



# Infor Distribution SX.e Release Notes for 2021

August 2021 Update

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## About this document

This document provides information about the enhancements and changes in Distribution SX.e for calendar year 2021. Enhancements and changes are organized by monthly update. Details of previous updates for this year are also included in this document.

See the Resolved Issues document for the list of fixed issues that are included in this update.



## Contacting Infor

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## Chapter 1: August 2021 Update

This section describes the details of the 11.21.8 release. This update includes new features and product improvements for the application.

The version number format is 11.21.x, where 11 = the primary version, 21 = the release year (2021), and x = the release sequence. Version 11.21.1 is the first release of version 11 for 2021.

The 11.21.8 update can be downloaded from the Infor Download Center.

See the *Infor Distribution SX.e Installation Guide* or *Infor Distribution SX.e Upgrade Guide*.

### Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

#### Customer

These new features or product improvements were made to the Customer module.

#### Product improvements

These product improvements were made to the Customer module.

#### Fatal errors in Cash Receipt Entry no longer stop processing

When a fatal type error is encountered when you finish transaction entry in **Customer Cash Receipt Entry**, processing is no longer interrupted. Instead, error transactions are now created that can be viewed and resolved in **Sales Invoicing Exception Inquiry**. In addition, this exception is displayed after updates are made in **Customer Cash Receipt Entry**: Update Completed. An Error Was Encountered. Check OEIX For Details.

General Ledger is also updated with postings to suspense accounts, if necessary.

When you access **Sales Invoicing Exception Inquiry** to view errors for **Customer Cash Receipt Entry**, you can now limit the records that display to AR-type errors. A new field, **Exception Type**, is added to the Search panel. When you select **Accounts Receivable**, the columns in the grid are relabeled to display AR detail. You can review the errors to determine how to correct them, either to provide missing data, or reverse GL suspense account postings.

**Note:** Fatal errors might occur for an inactive or missing invoice, inactive or missing credit, or missing customer record, etc. These errors must be resolved and payments or credits reapplied in **Customer Cash Receipt Entry**.

## EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

## Product improvements

These product improvements were made to support EDI documents.

### Rebate remittance exceptions report now provided

When an EDI 849 Response to Product Transfer Account Adjustment document is received in the ProcessSXVendorRebateClaim BOD, an **EDI Rebate Remittance Exceptions Report** is now sent to the email address on the stored **EDI Entry Processing Rebates Report** that is used to process the BOD. Use the report to reconcile the vendor rebate credits provided in the BOD against the rebate amounts claimed.

The email address is specified in the Printing Information section on the **Information** page on the **EDI Entry Processing Rebates Report**.

When the BOD is received, the **EDI Rebate Remittance Exceptions Report** is initially created in the company print directory. It is automatically removed after seven days by the RDCLEAN process. The report file name for each BOD transaction is `ionrpt-etcc#####.txt`. The number in the file name corresponds to the Document ID in the **Electronic Transaction Control Center (ETCC)**.

See the *Infor Distribution SX.e Setup and Administration Guide for EDI*.

## Infor Service Management

These new features or product improvements were made to support the integration to Infor Service Management.

## New features

These new features were added to support the integration to Infor Service Management.

### Service Order forms available in Distribution SX.e

To provide a more efficient workflow that eliminates toggling between applications, you can now access the Service Order form and other related forms in Distribution SX.e.

This table shows the forms that you can access from the Service Management module in the Distribution SX.e menu:

Category	Form	Acronym
Inquiry	Signatures	ISMIS
Setup	Incidents	ISMSI
	Service Orders	ISMSSRO
Entry	Incident Quick Create	ISMEIQC
	SRO Quick Create	ISMESRQC
Reports	Service Order Work Order Report	ISMRSWOR

Online help for the forms is maintained in the Service Management documentation library.

The Distribution SX.e version of the Service Management forms are also available in Service Management. The name of Distribution SX.e versions of the form are annotated with an .sxe suffix, for example, **Signatures.sxe**.

### Feature activation

You must specify the Service Management application URL in **SA Administrator Options-Integrations-Service Management** to enable the forms and data to display in Distribution SX.e. Operator access to the Service Management module and the individual forms is determined by standard functional security in **SA Operator Setup**.

## ION integration

These new features or product improvements were made to support the integration to ION.

## Product improvements

These product improvements were made to support the integration to ION.

## Ship to and bill to phone numbers added to SXFileTransport BOD

The Ship To Phone Number in **Customer Ship To Setup** and Bill To Phone Number from **Customer Setup** are now included in the SXFileTransport BOD. The SXFileTransport BOD is transmitted to ION when you select to print Format 4 forms, such as an invoice or pick ticket, to **Third Party** or **IDM Output Management and Third Party**.

## Miscellaneous

These new features or product improvements affect multiple functions in the application.

## Product improvements

These product improvements affect multiple functions in the application.

## Dropbox changes support Refresh Token handling

Changes are made to the integration to Dropbox to support an updated process for obtaining access tokens to the Dropbox server and to the method for sending files to Dropbox.

Effective September 30, 2021, Dropbox will no longer return access tokens that are long-lived, or do not expire. This requires changes to the Distribution SX.e application to return Refresh Tokens when uploading documents that are printed to Dropbox.

The changes impact new Dropbox configurations only. If you are currently using Dropbox and have installed and configured the application, Dropbox will continue to accept your existing tokens.

See the information in the Distribution SX.e online help for enabling report output to Dropbox.

## Feature activation

If your company or users have not installed and configured Dropbox as an integrated file-hosting service, you will use these functions to configure the integration:

- **SA Administrator Options-System-General**  
Select the **Interface to Dropbox** option in order to send reports to Dropbox.
- **SA Operator Setup-Controls**  
Each operator must generate a new App Key, Secret Key, and Code for Dropbox. These values are now stored in the database. The system administrator uses those values to receive a new access token that is uploaded to Dropbox.
- **Dropbox**  
The Dropbox Developers web site is used to configure the application to return Refresh Tokens when documents are uploaded from Distribution SX.e. A temporary code is saved on the **SA Operator**

**Setup** account and is used to obtain a Refresh Token that is tied to the user's Dropbox login to enable access to their personal Dropbox area.

## Performance improved for selection of large data sets in grids

Changes were made to improve the time required to select a large number of data sets in grids in Distribution SX.e. These changes improve the time required for all records to be selected when you click **Select All** for any grid.

## Product

These new features or product improvements were made to the Product module.

## Product improvements

These product improvements were made to the Product module.

### Product names with asterisk display in warehouse product search

Product names that end in an asterisk (\*) are now displayed in the grid after you conduct a search using the **Product** lookup field in **Product Warehouse Product Setup**. Previously, a product ending with an asterisk did not display in the grid because the asterisk was omitted from the search.

To facilitate this change, the asterisk is now processed as a special character in the word index. To implement this change, you must run **SA Word Index Rebuild Report** for these tables:

- ICSP
- ICSW
- ICSES
- PDSC
- SLED

### Batch call process enabled for Exception Center search

Batch call processing is now enabled for searching and loading data in **Product Administration Exception Center**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select the **ICAMU Search - icamubuildmainlist** service interface call from the **Available Advanced Polling Calls** list.

With this service interface call selected, when you conduct a search for a **Record Type** of **Automated** in **Product Administration Exception Center** and select a large number of records to display, a batch

process is initiated that runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the search process to complete without timeout errors.

## Performance improved for Month End Processing

Changes were made to improved the processing time required when you run **Product Administration Month End Processing Report** and select **yes** for the **Recalculate ICSL Product Line Usage** option.

## Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

## Product improvements

These product improvements were made to the Pricing and Discounting module.

## Pricing API calls updated to include future prices

If you use these API calls to receive requests for and return pricing data to integrated applications, you can now include future prices set up for products in **PD Future Price/Cost Change Setup**:

- `sxapiOEPricing`
- `sxapiOEPricingMultiple`

The API calls were updated to allow passing a `futuredate=mm/dd/yy` value in the Extra Data List input parameter.

These business rules can be enabled in **SA Business Rule Setup** to use the future date to return future price data:

- **AllowFuturePrice**  
Select **yes** for the **Rule Value** to allow API requests for a future price. If this business rule is not enabled, future prices are not calculated and returned in the API call, regardless if a future date is provided in the request.
- **AllowFuturePriceCost**  
Select **yes** for the **Rule Value** to return an API request for a future price or cost from **PD Future Price/Cost Change Setup**.
- **AllowFuturePriceCostSeq**  
Select **yes** for the **Rule Value** to use **PD Future Price/Cost Change Setup** records to calculate prices or costs in date sequence. If there is both a global and warehouse-specific future price record with the same effective date, the warehouse-specific record is used.

Future prices are set up for products in **PD Future Price/Cost Change Setup** and assigned an **Effective Date**. If a future date is passed in either of the API calls, it is verified against records in **PD Future Price/Cost Change Setup** with an Effective Date on or before the future date to determine the future cost. The process for determining the future price is similar to the logic applied when you run **PD Administrator Future Price/Cost Report** to update prices and costs on **Product Warehouse Product Setup** records.

Future price requests cannot be made for these records:

- Rebate prices
- Nonstock products
- Catalog products
- Build-on-demand kits
- Tally product
- Value Add product

## Purchase

These new features or product improvements were added to the Purchase module.

### Product improvements

These product improvements were added to the Purchase module.

### Inactive lines filter available in Purchase Order Entry

A **Show Inactive Lines** flag is now available in **Purchase Order Entry-Edit Lines**. Select or clear this option to show or remove inactive records in the Lines grid.

## Sales

These new features or product improvements were made to the Sales module.

### Product improvements

These product improvements were made to the Sales module.



## Sales order invoice verification enabled

You can now flag a sales order to require operator review before an invoice is created and sent to a customer. This function is useful when a fully shipped order should be held for invoicing because of incomplete information that could affect invoicing accuracy and customer acceptance. This enhancement does not change how orders are picked (Stage 2) or shipped (Stage 3), only how they are invoiced (Stage 4). When this enhancement is enabled, the new **Require Invoice Verification** field can be set on these pages:

- **Sales Order Entry-Initiate**
- **Sales Order Entry-Maintain**
- **Sales Shipping Feedback Entry-Shipping Details-Header**

When this enhancement is enabled, invoice processing is prevented for any sales order where the new **Require Invoice Verification** field is set to **Yes**. A **Yes** value indicates that an operator must review the invoice and change the field to **No** before the sales order can be invoiced.

The **Require Invoice Verification** field can be changed to **Yes** by an operator during **Sales Order Entry** or **Sales Shipping Feedback Entry** only. Care should be taken when selecting **Yes**, as a delayed invoice results in delayed payment to you.

**Note:** The **Require Invoice Verification** setting cannot be updated by any external BODs or API programs that create or modify sales orders.

For each sales order requiring invoice verification that is encountered in the **Sales Entry Invoice Processing Report**, an exception is created and reported on the **Sales Exception Report**. You can also see the exceptions on the **Sales Pre-Invoice Exceptions Report** and in **Sales Invoicing Exception Inquiry**.

The **Sales Order Register Report** is updated to include a new option to report only orders where the **Require Invoice Verification** field is set to **Yes**.

The **Require Invoice Verification** value is also visible for these functions:

- **Sales Order Inquiry**
- **Sales Order Master List Report**

In these functions where a new order or order suffix is created, the **Require Invoice Verification** field is populated based on its value in the originating order:

- **Sales Order Entry-Sales Order Fulfillment**
- **Sales Order Entry-Copy**
- **Sales Blanket Release Entry**
- **Sales Entry Processing Cancel/Convert Orders Report**
- **Sales Shipping Feedback Split to Backorder Entry**

You can change the invoice verification value by maintaining the new order in **Sales Order Entry**.

Demand printing for invoices is unchanged. You can print an invoice on demand that is set for invoice verification from the **Sales Demand Invoice Report**, and from **Sales Order Entry**, **Sales Shipping Feedback Entry**, and **Sales Credit Release Inquiry**.

### Feature activation

Select the new **Use Invoice Verification** option in **SA Administrator Options-Documents-Sales Orders-Processing**. The field is deselected by default.

Optionally, you can use **SA Mass Maintenance Administration** to update the new **Require Invoice Verification** field value on many sales order header records at one time. Sales orders with a stage of 3 or lower only can be updated in **SA Mass Maintenance Administration**.

### Sales order header fields added to Sales Credit Release Inquiry

These fields from **Sales Order Entry** order header records are now displayed in the **Sales Credit Release Inquiry** grid:

- **Customer PO**
- **Ship Date**
- **Ship To**

These fields can provide important information to credit managers when determining which orders should be released from credit hold. This is useful when multiple orders for the same customer purchase order (PO), ship date, or ship to should be released together.

### Feature activation

Use Personalization to add the **Customer PO**, **Ship Date**, and **Ship To** columns to the grid in **Sales Credit Release Inquiry**.

## System Administrator

These new features or product improvements were made to the System Administrator module.

### Product improvements

These product improvements were made to the System Administrator module.

### Data extraction report name updated

The **SA Administrator Birst Extraction Report** is now named **SA Data Extraction for Data Lake and Birst**. This name change helps to clarify that the report is not exclusively used by Birst.

## Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake using **SA Data Extraction for Data Lake and Birst**:

- aodata
- arsde
- gletv
- icsdp
- oeeha
- sasb
- sastc
- oteh
- oteph
- otepl
- otevh
- otevl

## Conversion program to purge all BODs after 60 days

A conversion program is now included in the standard CONV routines that are initiated each time you upgrade Distribution SX.e to purge all inbound and outbound BOD records in the ION inbox/outbox, regardless of status, that are older than 60 days. The program will also purge successfully processed BODs that are older than 7 days.

This is to prevent the inbox/outbox from filling up with BOD records and impacting system performance. Pending or processed BODs not yet purged can be viewed in **SA ION Inbox/Outbox Inquiry**.

## Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

### New features

These new features were added to the TWL module.

### TWL RF upgraded to HTML5

The TWL RF device user interface is now upgraded to use HTML5 web markup language.

The HTML5 upgrade provides for controlled data updates while keeping application functionality consistent for existing users. Some user interface changes are made to enable the program to run in

a web environment. Using HTML5 standards provides for a more modern looking user interface. Previously, the TWL RF module was presented as a character-based user interface (CHUI).

Several features are added with the HTML5 upgrade to enhance user workflow including:

- Upgraded login security
- Improved label printing functionality
- Reorganized questions and prompts before data update
- Reduced prompts by presenting tables to the user in work order creation
- Icons added for notes in picking and receiving
- Occasional event sequence change
- Rush and Alternate warehouse notifications are now informational
- Use of shortcuts in a web environment with new menu options instead of shortcut keys

Approximately 130 TWL RF functions have been upgraded.

A new **TWL Execution-RF Admin Maintenance** function allows your warehouse manager to review data issues and release locked data records resulting from exiting a TWL RF function improperly. This may occur when an RF user closes a window rather than selecting a **Cancel** option on the RF device, locking the record and leaving data inaccessible to all users. These data issues are logged when the user does not exit a TWL RF window properly:

- **Active Receipt Lines**

When a user selects a line to receive in the RF, its status is changed to active to notify other users that the line is no longer available. If the user leaves the **Receipt** window by closing the web browser, it is left in an active stage and other users are unable to access the line. Use the **Active Receipt Lines** search option to select the lines and then click **Reopen Lines** to release them.

- **In Pick Picks**

When a user selects a line to pick in the RF, its status is changed to in-pick to notify other users that the pick is no longer available. If the user leaves the **Picking** window by closing the web browser, the pick is left in an in-pick stage, preventing other users from accessing the record. Use the **In Pick Picks** option to release these picks.

- **Active Putaway**

During the beginning of a putaway operation, a record is created to link to the original receipt. If the user leaves the **Putaway** window by closing the web browser, the putaway is left active, not allowing other users to access the putaway. Use the **Active Putaway** option to release these putaway records.

- **Active Replenishments**

During a 1-step replenishment or the first step of a 2-step replenishment, the movement record is marked active after the user starts working on it. If the user exits the **Replenishment** window by closing the web browser, the movement record is left active. Use the **Active Replenishments** option to release these movement records.

- **Close Receipts**

The **Close Receipts** search option provides a broad overview of open receipts needing to be closed. Closing receipts in this function must only be done by the warehouse administrator. Select a receipt in the grid and click **Close**.

**Note:** We recommend only working with the current day's open records if you are certain the line in question is available and a user has reported they incorrectly closed the browser and cannot access the record again. Select **Include Today** to view the latest active lines.

New hotkeys are implemented as part of the HTML5 upgrade as shortcuts to perform certain tasks. These replace the previous function keys used with the character RF devices. Examples of new hotkeys include:

Hotkey	Function
<b>Alt+L</b>	Set the label printer
<b>Alt+A</b>	Add a note
<b>F4, x, or Back</b> button	Go back to previous screen

**Note:** The **X** key can be used to navigate back in menu functions and in grids. Additionally, the user can only press **F4** and the back button in the RF browser to navigate back from menus with enterable fields.

See the RF navigation information in each Total Warehouse Logistics user guide.

### Feature activation

**Important:** The TWL RF HTML5 enhancement is released with limited availability. The features supporting the HTML5 user interface are being delivered in two phases. The first phase is released in the August 2021 update, or 21.8, and supports the majority of tasks performed using TWL RF devices. We will notify you when the second phase of planned features are available in a bug fix pack and the feature is out of limited availability.

RF device users must now sign in with a Distribution SX.e login instead of using their **TWL RF Employee** login. The **TWL RF Employee** record is still created, but the **TWL RF Employee ID** must be assigned to the user's **SA Operator Setup** record to support single sign-on access to TWL RF.

To enable access to **TWL Execution-RF Admin Maintenance**, you must apply the appropriate security permissions to the user's **SA Operator Setup** record. We recommend you limit access to this new function to only warehouse administrators.

We recommend you review your RF devices to verify they are HTML5-compatible. See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.

TWL documentation is updated to reflect any changes to procedures where an RF device is utilized.

## Receiving Overseas Trade containers supported in TWL

Total Warehouse Logistics (TWL) is enhanced to now include Overseas Trade (OT) tracking documents when receiving products in a TWL warehouse. Tracking documents are created in **OT Transaction Entry** to assign purchase orders for an overseas vendor to a container or vessel. When the container is received in your TWL warehouse using an OT tracking number in **Purchase Receipt of Inventory Entry** or processed in **EDI Entry Processing Ship Notice Report**, TWL is updated via an Advance Ship Notice (ASN) record.

To support ASN receiving in TWL, **OT Transaction Entry** transactions that are created manually in **OT Transaction Entry** or received in the EDI 856i Advance Ship Notice are updated to include **Purchase Batch Receiving Entry** records (POEBT which include POEBH and POELB records). These POEBT records are temporary database records that are sent in a **WL Transaction Inquiry** receipt update as standard ASNs are. When receiving is completed against the ASN document in TWL, either automatically or manually, the **WL Transaction Inquiry** record updates the purchase orders and the temporary POEBT records are deleted.

**WL Entry Batch Receiving Report** is also updated to allocate any OT addons across all purchase orders in an OT transaction. This mimics the same allocation method used when receiving POs assigned to an OT tracking document in **Purchase Receipt of Inventory Entry** for a standard warehouse. OT addons are still entered in **OT Transaction Entry**.

To support search and analysis of Overseas Trade transactions in Birst, these Overseas Trade tables are added to the export process for the Data Lake:

- OTEH: **OT Transaction Entry** header
- OTEPH: **OT Transaction Entry** PO header
- OTEPL: **OT Transaction Entry** PO lines
- OTEVH: **OT Vessel Entry** header
- OTEVL: **OT Vessel Entry** lines

To activate these tables for Data Lake export, select the **Replicate to Data Lake** option for each table in **SA Administrator Options-System-Options**. The tables are exported to the Data Lake when you run the **SA Data Extraction for Data Lake and Birst Report**.

### Feature activation

No activation is required to support receipt of Overseas Trade containers in TWL. The POEBT records in the ASNs are created automatically when you receive against an OT tracking number in **Purchase Receipt of Inventory Entry** or process the EDI 856i ASN containing an OT tracking number.

