface.

These buttons and fields on base SyteLine forms are now enabled when a site is licensed for the Tax Interface; otherwise they are displayed but disabled:

- **Calculate Tax** button on **Customer Orders** and **Estimates** forms.
- **Pref Geo Code** field and **Validate** button on **Customers**, **Prospects**, and **Customer Ship Tos** forms.

Workbench Suite updates

Some of the tools formerly in the Workbench Suite were incorporated into the core Mongoose toolset: DataViews, Critical Numbers, and DataSearch. For more information about how these tools are used now, see the [General](#) section above and [Mongoose Customization and Development](#) section, below.

The Workbench forms, Navigation forms, and prebuilt sources for critical numbers, DataViews, and DataSearch are only available in the SyteLine Workbench Suite. The Workbench Suite is now installed with base SyteLine. To access either the new core Mongoose tools or the SyteLine-specific forms and sources, you must have a SyteLineWB license. Two new authorization groups separate the operational use of critical numbers and DataViews from the administration. The Workbench User group can view critical numbers and DataViews, and the Workbench Administrator group can modify and create new critical numbers and DataViews. Some Workbench forms are also included in the Service group.

Mongoose Customization and Development

We added these customization and development features.

Business Object Document (BOD) integration

These areas of BOD integration were improved:

- **Inbound processing of insert and delete requests:** Previously, the system treated all inbound BOD action requests as updates. This required developers who wanted the system to process insert or delete requests to handle those requests with custom save methods. Now, the system automatically recognizes insert and delete requests and submits them for processing as such automatically, eliminating the need for custom save methods.
- **BOD keyword resolution:** The BODNOUN() and BODVERB() keywords are now resolved by the system before the custom save method is executed. This means that developers no longer need to ensure that the custom save method translates these keywords to parameters within the method.
- **Generating replication document (BOD) scripts:** Use the new **Repl Doc Script Generator** form to generate a replication document script in a specified folder and then, optionally, check the script into a source code control system. This is useful if you create custom replication documents that you want to include during system upgrades. The check-in and checkout process is similar to the one used for extension classes in the **IDO**s form.
- **Send BOD event action:** You can use the new event action, Send BOD, to programmatically create and send a BOD to the **Replication Document Outbox** from an event defined in the application event system. Two new forms were created to help users accomplish this: the **Event Action Send BOD** form, which is used to send the BOD during run time; and the **BOD Templates** form, which is used to register BOD templates for use with the **Event Action Send BOD** form.
- See also **Event System handling of received BODs**, below.
- **P keyword in BODs:** You can now use the P keyword within elements and literals in outbound BODs for properties that need to be added to the IDO collection query. At runtime, the keyword in the literal string is replaced with the value of the property.

DataViews

Click the new **DataView** button on the toolbar to open the **DataViews** form. With DataViews, you can view, parse, sort, group by, and filter data from the application within user-definable views and layouts. The DataView setup is similar to an Excel spreadsheet, displaying data in columns. As with form personalization, the DataView structure supports user, group, and site level layouts. You can export the DataView as a report to a printer, XPS file, or Excel. Additionally, you can drill down to the related form by clicking **Details** on the right-click context menu of a DataView. For more information, see the help topic [About DataViews](#). To use the DataViews features, you must be assigned a SyteLineWB (Workbenches) license.

To support DataViews, the StdCurCompSearch event and these form component scripting APIs were added: DataViewGetScopeFilter(), DataViewRefresh(), DataViewDrilldownLoadDetailForm(), and DataViewDrilldownRunSubDrilldown().

Data Maintenance Wizard for one-step table, IDO, and form creation

In Design Mode, click **Form > Definition > New Data Maintenance** to use a wizard that helps you create a database table, an IDO with its properties, and (optionally) a form all at one time. With the wizard you can complete simple, two-dimensional forms, for example with no containers such as form pages or notebooks. For more complex forms, use this wizard to build the basics of the table

and IDO, and then use the **New Form Wizard** to perform additional work on the form, for example to add subcollection properties, etc.

After you create the data definitions, you can choose to create a form and/or a script from the data. You can also save your definitions in a template (XML). Use this option to save your changes periodically during the definition, to complete the definition later, or to use it again for future forms. When you select a property class, the wizard automatically sets the Column Data type (SQL data type) and the Mongoose data type. When you define properties with user-defined types, the wizard simply sets that user-defined type and nothing else. The wizard includes help messages that display when you hover over areas of the dialog.

Form inheritance

You can now create a form that inherits components, variables, etc., from another form. This can be useful for forms intended for use as styled web pages, where a template defines the base styling and other forms inherit from it. The **New Form Wizard (Form > Definition > New)** now has an option to extend an existing form - just specify the new form name and the name of the form from which it is derived. When you edit the new form in design mode, a new **Base Form Name** property specifies the name of the form on which your new form is based. By default, all components, event handlers, variables, and scripts are inherited from the base form. Inherited components, event handlers and variables are read-only by default, but you can set the new property **From Base Form** to False and then edit them as needed. The **Edit Form Script** dialog box has a new Base Script(s) tab where you can view the scripts used in the base form. We also added a filtering feature to the **Event Handlers** list dialog box.

Other New Form Wizard improvements

The ways you can select multiple properties are enhanced on the **Properties Selection** page. The **Properties Definition** page now lets you create or set string captions for each property. A container and the component's sequence within that container can be set for each property. Definition of form pages and notebooks is more intuitive. Additional form types of detail-only and tile were added. The wizard includes help messages that display when you hover over areas of the dialog.

Custom application messages

A new **Message Num Prefix** field on the **General Parameters** form lets you specify a prefix to use with your custom messages, so that you can easily identify your company's messages and distinguish them from system messages. To create and maintain system and custom messages, see the help topic [About Message Construction](#).

FusionCharts

All existing SyteLine graphs on forms were converted to use the FusionCharts tool. Two new Design mode controls were added to the toolset to support FusionCharts: **Chart** and **Gauge**. You can also use these controls to add custom charts or gauges to your forms. The Gauge component supports the use of critical numbers. Click events are supported at the chart and individual data plot levels (for example, column of a column chart, pie slice of a pie chart, etc). These click events can be handled by specifying a URL to launch or a JavaScript function to execute. (The old graphing tool is still

available for backward compatibility.) For more information see the help topic [Adding Charts or Gauges to a Form](#).

New options for SQL table design

The **SQL Tables** form now provides more options for creating and modifying SQL tables in the system. You can now not only add columns and primary keys, but also add and modify constraints (such as foreign key relationships and indexes), set data types, and create user-defined data types.

Store images in the Forms database

You can now store image (graphics) files in the Forms database, so they are more easily accessible from a "cloud" or remote installation. Design Mode now provides a new Edit menu option and an Images dialog box.

Application Event Service

We updated these features:

- **Event System handling of received BODs:** Now various actions can be performed in the Application Event System in response to the reception of any inbound BOD. When an inbound BOD is received, a new **BodOnReceive** framework event is generated. You can define event handlers based on the event, and then have the handlers execute before or after normal framework processing, based on some filter criteria. To support this, the **Applies to Objects** field on the **Event Handlers** form now allows you to enter a BOD verb-noun pair. The modal **Event Action Set Values** form has new **Values from BOD** fields that apply only to the BODOnReceive event. The new forms **Event Action Set Variables from BOD**, **Event Action Extract XML Collection**, **Event Action Select XML Template**, and **Event Action Set Extract XML Collection** support this feature. On the **Event Action Expression Editor**, four new functions (XML2, XML3, XML6, and SUBXML) can be selected from the drop-down list. New keywords and string expressions relating to BODs are available, a new IDO method **NotifyInboundBODArrived** exists, and a new generic action type **ExtractXmlCollection** can generate a collection from an XML string.
- **New Voting tabs:** Use the new Voting tab on the Event Status and Event Handler Status forms to see the current voting status of handlers for Prompt actions. You can see how many recipients have yet to vote, how many votes are still required to reach a quorum, how long since the last vote was received, and more. This tab also includes a reminder button to reprompt recipients who have not yet voted.
- **Reply To email options:** On the Users form and the Event Action Send Email form, you can now specify "Reply To" options.
- **Improved handling of missing or invalid values:** The system no longer throws an exception when it encounters invalid or "illegal" values for PROPERTY() function references, PROPERTYMODIFIED() references, or SETPROPVALUES() keyword entries. Instead, the system returns an empty string or does nothing with the invalid value. To determine whether invalid values have been or are about to be encountered, use the new PROPERTYAVAILABLE() function before the reference, after the reference, or both.

- **Support for object export and import:** System objects such as application events, event triggers, event handlers, event global constants, and event initial states can now be exported and imported like other IDO metadata.
- **Enhancements to the user interface:** The user interface for many Event System forms was improved; for example, we now provide indicators for suspended rows, different editing modes based on audience comfort and skill, improvements to the diagram forms, a workflow library with reusable templates, and more.
- **Launching the Event Handler Status form:** The **Suspended Updates** form now has a button that allows you to launch the **Event Handler Status** form directly.