The existing options for controlling ASN receipts in TWL are honored by this new process. We recommend you review these options in **Vendor Setup-Ordering** and **TWL Administrator-System Parameters** and determine how they should be set for your company:

- If the **Create TWL ASN** option is selected for each overseas vendor in **Vendor Setup-Ordering**, ASNs are sent to TWL immediately upon receipt in **Purchase Receipt of Inventory Entry**. If this option is not selected, you can hold the ASNs for review using the Load ASN function on the RF. Then use Shipment ASN to receive the ASN.
- To enable automatic receipt of ASNs in TWL, select **yes** for the TWL system parameter **6264-Auto Receive ASN**. Then, select **WL Auto Receive ASN** for each overseas vendor in **Vendor Setup-Ordering**. If you have not implemented auto receiving of ASNs in TWL, you must manually receive each ASN.
- Select the **Block POs** option in **Vendor Setup-Ordering** to block individual purchase orders that are associated with an ASN from being sent to TWL in a receipt transaction (RT) when the PO is printed in Distribution SX.e. Instead, all POs for the vendor are contained in the ASN and the receiving is done against this ASN.

## Product improvements

These product improvements were made to the TWL module.

### Order line status added to TWL Order Inquiry-Lines

The order line status is now added to the **TWL Order Inquiry-Line** grid. A new column, **Line Status**, displays the status, such as **Picked** or **Shipped**, of the order line.

### TWL Order Drop displays errors for failed order drops

**TWL Order Drop** now displays inventory allocation errors in the **Orders Attempted** tab of the **Drop Summary** screen if any issues are encountered during the order drop process. Previously, these errors only displayed in the GUI (Graphical User Interface) version of TWL.

In addition to this update, the error messages now provide the reason for the failed order drop instead of only displaying the rule used for the order drop. Providing the reasons for any issues caused during the order drop process helps warehouse managers resolve the errors.

### TWL EOD process outputs to new log file

The TWL EOD process executed by the Report Scheduler now outputs to a new TWL log file named `twleod.log`. This new log file better isolates the results of the TWL EOD execution.

Previously, the TWL EOD process would output to the standard `rptrun` output log file instead of a TWL log file.

## Vendor

These new features or product improvements were made to the Vendor module.

## Product improvements

These product improvements were made to the Vendor module.

### New AO option checks invoice tolerances before receiving

A new option, **Check Invoice Tolerances Before Receiving**, is added to **SA Administrator Options-Vendors-Receiving**. When this is selected, the AP Total Costed amount for a DO purchase order automatically received when it is costed against a vendor invoice in **Vendor Invoice Center Entry** must also be within the invoice total tolerance allowance.

In some situations, a DO PO may be automatically received because the PO quantity, PO amount, and PO Header values are all within the tolerances defined in the Auto-Receive of Direct Orders section in **SA Administrator Options-Vendors-Receiving**. However, the vendor invoice might show a proof balance that prevents it from being costed. This creates a reconciliation error and requires manual review.

If the **Check Invoice Tolerances Before Receiving** option is selected, the total costed amount is checked to ensure it is within the tolerances defined at the company level in the Tolerances for Batch Reconcile section in **SA Administrator Options-Vendors-Receiving** or by vendor in **Vendor Setup-Reconcile**. If it is not, the DO PO is not received and the AP invoice is not costed.

#### Feature activation

Select the **Check Invoice Tolerances Before Receiving** to prevent the receipt of DO POs when the corresponding invoice is out of tolerance with invoice reconciliation tolerance settings.

## Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

## Upgrade path

To upgrade to Infor Distribution SX.e 11.x, you must be on a version of 4.0 or later. Older releases should be upgraded to 4.0 before upgrading to 11.x.

## Progress OpenEdge version requirement

Progress OpenEdge version 11.7.2.011 is the minimum requirement for Distribution SX.e version 11.19.1 and later.

If you upgrade your on-premises installation, you must install it on the Windows client machines, and then re-install the clients to use the new version of OpenEdge. After upgrading the database to a new version of OpenEdge, all shared memory connections require the new version.

Contact Infor Support if you have questions regarding installation or upgrade issues.

See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.



## Deployment information

This section describes any changes to the deployment of Distribution SX.e.

### Baseline schema directory reorganized by version

The `/database/baseline/` directory of the `SX.enterprise_Full_Release_x_x_x_x.zip` file was reorganized to group the `.df` files for the Distribution SX.e, Total Warehouse Logistics, and word index databases by release. The `.df` files for the current release are in the root directory. The `.df` files for previous releases are in sub-directories. Additionally, `delrepl.xx_xx_x.df` files are now included in the directory. You can use them to remove the replication write and replication delete triggers.

See the *Infor Distribution SX.e Installation Guide* and the *Infor Distribution SX.e Upgrade Guide*.

## Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

## Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

## Chapter 2: July 2021 Update

This section describes the details of the 11.21.7 release. This update includes new features and product improvements for the application.

The version number format is 11.21.x, where 11 = the primary version, 21 = the release year (2021), and x = the release sequence. Version 11.21.1 is the first release of version 11 for 2021.

The 11.21.7 update can be downloaded from the Infor Download Center.

See the *Infor Distribution SX.e Installation Guide* or *Infor Distribution SX.e Upgrade Guide*.

### Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

#### Bulk Delivery

These new features or product improvements were made to the Bulk Delivery module.

#### Product improvements

These product improvements were added to the Bulk Delivery module.

##### MRU lookup added

The Most Recently Used (MRU) feature is added to lookups in the Bulk Delivery module. Use the MRU lookup feature to view the last five records that you accessed for a given entity or document.

## Delivery Due Date range added to replenishment report

The starting and ending **Delivery Due Date** range is added to the **BD Entry Recommended Tank Replenishment Report**. Use this date range to specify a starting and ending date by which deliveries are due and create tank replenishment recommendations for that date range. The **Delivery Due** date is stored in **BD Tank Master Setup** and is updated when you run **BD Administrator Tank Calculations Report**.

## EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

## Product improvements

These product improvements were made to support EDI documents.

## Additional update status values detail EDI 820 processing

Update status values that represent stages of the WIP update status are now available for EDI 820 Payment Order/Remittance Advice transactions in **Electronic Transaction Control Center (ETCC)**. This table shows the new or updated update status values that can display:

Update Status	Description
Ready to Process	This status is displayed if one of these conditions are met: <ul style="list-style-type: none"> <li>All errors and exceptions for the transaction have been reviewed and corrected. The transaction is ready to process.</li> <li>The transaction was imported without error and is ready to process, but the transaction is not scheduled for an update. The stored <b>Customer Entry Lockbox Import Report</b> that was used to process the EDI 820 document is not set to post or update imported transactions.</li> </ul>
Schedule Update	This status is displayed temporarily before the update is scheduled.
WIP	The transaction was imported and is being processed as a new record in the system. This temporary status is displayed before another WIP-related update status is applied.
Update Scheduled	The transaction is scheduled for an update, but the <b>Customer Entry Lockbox Update Report</b> has not yet run.
Update Started	The update is in process.
Update Failed	An error occurred during processing, and the transaction was not updated.

See the *Infor Distribution SX.e Setup and Administration Guide for EDI*.

## Infor Distribution Proof of Delivery CE

These new features or product improvements were made to support the integration to Infor Distribution Proof of Delivery Cloud Edition.

### Product improvements

These product improvements were made to support the integration to Infor Distribution Proof of Delivery CE.

#### Accounting entity added to Managers application

The **Accounting Entity** is now displayed on all delivery detail grids in the Managers application. This enables you to distinguish the company associated with a delivery transaction.

These grids are updated to include the Accounting Entity:

- **Unscheduled Deliveries**
- **Deliveries**
- **Delivery Detail-Add Delivery**

Use the filter option in the grid header for this field to limit the deliveries by company/accounting entity.

## Infor Document Management integration

These new features or product improvements were made to support the integration to Infor Document Management.

### New features

These new features were added to support the integration to Infor Document Management (IDM).

#### Barcode label printing supported with IDM

You can now print barcode labels for Integrated Barcode, cartonization, and Total Warehouse Logistics (TWL) using Infor Document Management (IDM). When label printing is initiated in Distribution SX.e, the values that are required for the labels are sent to IDM in XML format through the Document Output

API call. The labels, which are based on templates that are saved in IDM, are then output to printers that are identified as IDM label printers in Distribution SX.e.

Each label type has a standard template with standard fields. Use the IDM Word Add-in tool to customize the content and design of the label templates. You can add additional fields, including calculated fields, to each label to meet your business requirements. You can also create pick, ship, and WL SCM labels to meet the business requirements of specific customers.

You can print labels through IDM exclusively, or use IDM and another printing solution such as Enterprise Printing Platform. IDM label printing supports the same labels and additional fields as Enterprise Printing Platform except for the start and end calculated fields. You cannot print EDI labels that require a custom format through IDM.

**Note:** In support of this enhancement, the Enterprise Printing Platform Integration section in **Customer Setup-General** was renamed to EPP/IDM Integration. Additionally, the Enterprise Printing Platform value in the **Usage Type** field in **TWL Administration-Label Setup** was changed to **EPP/IDM Integration**.

### Feature activation

To implement this feature and utilize the new label templates, you must import the templates into IDM. The templates are included in the `IDM_SX_Label_Templates` folder in the `IDM_SX_Content_11_21_7.zip` file that you can download from Knowledge Base article 1887404. The templates are saved under the SX Label Templates document type.

To print IDM labels for Integrated Barcode and cartonization, you must select the new **IDM Labels** option in **SA Printer Setup-Settings**. If you use customized templates, you must specify customized template information on printer records to override standard template output. If you use customer-specific templates, specify customized template information on **Customer Setup** records to override the template output that is set up for the printer.

To print IDM labels for TWL, you must select **IDM Label** in the new **Label Printer Model** field in **TWL Administration-Printer Setup**. If you use custom templates, you must override the label at the standard record level in **TWL Administration-Label Setup** and then edit the record at the printer record level to specify the template and the required fields.

See the *Infor CloudSuite Distribution Configuration Guide* and the *Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics*.

## Product improvements

These product improvements were made to support the integration to Infor Document Management.

### Carton information added to pick ticket forms

If you select to print carton detail on warehouse transfer (WT) or Value Add (VA) pick tickets, it is now included on the pick ticket form for both the header and line items. Additionally, the pick ticket form for sales orders (OE) now includes the carton unit of measure for line items.

The pick ticket form is printed when you select **Print Format 4** and an **Output Type** of **IDM Output Management** for the document in **SA Administrator Options-Documents**.

An updated version of these templates is available in the `IDM_SX_Content_11_21_7.zip` file and can be downloaded from KB 1887404:

- SXOEPickTicketTemplate
- SXOEPickTicketTemplate\_Portrait
- SXVAPickTicketTemplate
- SXWTPickTicketTemplate

## New event notifies of IDM connection failure

A new event can be activated that will notify you via email when Infor Document Management (Format 4) forms fail to transmit to IDM.

The event, **IDMfailure-error**, uses the **IDMfailure** trigger and is set up in **SA Event Manager Activate Entry-Action**. To receive an email, modify the event to select who should receive the action, and then select **Email Message**. Specify the operator or email address to receive the email.

If no event body is specified when you activate the event, the event details are provided in the body of the email:

- Event Name: IDMfailure-error
- Event Desc: IDM Format 4 report transmission error
- Warehouse/Customer
- Operator
- Message: [Error message that is written to the IDM log]

## Infor Service Management

These new features or product improvements were made to support the integration to Infor Service Management.

### New features

These new features were added to support the integration to Infor Service Management.

### Service Management forms available in Distribution SX.e

To provide a more efficient workflow that eliminates toggling between applications, you can now access several Service Management forms in Distribution SX.e.

This table shows the forms that you can access from the new Service Management module in the Distribution SX.e menu:

Category	Form	Acronym
Inquiry	Contract Invoice Listing	ISMICIL
Setup	Contract Rates	ISMSCR
	Service Types	ISMSST
Entry	Rental Counter	ISMERC
	Contracts	ISMEC
	Contract Invoicing	ISMECI
	Contract Lines	ISMECL
Reports	Rental Pick List Report	ISMRPL
	Contracts To Be Invoiced	ISMRCTBI
	Rental Contract Agreement	ISMRRRA

These forms are also available from **Rental Counter** form in Distribution SX.e:

- Rental Check Out
- Rental Check In
- Purchase Information

In Distribution SX.e, the forms were updated to match Distribution SX.e design standards. Additionally, fields that do not pertain to the integration between Distribution SX.e and Service Management were removed.

Online help for the forms is maintained in the Service Management documentation library.

The Distribution SX.e version of the Service Management forms are also available in Service Management. The name of Distribution SX.e versions of the form are annotated with an .sxe suffix, for example, Contracts.sxe.

### Feature activation

You must specify the Service Management application URL in **SA Administrator Options-Integrations-Service Management** to enable the forms and data to display in Distribution SX.e. Operator access to the Service Management module and the individual forms is determined by standard functional security in **SA Operator Setup**. Operator access to forms that are accessed from a parent form is based on the security for the parent form.

## Product improvements

These product improvements were made to support the integration to Infor Service Management.

## New API call retrieves shipped quantity for inventory quantity calculations

A new API call, `sxapioegetservicerentorder`, now provides Service Management with the shipped quantity of an order line in Distribution SX.e. The value is retrieved from the word index, based on the service order (SRO) number and service line key that is included in the call. The shipped quantity is taken from the current active SRO or the most recent sales order tied to the SRO. It is used to determine inventory quantities that are used in conjunction with these settings in Service Management:

- **Enforce Allocation** option on the **Integrations Parameter** form  
You can select **Enforce Allocation** to prevent service order material transactions from being posted when the item/warehouse Item On Hand quantity is less than the Allocated Order quantity. This setting ignores the **On Hand Neg** on the **Inventory Parameters** form, which allows on-hand balances to be negative.
- **Pull Current SX.e Inventory** option on the **Service Orders Transactions** form  
When you select **Pull Current SX.e Inventory**, the item/warehouse Item On Hand quantity and Allocated Order quantity in Service Management are updated with the amounts from Distribution SX.e.

## ION integration

These new features or product improvements were made to support the integration to ION.

## Product improvements

These product improvements were made to support the integration to ION.

## Salesrep elements added to API calls

These API calls were enhanced to include these new values to be used to filter the results returned in the response calls:

- `sxapiargetcustomerlistv3`  
Added the `slsrepin`, `slsrepout`, and `salesterr` (Inside Salesrep, Outside Salesrep, and Territory) to limit the customer records returned by these values
- `sxapiargetshiptolistv4`  
Added the `slsrepin`, `slsrepout`, and `salesterr` (Inside Salesrep, Outside Salesrep, and Territory) to limit the customer ship to records returned by these values
- `sxapiargetinvoiclistv3`  
Added the Due Date criteria to limit results by invoice due date, instead of invoice date

These filters are applied when a customer or ship to number is not provided in the API call.



## Ship to ID added to API calls

The Ship To element is added to these API calls:

- `sxapisfgetopeninvoicev2`
- `sxapisfgetpaidinvoicev2`
- `sxapisfgetoeorderhistoryv2`

The existing versions of the invoice calls were modified. A new version, v2, of the order history API call was created.

If the ship to number is passed in these API calls, only the invoices or orders for the ship to are returned.

This enhancement was identified as relevant for the Infor Distribution Storefront integration where the parent-child relationship is established for account records, however, it can be used by any process or third-party application that utilizes these API calls.

## Employer Reference element added to ContactMaster BOD

The `EmployerReference` element is added to the ContactMaster BOD. This field is updated when you add a new contact to a **Customer Ship To Setup** record. It is populated with the **Customer Setup** number associated with the ship to record.

## Miscellaneous

These new features or product improvements affect multiple functions in the application.

## New features

These new features affect multiple functions in the application.

## WYSIWYG designer updated with new controls

The WYSIWYG designer in the Extension Enablement Kit was updated to include these new controls:

These controls are new:

- **Count:** Shows a number that represent a count of something, such as the number of lines on an order, and a label. The number can be bound to any property. The label can be bound to any property or resource. The control can serve as a hyperlink.
- **Expandable Card:** A container section used to group fields and other controls. It acts like an Expandable Area and looks like a Card.
- **Tag:** A colorized, pill-shaped field with text that is used to highlight data. They are dynamically sized, based on the amount of text. Tags can be used in conjunction with fields or as standalone controls.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

## Product improvements

These product improvements affect multiple functions in the application.

### Field extension capabilities expanded

If you use the Extension Enablement Kit to extend your user interface, you can now specify HTML data in the **Data Description** field to assign properties to info, text, or lookup fields. You can extend the fields to apply modifications such as color and dynamically-sized tags.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

## Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

### New features

These new features were added to the Pricing and Discounting module.

### Alternate pricing hierarchy available for Level 2 pricing types

When a product's price is obtained from product and pricing records in Distribution SX.e, a complex pricing hierarchy logic is initiated that considers numerous factors, such product price type, product line, product category, region, etc. This pricing hierarchy follows a preset order that poses a challenge for companies that require a more flexible pricing structure.

You can now select an alternate pricing hierarchy for Level 2 pricing records. Level 2 records are pricing records set up in **PD Pricing Setup** for these price types in this order:

- Customer/Product Price Type
- Customer/Rebate Type
- Customer/Product Line
- Customer/Product Category

You can modify the order that these pricing records are applied in the pricing hierarchy. A new Level 2 Pricing Hierarchy **Override Hierarchy** selection table is added to **SA Administrator Options-Products-Pricing**. To override the default pricing hierarchy for these pricing record types, click and hold a pricing type in the list and drag it to the desired position. When you save the changes, the order in the **Override Hierarchy** list is the new order in which Level 2 pricing records are applied.

The existing option, **Use Rebate Pricing Records Before Price Type**, is also changed. This option now applies to Level 4 pricing records instead of both Level 2 and Level 4 records, because of the ability to define where Level 2 rebate records appear in the **Override Hierarchy** list. Level 4 records are pricing records set up in **PD Pricing Setup** for these price types in this order:

- Customer Type/Product Price Type
- Customer Type/Rebate Type

If the **Use Rebate Pricing Records Before Price Type** option is selected, the pricing records in the **Override Hierarchy** list are re-ordered as:

- Customer/Rebate Type
- Customer/Product Price Type
- Customer/Product Line
- Customer/Product Category

This can be overridden, however, we recommend that you keep the order of records consistent between Level 2 and Level 4 pricing records.

### Feature activation

To activate this feature, change the order displayed in the **Override Hierarchy** list in **SA Administrator Options-Products-Pricing**. We recommend that you review your pricing options and verify the **Override Hierarchy** represents your company's pricing structure.

**Note:** All four Level 2 price types are displayed in the **Override Hierarchy** list even if not all types are selected or activated in **SA Administrator Options-Products-Pricing**. If a price type is not used, it is excluded when the pricing logic is applied in Distribution SX.e.

## Product improvements

These product improvements were made to the Pricing and Discounting module.

### Batch call process enabled for PD Mass Maintenance Entry

Batch call processing is now enabled for loading pricing data sets and importing data in **PD Mass Maintenance Entry**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select these service interface calls from the **Available Advanced Polling Calls** list:

- **PDEM Import From Excel to Set (Type 1, 5, 7) - pdemexcelimportupdtpdsc1**

- PDEM Import From Excel to Set (Type 2) - pdemexcelimportundtpdsc2
- PDEM Import From Excel to Set (Type 3, 4, 6, 8) - pdemexcelimportupdtpdsc3
- PDEM Import From Excel to Set (Rebates) - pdemexcelimportupdtpdscr
- PDEM Load Data From Set (Type 1, 5, 7) - pdemloadpdsc1
- PDEM Load Data From Set (Type 2) - pdemloadpdsc2
- PDEM Load Data From Set (Type 3, 4, 6, 8) - pdemloadpdsc3
- PDEM Load Data From Set (Rebates) - pdemloadpdscr

With these service interface calls selected, when you load a selected set or when you select **Import Excel** to load pricing records from an Excel file, a batch process is initiated that runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the load or import process to complete without timeout errors.

## Project Job Management integration

These new features or product improvements were made to support the integration to Project Job Management (PJM).

## Product improvements

These product improvements were made to support the PJM integration.

## Project Job Management v3.21.7 certified

Distribution SX.e now supports a certified integration with Project Job Management (PJM) version 3.21.7. PJM is an MVPP application that manages small contract bids and large commercial jobs.

We recommend that you re-sync the CustomerPartyMaster and ShipToPartyMaster BODs after an upgrade.

See the *Infor Distribution SX.e Integration Guide for Project Job Management*.

## Sales

These new features or product improvements were made to the Sales module.

## New features

These new features were added to the Sales module.

## New sales-related Coleman AI widgets

Item Recommender context applications that recommend upsell and cross-sell products are now available in **Sales Order Entry** and **Sales Customer Pricing Inquiry**. You can use the context applications to offer similar and related products to your customers, contributing to increased customer satisfaction and increased sales.

Both widgets use an open source algorithm, Implicit Recommender, to recommend related products that were previously purchased by other similar customers. The algorithm is processed by quests within Infor Coleman AI Platform. These quests are AI models in which machine learning occurs. Each context application uses a unique quest, but both use historical sales order line data from the Infor Data Lake.