Inheritance of inline lists and validators from the property or property class

If an inline list or validator is defined on a property, that specification is now inherited by components in WinStudio that are bound to that property, unless a property class extension, component class, or component overrides the inherited list.

IDO extension class development environment improvements

We made these improvements:

- Developers working with IDO extension classes can install the Visual Studio extension **MGVSExtension.vsix** to facilitate iterative development and testing. This extension provides a Mongoose Developer Tools window where you can publish your IDO extension classes. The IDO cache can be automatically discarded after publishing.
- These events are now available to IDO extension classes, to provide more control over standard IDO behavior:
- **PreInsertItem:** Fires prior to processing each inserted item included in an UpdateCollection request.
- **PostInsertItem:** Fires immediately after processing each inserted item included in an UpdateCollection request.
- **PreUpdateItem:** Fires prior to processing each updated item included in an UpdateCollection request.
- **PostUpdateItem:** Fires immediately after processing each updated item included in an UpdateCollection request.
- **PreDeleteItem:** Fires prior to processing each deleted item included in an UpdateCollection request.
- **PostDeleteItem:** Fires immediately after processing each deleted item included in an UpdateCollection request.

For each event, the handler is called with a reference to the item that is about to be processed, or that was just processed.

- We added an **IDODataset** class for easier loading, updating, and saving of changes to collections. Previously, to load items, update them, and save them, you had to call LoadCollection to get the items into a LoadCollectionResponseData instance and copy the items to an UpdateCollectionRequestData instance in order to save them. Now, the IDODataset class is included in the IDOProtocol.dll assembly and is part of the Mongoose.IDO.Protocol

namespace. It can be used in any context where the `UpdateCollectionRequestData` class can be used: inside IDO extension classes, form and global scripts and external code using the IDO Client class library (`IDORequestClient.dll`).

- We added a new **LoadCollectionResponseData** method, `AddNewItem()`. This method adds a new item to the response, optionally initializing the record with the values specified in the `values` parameter. It returns the `IIDOItem` interface, which provides the `GetValue`, `SetValue`, and `IsPropertyIncluded` methods. `GetValue` and `SetValue` allow you to get and set property values by name rather than by ordinal position, as was required previously. `IsPropertyIncluded` will return `true` if the property is included in the result set.

New and Copy operations for IDO Properties form

Previously you had to use a wizard to create a new IDO property. Although you can still use the wizard, you can now use the normal New and Copy operations from within the **IDO Properties** form.

Critical numbers

We added critical numbers as a new data source for gauge control. You can now bind a gauge to a critical number. Critical numbers are key performance indicators (KPI) that you can use to track progress. For more information, see the help topic [About Critical Numbers](#). The critical number **Email Generation** utility now uses the application event system instead of using the external emailer service. To use the Critical Numbers features, you must be assigned a SyteLineWB (Workbenches) license.

Easier definition of component class parameters

Previously, when you specified the parameters for a component class in the Component properties sheet, you had to type a comma-delimited list into the Parameters field. Now you can optionally use the new **Edit List of Component Class Parameters** dialog box, to manage long lists of parameters, and to build parameters by selecting from drop-down lists of variable, component, and property names used in the current form.

Transparency and gradient options for backgrounds

Forms and some types of form components now offer the option to use transparency (alpha) values and linear gradients. You can save background color definitions as global variables for reuse, or you can modify the settings on an individual form/component basis.

Drag-and-drop on forms

You can now use drag-and-drop functionality between components on forms. Two new component standard event properties, `Drag From Events` and `Drop On Events`, were created to facilitate this functionality.

Updates for Web rendering

We added options to the View menu to hide or show the first (grid fields) pane and second (edit fields) pane, when they are available on a form. You can also use the hot key combinations `Ctrl-`

Shift-1 and Ctrl-Shift-2 to hide or show the panes. On a notebook component, the No Scroll option and tab foreground/background color options are now honored in browsers. The **To Excel** export option for grids is now honored in the browser. On mobile devices that are displaying a form in a Web browser, the tap-and-hold action is now treated as a contextmenu event for the target element, so the standard right-click menu is now displayed.

Support for multiple Web parts

The Send Web Container Message event type now supports the use of multiple Web Parts within a single SyteLine session.