When you specify a product in **Sales Order Entry** or **Sales Customer Pricing Inquiry**, each context application calls the related quest using an API endpoint to retrieve ranked product recommendations in real time. For the upsell widget, the recommended products are similar to the specified product. The recommended products are not necessarily higher-priced products, but are instead alternate products to provide customers with purchasing options. For the cross-sell widget, the recommended products are products that other similar customers have purchased in addition to the specified product.

By default, the context applications display the product number only. Optionally, you can activate an API flow to also display the product description and price. The recommended products that are displayed in the context applications are informational only. If the customer agrees to purchase an upsell or cross-sell product, you must manually add the product to the sales order.

### Feature activation

To use this feature, a license to Coleman AI Platform is required. To activate this feature, you must perform setups in Coleman AI Platform and configure the context applications in Infor Ming.le Homepages. The files that are required for implementation are included in the `ItemRecommender.zip` file that is attached to Knowledge Base article 1887404.

Optionally, import, configure, and activate the `GetItemDescandPrice` API flow in ION Desk to retrieve product description and price from product records, based on the company and products numbers.

If the ICSP, ICSW, OEEH, and OEEL tables were not previously extracted to Data Lake, then run the **SA Administrator Birst Extraction Report** to extract the data before performing setups in Coleman AI Platform.

See the *Infor Cloudsuite Distribution Configuration Guide*.

## Order overview information added to Sales Order Inquiry

To provide quick access to key order information, an **Overview** tab was added to **Sales Order Inquiry**. The order information is grouped in collapsible sections, also called cards, that displays data from other tabs. It is presented in standard static fields, key performance indicator (KPI) charts, and other visual components.

A Summary section and Lines section is displayed for all transaction types. The Summary section displays these elements:

- Select fields from the **Header** and **Totals** tabs.

- Counts for lines, packages, and history (backorders). Each number is a hyperlink that opens the corresponding tab.
- Color-coded tags that represent flags or conditions that apply to the order including header notes, line comments, fulfillment order, approval hold, backorders exist, substitutes not allowed, backorders not allowed, late order, and canceled order.
- Process indicator that shows the sales order stages and the related dates.
- Donut chart that displays the percentage of cost and margin for the order.

The Lines section displays donut charts with Line Types, Ship Quantity, and Return Lines data.

A Blanket Release Schedule section and Blanket Release Value section are displayed for Blanket Order (BL) transactions, excluding . The Blanket Release Schedule section displays a column chart with the date and suffix of each Blanket Release (BR) and product information. Hyperlinks to **Sales Blanket Release Entry** and **Sales Order Entry** are also provided. The Blanket Release Value section displays a column chart with the date and suffix of each BR and the value of the BR.

Existing security settings from **SA Operator Setup** are honored on the **Overview** tab. For example, if a user is not allowed to enter or view prices, then the Total Invoice amount and other price-related elements are not displayed.

Users can personalize the **Overview** tab to hide or collapse a card, change the color of tags, and make other changes. Developers can also use the Extension Enablement Toolkit to customize the tab and add additional tags to meet your business requirements. They can also increase the threshold count for summarizing Blanket Release products.

As part of this enhancement, all existing collapsible sections in **Sales Order Inquiry** were placed in cards to improve the layout and usability.

### Feature activation

Access to the **Overview** tab is controlled by functionality security in **SA Operator Setup**. By default, all users that currently have access to **Sales Order Inquiry** are given access to the **Overview** tab.

## Product improvements

These product improvements were made to the Sales module.

### Personalized sort order limitation resolved

If Infor Support advised you to remove personalized default sort settings from the Orders grid in **Sales Order Inquiry**, you can now re-apply them. Removal of the settings was a temporary solution to an advanced search issue that was caused by a recent enhancement. The issue is now resolved. You must use Personalization to apply the default sort order to individual grid columns.

## Tax Group field required for taxable line items

The **Tax Group** field in **Sales Order Entry-Advanced Line Entry Extend** window is now required when you enter an order line for a taxable customer or product.

Previously, it was possible to delete the default value in this field and leave it blank on a taxable line. Now, the error `Invalid Tax Group (4217)` is displayed. If the intention is to create the line as nontaxable, the appropriate Tax Group must be selected.

**Note:** If the company is Canadian, the **Tax Group** can be blanked out in this situation to indicate the order line is nontaxable.

## Batch call processing enabled for Quick/Easy Line Entry

Batch call processing is now available for **Sales Order Entry-Easy Line Entry** and **Quick Line Entry**.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, and select the **OET-Quick/Easy Line Multi Line Create - oemultilinecreate** service interface call from the **Available Advanced Polling Calls** list, a batch process is initiated when you use Easy Line Entry or Quick Line Entry in **Sales Order Entry**. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows either line entry function to complete without timeout errors.

**Note:** This may resolve situations where orders are entered remotely where an interrupted or slow internet connection may cause delays and, subsequently, duplicate order lines.

## Sales Manager

These new features or product improvements were made to the Sales Manager module.

## Product improvements

These product improvements were made to the Sales Manager module.

## SM Gov Tax Recalculation Report no longer updates credit card tendering

The **SM Government Tax Recalculation Report** is used to recalculate sales tax on uninvoiced sales orders. This report is modified to no longer create credit card authorizations nor adjust or create tendering transactions for the difference in the tax amount on sales orders. Previously, these adjustments created discrepancies in how data was processed, primarily if Force Sale Management was implemented.

If payment adjustments are required on a sales order after taxes are changed by this report, you must manually make the changes in **Sales Order Entry** and possibly re-tender the order. If a tax amount change is not re-tendered, it is shown as an amount due after invoice processing.

## System Administrator

These new features or product improvements were made to the System Administrator module.

### Product improvements

These product improvements were made to the System Administrator module.

### Changes to files submitted by SA MTD VAT Reporting

Her Majesty's Revenue and Customs (HMRC) has completed a review of the fraud prevention headers submitted to HMRC when the **SA MTD VAT Reporting** is run. Because Distribution SX.e operates in a private network, not a public one, certain fraud prevention headers are now removed. These new headers are now included in each API call initiated by the report:

- Gov-Client-Local-IPs-Timestamp
- Gov-Vendor-Product-Name
- Gov-Client-Local-IPs

These changes are made to ensure Infor's adherence to HMRC's Making Tax Digital requirements.

### Processing time improved

Changes were made to the **SA Data Archive Orders Report** to improve its processing time.

## Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

### Product improvements

These product improvements were made to the TWL module.

### Improved clarity in TWL User Specific Configuration field labels

Several field labels in **TWL Administration User Specific Configuration** are changed to better reflect their purpose. The **Copy** button for the User Specific Configurations grid is now labeled **Copy from Warehouse**.

When you drill into a line item in the **TWL Administration User Specific Configuration** grid, these field labels are updated on the **Detail Overview** page:



- **Default Answer Is 'Yes'**
- **Create Employee Specific Version On Next Encounter**
- **Automatically Answer With The Default**

## Non-labor lines able to be set to lost business after counter sale order

You are now able to set non-labor lines to lost business after a Counter Sale (CS) order is dropped to TWL. This change supports those situations where a customer changes their mind about an item after the order is dropped to the warehouse and requests that the item be removed from the order.

Previously, you were prevented from setting CS lines to lost business after the order was dropped.

## Search time improved in TWL Receipt Inquiry

To prevent search query timeouts that can occur with large data sets, a record limit was added to **TWL Receipt Inquiry**. The default record limit is 500, but you can change the value. Data index usage was also updated to improve search time.

## New ship date field added to Advanced Search in TWL Order Drop Manager

The new **Match Expected Date Type** field is added to the **Advanced Search** view in **TWL Order Drop Manager**. The **Match Expected Date Type** gives you the option to only display orders with the exact expected ship date.

Previously, the query would return all orders up to and including the expected ship date.

## Value Add

These new features or product improvements were made to the Value Add module.

## Product improvements

These product improvements were made to the Value Add module.

## Customer forecasting enhancement for Value Add

Using customer forecasting, you can accommodate anticipated new sales in addition to the actual usage for the previous 25 months when you factor anticipated volume and its effect on replenishment recommendations for the next 12 months. When you use customer forecasting, the total forecast quantity to order or transfer for all active forecasts is now included in the replenishment recommendations

of the **VA Entry Recommended Replenishment Report**. This customer forecast quantity is used to calculate the order point and line point for replenishment, and it now displays on the report.

However, this report currently only reviews forecasts for the period specified when the replenishment function is run. It does not consider forecasts outside of the date range for which the report is run. This does not allow distributors to procure inventory needed when customer forecast periods start, especially for products with longer lead times.

This enhancement includes controls to allow consideration of product lead times for VA products when calculating the impact of customer forecast usage on VA replenishment recommendations.

Two options in **SA Administrator Options-Products-Replenishment** can be used when you run the **VA Entry Recommended Replenishment Report**. When **Include Lead Time** is selected, a product's lead time is added to the current date when searching for active customer forecasts to include in the replenishment report.

A second option, **Ramp Up Days**, can be used to specify the number of days to add to the calculated forecast date when searching for active forecasts. This is optional and is recommended when products have particularly long lead times.

### Feature activation

To include accurate replenishment calculations in the **VA Entry Recommended Replenishment Report**, set up customer forecasts in **Product Customer Reservation/Forecast Setup** and set up the VA fabricated product's **Average Lead Time** in **Product Warehouse Product Setup**.

Enable these options in **SA Administrator-Products-Replenishment** for customer forecasting:

- **Include Lead Time?**
- **Ramp Up Days**

If **Include Lead Time** is not selected, then lead times are not added to the start and end dates when searching for active forecasts, and the calculations used to determine the quantity to replenish for forecasts is unchanged.

## Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

## Upgrade path

To upgrade to Infor Distribution SX.e 11.x, you must be on a version of 4.0 or later. Older releases should be upgraded to 4.0 before upgrading to 11.x.

## Progress OpenEdge version requirement

Progress OpenEdge version 11.7.2.011 is the minimum requirement for Distribution SX.e version 11.19.1 and later.

If you upgrade your on-premises installation, you must install it on the Windows client machines, and then re-install the clients to use the new version of OpenEdge. After upgrading the database to a new version of OpenEdge, all shared memory connections require the new version.

Contact Infor Support if you have questions regarding installation or upgrade issues.

See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.

## Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

## Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

## Chapter 3: June 2021 Update

This section describes the details of the 11.21.6 release. This update includes new features and product improvements for the application.

The version number format is 11.21.x, where 11 = the primary version, 21 = the release year (2021), and x = the release sequence. Version 11.21.1 is the first release of version 11 for 2021.

The 11.21.6 update can be downloaded from the Infor Download Center.

See the *Infor Distribution SX.e Installation Guide* or *Infor Distribution SX.e Upgrade Guide*.

## Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

### Customer

These new features or product improvements were made to the Customer module.

### New features

These new features were added to the Customer module.

#### New event notification for payment by credit hold customer

You can now receive a notification when a payment is received from a customer on credit hold who is not allowed to order products. The notification can prompt credit managers and other appropriate staff to review the customer's sales order status and open order activity after payment is made against their outstanding balance.

The new **ar-nosalespayment** event in **SA Event Manager Activate Entry** informs a selected user when AR cash posting functions are made to create a payment record for a customer with a **Sales**

**Order Status** of **No** in **Customer Setup**. The event uses the new **ar-createcheck** trigger, which is located in both **Customer Cash Receipt Entry** and **Customer Entry Lockbox Update Report**.

#### Feature activation

Enable the notification by activating the new **ar-nosalespayment** event in **SA Event Manager Activate Entry**.

## Product improvements

These product improvements were made to the Customer module.

### Ship To range added to Customer Period Analysis Report

An optional **Ship To** selection range is now available in the **Customer Period Analysis Report**. Some distributors set up job sites or projects as individual records in **Customer Ship To Setup**. Customers in **Customer Setup** can have many **Customer Ship To Setup** records. This new selection range is useful to produce reports for a specific **Customer Ship To Setup** record, which assists with the credit management and collection process.

## Distribution Analytics for Birst

These new features or product improvements were made to the Distribution Analytics content for Infor Birst.

## Product improvements

These product improvements were made to the Distribution Analytics Content for Birst.

### New Reset AP and AR Space workflows available

Two new workflows are available to run manually in case of data discrepancies in the Accounts Payable (AP) and Accounts Receivable (AR) Birst spaces. The workflows are named **CSD Reload AP** and **CSD Reload AR**. You can use these workflows to delete and re-extract all data for the respective spaces, which can be helpful when resolving data discrepancies.

#### Feature activation

The workflow is included in the Infor Distribution Analytics content provisioned for your tenant by Infor Cloud Operations, but it must be run manually. We recommend you contact your Infor Consultant before deleting and re-extracting all data in your Birst spaces.

See the information in the *Infor Distribution Analytics for Birst Configuration Guide* on troubleshooting Birst data mismatch issues.

## Distribution Analytics for Birst content updated

The updated Distribution Analytics for Birst content is available for each tenant in a strategic release schedule. This approach maximizes the availability of each tenant's data and Infor's Customer Support resources.

With this content release, the default Birst workflows are enabled. If your tenant uses custom workflows, then you must disable or reschedule the default workflows so they do not override your custom workflows.

Disable the default workflows with these steps:

- 1 Log in to Infor Ming.le and select the Birst application.
- 2 Click **Admin** in the menu.
- 3 Select **Orchestration**.
- 4 Search for **CSD Analytics Daily Extract and Process**.
- 5 Click the **Actions** arrow to the right of **CSD Analytics Daily Extract and Process**, then select **Scheduling**.
- 6 Click **Edit Schedules**.
- 7 Toggle each schedule to disable them, then save your changes.

See more information about disabling default workflows in *KB 2202593*.

## Infor CloudSuite Field Service/Infor Service Management

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service/Infor Service Management.

### New features

These new features were added to support the integration to CloudSuite Field Service/Infor Service Management.

### CloudSuite Field Service renamed

Beginning with the June release, CloudSuite Field Service will be renamed to Infor Service Management. References to CloudSuite Field Service in the associated documentation will be updated, where appropriate, to reflect the change.

## Product improvements

These product improvements were made to support the integration to CloudSuite Field Service/Infor Service Management.

### Additional BOD values ensure correct AP invoice calculations

The Process.Invoice BOD that is generated by Infor Service Management and consumed by Distribution SX.e was modified to include additional data for each Invoice BOD line that represents a re-rent product. This change addresses adjustments to the original amount owed to the vendor that are required when partial check-ins or early check-ins are invoiced.

These elements were added to the UserArea in the InvoiceLine section of the Process.Invoice BOD:

- **AdjustedLineQty**  
The adjusted line quantity is the quantity of product that you are renting from a vendor. If the value is positive, you are renting product from your vendor and owe a rental fee. If the value is negative, you have returned some or all of the products to your vendor before the next rental payment is due and should receive a credit.
- **OrigPOCost**  
The original purchase order cost is the amount that you are paying your vendor each rental period for the product.
- **OrigPOVendNum**  
The vendor number from the original purchase order is used to find the **Vendor Setup** record to determine if the Accounts Receivable workflow for vendor invoicing is used. If **Accounts Receivable** is selected in the **Rental Invoice Source** field, then an AP invoice is created in **Vendor Invoice Center Entry** when the Invoice BOD is processed.

The amount of the AP invoice is calculated by multiplying the adjusted line quantity by the original purchase order cost. If multiple lines for re-rent products from the same vendor are included in the Invoice BOD, the amounts for the lines are totaled to determine the amount for the AP invoice. If the total amount is positive, the AP invoice is created as an expensed invoice for the amount that you owe your vendor for the rented products. If the total amount is negative, the AP invoice is created as an expensed miscellaneous credit for the amount of a refund the vendor owes you for the items that you returned.

## Infor CRM integration

These new features or product improvements were made to support the integration to Infor CRM.

### New features

These new features were added to support the Infor CRM integration.

## Inbound Process Quote BOD supported

The inbound Process Quote BOD is now received from ION and used to promote a quote order in Infor CRM to a Quote Order (QU) in Distribution SX.e.

Enhancements are made to BOD handling in Distribution SX.e to consume the Process Quote BOD from Infor CRM. Upon receipt of the Quote BOD, a Quote Order is created in Distribution SX.e that can be maintained in **Sales Order Entry**. As with sales orders received from Infor CRM, you cannot maintain a quote order in Infor CRM after it is promoted to Distribution SX.e

After receiving the inbound Process Quote BOD, Distribution SX.e returns an acknowledgment Process Quote BOD to Infor CRM with the details of the new Quote Order. If the inbound Process Quote BOD encounters errors, Distribution SX.e returns Confirm and Acknowledgment Quote BODs with the error information.

Previously, quote orders from Infor CRM could not be promoted to Distribution SX.e.

### Feature activation

The inbound Process Quote and outbound Process Quote BODs must be configured for the connection point to ION, as well as the document flow between Distribution SX.e and Infor CRM. A new sample document flow, `SX_CRM_DocumentFlow_Sample.xml`, can be downloaded from KB article 1887404.

See the *Infor Distribution SX.e Integration Guide for Infor CRM* for instructions for imported and updating the document flow.

## Miscellaneous

These new features or product improvements affect multiple functions in the application.

## Product improvements

These product improvements affect multiple functions in the application.

## Overseas Trade

These new features or product improvements were made to the Overseas Trade module.

## Product improvements

These product improvements were made to the Overseas Trade module.



## Line detail from Overseas Trade transaction included on report

The line detail included on the **OT Master List Report** is now extracted from **OT Transaction Entry** detail, rather than **Purchase Order Entry** detail. This ensures that any changes made to the PO line detail in **OT Transaction Entry**, such as to add a line or change order quantities, is reflected accurately on the report.

Line detail is included on the **OT Master List Report** when you select **Yes** to **Print Line Items**.

## Purchase

These new features or product improvements were added to the Purchase module.

### Product improvements

These product improvements were added to the Purchase module.

### Batch call process enabled for Purchase Order Inquiry

Batch call processing is now enabled for line detail search in **Purchase Order Inquiry**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select the **POIP Line Detail Search - poipbuildpolist** service interface call from the **Available Advanced Polling Calls** list. With this service interface call selected, when you select Advanced Search in **Purchase Order Inquiry** and select **Line Detail** in the **Display** criteria, a batch process is initiated that runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the Advanced Search of line detail to complete without timeout errors.

### ASN receipt information for POs now available

Advanced shipping notice receipt information for purchase orders sent to TWL is now displayed in **Purchase Order Inquiry** on the **Warehouse Logistics Inquiry** view.

A new **Receipts** field in the Warehouse Logistics section of the **Warehouse Logistics Inquiry** view lists the receipts received against purchase orders.

## Sales

These new features or product improvements were made to the Sales module.

## New features

These new features were added to the Sales module.

### Direct POs and WT's for kit component sourcing supported

You can now create direct purchase orders (PO) or warehouse transfers (WT) in **Sales Order Entry** to source components for build on demand (BOD) kits. Use direct POs and WT's to ship the components directly to customers to save time and freight costs for you and your customers in situations where:

- The kit will be assembled at the customer site.
- The size or weight of the component is too large for your warehouse.

Kit component sourcing is initiated on the **Kits** page in **Advanced Line Entry**. You can create a direct PO or WT for components on these pages:

- **Kits-Component Sourcing**
- **Multi-Comp Sourcing**

When you source a kit component using a direct PO or WT, you cannot ship the kit on the sales order until after you receive the direct PO or WT. Additionally, you cannot zero ship a component to source a component that is in stock. Instead, you can change the line type for the component to special. You can also backorder the component if the component is enabled for backordering in **KP Component Setup**.

These functions were modified to process direct components:

- **Sales Order Entry, Sales Entry Pick Tickets Report, and Sales Shipping Feedback Entry:** When the order is processed, direct components do not affect the committed or reserved balances in **Product Warehouse Product Setup**.
- **Sales Entry Pick Tickets Report and Sales Entry Processing Delivery Document Report:** Direct components are not included on the report.
- **Sales Entry Processing Back Order Fill Report:** The **DO?** value is **yes** on the Specially Handled Receipts Report when the direct component is filled.
- **Sales Entry Processing Acknowledgements Report:** Direct components are flagged.
- **Sales Entry Invoice Processing Report:** Direct components are flagged. Their cost is not recalculated. Transaction records are created in **Product Adjust Non-Stock/Direct Order Entry**. Direct components are posted to direct General Ledger accounts for inventory and cost of goods sold.
- **Transfer Entry Print WT Report:** The net amount for components on direct WT are from the tied line or component.