Multi-device forms

The system now supports multiple display formats, including the standard Smart client, Web browsers, and multiple mobile devices, all from a single form. You can set which type of device should be the default display and make variations in different displays based on the type. For more information, see the help topic [About Devices and Derived Forms](#).

New IDO deletion options

This feature allows for the orderly deletion of records when the deletion involves more than one IDO. There are now three options: Restrict, Remove, and Cascade. For more information, see the help topic [IDO Deletion Rules](#).

Events posted asynchronously

The Edit Event to Generate dialog box is now enabled with the option to post an event asynchronously. Select this field to complete the current processing, and then generate the event handler.

Display images in components

With form components that allow the use of graphics images, you now have three new options to define how the image displays within the component: Fit, Fill, and Actual.

New standard event StdObjectModified

You can take action when a row in the current collection becomes modified with this new WinStudio standard event. This event is generated only when the user changes the value of a component bound to a property of the current collection or an event handler marks the row or a property modified, and the current row is not already modified. This could also occur on an auto-inserted row that becomes modified, but more typically it would be generated on a row queried using LoadCollection and then modified.

Multiple options for PROPERTY and FILTERPROPERTY functions

Previously, options for the PROPERTY event parameter function included only PROPERTY() and P(). New options include PROPERTY2(), PROPERTY3(), P2(), and P3(). Similar new options

now exist for the FILTERPROPERTY / FP event parameter function. All options behave in a way similar to their predecessors.

Set default user name

You can now set a default user name on any records created in a session without creating a new session.

Support for non-Mongoose data sources

You can now incorporate data from non-Mongoose SQL Server databases into your SyteLine application. The new **IDO Linked Databases** and **IDO Linked Tables** forms help you to incorporate data sources that do not use the Mongoose table schema.

In addition, Mongoose applications can now communicate with Oracle databases through the IDO layer. A new form, **Outrigger Profiles**, is used to define a profile for the Oracle database. The profile stored with an IDO definition is used to make an ApplicationDB object within the IDO layer for read and write operations on the table, as well as for method calls to that database. A called Oracle IDO method must be a function with a return type of integer. The standard Oracle client dlls are required on the Mongoose utility server. For more information, see the help topic [Including Data from an Oracle Database into a Mongoose Application](#).

New process default for alphanumeric field fill options

There is now a new process default for use with alphanumeric fields that use an <alphaprefix><numericssuffix> format. Previously, fields that used this format would automatically fill in the space between the alphabetic characters and the numeric characters with zeroes. For example, an alphanumeric field of this format with a length of 10 would display an entry of "T455" as "T000000455". The new NUMSORTCHAR numeric pad process default provides other options for the display of data with fields using this format. For more information, see the help topic [Default Names](#).

Default values on base-table bound IDO properties for inserted records honored

Previously, the default value specified on an IDO property was treated as a UI hint only. There was no logic in the IDO layer to use the default values other than when reporting the values to the client. The system now uses the default values specified in the IDO property metadata to ensure that any insert action executed through an IDO includes the IDO property's default value. This applies only to base-table bound IDO properties when the IDO insert request does not include all properties that have a default value defined, or when it includes one or more of these properties, but they are not marked as "modified". In this way, they behave much like a default value specified on a column in the database.

Support for multiple form-only forms as a stack

Previously, in form-only mode on a Web client, you had to ensure that only one form was running at a time. A second requested form was loaded under the first form, instead of on top of it. To handle this, developers had to use "goto form," which forced the first form to close before the new form

opened. Now a second requested form opens on top of the first form on a Web client, and if you close the second form, the first form is redisplayed.

AppMetaDataTransport updates

You can now use a single command to export all metadata objects for a configuration to a set of XML files. You can also use a similar command to perform a mass import of all metadata objects from a set of XML files into a configuration. These options are available as line commands only. In addition, system objects such as application events, event triggers, event handlers, event global constants, and event initial states can now be exported and imported like other IDO metadata.

Review of IDO method calls

We compared IDOs and their related stored procedures and corrected any mismatched numbers of parameters, mismatched parameter names, and mismatched parameter lengths.

Query events

Two new standard events were added to WinStudio Designer. StdQueryFormInitializeCompleted is generated after initialization is complete, and after the user opens a new saved filter. StdQueryFormClearCompleted is generated after the user clicks the Clear button.

For SetValue event response type, not marking targets as modified

The WinStudio event handler response type of SetValue now supports an option not to mark components and properties modified.