**Note:** If you use Infor Document Management to print acknowledgments and invoices, the direct component flag is included on the standard forms in the `IDM_SX_Content_11_21_6.zip` file posted to KB 1887404 on the Infor Support Portal. If you use custom templates, you must manually update them to include the direct component flag.

## Product improvements

These product improvements were made to the Sales module.

### Format of line item values updated

The formats for these values in the Line Items grid on the **Edit Lines** page in **Sales Order Entry** now match the formats used in the Order Lines grid in **Sales Order Inquiry-Line Detail**:

- |                     |                    |
|---------------------|--------------------|
| • Discount Amount   | • Margin Amount    |
| • Discount Percent  | • Margin Percent   |
| • Discount Type     | • Net Price        |
| • EHF Amount        | • Price            |
| • EHF Exempt Amount | • Product Cost     |
| • EHF Net Amount    | • Quantity Shipped |
| • Kit Split Amount  | • Unit Conversion  |

### Order origin code for counter sales updates sales order

The default order origin code for counter sales now updates a Counter Sales (CS) order when these conditions are met:

- An origin code is set up for a Counter Sale in **SA Table Code Value Setup**. **Counter Sale** must be selected in the **Background Function** field on the origin code record.
- You did not manually specify an origin code on the **Sales Order Entry-Initiate** page when you first created the CS order.

If you do not set up an origin code for a Counter Sale, the default order origin code that is specified in the **SA Administrator Setup-Documents-Sales Orders-Entry Settings** is used for CS orders.

**Note:** You must add the **Origin Code** field to the **Sales Order Entry-Initiate** page using Personalization. The default origin code for a CS order does not automatically display in the **Origin Code** field on the **Initiate** page. The code is applied to the order later in the workflow, after you leave the **Initiate** page.

### Sales Demand Invoices Report options defaults updated

These **Sales Demand Invoices Report** options are no longer required fields:

- **Enter a List of Order #'s?**
- **Print Fully Tendered Counter Sales?**

Both fields have default values of **No**. This change resolves an issue that prevented the **Sales Demand Invoices Report** from printing automatically, based on the **Print Invoices at Shipping** option in **Product Warehouse Description Setup**.

## Ship To selection range added to Sales Demand Invoices Report

An optional **Ship To** selection range is now available in the **Sales Demand Invoices Report**. Some distributors set up job sites or projects as individual records in **Customer Ship To Setup**. This new selection range is useful to print invoices on-demand for a specific **Customer Ship To Setup** record.

**Note:** The new selection range option does not change the order in which generated invoice documents are sorted, most notably when printing invoices to Format 4 forms using Infor Document Management.

## Warning displayed when ship to address changed

When you use system rates for calculating sales taxes in **Sales Order Entry** and change the ship to address after creating lines on an order, a warning is now displayed: `Ship To Address Change - Review Taxes and Totals`.

You must review the amounts calculated for the order on the **Taxes and Totals** view and manually update the jurisdiction and click **Recalculate** to match the new ship to if necessary. The jurisdiction is not updated automatically in this situation.

## System Administrator

These new features or product improvements were made to the System Administrator module.

### New features

These new features were added to the System Administrator module.

### Improved open journal tracking

System administrators can now track GL journals that have not been properly closed and notify the operators on the journals. The new `sa-jrnlopen` event in **SA Event Manager Activate Entry** informs the specified users when the new **SA Open Journal Assignment Report** has found an open journal within the specified report criteria.

Additionally, the `sa-jrnlopen` event is triggered to search for open journals before disconnecting the operator in these scenarios:

- The system administrator selects one or more operators and performs a **Clear User** operation in **SA Connection Inquiry**
- The system administrator clears operator sessions in **SA Administrator Operator Disconnect Report**

Batch journals, which are intended to remain open for an extended period of time, are excluded from triggering the `sa-jrnlopen` event to notify operators. Batch journals are displayed in the new **SA Open Journal Assignment Report**.

## Feature activation

Notification of open journals is controlled by activating the new **sa-jrnlopen** event in **SA Event Manager Activate Entry**. Once the event is active, it can be reviewed in **SA Event Manager Transaction Inquiry**. You should also assign the proper security level in **SA Operator Setup** to the new **SA Open Journal Assignment Report** for those operators who should have access.

## Product improvements

These product improvements were made to the System Administrator module.

### Adjusted Operator Time added to SA Journal Setup

Two fields are added to **SA Journal Setup** to display the time a journal was assigned and closed in the time zone of the user viewing the journal record.

The new **Adjusted Operator Time** fields for the Assigned journal time and the Closed journal time display the Assigned and Closed times adjusted for the user's time zone. For example, if the journal is created at 8:30 AM Eastern Standard Time, and the operator viewing the journal record in **SA Journal Setup** is in the Mountain Standard Time region, the **Adjusted Operator Time** for the Assigned time is 6:30 AM.

The Assigned and Closed times are no longer converted to the viewing user's timezone. They are the actual times recorded for the journal record when it was saved, and are based on the time zone of the operator who saved the journal.

**Note:** We recommend you do not change the Assigned and Closed dates and times. However, if a change is required, you should honor the same time zone in which the original times were posted.

### Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake using the **SA Administrator Birst Extraction Report**:

- icseh
- oeehta
- poelo

## Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

## New features

These new features were added to the TWL module.

### New inquiry enables mass reversal of TWL orders in picked stage

You can now retrieve dropped orders from TWL and revert the order stage from Picked to Ordered for large lists of orders when you select **Undo OE Order Picking Stage** from the new **Sales TWL Undo OE Order Picking Stage Inquiry** function. This allows you to quickly maintain a group of orders by undropping them at one time. After orders are undropped, you can maintain them in **Sales Order Entry** or **SA Mass Maintenance Administration**, and then re-dropping to TWL.

To modify a **Sales Order Entry** order that has been moved to TWL, the order must be in an undropped TWL order stage. The **Sales TWL Undo OE Order Picking Stage Inquiry** retrieves a list of **Sales Order Entry** orders for a TWL warehouse that are currently in a picked stage. After the order is undropped, you unallocate the order from the warehouse floor and revert the order stage from picked to ordered.

#### Feature activation

To use **Sales TWL Undo OE Order Picking Stage Inquiry**, **SA Operator Setup** permissions must be granted to users that are familiar with TWL standard practices and order management.

See the *Infor Distribution SX.e Total Warehouse Logistics User Guide for Managing Orders*.

## Product improvements

These product improvements were made to the TWL module.

### Zero now valid entry for position and level positions in TWL Multiple Location Create

Zero is now a valid entry for both the **Position** and **Level** positions in **TWL Multiple Location Create**.

## Transfer

These new features or product improvements were made to the Transfer module.

## New features

These new features were added to the Transfer module.

## New notification for transfer backorder fill

You can now receive a notification when a warehouse transfer has been filled through the back order fill process. The notification can prompt the appropriate personnel to manage and update the warehouse transfer. Previously, warehouse personnel manually reviewed all allocation reports to determine if a warehouse transfer was filled, then notified the user who created the warehouse transfer.

### Feature activation

Enable notifications by activating the new `wt-bofillallocrpt` event in **SA Event Manager Activate Entry**. The event informs a selected user when a warehouse transfer is filled by the **Sales Entry Processing Back Order Fill Report** process.

## Product improvements

These product improvements were made to the Transfers module.

### Alternate order number added to transfer pick ticket XML output

The alternate order number data stored with a tied warehouse transfer is added to the XML output for the WT pick ticket. These fields are now included in the Line level data of the XML output for pick tickets when printing to Format 4 and using Infor Document Management (IDM) or a third-party forms application:

- TieType (example, 'o' for order)
- TieNumber (tied order number)
- TieSuffix (tied order suffix number)

**Note:** The standard pick ticket template for IDM was not updated to include this detail. To print this detail on your pick ticket, you must create a custom `SXWTPickTicketTemplate` and include the alternate order elements on your forms.

## Vendor

These new features or product improvements were made to the Vendor module.

## Product improvements

These product improvements were made to the Vendor module.

## New option creates 1099 output for prior year

The Internal Revenue Service (IRS) now accepts 1099-MISC forms after December 31, or after the end of the current calendar year. This requires that you specify the proper reporting period when you run the **Vendor Administrator Federal 1099 Print** after December 31st. You must take care to select data for the prior year but populate the Prior Year Indicator properly in the 1099 output to avoid rejection by the IRS.

A new option is added to the report to allow you to select the prior tax reporting year. When you select **Yes** for the new option, **For Prior Tax Year**, these changes occur:

- The Prior Year Indicator, 'P', is loaded in Position 6 of the T record.
- The selection for the option, **(C)urrent or (P)revious Year's Payments** is checked.
  - If **Previous** is selected, data is extracted from the **Payments Last Year** in **Vendor Setup**. The Payment Year is updated with the current year minus 1.
  - If **Current** is selected, and you are sending output to Magnetic Media, the message `Cannot Use Current Year Payments to Generate Prior Tax Year Report` is displayed. No output is generated.
- The Prior Year Indicator is no longer updated based on your selection for the **(C)urrent or (P)revious Year's Payments** option.

When you select **No** for the **For Prior Tax Year** option, the Prior Year Indicator is blank. If **Current** is selected for the **(C)urrent or (P)revious Year's Payments** option, data for the 1099 output is extracted from the **Payments Year to Date** for each vendor in **Vendor Setup**. The Payment Year for the 1099 output is updated with current year. If you have already run **Vendor Administrator Year End, Payments Year to Date** amounts are moved to **Payments Last Year**. Select **Previous** and data is extracted from **Payments Last Year**. The Payment Year is updated with the current year minus 1.

## Business rule resolves date inconsistencies for UK companies

Notes added to invoices in **Vendor Invoice Center Entry** are now assigned a date using the format defined in the new DatabaseDateFormat business rule. If you are a company operating in the United Kingdom, you must change the date format for the business rule in **SA Business Rule Setup** by setting the **Rule Value** from **mdy** to **dmy**. This ensures the notes date, which is a primary key for search, is assigned using the appropriate format and does not cause errors.

**Note:** The business rule may not exist in **SA Business Rule Setup**. If not, you must create it using the **SA Table Code Value Setup-Business Rules** template for the standard DatabaseDateFormat rule.

This business rule is applied to any notes created after the business rule's **Rule Value** is set. Contact Infor Support to request assistance with resolving any existing invoice note records created with a US-formatted date. They can provide assistance in running a data scrub routine to fix the primary key on existing records.



## Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

## Upgrade path

To upgrade to Infor Distribution SX.e 11.x, you must be on a version of 4.0 or later. Older releases should be upgraded to 4.0 before upgrading to 11.x.

## Progress OpenEdge version requirement

Progress OpenEdge version 11.7.2.011 is the minimum requirement for Distribution SX.e version 11.19.1 and later.

If you upgrade your on-premises installation, you must install it on the Windows client machines, and then re-install the clients to use the new version of OpenEdge. After upgrading the database to a new version of OpenEdge, all shared memory connections require the new version.

Contact Infor Support if you have questions regarding installation or upgrade issues.

See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.

## Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

## Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

## Chapter 4: May 2021 Update

This section describes the details of the 11.21.5 release. This update includes new features and product improvements for the application.

The version number format is 11.21.x, where 11 = the primary version, 21 = the release year (2021), and x = the release sequence. Version 11.21.1 is the first release of version 11 for 2021.

The 11.21.5 update can be downloaded from the Infor Download Center.

See the *Infor Distribution SX.e Installation Guide* or *Infor Distribution SX.e Upgrade Guide*.

### Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

### Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

#### Bulk Delivery

These new features or product improvements were made to the Bulk Delivery module.

#### New features

These features were added to the Bulk Delivery module.

## New Bulk Delivery module

A new module, Bulk Delivery, is added to Distribution SX.e to manage non-durable, bulk goods that are usually stored in tanks, drums, totes, pails, etc. These storage tanks are generally located on site at lube shops or dealerships. The Bulk Delivery module is used to manage the storage types and replenishment and delivery of material in each storage device.

The Bulk Delivery module can be set up to forecast replenishment and facilitate delivery of bulk products in the field. This includes estimating the quantity remaining in storage devices, such as tanks, and estimating the quantity needed to fill tanks.

Bulk Delivery can also be used to group orders for delivery by assigning them to trucks or truck compartments, and printing delivery documents such as driver cards, load sheets, and meter tickets.

### Bulk Delivery functions

The Bulk Delivery module is comprised of these functions:

- Bulk product setup:
  - **BD Tank Master Setup**
  - **BD Truck Master Setup**
- Bulk product replenishment:
  - **BD Administrator Tank Calculations Report**
  - **BD Demand Center Entry**
  - **BD Entry Recommended Tank Replenishment Report**
- Bulk delivery management:
  - **BD Load Center Entry**
  - Bulk delivery printing:
    - **BD Entry Print Driver Card Report**
    - **BD Entry Print Load Sheet**
    - **BD Entry Print Meter Ticket**
- **BD Entry TWL Update** is used to update inventory in TWL warehouses

### Updated processes

These existing Distribution SX.e functions are updated to support the new Bulk Delivery module:

- **Product Setup**

Bulk materials are identified by selecting the **Bulk Delivery** option in **Product Setup-General**.
- **Product Extended Cross Reference Setup**

Create cross reference records for excess bulk product storage, such as for drums.
- **Sales Order Entry**

Bulk delivery orders may be entered in **Sales Order Entry** as an alternative to automatic order creation in **BD Demand Center Entry**. Bulk delivery products are limited to Stock Orders (SO), Return Merchandise (RM) orders, and Correction (CR) orders. A **Tank ID** field is added to the **Advanced Line Entry** window in the Extended Fields section. This field is required for products set up as bulk delivery products.

- **Sales Shipping Feedback Entry**  
After delivery, this function is run to update the bulk product's quantity shipped with the actual quantity of bulk product delivered. This also updates the sales order stage to Shipped (3).
- **Sales Entry Invoice Processing Report**  
After delivery and update of the order stage, the bulk delivery sales order can be invoiced.
- **SA Table Code Value Setup**  
Values from these new Bulk Delivery tables are used during truck and tank setup: Delivery Group, Fill Cycle, Truck Type, and Unit.

### Feature activation

The Bulk Delivery module is included in the core set of modules delivered with Distribution SX.e version 21.5. To activate the Bulk Delivery module, select the **Bulk Delivery Active** option in **SA Administrator Options-Documents-Sales Order-Processing**. Enable function security for your personnel for access to Bulk Delivery functions in **SA Operator Setup-Function Security**.

## Customer

These new features or product improvements were made to the Customer module.

## Product improvements

These product improvements were made to the Customer module.

### Invoice selection improved in Customer Cash Receipt Entry

Multiple workflow enhancements are added to **Customer Cash Receipt Entry** to reduce keystrokes and expedite payment processing.

When you apply a customer's payment using the **Invoice # Apply To Type** option, you are now taken directly to the invoice in the Invoices grid in **Customer Cash Receipt Entry**. The specific invoice is highlighted in the grid and is checked, ready to be paid.

A new dialog window, **Select From Duplicate Invoices**, is displayed if you select **Invoice** in the **Apply To Type** field, and multiple invoices exist with the same invoice number. If a single invoice exists for the exact amount specified, it is selected by default. Otherwise, you can select the correct open invoice for the customer/ship to from the list and click **OK**. The invoice information is defaulted in the **Cash Receipt Entry** window. Any miscellaneous credits available for the customer are also listed.

If the Invoice # is specified with a 00 suffix, all suffixes for the selected invoice are listed in the **Select From Duplicate Invoices** window.

## EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

### Product improvements

These product improvements were made to support EDI documents.

#### EDI 855 inbound flat file processing updated

These updates were made to the flat file processing for inbound EDI 855 Purchase Order Acknowledgements:

- An extra line item is no longer created when you run the **EDI Entry Processing PO Acknowledgement Report** with the **Process Document Through ETCC** option set to **Yes**. The extra line caused an error that displayed on the exceptions report and in the **Electronic Transaction Control Center (ETCC)**.
- The price unit of measure and quantity unit of measure values for the line items in the inbound file are validated. Based on those values, the price and quantity of the line item on the purchase order are updated. If an update occurs, the quantity unit of measure from the flat file is now displayed in the `Invalid Quantity Unit of Measure` message and the price unit of measure from the flat file is now displayed in the `Invalid Price Unit of Measure` message.
- A new message, `Check Log for Possible Data Error`, is displayed on the exception report and in ETCC when a line fails to import. Typically, the error occurs when the file is corrupt and missing a carriage return or line feed. This message is a header-level message. The message is an exception by default, but you can override message handling in **SA Business Rule Setup**.
- The log file now includes these values:
  - The line number of the `.dat` file that is being read in.
  - Data and number of bytes imported when the import fails.

See the *Infor Distribution SX.e Setup and Administration Guide for EDI for Flat File Processing*.

## Infor CloudSuite Field Service integration

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service.

### New features

These new features were added to support the integration to Infor CloudSuite Field Service.

## Invoice milestone billing supported

Invoice milestone billing is now supported with the integration to Service Management. Invoice milestone billing is scheduled billing activity against a Project Fixed operation on a service order in Service Management. When a milestone is invoiced in Service Management, a matching General Ledger posting is made in Distribution SX.e. The GL posting equals the value of the milestone, not the value of the operation, ensuring General Ledger is synchronized with the Service Management invoice.

When Service Management generates a ServiceOrder BOD to create a sales order in Distribution SX.e, line items are created for each Project Fixed operation and its corresponding transactions. The ServiceOrder BOD indicates whether invoice milestone billing was applied to an operation with a new **InvoiceMilestone** property. The value of the property is true when **Use Invoice Milestones** is selected on the **Service Order Operations** form in Service Management.

The line items for an operation and its related transactions are adjusted on sales orders to accommodate milestone billing. The value of the operation is displayed in the **Net Amount** field for the operation line item. The quantity shipped for the operation line item is 0 to prevent the line from being invoiced for the entire value. Additionally, the value of each related transaction is 0.

For an operation line item, the value of the operation is displayed as the net amount but the shipped quantity is set to 0.

When a milestone is reached, it is invoiced in Service Management. An Invoice BOD is generated that indicates whether the billed amount is associated with a milestone with a new **InvoiceMilestone** property. The value of the property is true when **Use Invoice Milestones** is selected on the **Service Order Operations** form and an invoice milestone was billed.

When the Invoice BOD is consumed by Distribution SX.e, a line item is added to the sales order for the milestone amount. The quantity ordered on the new line equals the quantity shipped, and the net amount equals the amount of the milestone invoice. The order is shipped and invoiced for the milestone amount. After the order is invoiced processed, these events occur:

- The amount of the milestone invoice is posted to the General Ledger.
- A backorder is created with the operation and transactions lines from the original order, including the amounts. The backorder is in Stage 1-Ordered.

When the next milestone is reached and invoiced, a new line for the milestone amount is added to the backorder. The backorder is shipped and invoiced, and the amount of the milestone invoice is posted to the General Ledger. Another backorder is created with the operation and transactions lines from the original order. The process repeats each time a milestone is reached and invoiced.

After the final milestone is invoiced and the operation is set to complete in Service Management, a ServiceOrder BOD is generated. Because invoice milestone billing was used for the operation, none of the remaining lines on the backorder that are related to the operation can affect the General Ledger. These updates are made to the backorder:

- The Net Amount for the operation line is changed to 0.
- The quantity shipped for the operation line is changed to 1.

If the operation is the last operation on the order, the order can be shipped and then invoiced with no amount due and no impact to the General Ledger. Alternatively, you can close the service order to cancel to sales order in Distribution SX.e when you invoice the final milestone for the last operation on the order. The lines are sent to lost business and no further processing is required. If another open

operation is included on the backorder, another backorder is created and the invoice milestone process continues.

**Note:** Time and Material operations that are included on service orders are not eligible for invoice milestone billing. Transactions that are related to Time and Material operations are subject to standard invoice processing.

### Feature activation

To use invoice milestone billing, Service Management must be activated in **SA Administrator Options-Integrations-Service Management**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service*.

## Automatic creation of recurring payments for re-rent items

If you use the re-rent function in Service Management, you can now process recurring payments for re-rented items based on invoices from the vendor or for the customer. Use the new **Rental Invoice Source** field in **Vendor Setup** to indicate the workflow your company will use to create invoices, either **Accounts Payable** or **Accounts Receivable**. The value also applies to all ship froms for the vendor.

Both invoicing workflows use the rental contract number to associate the related purchase orders and invoices. The rental contract number and rental contract line number are now included in the PurchaseOrder BOD from Service Management. When Distribution SX.e consumes the BOD to create a purchase order, the values are used to associate the rental contract, purchase order, and purchase order line. Those associations are then used when processing the Invoice BOD or the SupplierInvoice BOD.

### Accounts Payable workflow

If you select **Accounts Payable** as the **Rental Invoice Source**, you must process invoices provided by the vendor in **Vendor Invoice Center Entry**. You must process the initial invoice as a trade invoice, which is associated with the purchase order by the purchase order number. After you cost the trade invoice, the purchase order is closed and you cannot associate any additional vendor invoices with the purchase order. Subsequent invoices for the re-rented items are entered as expense invoices. Specify the rental contract number in new **Rental Contract** field on the **Invoice Detail** page to associate the payment with the purchase order and purchase order line. View information about invoices and purchase order lines with the same rental contract number on the new **Rental Contract** tab on the **Invoice Detail** page.

If the vendor sends invoices electronically, an invoice is created automatically in **Vendor Invoice Center Entry**. If the SupplierInvoice BOD includes a rental contract number and the purchase order to rent the item is in Received stage, then a trade invoice is created. If the purchase order is closed, then an expense invoice is created and the lines are totaled to calculate the amount of the expense invoice.

### Account Receivable workflow

If you select **Accounts Receivable**, invoices are automatically created in **Vendor Invoice Center Entry**, based on customer invoice creation initiated in Service Management. To use this workflow, you must have an agreement with the vendor that you will submit your recurring rental payment without the vendor providing an invoice.

The vendor invoice is created when Distribution SX.e consumes the Invoice BOD that is sent when a rental contract invoice is generated in Service Management. For each line on the Invoice BOD with a rental contract number, the number is used to find the line for the re-rent item on the original purchase order. The cost per rental period is included on the original purchase order line. Total invoice amounts are used to create expense invoices for each vendor in **Vendor Invoice Center Entry**.

**Caution:** If you use the accounts receivable workflow, you must check-in all re-rented items on an order at the same time. If you attempt multiple check-ins, vendor invoices are not generated after the first check-in.

In support of this enhancement, rental contract values in the **APEI**, **APET**, and **APSV** tables are available for ad hoc reporting against the Data Lake. Rental contract numbers are displayed in **Purchase Order Inquiry**, **Vendor Inquiry**, and **GL Journal Inquiry**. Additionally, these reports were updated include information that are related to the enhancement:

- **Purchase Master List Report**
- **Vendor Master List Report**

### Feature activation

Select the **Rental Functionality Active** option in **SA Administrative Options-Integrations-Service Management** to activate the rental contract functionality. The Accounts Payable workflow for invoicing a vendor is the default workflow and requires no activation. To activate the Accounts Receivable workflow, you must select **Accounts Receivable** in the **Rental Invoice Source** field in **Vendor Setup**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service*.

### BOD updates create AR credits for rental contract orders

You can now process accounts receivable credits for rental contracts in Distribution SX.e using the **Invoices, Debit and Credit Memos** form in Service Management. Distribution SX.e consumes and processes rental contract credit information provided by Service Management through the Invoice BOD. The BOD is generated during invoice posting.

If the **Unit Price/Amount** field for a line item on the BOD contains a negative number, a return line is created on a stock order in **Sales Order Entry**. The order is then shipped and the order is invoiced using standard processing.

The credit given to the rental customer is applied against the rental contract itself and not against the product that was rented. Accounts payable invoice processing for re-rent products is not affected by this enhancement.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service*.



## Rental contract freight charges now update sales order addons

Freight charges added to a rental contract in Service Management are now included on the Invoice BOD that is generated when a rental product is checked out or checked in. When the BOD is consumed by Distribution SX.e, the freight charge displays as an addon freight charge in **Sales Order Entry**.

The rental contract can be invoiced for the duration of the rental contract during check-out and check-in. The freight value is charged on the first invoice, which is usually created during rental check-out, and then set to zero.

If an additional freight charge must be applied to more than one invoice, the freight charge must be added to the rental contract again. The amount is included on the next invoice and again set to zero. Freight charges are not cumulative.

The **Freight** field was added to Service Management forms that are related to rental contracts in v2021.5 to meet taxing requirements and improve workflow. Previously, freight could only be added to a rental contract using the **Surcharge** field.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service*.

## Infor Distribution Proof of Delivery CE

These new features or product improvements were made to support the integration to Infor Distribution Proof of Delivery Cloud Edition.

### New features

These product improvements affect version 21.x of Infor Distribution Proof of Delivery CE.

### Delivery images now stored in IDM

Signatures and images captured by your delivery driver and stored on the order data returned to the ERP are now stored in Infor Document Management.

Updates to order data, including links to any signature captures files in Proof of Delivery, were previously sent to the ERP in the Shipment BOD. With this new integration to IDM, prior to the Shipment BOD being submitted, signatures and images are updated to IDM. A unique identifier is assigned to each signature and to each image document. These identifiers are now stored on the Shipment BOD in the UserArea element. The associated sales order header is also updated with the ID, enabling you to view the images on the order in the ERP.

Use the Proof of Delivery Manager application to view signatures and images associated with a delivery and stored in IDM. The Delivery Images and Receiver Signature sections can be viewed on the **Delivery Detail** screen.

Two new document types are added to IDM to support these image files: POD\_Signature and POD\_Delivery\_Image.

**Note:** You can include the signature image on invoices printed in Distribution SX.e as Format 4 forms (IDM or 3rd-party). You must create a custom Invoice template to include the signature image.

## Infor Document Management integration

These new features or product improvements were made to support the integration to Infor Document Management.

### Product improvements

These product improvements were made to support the integration to Infor Document Management.

#### Missing detail included on Statement form

Ship to detail including outstanding charges is now included on the Statement form if statements are printed in **Customer Entry Statement Print Report** as Print Format 4.

In addition, reference information is now included on the Statement form if you select **Yes** for the **Print References** option. This prints any reference line that is attached to a transaction.

#### Adjusted printing of sales order subtotal lines

Sales order subtotal lines are now printed as separate lines, right-justified, on these Format 4 forms:

- Acknowledgment
- Delivery Note
- Invoice and Consolidated Invoice
- Pick Ticket
- Quote

The subtotal lines follow any comment lines. Previously, subtotal lines were included with the comment lines.

**Note:** The standard Infor Document Management templates for these forms have been updated and can be downloaded from the `IDM_SX_Content_11_21_5.zip` file attached to KB 1887404:

- SXAcknowledgementTemplate
- SXDeliveryNoteTemplate
- SXInvoiceTemplate
- SXConsolidatedInvoiceTemplate
- SXOEPickTicketTemplate
- SXQuoteTemplate

If you are using a custom version of any of these templates, you must apply the changes made to the XML output to your custom forms.

## External comments printed correctly

Comments added to a sales order as external, stand-alone comment lines are now printed correctly on the Invoice and Pick Ticket Format 4 forms.

**Note:** If a stand-alone comment line is added as line 0, it is included in the header section of the XML output and is printed before Line 1 on the form.

The standard Infor Document Management templates for these forms have been updated and can be downloaded from the `IDM_SX_Content_11_21_5.zip` file attached to KB 1887404.

## Pick ticket forms changed for picking and packing list

Separate output files are now created for pick tickets printed in Format 4 (IDM or third-party), depending upon the ship complete status of the order.

When you print a pick ticket in **Sales Entry Pick Tickets Report**, two pages are printed. The first is labeled "Pick Ticket" on the right corner of the form, and the second is labeled "Packing Slip".

On pick tickets where some lines may be backordered, the Format 4 "Pick Ticket" form includes only those lines that can be picked and does not include the shipping address.

When backordered lines are filled and the order is ship complete, and the pick ticket is printed again, only the lines still to be picked are included on one set of forms, and all lines are included on a second set of forms as a reprint. Two versions of both pages are printed, for a total of four pages:

- Page 1: "Pick Ticket" with only the lines to be picked printed on the form. No ship to address is included, and "Reprint" is printed in the top center of the form.
- Page 2: "Packing Slip" with only the lines to be packed printed on the form. No ship to address is included, and "Reprint" is printed in the top center of the form.
- Page 3: "Pick Ticket" with all lines from order printed on the form. The ship to address is included. "Packing Slip" is printed in the top center of the form.
- Page 4: "Packing Slip" with all lines from order printed on the form. The ship to address is included. "Packing Slip" is printed in the top center of the form.

If an order has no backordered lines and all lines can be shipped, two versions of the pick ticket and packing slip forms are created as described in the bullets above.

The standard SXOEPickTicket template is updated with these label changes and can be downloaded in the `IDM_SX_Content_11_21_4.zip` file attached to KB article 1887404.

**Note:** If you have custom pick ticket forms, you must add the Packing Slip label to your forms manually. See KB 2190215 for instructions for customizing your OE pick tickets.

## Infor Rhythm for Commerce integration

These new features or product improvements were made to support the integration to Infor Rhythm.

### Product improvements

These product improvements were made to support the integration to Infor Rhythm.

### Pricing API call processing time improved

The processing time for handling the Rhythm PricingServices call when it is received in Distribution SX.e is improved. This call is initiated by Rhythm for Commerce when inquiring on prices for multiple products in Distribution SX.e where no warehouse is specified.

### Values added to inbound SalesOrder BOD for Rhythm integration

New fields are received in the SalesOrderHeader section of the inbound Process SalesOrder BOD: **Placed By** and **Reference**.

The **Placed By** value is received in the inbound Process SalesOrder BOD as a part of the order header note section. For the Rhythm for Commerce integration, this will store the email address of the user who created the order in Rhythm. The **Placed By** email is displayed in **Sales Order Inquiry-Totals** in Distribution SX.e. It is also displayed in the **Order Global Note** view in the Notes context application.

The **Reference** field is now populated in the SalesOrder BOD with the **Your Reference** value in Rhythm. This field, combined with the source order number (purchase order #), updates the **Reference** field on the sales order header. It can be viewed in the **Reference** field in **Sales Order Inquiry-Header** in the Reference & Other Information section in this format: **[Reference] ; ION: [source order #]**.

## ION integration

These new features or product improvements were made to support the integration to ION.

### Product improvements

These product improvements were made to support the integration to ION.

## Employer Reference element updated in ContactMaster BOD

The element, EmployerReference, is now updated when a contact record is associated with a **Customer Ship To Setup** record. The EmployerReference tag references the **Customer Ship To Setup** record associated with the contact role.

The EmployerReference element is generally used by CRM applications for account lookup.

## Miscellaneous

These new features or product improvements affect multiple functions in the application.

## Product improvements

These product improvements affect multiple functions in the application.

## Hot key improvements increase usability

The performance of hot keys that are applied to complex screens through the Extension Enablement Toolkit was improved to ensure consistent behavior and increase usability. Previous issues, such as focus and application per page, were resolved.

Your system administrators can create hot keys to navigate modals and screens with multiple tabs and views, such as **Sales Order Inquiry** or **Vendor Invoice Center Entry**, to improve workflow. Hot keys can also be used to perform button functions, such as opening a new or existing record.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

## Product

These new features or product improvements were made to the Product module.

## Product improvements

These product improvements were made to the Product module.

## Product List added to Product Warehouse Product Setup

The **Product List** option is now available in **Product Warehouse Product Setup**. You can select a product in the grid and select **Product List > Add To Product List** or **Create New**. This mirrors the same capability that already exists in **Product Setup**.

Product lists are created as a quick shopping list of items that are frequently ordered together in **Sales Order Entry**. They are created in **Product List Setup** or with the **Product List** option in **Product Setup** or, with this enhancement, in **Product Warehouse Product Setup**.

## Purchase

These new features or product improvements were added to the Purchase module.

## Product improvements

These product improvements were added to the Purchase module.

## Catalog vendor product number printed on non-stock purchase orders

You can now print vendor products from **Product Catalog Setup** on nonstock purchase order lines in the **Purchase Entry Processing Print POs Report** and **Purchase Demand Print Report**. When you select **No** in the **Print Our Product Number?** option and the line is for a nonstock catalog product, the vendor product number is printed if a record exists. If a vendor product is not set up in **Product Catalog Setup**, the product from **Purchase Order Entry** is printed.

## Improved product value logic for purchase order Excel spreadsheet import

When you format an Excel spreadsheet to import and create an order in **Purchase Order Entry**, a product value is required for each line item. You may include values in the **Vendor Product** and **Distributor Product** columns for the line item. The **Distributor Product** value takes precedence and is used, even if both values are imported.

To prevent the **Distributor Product** value from being replaced, the cross-reference logic for vendor products that was previously applied to the **Distributor Product** column has been removed. Now, the Vendor Product cross-reference logic is only applied to the **Vendor Product** column. When you import only a **Vendor Product** value in the line item, the value is used to determine the **Distributor Product** value, based on **Product Extended Product Cross Reference Setup-Vendor** and **Product Warehouse Product Setup**.

## Sales

These new features or product improvements were made to the Sales module.

### Product improvements

These product improvements were made to the Sales module.

#### New AO option allows for whole order discount greater than order amount

A new option, **Allow Whole Order Discount Greater Than Shipped**, is added to **SA Administrator Options-Documents-Sales Orders-Entry Settings**. When this option is selected, you are able to enter a whole order discount on an order in **Sales Order Entry** when the line total of the order is zero. If the discount makes the order total negative, a Miscellaneous Credit is created during **Sales Entry Invoice Processing Report**.

If the option is not selected, the whole order discount cannot exceed the shipped line total on the current order suffix. If the shipped quantity is zero, such as for a Quote Order or backordered amount, the whole order discount cannot exceed the total line amount. The message `Whole Order Discount Greater Than Invoice Amount (5904)` is displayed.

When selected, this option applies to whole order discount amounts only, not whole order discounts applied as a percent of the order. The whole order discount is applied to the -00 suffix and is not rolled to a backorder.

**Note:** This feature restores functionality that was previously available in Distribution SX.e, but adds the Administrator Options control for enablement in your company.

## System Administrator

These new features or product improvements were made to the System Administrator module.

### New features

These new features were added to the System Administrator module.

#### Improvements to batch call processing

Batch call processing was originally implemented in the January 2021 update (11.21.1) for processing large transaction sets in **Customer Cash Receipt Entry** in a batch process to avoid time-out errors. Since then, it has been made available for several other transaction processing and inquiry functions in Distribution SX.e. In the May 2021 version, these improvements are added:

- Option is relabeled to more clearly define its use
- Individual service call selection enabled from a scrolling list
- Orphan batch process records are now purged
- Improved logging of batch processes
- New business rule can be enabled to control time between polling

The original option, **Use Batch Call Process for Designated Slow Service Interface Calls**, in **SA Administrator Options-System-General** is relabeled **Use Advanced Polling Interface Logic for Designated Service Interface Calls**.

The option is enhanced to enable these new capabilities:

- New selection list

The existing option is updated to include a scrolling selection list of all service calls that are enabled for batch call processing. The new **Available Advanced Polling Calls** list currently includes service calls for **Customer Cash Receipt Entry**, **Sales Order Inquiry**, **Sales Order Entry**, **Purchase Receipt of Inventory Entry**, **Transfer Receipt of Inventory Entry**, and **Transfer Shipping Entry**.

If the **Use Advanced Polling Interface Logic for Designated Service Interface Calls** option is selected, and no calls are selected in the list, batch processing is enabled for all calls. This ensures that the option is fully activated if you had enabled the option in a prior update.

If the option is selected, and you select any calls in the list, batch processing is enabled for the selected calls only.

If the option is not selected, batch call processing is not enabled for any service calls. If you uncheck the option after selecting service calls in the list, those calls remain selected. This is useful for disabling batch call processing temporarily. The selected calls remain selected if you enable the option at a later date.

- Purging records

The existing `rdclean` utility is used to review any orphaned batch process records that remain in the database more than two days after the process is completed. `Rdclean` removes any batch call records that remain with a transaction date two days older than the current date.

- Logging

Log records, labeled `batchcallprocess`, are now added to the `rptsch.mmddyyy.log` file and can be used for debugging, if necessary.

- Business rule

A new business rule, `RequestPollingInterval`, can be configured in **SA Business Rule Setup** to override the 5-second interval between polling the batch process to determine if it has completed. You can set a shorter interval to require the poller to check the batch process sooner than 5 seconds. This is useful if a service call normally can complete in a short amount of time, under the 5-second polling time. If the business rule is enabled for a time under 5 seconds, and you run a process where a large set of data is processed, the batch process is run more frequently, but you do not experience the timeout issues.

Infor shall continue to review other transaction processing service calls in Distribution SX.e to determine where the batch process would reduce time-out issues for large transaction sets. We recommend you review the **Available Advanced Polling Calls** list periodically or as part of troubleshooting transaction set time-out errors.



## Feature activation

To activate this feature, you must enable batch call processing by selecting the **Use Advanced Polling Interface Logic for Designated Service Interface Calls** option in **SA Administrator Options-System-General**. If you enabled this option previously, review the list of service calls in the **Available Advanced Polling Calls** list to select the specific calls to enable for batch processing. If you do not select specific calls, all calls are enabled.

To enable the business rule, select the **RequestPollingInterval** attribute for a Config category and Configuration Setting rule type in **SA Business Rule Setup**. Specify the number of seconds in the **Rule Value** field. To inactivate this business rule and use the standard 5-second interval, specify 0 in the **Rule Value**.

**Important:** Batch call processing, when activated, may impact your system response time. We recommend you review each service call enabled for batch processing and activate only the calls that currently experience time-out issues.

## Product improvements

These product improvements were made to the System Administrator module.

### Report Ranges and Options grid customization enabled

You can now clear or reorder Ranges and Options grid records in **SA Administrator Options-System-Report Items**. This feature is helpful for operators who develop custom reports or add custom options to existing reports.

**Note:** The standard report ranges and options controlled by Distribution SX.e development metadata are overwritten with each release. A custom report should be set up as **Site Specific** in the **Standard** field in **SA Administrator Options-System-Report Items** so its custom ranges and options are not overwritten.

### Importing data from different tenant supported

You can now export data from a source environment from one tenant and then import it into a target environment for a different tenant. This improvement is intended for use by Infor Partners that export 'clean' data from their tenant into a customer tenant for testing.

Before you export the data using the **SA Tenant Refresh - Data Export Report**, you must set up a new business rule in **SA Business Rule Setup**. The business rule is a non-directional global rule that contains these values:

- Document Handler: config
- Node Name: TenantRefresh
- Attribute Name: PartnerExport
- Rule Value: Name of the tenant that will import the data

After the data is successfully exported, the **Rule Value** field for the business rule is cleared. You can then run the **SA Tenant Refresh - Data Import Report** in the target environment.

If you use the business rule, note these differences from the standard tenant refresh process:

- The 28-day limit on data refreshes is not enforced if a business rule is set up for a target tenant.
- If data is successfully imported into a production environment (<tenant>\_PRD), then a record is written to the database to indicate that the import was completed. This record prevents duplicate imports from the same source tenant. If the **SA Tenant Refresh - Data Import Report** is run for the same source tenant, then this error is displayed on the report output: `PRD tenant already imported on: <date>`. After the original import, you cannot run the report again unless the record is manually removed from the database. You must contact Infor Support about record removal.

See the *Infor CloudSuite Distribution Configuration Guide*.

## Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake:

- arsrt
- edsbwc
- icsou
- icspe
- icsv
- icswb
- oeehextra
- wmet
- wmsb
- wmsbp

## Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

### New features

These new features were added to the TWL module.

### Reprint pick label functionality and additional fields added to lot entry

These enhancements were made to TWL to improve lot processing and to enable the reprinting of pick labels:

### Reprinting pick labels

If a label is lost or requires updates, you can now reprint or make updates to the pick label.

A new menu option, **Reprint Picking Lbl**, is added to the **Order Picking Main Menu**, **Pick Selection** and **Order Picking** windows in TWL. Select this option to reprint or make updates to pick labels without needing to access a Distribution SX.e terminal.

### Additional fields added to lot entry

Several new data fields are added to **Product Extended Lot Number Setup** and **Purchase Receipt of Inventory Entry** in Distribution SX.e:

- **Country of Origin:** The country in which the lot was manufactured, produced or grown.
- **Case Quantity:** The quantity in each case for the specific lot. The case quantity for a product may vary based on the vendor.
- **Mfg Lot #:** The lot number from the manufacturer. This may be different than the lot number assigned by the distributor.

After lot data records are updated in **Purchase Receipt of Inventory Entry** these events occur:

- **TWL Stock Adjustment** data is passed to Distribution SX.e through the **WL Entry Batch Adjust Inventory Report**, which either creates a new **Product Extended Lot Number Setup** record or adjusts existing **Product Extended Lot Number Setup** records as needed.
- **TWL Initial Data Load** data is passed to Distribution SX.e, which either creates a new **Product Extended Lot Number Setup** record or adjusts existing **Product Extended Lot Number Setup** records as needed.
- **TWL Cycle Counting** data is passed to Distribution SX.e, which creates a new **Product Extended Lot Number Setup** record or adjusts existing **Product Extended Lot Number Setup** records as needed.

The data is printed on product and shipment labels so it can be identified both in the warehouse and at the job site.

The pick label reprinting functionality and the additional lot entry fields are applied to both TWL and TWL RF.

### Feature activation

Review these new TWL system parameters to activate the new data added to lot products:

- 7511-Assign Country to Lots: added to activate the functionality of assigning the country in which the lot was manufactured. The parameter defaults as cleared.
- 7512-Assign Mfg# to Lots: added to activate the functionality of assigning the lot number from the manufacturer. The parameter defaults as cleared.
- 7513-Assign Case Quantity to Lots: added to activate the functionality of assigning the case quantity for specific lots. The parameter defaults as cleared.

**Note:** If updates to existing labels are required, you can make updates using **Product Extended Lot Number Setup** data in the **Barcode Label Designer** in Enterprise Printing Platform (previously Unibar).

See the *Infor Distribution SX.e Total Warehouse Logistics User Guide for Picking, Packing, Shipping, and Kitting* and *Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics*.

## Transfer

These new features or product improvements were made to the Transfer module.

### Product improvements

These product improvements were made to the Transfers module.

#### Batch call process enabled for transfer shipping and receiving

Batch call processing is now enabled for Final Update in **Transfer Shipping Entry** and **Transfer Receipt of Inventory Entry**. It is also enabled for auto receiving in **Transfer Shipping Entry**.

When you select **Use Advanced Polling Interface Logic for Designated Service Interface Calls** in **SA Administrator Options-System-General**, you can select these service interface calls from the **Available Advanced Polling Calls** list:

- **WTEI** - **wteiupdatefinal**
- **WTES** - **wtesfinalupdate**

This initiates a batch process when you select **Final Update** in these functions, or when you select **Ship All; Auto Receive WTs** in **Transfer Shipping Entry**. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the Final Update and Auto Receive functions to complete without timeout errors.

## Value Add

These new features or product improvements were made to the Value Add module.

### Product improvements

These product improvements were made to the Value Add module.

## Improved VA Shipping Entry prompts for short-shipped order sections

**VA Shipping Entry** functionality has been improved to ensure that you are notified when a Value Add (VA) order section is short-shipped. Additionally, a new administrator option setting can be set to prevent short-shipping VA orders. In **SA Administrator Options-Documents-Value Add-Entry Settings**, the **Auto Create Section BO in Shipping** field is renamed to **Default Action for Short Shipped Sections**. You can select one of these options from the field:

- **Auto Create Back Order**
- **Always Prompt**
- **Do Not Allow**

The **Do Not Allow** option is new. Select it when you want to always prevent short-shipping VA orders.

When the **Always Prompt** option is selected, a warning is displayed in **VA Shipping Entry** when you specify a shipped quantity that is less than the ordered quantity. You can choose to cancel the action, proceed with the short-ship order, or create a back order. The option to create a back order is available when you select the **Allow Section Back Order** option in **VA Shipping Entry**.

**Note:** Use caution when proceeding with a short-shipped order in **VA Shipping Entry**. You will receive an error during **VA Receipt of Inventory Entry** and must reduce the quantity received to match the actual amount shipped.

## Vendor

These new features or product improvements were made to the Vendor module.

## Product improvements

These product improvements were made to the Vendor module.

## Enhancements to Vendor Cash Requirements Report

Several enhancements were made to the **Vendor Cash Requirements Report** to provide greater flexibility in creating report output. These enhancements include:

- **Additional report output formats**  
A new option allows you to send the report to CSV file, Email, Dropbox, or ION when **Detail** is selected in the **(D)etail, (V)endor Totals, or (S)ummary** report option. **Email** sends the CSV output as an email attachment. Use the **Dropbox** selection to generate the report in CSV format and upload to your Dropbox account. Selecting **ION** generates output using the existing AnyDocument BOD.
- **New options**

New options were added to include a CSV file name or email address. If you select CSV file output, you can specify the file name in the new **CSV File Name** option. If you select Email output, you can specify the email address to whom the CSV file is to be sent.

If you generate ION output, you can use **SA ION Inbox/Outbox Inquiry** to verify the AnyDocument BOD is sent to ION. The AnyDocument BOD is already in use, and the lookup already contains the BOD as a choice.

### Feature activation

If you plan to generate the **Vendor Cash Requirements Report** with the **ION** output option, you must activate the ION connection in SA Administrator Options. Select the option, **Use ION Inbox/Outbox**, in **SA Administrator Options-Integrations-ION Interface Options**. This relies on ION Messaging Service to send and receive BODs. You cannot use the SX.e Extension (Fortress) to send the AnyDocument BOD.

## Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

## Upgrade path

To upgrade to Infor Distribution SX.e 11.x, you must be on a version of 4.0 or later. Older releases should be upgraded to 4.0 before upgrading to 11.x.

## Progress OpenEdge version requirement

Progress OpenEdge version 11.7.2.011 is the minimum requirement for Distribution SX.e version 11.19.1 and later.

If you upgrade your on-premises installation, you must install it on the Windows client machines, and then re-install the clients to use the new version of OpenEdge. After upgrading the database to a new version of OpenEdge, all shared memory connections require the new version.

Contact Infor Support if you have questions regarding installation or upgrade issues.

See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.

## Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

## Chapter 5: April 2021 Update

This section describes the details of the 11.21.4 release. This update includes new features and product improvements for the application.

The version number format is 11.21.x, where 11 = the primary version, 21 = the release year (2021), and x = the release sequence. Version 11.21.1 is the first release of version 11 for 2021.

The 11.21.4 update can be downloaded from the Infor Download Center.

See the *Infor Distribution SX.e Installation Guide* or *Infor Distribution SX.e Upgrade Guide*.

### Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

#### Distribution Analytics for Birst

These new features or product improvements were made to the Distribution Analytics content for Infor Birst.

#### Product improvements

These product improvements were made to the Distribution Analytics Content for Birst.

#### New Total Warehouse Logistics data model

A new data model is now included in the prebuilt content delivered with Distribution Analytics for Birst.

The Total Warehouse Logistics data model provides business intelligence and reporting capabilities using data extracted from your Data Lake, ADR, and Birst Data Warehouse modules. The Total Warehouse Logistics data model uses existing business transaction data from TWL to provide Birst



models for productivity, picking, receiving, put away, and cycle count analysis, and warehouse and employee activity summary and detail reports.

The Total Warehouse Logistics data model is based on your company's existing business information from TWL. These TWL Data Lake objects are extracted and processed into the Raw Data Source space using existing extraction workflows:

- BINMST
- CARRIER
- EMPMST
- ITEM
- TRANSACTIONS

The Total Warehouse Logistics data model consists of these dashboards:

- Productivity Analysis
- Productivity Summary Analysis
- Productivity Summary
- Productivity Detail
- Employee Activity Summary
- Employee Activity Detail
- Picking Analysis
- Put Away Analysis
- Receiving Analysis
- Cycle Count Analysis
- Pick to Pack-Pick to Tote Summary
- TWL CSD Detail

These KPIs are available:

- #Lines Received
- #Lines Put Away
- #Lines Picked (count of sales order lines picked)
- #Cycle Counts
- #Orders Dropped
- #Orders Shipped
- #PO Closed
- #Products Moved
- #Lines Picked (count of purchase order lines picked)
- #Cartons Picked
- #Locations Picked
- #Orders Picked
- #Cartons Put Away
- #Locations Put Away
- #POs Put Away
- #PO Lines Received
- #Received POs on the dock

- #Received Cartons on the dock
- #POs Received
- #Received Products on the dock
- #Products Counted
- #Locations Counted
- %Locations Counted
- %Products Counted

### Feature activation

Users must be assigned to the SX-BIRST-WarehouseManager security role in Infor Ming.le and have access to the consumer space to access the Total Warehouse Logistics reports and dashboards in Birst.

Also, verify the **Audit** flag is selected for the five Data Lake objects (Binmst, Carrier, Empmst, Item, and Transactions) in **SA Audit Processing Administration**. This ensures these tables are replicated to the Data Lake.

See the *Infor Distribution Analytics for Birst User Guide* for information about the Total Warehouse Logistics data model, in addition to the other data models included in the Distribution Analytics for Birst content.

See the *Infor Distribution SX.e Configuration Guide for Infor Operating Services* for information about configuring Distribution Analytics for Birst.

## New GL Reset Account Maps workflow available

A new `CSD GL Reset Account Maps` workflow is available to run manually in case of data discrepancies in the General Ledger (GL) Birst space after it has been reconfigured. You can use this workflow to reset the GL hierarchy and accounting maps and delete any elements that exist in the already processed maps.

### Feature activation

The workflow is included in the Infor Distribution Analytics content provisioned for your tenant by Infor Cloud Operations, but it must be run manually. We recommend you contact your Infor Consultant before resetting your GL hierarchy and accounting maps.

See the *Infor Distribution Analytics for Birst Configuration Guide*.

## EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

## Product improvements

These product improvements were made to support EDI documents.

### Stored reports used for rebate processing

You can now create stored **EDI Entry Processing Rebates Reports** with different default options, and then use business rules to apply them at the vendor, company, or global level. When an inbound SyncSXVendorRebateClaim BOD is received, this business rule hierarchy is used to determine which stored report is used for processing:

- Vendor
- Company
- Global
- Standard stored report

If you do not set up stored reports, the standard report with the standard default values is used.

After the transaction is processed, the informational messages are displayed in the **Electronic Transaction Control Center (ETCC)**. The messages show which stored report was used to process the transaction and the default value for each report option on the stored report. The information messages are retained until you delete them.

To establish rebate processing parameters, set up stored reports in **EDI Entry Processing Rebates Report**. At a minimum, we recommend that you create a standard stored report that is named @edepr. Ensure that the default values for the report options address the majority of your processing requirements. Then, set up the business rules to indicate which report applies to a vendor or company, or the system. If a business rule template is not available for default rebate processing parameters, you must set it up in **SA Table Code Value Setup**.

See the *Infor Distribution SX.e Setup and Administration Guide for EDI*.

## Enterprise Printing Platform integration

These new features or product improvements were made to support the integration to Enterprise Printing Platform.

## Product improvements

These product improvements were made to the Enterprise Printing Platform integration.

### Label reports updated to support integration

These changes were made to the label reports in support of the Enterprise Printing Platform integration:

- Only these label files, which are compatible with the Label Designer in Enterprise Printing Platform, are now retrieved when you run the **SA Default Label Retrieval Report**.
  - zeb\*.lbl for Total Warehouse Logistics
  - \*zb9.lbl for Integrated Barcode
- Enterprise Printing Platform is now referenced in the report output for the **SA Default Label Retrieval Report** and the **SA Label Configuration Review Report**, replacing references to Unibar ELS Enterprise.
- Options 2 and 3 on the **SA Default Label Retrieval Report** were renamed to **SXe EPP Default Labels** and **SXe EPP Default Labels**.

Additionally, the description of System Parameter 1019 in **TWL Administration-System Parameters** was updated to remove a reference to Unibar.

## Infor CloudSuite Field Service integration

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service.

### New features

These new features were added to support the integration to Infor CloudSuite Field Service.

### Creation of assembly SROs now supported

You can now create sales orders for assembly products in **Sales Order Entry**, and then run a report to generate corresponding assembly SROs in Service Management. Synchronization is maintained between the documents when you edit the assembly SROs and post transactions in Service Management. Other processing, such as picking, shipping, and invoicing, is performed in Distribution SX.e.

An assembly product is a primary product that is assembled with components, such as options and accessories, that are based on customer specifications. Assembly components can be stocked, catalog, and nonstock products. Assembly components can also be labor products that represent work codes or miscellaneous codes from Service Management.

Assembly products are defined using templates that are set up in Service Management. A template can include all or some of the planned material, planned labor, and planned miscellaneous items for an assembly product. The assembly product and its template are required on a sales order, but the assembly components that you add to a sales order depends on your use of templates.

Assembly components are associated with an assembly product in **Sales Order Entry**. You can enter an assembly product and its associated assembly components on a stock order, direct order, or a quote. If you create a quote, you must convert it to a stock order or direct order for processing. When you finish the sales order, the Tag & Hold disposition is automatically applied to prevent backorders and shipment. You can edit the sales order until you create the assembly SRO in Service Management.

A new report, **Sales Entry Generate Service Orders for Assembly Report**, is run to create the assembly SROs in Service Management. The report indicates if the assembly product was successfully added to an assembly SRO. If an error occurred, you can correct the error and then re-run the report.

When an assembly SRO is successfully created in Service Management, these events occur in Service Management:

- Planned material, planned labor, and planned miscellaneous items are added to the assembly SRO, based on the line items on the sales order. The standard assembly components from the template are also added to the assembly SRO. The sales order number is annotated and the **Assembly Ready for Service** option is selected.
- A ServiceOrder BOD is sent to Distribution SX.e to update the sales order with any assembly components from the template that were not included on the sales order. After the sales order is updated, you cannot edit the sales order unless you are granted authority for the Change Assembly SRO Sales Orders authorization point. If you edit a sales order after the assembly SRO is created, you must manually update the assembly SRO to maintain synchronization between the documents.

When work begins on the assembly SRO in Service Management, a ServiceOrder BOD is generated each time the service technician performs an edit or posts a transaction. When the service technician closes the assembly SRO, the ServiceOrder BOD is sent and the Tag & Hold disposition is removed from the sales order. You can then continue to process the sales order in Distribution SX.e.

To pick products for sales orders with assembly products, you can run the **Sales Entry Pick Tickets Report** or use Total Warehouse Logistics. You can also use the standard processes or Total Warehouse Logistics for packing, shipping, and invoicing.

### Feature activation

Service Management must be activated in **SA Administrator Options-Integrations-Service Management**. To implement the assembly SRO process, specify the Service Management V2 API URL in **SA Administrator Options-Integrations-Service Management**. The URL is required for the new `APIGetSROTemplates` and `APICreateSROFromExternalOrder` calls that are used in the assembly SRO process.

You must also set up the Level 5 functional security in **SA Operator Setup** for operators who will run the **Sales Entry Generate Service Orders for Assembly Report**. The function acronym for the report is OERAO.

You can identify assembly products and the associated template for assembly products in **Product Setup**. This setup is not required because you can identify assembly products and the associated template at the line level in **Sales Order Entry**.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service*.

### Direct orders supported for sourced products

Direct purchase order and warehouse transfers ties to source planned material transactions for stock and nonstock items on service orders are now supported. If the **Direct Ship** option on the **SX.e Non-Stock Query** or **SX.e Material Availability** form in Service Management is selected, a tied sourcing document is created when a sales order is created in Distribution SX.e. The ship to and ship

to address on the tied sourcing document reflects the customer or customer ship to address, not the address of the ordering warehouse.

The **DropShipIndicator** element was added to the ServiceMasterGroup section in the ServiceOrder BOD to support this enhancement. Valid values for the field are true or false.

When a tied source document is processed in **Purchase Receipt of Inventory Entry** or **Transfer Receipt of Inventory Entry** in Distribution SX.e, the ReceiveDelivery BOD is sent to Service Management to update the service order. The ReceiveDelivery BOD will include the value **Direct Order** in the **Description** field in the header.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service*.

## Infor Distribution Storeroom CE

These new features or product improvements were made to Infor Distribution Storeroom Cloud Edition.

### New features

These new features were added to Infor Distribution Storeroom CE.

### Vending machine integration supported

You can now integrate Storeroom with a third-party vending machine application to automatically create issues. The integration uses ION API to consume REST Storeroom API service calls. The vending machine application must be able to send JSON files to the web service.

JSON files containing data for one or more issues are sent from the vending machine to the REST service target location, `/vendingMachine/file`. The data is validated against fields in the Storeroom database. If the data passes validation, the issue is automatically created in Storeroom. If the data does not pass validation, you must manually correct and submit the issue in the Storeroom Import function.

#### Feature activation

You must set up a backend service account for the vending machine application in ION API and download credentials. You must associate the service account with an Infor Ming.le user that is assigned at least one Storeroom security role other than SM.StoreroomMobile. You must also configure the vending machine application to invoke the web service.

See the *Infor Distribution SX.e Integration Guide for Infor Distribution Storeroom CE*.

### Operating system requirements for Storeroom Mobile updated

These operating systems versions are now required to support Storeroom Mobile 11.21.4:

- Android 5.1
- iOS 11.0

The changes to Storeroom Mobile to support iOS v11.0 impact how local data is stored on the mobile device. If you use iOS, local data that is stored in existing instances of the mobile app is not retained when the app is updated to the 11.21.4 release. This data is affected:

- Drafts
- Server settings
- User settings
- Most recently used (MRU) values in lookups

Before the 11.21.4 update, we recommend that you submit drafts for issues, returns, and other documents.

**Important:** If you disable the App Updates settings on your iOS device, you will receive notification when the update for Storeroom Mobile v11.21.4 is available, but it will not install automatically. You can then install the update manually after you have submitted the drafts and are prepared to reconfigure the server and user settings. If the App Updates setting is enabled, the update for Storeroom Mobile v11.21.4 will automatically install after the 11.21.4 release becomes available on April 17.

After the update, you must re-enter your server settings and user settings. See information about submitting drafts and resetting the server and user settings in the *Infor Distribution Storeroom Mobile User Guide*.

## Miscellaneous

These new features or product improvements affect multiple functions in the application.

### New features

These new features affect multiple functions in the application.

### User control of collapsible areas implemented

To accommodate your workflow, you can now control the default state of most collapsible sections and panels in Distribution SX.e.

#### Collapse/expand control of sections supported by Personalization

You can now personalize the default state of sections on a page. You can collapse or expand a section, based on your workflow, to improve usability. Depending on the default state, you can then use the [Show More](#) and [Show Less](#) controls to expand or collapse a section. Examples include the Advanced Search that is available in most inquiry functions and the Extended Fields section on the **Advance Line Entry** page in **Sales Order Entry**.

If certain conditions must be met before a section is available for expansion, you cannot personalize it. This message is displayed on the **Edit Control** window: This control has collapse logic that cannot be changed.

See the *Infor Distribution SX.e User Guide*.

### Collapse/expand control of panels and sections based on your previous user session

The state of each panel and each section within a panel in Distribution SX.e is now retained in your browser's local storage from session to session. It is retained per machine, based on your operator and company. Panels are controlled by menu function. Sections are controlled individually within each menu function. You can use this feature to close the panels and sections that you do not use regularly to streamline the appearance of your UI. Most panels and sections are open by default until you collapse them, but these exceptions apply:

- Panels are collapsed by default if they do not contain information.
- Most sections on the **Developer** editing pages are collapsed by default.
- Panels are collapsed by default when you use the Compare tool in **SA Extension Administration**.
- The panel with the Search In and Refine sections on the **Global Search** page is expanded or collapsed based on your search activities.

**Note:** This improvement does not include the **Context App** panel in Infor Ming.le.

### User interface readability improved

In all applicable functions, the static data in information fields is now displayed in bold font. This change was implemented to improve readability on pages with numerous information fields. Examples include the **Header** tab in **Sales Order Inquiry** and the **Invoice Detail** page in **Vendor Invoice Center Entry**.

This change can be modified using the Extension Enablement Toolkit. The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

## Product improvements

These product improvements affect multiple functions in the application.

### Modified controls identified in Personalization

On the **Personalization** page, you can now use one of these methods to identify the controls that were modified:

- Highlight the changes



Select **More Actions > Highlight Changes** to highlight the modified controls with an orange border. You must access the **Edit Control** window for the control to view the changes. A control is not highlighted if it was moved, but not otherwise edited.

See the *Infor Distribution SX.e User Guide*.

- Review the JSON values

JSON values that show the control modifications are available at the control and page levels. To view the JSON values for a control, click the action icon for the modified control and then select **Show Changes**. To view the JSON values for the page, select **More Actions > Show JSON**.

**Note:** The JSON values are intended for use by developers only.

If you personalize at the User level, only your modifications are shown. If you personalize at the Profile or Company level, modifications made by you and other users are shown. Personalization records are also maintained in **SA Personalization Administration**.

## Product

These new features or product improvements were made to the Product module.

### Product improvements

These product improvements were made to the Product module.

### Record limit search field added to Product Extended Product Cross Reference Setup

A **Record Limit** field is added to the **Search** pane in **Product Extended Product Cross Reference Setup**. You can use this field to specify the maximum number of records returned when performing an inquiry for reference, customer, and vendor product cross-references.

The default record limit is set as a business rule in **SA Business Rule Setup**. You can clear the **Record Limit** field before your search to return all records within your search parameters.

### New option displays last suffix for dummy core master transaction

A new option is added to **Product Adjust Core Master Entry** to show the last suffix found for a Miscellaneous Order for a blank or 0 document. This is useful if you are creating a dummy master record and need to avoid entering a duplicate suffix when adding another suffix. The option, **Last Order Suffix**, is displayed next to the **Document #**. Also, a new **Next Line #** option is added that displays the next available line for the selected Misc Order and suffix.

## Purchase

These new features or product improvements were added to the Purchase module.

### New features

These new features were added to the Purchase module.

### Batch call processing enabled for Purchase Receipt of Inventory Entry

Batch call processing is now available for **Purchase Receipt of Inventory Entry**.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, a batch process is initiated when you run Final Update for a purchase order or multiple POs with a large number of lines. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the Final Update function to complete without timeout errors.

Batch call processing is available for these functions only at this time:

- **Customer Cash Receipt Entry**
- **Sales Order Entry-Copy**
- **Sales Order Entry-Sourcing** to a VA order
- **Sales Order Inquiry**
- **Purchase Receipt of Inventory Entry**

## Sales

These new features or product improvements were made to the Sales module.

### New features

These new features were added to the Sales module.

### Sales Order Inquiry usability improved

To improve usability and efficiency, these changes were made to **Sales Order Inquiry**:

- Direct access to **Sales Order Entry** from the main inquiry page and the order detail page  
**New, Maintain, Cancel, Copy, and Print** buttons are now available. Click **New** to open **Sales Order Entry** to enter a new order. Click one of the other buttons to open the selected order in **Sales Order Entry** in the corresponding mode.

The operator security that is required to perform the actions directly in **Sales Order Entry** is honored in **Sales Order Inquiry**. For example, if you do not have the security to create a new order in **Sales Order Entry**, the **New** button is not available in **Sales Order Inquiry**.

- Customer parameters honored in the **Product** field in the Advanced Search

If these conditions are met, the products that are available in the **Product** lookup are determined by customer values:

- You specify a customer in the Advanced Search before you access the **Product** field.
- Customer cross-reference records are set up in **Product Extended Product Cross Reference Setup**.

- Multiple value selection supported in the **Line Type** field in the Advanced Search

You can now select one or more of these values: **Select All**, **Special**, **Non-Stock**, **Lost Business**, and **Stock**. If you do not select a value, then all values are used in the search. If you select one or more values but not all values, then the **Display** field is disabled with the default value of **Line Detail**.

- Line Type column in the Orders grid on the main inquiry page is updated

The **Non-Stock** column was relabeled as **Line Type**. The description of the line type is now displayed in the column, for example, **Stock**, **Special**, **Nonstock**, or **Lost business**. Previously, the column was blank if the line type was stock, or a code was displayed for the other line types.

- Stage column in the Orders grid on the main inquiry page is sorted by description

When you sort the Stage column in ascending or descending order, the orders are now sorted alphabetically, based on the value in the column. Previously, the column was sorted based on the numerical value that is assigned to the stage.

- Columns in the Orders grid on the main inquiry page were added or updated

The format of the Orders grid depends on the values included in the search. Separate formats accommodate header, line, component, or core information. For this enhancement, columns were added or updated for the header, line, and component formats.

These columns were added to the header format:

- Inside Sales Rep Name: This value corresponds to the initials in the Inside Sales Rep column.
- Outside Sales Rep Name: This value corresponds to the initials in the Outside Sales Rep column.
- Taken By Name: This value corresponds to the operator initials in the Taken By column.

These columns were added to the line format:

- Price: If you cannot view prices, based on the **Price/Discount Info** setting in **SA Operator Setup**, then the column is blank. If you conduct a search for kit components, this column is not displayed.
- Special Cost: This value is the special price cost per unit.
- Taken By Name: This value corresponds to the operator initials in the Taken By column.
- Extended Description: You must add this column to grid using Personalization. If the extended description is not shown in its entirety within the column, an ellipsis ( . . . ) is displayed. Hold your mouse over the description to view additional information.

These columns were added to the component format:

- Component Type: This column is displayed only if you conduct a search for all orders and kit components. Valid values include kit or tally.

- **Component Line Type:** This column is displayed only if you conduct a search for kit components. Valid values include stock, nonstock, special, and lost business.
- **Component Extended Description:** You must add this column to the grid using Personalization. This column is displayed only if the search includes kit components. If the extended description is not shown in its entirety within the column, an ellipsis ( . . . ) is displayed. Hold your mouse over the description to view additional information.

The **Price/Discount Info** setting in **SA Operator Setup** is now honored in these columns in the line format: Net Ordered Amount and Net Shipped Amount. If your operator security prevents you from viewing prices, then the column is blank.

**Note:** If you conduct a search for kit components, the columns are not displayed.

- Order Rep and Order Rep Percent values were added to these pages:
    - Order Controls section on the **Header** tab on the order detail page
    - General section on the **Extended** tab of the line detail page
- Note:** The values are also now available on the same page in **Sales Credit Release Inquiry**.

See [User control of collapsible areas implemented](#) on page 87.

## Batch call processing enabled for VA sourcing in Sales Order Entry

Batch call processing is now available for **Sales Order Entry-Sourcing** when tying an order to a VA order with a large number of inventory lines.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, a batch process is initiated when you tie a sales order to a Value Add order with a large number of inventory lines, either in a single section or multiple sections. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the addition of the line from the VA order to complete without timeout errors.

Additionally, an internal change to Progress settings is also implemented to improve performance in the process.

**Note:** Batch call processing is available for these functions only at this time:

- **Customer Cash Receipt Entry**
- **Sales Order Entry-Copy**
- **Sales Order Entry-Sourcing** to a VA order
- **Sales Order Inquiry**
- **Purchase Receipt of Inventory Entry**

## Batch call processing enabled for Sales Order Inquiry

Batch call processing is now available for **Sales Order Inquiry**.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, a batch process is initiated when you inquire on a sales order with a large number of lines. This batch process runs outside of the normal Service Interface

calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the inquiry function to return your search results against large record sets without timeout errors.

Batch call processing is available for these functions only at this time:

- **Customer Cash Receipt Entry**
- **Sales Order Entry-Copy**
- **Sales Order Entry-Sourcing** to a VA order
- **Sales Order Inquiry**
- **Purchase Receipt of Inventory Entry**

## Product improvements

These product improvements were made to the Sales module.

### Operational hold codes created for system-defined hold codes

When you activate operational hold codes, operational hold code values for these system-defined hold codes are now created in **SA Table Code Value Setup**:

- e: API/EDI hold, or e-hold
- h: Credit hold
- w: Service Warranty hold

Previously, only the user-defined legacy hold codes were converted into operational hold code values in **SA Table Code Value Setup**. Operational hold codes are activated by selecting **Use Operation Hold Codes** in **SA Administrator Options-Documents-Sales Orders-Entry Settings**.

### Shipped quantity set to zero for tied work orders in Order Fulfillment

These changes were made to the order fulfillment process:

- The shipped quantity for sourced Value Add and kit products on the stock orders that are created after you submit the fulfillment order is now set to zero. Previously, the shipped quantity reflected the quantity that was available in the warehouse on the stock order, which caused the sourcing document to be ignored.  
You can include fabricated products on fulfillment orders, but you must source them manually. Use your standard workflows to process the fabricated products and update the tied stock orders. Because warehouse lists are not created for fabricated products, you cannot select a source for a fabricated product using the order fulfillment process in **Sales Order Entry**.
- The **Blanket Order** window with the lump sum billing settings no longer opens when you maintain an existing fulfillment order.

## Notes can be added to a shipping request

You can now add a note to a shipping request in **Sales Shipping Request Entry**. Notes are added in the Notes context application. You can select to print notes when you select the shipping request and click **Print**.

## System Administrator

These new features or product improvements were made to the System Administrator module.

### New features

These new features were added to the System Administrator module.

### New business rule sets batch process polling interval

Batch call processing was originally implemented in the January 2021 update (11.21.1) for processing large transaction sets in **Customer Cash Receipt Entry** in a batch process to avoid time-out errors. Since then, it has been made available for several other transaction processing and inquiry functions in Distribution SX.e.

Batch call processing is enabled by selecting the **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**. As the batch process runs, a poller is initiated that tracks the status and logs updates to a database table. This status table is updated when the batch process is requested, processed, completed successfully, or completed with errors. Any errors are reported to the screen.

A new business rule, RequestPollingInterval, can be configured in **SA Business Rule Setup** to override the 5-second interval between polling the batch process to determine if it has completed. You can set a shorter interval to require the poller to check the batch process sooner than 5 seconds. This is useful if a service call normally can complete in a short amount of time, under the 5-second polling time. If the business rule is enabled for a time under 5 seconds, and you run a process where a large set of data is processed, the batch process is run more frequently, but you do not experience the timeout issues.

### Product improvements

These product improvements were made to the System Administrator module.

## Rule Value field change displays full text

The **Rule Value** field in **SA Business Rule Setup** is changed to a Text Area field, allowing entry of up to 256 characters. This type of field enables the full display of all text specified in the **Rule Value** field, and scrolling is no longer required.

If the full text is not displayed in the **Rule Value** column when you view the list of business rules in the **SA Business Rule Setup** grid, an ellipsis indicator is displayed. You can hold your mouse over the field to read the full text.

## Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

### New features

These new features were added to the TWL module.

### Packing list printer selection available for operators

Packing operators are now able to select a specific printer in **TWL Order Packing** instead of the default printer based on the **Carrier Master** record.

This enhancement helps reduce the time spent sorting through printed packing lists at the packing list printers. This also reduces the number of packing operators at the packing list printers because fewer operators will use the same printer. However, if the operator does not select a printer to associate to the packing station, then the packing lists are sent to the printer specified on the **Carrier Master** record.

#### Feature activation

A new TWL system parameter, 5260-Allow Using Pack Printer, is added enabling the user to select a specific packing list printer instead of having to use the default printer. The parameter defaults as unchecked, meaning the printer specified on the **Carrier Master** record is used.

## Value Add

These new features or product improvements were made to the Value Add module.

### New features

These new features were added to the Value Add module.

## Value Add integration with CPQ enhanced

The Value Add (VA) integration to Infor CPQ is expanded to allow configuration of specific VA products through the Value Add workflow from **Sales Order Entry**. This enhancement ensures that material items are correctly configured and priced during order entry. Previously, you were required to separately configure the tied VA order through **VA Order Entry** after the **Sales Order Entry** process was complete.

After feature activation, when you add a configured VA product to a **Sales Order Entry** order, a tie is automatically created to a VA order for the **Sales Order Entry** warehouse. Both Stock Orders (SO) and Quote Orders (QU) are supported. When **VA Order Entry** displays for the tied VA order, you can click the new **Configure** button in the toolbar to initiate the CPQ configuration. This configuration now updates the tied VA order using inventory components from CPQ and section data from **VA Product Default Setup**. After the configuration is finished, a manual price override from CPQ occurs in the **Value Add Rollup** window. This overrides the sales order line price when you return to **Sales Order Entry**.

A new Configurator section in **VA Order Entry-Header** displays the data returned from CPQ after configuration, for example, **RuleSet**, **Status**, and **ConfiguredPrice**.

You can determine the specification, inventory component, and internal sections of the VA order automatically for configured products in **VA Product Default Setup**. The **VA Product Default Setup** defaults can include multiple IN inventory sections and both EX external and IT internal processes, which allows for more advanced VA work orders.

### Feature activation

Activate this feature by selecting **Auto Source CPQ Configurator VA Assembly Type Products** in **SA Administrator Options-Integrations-Configurator Options**.

Products that are configured for CPQ integration require a **Value Add Assembly Type** of **CPQ Configurator** in **Product Setup-General** and require a valid CPQ **RuleSet** in **Product Setup-Cores & Configurator**.

Verify that your initial CPQ integration is set up to automatically advance to **VA Order Entry** from **Sales Order Entry** when a VA line is entered. In **Sales Order Entry-Order Entry Defaults**, select **After Add or Change** in the **Value Add Workflow** field.

The initial integration to CPQ does not change and requires set up in both **SA Administrator Options-Integrations-Configurator Options** and **Product Setup** to establish a link between Distribution SX.e and CPQ. Ensure that the correct CPQ configurator templates are installed and configured for VA use. In addition, ensure that the CPQ Rulesets are properly configured to return data to create a VA order.

See the *Infor Distribution SX.e Integration Guide for Infor Configure Price Quote and Enterprise Quoting*.

## Product improvements

These product improvements were made to the Value Add module.



## Columns added to Value Add entry and inquiry grids

To improve production planning and scheduling efficiency, **Customer Name**, **Ship To**, and **Ship To Name** are now available as columns in the **VA Order Entry** and **VA Order Inquiry-Header Information** grids.

## Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

## Upgrade path

To upgrade to Infor Distribution SX.e 11.x, you must be on a version of 4.0 or later. Older releases should be upgraded to 4.0 before upgrading to 11.x.

## Progress OpenEdge version requirement

Progress OpenEdge version 11.7.2.011 is the minimum requirement for Distribution SX.e version 11.19.1 and later.

If you upgrade your on-premises installation, you must install it on the Windows client machines, and then re-install the clients to use the new version of OpenEdge. After upgrading the database to a new version of OpenEdge, all shared memory connections require the new version.

Contact Infor Support if you have questions regarding installation or upgrade issues.

See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.

## Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

## Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

## Chapter 6: March 2021 Update

This section describes the details of the 11.21.3 release. This update includes new features and product improvements for the application.

The version number format is 11.21.x, where 11 = the primary version, 21 = the release year (2021), and x = the release sequence. Version 11.21.1 is the first release of version 11 for 2021.

The 11.21.3 update can be downloaded from the Infor Download Center.

See the *Infor Distribution SX.e Installation Guide* or *Infor Distribution SX.e Upgrade Guide*.

### Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

#### EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

#### Product improvements

These product improvements were made to support EDI documents.

#### Lockbox processing streamlined

The workflow to process lockbox payments that are received in EDI 820 Payment Order/Remittance Advice documents through ProcessRemittanceAdvice BODs has been improved. You can now access lockbox functions through hyperlinks in the **Electronic Transaction Control Center** (ETCC) and schedule the update process without accessing the **Customer Entry Lockbox Update Report** directly.

When an EDI document is received, the Update Status of the document is WIP (work in process) in ETCC. In the Detail section of the **Transaction Detail** page, these fields are now displayed for documents in WIP:

- **Batch #**  
Hyperlink to the **Customer Entry Lockbox Update Report**.
- **Customer #**
- **Check #**  
Hyperlink to **Customer Lock Box Entry**.
- **Ready to Process?**  
**Yes** indicates that the document can be scheduled for update. **No** indicates that the document contains errors that must be addressed in **Customer Lock Box Entry** before the update can be performed.

If the document is ready to process, you can click the new **Accounts Receivable - Lockbox Update** button to schedule the update for the batch. Click **Yes** when this message is displayed: *Schedule ARELU Lockbox Update?*. The update is based on stored reports that you set up in **Customer Entry Lockbox Update Report**. After the document is scheduled for update, these updates occur in ETCC:

- The Update Status of the document is changed to Complete.
- The **Batch #**, **Check #**, and **Ready to Process?** fields are no longer displayed.

If the document is not ready to process, you can click the **Check #** hyperlink to access **Customer Lock Box Entry**. If the document is ready to process after you save your corrections, this message is displayed: *Schedule ARELU Lockbox Update?* Click **Yes** to schedule the lockbox update for the batch. If you return to ETCC, you can refresh the page to update the status of the document.

These changes were also made to improve lockbox processing:

- The **Document ID** was added to **Customer Lock Box Entry**.
- The **Payment Reference Number** field on the **Transaction Detail** page in ETCC now supports 30 characters.

See the *Infor Distribution SX.e Setup and Administration Guide for EDI*.

## Enterprise Printing Platform/Unibar ELS Enterprise

These new features or product improvements were made to support the integration to Enterprise Printing Platform.

### New features

These new features were added to the Enterprise Printing Platform/Unibar ELS Enterprise integration.

## Enterprise Printing Platform/Unibar ELS Enterprise v10 certified

Distribution SX.e now supports a certified integration with Enterprise Printing Platform (EPP) version 10. EPP replaces Unibar ELS as the barcode label printing solution for the Integrated Barcode, Total Warehouse Logistics, and cartonization functions.

EPP is certified with Distribution SX.e v11.21.3 and later. To integrate an older version of Distribution SX.e with EPP, contact Infor Consulting Services.

**Note:** EPP version 10 is not dependent on the Adobe Flash platform, which is no longer supported.

See the *Infor Distribution SX.e Integration Guide for Enterprise Printing Platform* and the *Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics*.

## Infor CloudSuite Field Service integration

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service.

### New features

These new features were added to support the integration to Infor CloudSuite Field Service.

### Hold release for service orders now synchronized

When you approve a service order on credit hold in Distribution SX.e, the hold on the service order in Service Management is now released. An API call is generated when you approve a service order in **Sales Credit Release Inquiry** or **Sales Order Entry**. When Service Management consumes the API call, the **Credit Hold** option on the **Other** tab on the **Service Orders** form is cleared.

Whether you use legacy or operational hold codes in Distributions SX.e, the API call is generated only when the approval code for order is **y**. If you use operational hold codes, the API call is not generated if you release the credit hold but the order remains on hold for other reasons.

**Note:** To release hold codes and approve orders in **Sales Order Entry**, you must be granted authorization for the Change Order Created by Service Mgmt authorization point.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service and Infor Service Management*.

### Support for warranty claim reconciliation

The integration between Distribution SX.e and Service Management now supports the reconciliation of warranty claims. Use the new **Warranty Claim Reconciliation** form in Service Management to compare the amounts authorized by the vendor for the warranted service with the amounts on the warranty claims. If the amount of a claim exceeds the amount authorized by the vendor, an adjustment,

or write-off, is made for the difference. When you create the vendor invoice for the warranty claim in Distribution SX.e, the adjustment amount is posted to an adjustment account.

New General Ledger account fields in Distribution SX.e and updates to the Invoice BOD and BOD processing facilitate the enhancement.

When you submit a warranty claim in Service Management, an Invoice BOD is generated. It includes the value, **Pending**, in the **Invoice Status** field in the Status element of the Invoice BOD. When the BOD is consumed by Distribution SX.e, the existing warranty claim sales order is updated to change the line item prices to zero.

After warranty service work is performed, you can review the warranty claim using the **Warranty Claim Reconciliation** form in Service Management. When you select **Reconciled** in the **Claim Status** field, an Invoice BOD is generated. It includes the value, **Reconciled**, in the **Invoice Status** field in the Status element of the Invoice BOD. If an adjustment was calculated during reconciliation, it is included in the new **WarrantyClaimAdjustment** field in the UserArea of the BOD.

When Distribution SX.e consumes the BOD, an expense invoice is created in **Vendor Invoice Center Entry**. The warranted amount is created as a miscellaneous credit and posted to the new AP Warranty Claim Adjustment account assigned to the **Vendor Setup** record. Adjustment amounts are also posted to the AP Warranty Claim Adjustment account. The warranty claim sales order is updated to include the invoice number.

**Note:** The **AP Warranty Claim Adjustment** field was added to **Vendor Setup-General Ledger** and **SA Operator Setup-Other Options** for this enhancement. If an account is not provided on the vendor record, then the account from the operator record is used.

These reports were updated to add the AP Warranty Claim Adjustment account and other General Ledger accounts that were not previously included:

- **Vendor Master List Report**
- **SA Operator Information Report**

### Feature activation

Select **Enable Warranty Claims Reconciliation** in **SA Administrator Options-Integrations-Service Management**. You must specify AP Warranty Claim Adjustment accounts on **Vendor Setup** or **SA Operator Setup** records.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service and Infor Service Management*.

## Product improvements

These product improvements were made to support the integration to Infor CloudSuite Field Service or Infor Service Management.

## Authorization point added to Sales Shipping Feedback Entry

The authorization point, **Change Order Created by Service Mgmt**, is now active in several areas in **Sales Shipping Feedback Entry**. It now displays when you select **DETAIL** or **SHIP/UNSHIP** from the main page or the **Quick Ship** page and authorization is not granted. The addition of authorization points in **Sales Shipping Feedback Entry** prevents operators from making changes to orders and those changes not being reflected in Service Management.

Service orders should be maintained in Service Management, which also administers the billing of the service order. After billing information is sent from Service Management in the Invoice BOD, service orders are shipped and invoiced in Distribution SX.e.

You can update a service order in Distribution SX.e, however, this method is not recommended because it requires that you also manually update Service Management.

## Infor Service Management

These new features or product improvements were made to support the integration to Infor Service Management.

### New features

These new features were added to support the integration to Service Management.

### Pick ticket printing for planned materials supported

You can now implement an alternate workflow to print pick tickets for planned material transactions on service orders in Distribution SX.e, instead of Service Management. You can use the standard picking process for Distribution SX.e.

You can print pick tickets using the **Sales Entry Processing Pick Ticket Report** or on demand in **Sales Order Entry**. Pick ticket printing is based on the promised at the header and line levels. The promised date at the header level is the start date of the service order. The promised date at the line level is the transaction date for the planned material transaction.

Pick tickets for planned material transactions show the shipment type from Service Management, either Customer Ship, Customer Return, Inventory Issue, or Inventory Return. Pick tickets can also include the technician truck identifier if the shipment type is Inventory Issue. The technician truck identifier indicates which truck to load with the product. To include truck identifiers on pick tickets, you must set up your trucks as alternate warehouses in **Product Extended Warehouse Cross Reference Setup**. You must also select the new **Service Truck Stock Inventory** option to identify the alternate warehouse as a stocked truck.

The shipment type and technician truck identifier are included on Format 1 print output for pick tickets. If you use Format 4 output, you must map the new fields to your custom pick ticket template.

During print ticket printing, an API call is used to update the service order in Service Management. On the **Service Order Transactions** form, the **Pick List Printed** indicator is selected for the planned material transaction. If the indicator is selected, you can process the service order for invoicing in Service Management. The Invoice BOD is generated, which updates the status of the order to **Shipped** in Distribution SX.e.

If you do not enable pick ticket printing at the system level in Distribution SX.e, you can authorize pick tickets to be printed on demand. Use the new authorization point, **Print Order Created by Service Mgmt**, to authorize users to print pick tickets on demand in **Sales Order Entry** and other functions.

### Feature activation

To activate the feature, clear the **Do Not Print Service Pick Ticket** option in **SA Administrator Options-Integrations-Service Management**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management*.

### Default return type can be assigned to dirty cores

You can now select a default return type for a dirty core on a service order. Use the new **Dirty Core Return Type** field in **SA Administrator Options-Integrations-Service Management** to select either **Core Return** or **Core Buy** as the core return reason at the line level.

If you select **Core Return**, you are required to allocate each dirty core return against an order with a corresponding remanufactured product. You must edit the return line in **Sales Order Entry** to allocate the dirty core. An allocation record is then created in **Product Adjust Core Allocation Entry**. You can also view the core allocation at the line detail level in **Sales Order Inquiry**.

You must allocate the dirty core before the service order is processed for invoicing in Service Management. Adapt your current workflow to meet this requirement. If you do not allocate the dirty core before the service order is processed for invoicing, an error occurs when the Invoice BOD is received from Service Management. This message is displayed in **SA ION Inbox/Outbox Inquiry**:  
`Core Allocation Proof Must be Zero to Continue`. You must then allocate the dirty core and reprocess the service order for invoicing in Service Management to generate an Invoice BOD.

You can allocate a dirty core against a remanufactured core product on the same order when the order is in **Ordered** or **Picked** stage.

Allocation is not required if you select **Core Buy** or retain the default value, **None** in the **Dirty Core Return Type** field. The processing of dirty cores remains the same as in previous releases.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management*.



## Nonstock cost updates now consumed

If the cost of a nonstock for a planned material transaction is included in the ServiceOrder BOD, it can now be consumed by Distribution SX.e. It is used to update the cost of the nonstock on the sales order and the price of the nonstock on the tied purchase order. Previously, you were required to enter the values manually.

In Service Management, the cost of the nonstock is specified when the catalog or nonstock product is entered. The cost is then displayed in the **Unit Cost** field on the **Service Order Transactions** form. If a **Product Catalog Setup** record was set up for the nonstock in Distribution SX.e, the cost from the catalog record updates the unit cost in Service Management. If the cost was not specified on the catalog record or a catalog record was not set up, user can manually specify the unit cost.

When a ServiceOrder BOD is generated, the unit cost is recorded in `ServiceOrder/ServiceOrderLine/ServiceMaterialGroup/EstimatedCostPriceAmount` element.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management* and the *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

## Notification of warehouse transfer receipt automated

If a warehouse transfer was created to source a planned material transaction on a service order, a ReceiveDelivery BOD is now generated when the warehouse transfer is received in Distribution SX.e. After the BOD is consumed by Service Management, these actions occur:

- The posting process for the planned material transaction is initiated.
- The ship quantity, receive quantity, ship date, and receive date values are updated on the line item record on the warehouse transfer and the planned material record.
- If the received quantity equals the ordered quantity, the line item record status is changed to **Close**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management*.

## Nonstock products can be sourced through standard replenishment process

Nonstocks and catalog products on service orders can now be sourced through the standard PO replenishment process in Distribution SX.e.

A new option, **Create SX.e Purchase Order**, is available for nonstock or catalog products on a service order in Service Management. If the option is selected, a purchase order is automatically created in Distribution SX.e to source the product. If the option is not selected, the product is included in the **Purchase Entry Recommended Replenishment Action Report** (PO RRAR) in Distribution SX.e. PO RRARs are reviewed by buyers and converted into purchase orders in the **Purchase Demand Center**. Sourcing products through the RRAR process, although not immediate, can yield greater discounts.

In addition to the **Create SX.e Purchase Order** option, these new fields are also available for nonstock and catalog products on a service order:

- **SX.e Product Line**: Allows for better identification of the product

- **Rush Purchase Order:** Corresponds to the **Rush** option on the purchase order header.

The new fields are included in the `ServiceOrder/ServiceOrderLine/ServiceMaterialGroup/UserArea` element of the ServiceOrder BOD, and are consumed by Distribution SX.e.

### Feature activation

No activation is required. The process by which nonstocks and catalog products are sourced depends solely on the **Create SX.e Purchase Order** option in Service Management.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management* and the *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

### Hold release for service orders now synchronized

When you approve a service order on credit hold in Distribution SX.e, the hold on the service order in Service Management is now released. An API call is generated when you approve a service order in **Sales Credit Release Inquiry** or **Sales Order Entry**. When Service Management consumes the API call, the **Credit Hold** option on the **Other** tab on the **Service Orders** form is cleared.

Whether you use legacy or operational hold codes in Distributions SX.e, the API call is generated only when the approval code for order is **y**. If you use operational hold codes, the API call is not generated if you release the credit hold but the order remains on hold for other reasons.

**Note:** To release hold codes and approve orders in **Sales Order Entry**, you must be granted authorization for the Change Order Created by Service Mgmt authorization point.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service and Infor Service Management*.

### Support for warranty claim reconciliation

The integration between Distribution SX.e and Service Management now supports the reconciliation of warranty claims. Use the new **Warranty Claim Reconciliation** form in Service Management to compare the amounts authorized by the vendor for the warranted service with the amounts on the warranty claims. If the amount of a claim exceeds the amount authorized by the vendor, an adjustment, or write-off, is made for the difference. When you create the vendor invoice for the warranty claim in Distribution SX.e, the adjustment amount is posted to an adjustment account.

New General Ledger account fields in Distribution SX.e and updates to the Invoice BOD and BOD processing facilitate the enhancement.

When you submit a warranty claim in Service Management, an Invoice BOD is generated. It includes the value, **Pending**, in the **Invoice Status** field in the Status element of the Invoice BOD. When the BOD is consumed by Distribution SX.e, the existing warranty claim sales order is updated to change the line item prices to zero.

After warranty service work is performed, you can review the warranty claim using the **Warranty Claim Reconciliation** form in Service Management. When you select **Reconciled** in the **Claim Status** field, an Invoice BOD is generated. It includes the value, **Reconciled**, in the **Invoice Status** field in the

Status element of the Invoice BOD. If an adjustment was calculated during reconciliation, it is included in the new **WarrantyClaimAdjustment** field in the UserArea of the BOD.

When Distribution SX.e consumes the BOD, an expense invoice is created in **Vendor Invoice Center Entry**. The warranted amount is created as a miscellaneous credit and posted to the new AP Warranty Claim Adjustment account assigned to the **Vendor Setup** record. Adjustment amounts are also posted to the AP Warranty Claim Adjustment account. The warranty claim sales order is updated to include the invoice number.

**Note:** The **AP Warranty Claim Adjustment** field was added to **Vendor Setup-General Ledger** and **SA Operator Setup-Other Options** for this enhancement. If an account is not provided on the vendor record, then the account from the operator record is used.

These reports were updated to add the AP Warranty Claim Adjustment account and other General Ledger accounts that were not previously included:

- **Vendor Master List Report**
- **SA Operator Information Report**

#### Feature activation

Select **Enable Warranty Claims Reconciliation** in **SA Administrator Options-Integrations-Service Management**. You must specify AP Warranty Claim Adjustment accounts on **Vendor Setup** or **SA Operator Setup** records.

See the *Infor Distribution SX.e Integration Guide for CloudSuite Field Service and Infor Service Management*.

## Product improvements

These product improvements were made to support the integration to Service Management.

### New SRO assembly fields added to report

These Service Order (SRO) assembly fields are now included on the **Sales Order Master List Report**:

- Other Header Information
- SRO Assembly Order
- Other Line Item Information
- SRO Assembly
- SRO Template ID
- Related SRO Assembly Line

### Authorization point added to Sales Shipping Feedback Entry

The authorization point, **Change Order Created by Service Mgmt**, is now active in several areas in **Sales Shipping Feedback Entry**. It now displays when you select **DETAIL** or **SHIP/UNSHIP** from the

main page or the **Quick Ship** page and authorization is not granted. The addition of authorization points in **Sales Shipping Feedback Entry** prevents operators from making changes to orders and those changes not being reflected in Service Management.

Service orders should be maintained in Service Management, which also administers the billing of the service order. After billing information is sent from Service Management in the Invoice BOD, service orders are shipped and invoiced in Distribution SX.e.

You can update a service order in Distribution SX.e, however, this method is not recommended because it requires that you also manually update Service Management.

## Miscellaneous

These new features or product improvements affect multiple functions in the application.

### New features

These new features affect multiple functions in the application.

#### Batch call processing enabled for sales order copy

Batch call processing is now available for **Sales Order Entry-Copy**.

When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, a batch process is initiated when you copy a sales order with a large number of lines. This batch process runs outside of the normal Service Interface calls which must complete within a system timeout limitation of 1 minute. Batch call processing allows the copy function to complete without timeout errors.

**Note:** Batch call processing is available for **Sales Order Entry-Copy** and **Customer Cash Receipt Entry** only at this time.

## Product improvements

These product improvements affect multiple functions in the application.

#### Stage fields enabled for multi-value selection using Extensions

The **Stage** field in these functions now allows for multiple-value selection:

- **Serial # Lookup** window
- Advanced Search section of **Product Extended Serial Number Setup**

If you used the Extension Enablement Toolkit to extend the **Stage**, or `currstatus`, field for either function, review the extension to determine if it requires revision. Runtime errors might occur because the field is now a collection instead of a single string.

The Extension Enablement Toolkit is part of the standard product, but requires an advanced understanding of CSS and JavaScript to fully utilize it. We recommend that you engage Infor Consulting Services to either learn how to use the Extension Enablement Toolkit, or to have their developers use it to extend Distribution SX.e for your business requirements.

## Conversion program removes comma in tax jurisdiction description

A conversion program is now run when Distribution SX.e is updated to remove any commas included in the **SA Sales Use Tax Setup** jurisdiction **Description** field. If a comma is included in the jurisdiction description, it may be associated with an incorrect jurisdiction code, which can result in incorrect taxes being applied on a sales order.

The conversion program is included in the standard CONV routines that are initiated each time you upgrade Distribution SX.e.

## Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

### New features

These new features were added to the Pricing and Discounting module.

### Generic product rebate processing supported

You can now enable generic product rebate processing for identical products that are sourced from multiple vendors. Generic product rebate processing bypasses the vendor matching requirement used in standard rebate processing, but uses all other standard rebate processing criteria to determine the best rebate for sale order line items.

When you set up a Level 1 Product, Vendor on Sale rebate record in **PD Pricing Setup**, you are required to specify a vendor. With standard rebate processing, a rebate qualifies for processing if the vendor on the rebate matches the authorized replenishment path (ARP) vendor for the sales order line item. Depending on the type of product, the ARP vendor is determined from the product warehouse record, catalog record, or nonstock sales order line.

With generic product rebate processing, Level 1 Product, Vendor on Sale rebates that meet these conditions qualify for processing:

- The sales order line item matches the product on the rebate record.
- The vendor on the rebate record allows generic rebates.

Vendors that participate in the generic product rebate program are identified in **Vendor Setup**.

In support of this enhancement, the `sxapiAPVendorMnt` and `sxapiAPGetVendorDataGeneralV2` calls were also updated to include the new option.

#### Feature activation

Select **Allow Generic Product Rebates** in **SA Administrator Options-Products-Rebates**. Then, select **Use Generic Rebates** in **Vendor Setup-Ordering** for those vendors that allow generic product rebates. No changes are required for existing **PD Pricing Setup** records.

## Product

These new features or product improvements were made to the Product module.

## Product improvements

These product improvements were made to the Product module.

### Inquiry of kit component quantity to build enhanced

When inquiring on a prebuilt kit with other prebuilt kits as components, the **Quantity Available to Build** in **Product Inquiry-Components** and **Product Availability Inquiry-Components** now displays the quantity based on the availability of components for the prebuilt kit components, rather than the availability of the kit component on hand quantity.

When the **Expand Pre-Built Kits** option is selected, the components of any prebuilt kit products that are components of the selected kit product are expanded to display on the **Components** view. The **Quantity Available to Build** for the selected kit is based on the availability of the listed components.

If the **Expand Pre-Built Kits** option is not selected, the components of any prebuilt kits that are components of the kit are not displayed. The **Quantity Available to Build** displays the on hand quantity of the prebuilt kit component, rather than its components' availability.

## Sales

These new features or product improvements were made to the Sales module.

## Product improvements

These product improvements were made to the Sales module.

## Sorting by customer lookup name enabled for Sales Order Register Report

You can now sort the **Sales Order Register Report** by **Customer Lookup Name** by specifying **L** in the **(O)rder#, (C)ust#, (P)rod, (S)lsrep Order, (L)ookup Nm Seq** option when running the report. The data returned is sequenced by Customer Lookup Name. No other calculations or data output are changed.

## New option prevents update of tied order cost for specials

During sales order entry when you tie an order to a PO or transfer for a product that was obtained from the vendor as a special product, the received cost is normally carried back to the sales order line. The **Cost Override** flag on the line is set to **yes**. This cost is used during receiving to update General Ledger Inventory cost. During invoice processing, the new cost on the sales order line is used again to update GL Inventory and balance this account. At issue is the impact on commissions paid to salesreps based on margins. Margins for special products based on receiving cost may be overstated, thus resulting in inflated commissions.

This enhancement adds an SA Administrator option to block the update of the sales order line special product cost during **Purchase Receipt of Inventory Entry** or **Transfer Receipt of Inventory Entry**. Instead, the PO or WT cost is rolled to the internal **Received GL Cost** field on the line. The **Product Cost** on the sales order line is the cost from the inventory record and the **Cost Override** flag is **no**. This ensures the cost on the line only updates the cost used to calculate commissions, as defined in **SA Administrator Options-Products-Costs**.

To ensure that inventory is balanced between PO or transfer receiving and invoice processing, the Inventory control account is still updated with the received cost.

This option applies to lines marked as **Special** on sales orders and tied to purchase orders or transfers, including kit components. The option does not apply to special line items or components tied to KP or VA work orders.

**Note:** If you selected **Tied Special** or **Both** for the **Use Current Sales Mgr Cost** in **SA Administrator Options-Products-Costs**, the SM Cost is updated during **Sales Entry Invoice Processing Report**.

### Feature activation

To activate this feature, select **Do Not Update Tied Order Cost for Specials in PO/WT** in **SA Administrator Options-Products-Costs**.

## OE Credit Hold event updated

The OE Credit Hold (oe-credhold) event was updated to accommodate these types of hold code processing:

- Legacy hold codes

You can use the oe-credhold event to receive notification when a sales order is saved with an approval code other than 'y'. The order can be on hold for any reason. The oe-credhold event is used for orders created directly in **Sales Order Entry** or through the OE Full Order Maintenance

SXAPI program. If you use the Default Approval Type business rule to set the initial approval type for orders created through the SXAPI program, the approval type from the business rule is honored.

- Operational hold codes

You can use the oe-credhold event to receive notification when a sales order is saved with a credit hold code ('h') applied to the order. The oe-credhold event is used only for orders that are created directly in **Sales Order Entry**. The API Order Error Hold (oe-apierrhold) event is used for orders created through the SXAPI program. The operational hold code for electronically created orders ('e') is applied to the orders, and the approval code is 'N'. The Default Approval Type business rule is ignored.

**Note:** To receive notifications for other operational hold codes, you must activate the events that are specific to each hold code in **SA Event Manager Activate Entry**.

## System Administrator

These new features or product improvements were made to the System Administrator module.

### Product improvements

These product improvements were made to the System Administrator module.

### User profile column added to Authorization Point Security grid

A new user profile column is added to the Operators grid in **SA Authorization Security Administration-Authorization Point Security**. To access this page, select an authorization point in **SA Administration Authorization Security Setup**, and then click **Point Security (If Blank Operator)**.

The new column allows greater control when setting authorization point security for multiple operators. You can now filter the grid to select all operators with a specific user profile and change their authorization from the **Actions** menu.

### SA Tax Address Validation Report name changed

The **SA Tax Address Validation Report** is changed from **SA AvaTax Address Validation Report**. The **SA Tax Address Validation Report** is supported for both the AvaTax and Vertex tax integrations, therefore, the generic name is appropriate.

The report option, **Show Address Returned From AvaTax**, was also relabeled as **Show Validated Address Returned**.



## New data archive purge report for ION WL records

A new archive/purge report, **SA Data Archive System ION WL Records Report**, is added to purge ION WL records in these tables:

- esbwlstath
- esbwlstatl
- esbwlcontainer

The records in these tables are created for the integration to CloudSuite WMS (CSWMS) when order changes are sent from CSWMS to Distribution SX.e. We recommend you purge these records periodically.

## Additional XML documents processed by data archive report

SXXMLDOC records that have a docStatus of canceled (can) or a docStatus that is blank are now processed by the **SA Data Archive System SXXML Log Tables Report**. SXXMLDOC records are created to monitor SX.API transactions, based on the Create Transaction Audit Records business rule. When you run the report, the SXXMLDOC records are removed from the SXXML log tables unless they are used in the **Electronic Transaction Control Center**.

## Tables added to content extracted to text files for Birst

These tables are now included with the Distribution SX.e database tables that can be extracted when you run the **SA Administrator Birst Extraction Report** using the **Text Extract Type** and selecting **All Tables to Extract** :

- transactions
- carrier
- binmst
- item
- empmst
- KPET
- KPSO
- KPSG
- KPSK

## Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

## Product improvements

These product improvements were made to the Product module.

### Non-labor lines no longer set to lost business after counter sale order

Users are now prevented from setting non-labor lines to lost business after a counter sale order has been dropped in TWL. An error now occurs if a user attempts to set the line to lost business.

### New parameter enables automatic allocation of fewest lots required

If lot numbers are not already assigned when an order is dropped to TWL, the preselection of lots now automatically selects the fewest number of lots per location and the lot number for picking. Additionally, during the picking process, if manually selected by the picker, the next predetermined lot location and numbers are then preselected. The assigned lots direct the picker to the least number of lots. This enables the operator to pick from a single lot or the fewest number of lots that can be used if no single lot is able to fill the pick quantity.

This functionality increases productivity and supplies the customer with materials from as few lots as possible, which minimizes the potential for variation in product.

#### Feature activation

A new TWL system parameter, 7510-Order Drop By Lot Size is added to activate the functionality of automatic lot allocation based on fewest lots required. The parameter defaults as unchecked.

See the *Infor Distribution SX.e Total Warehouse Logistics User Guide for Picking, Packing, Shipping, and Kitting*.

## Vendor

These new features or product improvements were made to the Vendor module.

### New features

These new features were added to the Vendor module.

### AP freight allocation enabled

You can now use AP freight allocation to define freight terms for customers and vendors, and pass freight charges and tracking information from a vendor's PO to the tied sales order. If the purchase order is linked to a direct sales order, this enhancement can keep the freight billing and tracking properly

passed to the customer. This enhancement improves your visibility of sales order costs and increases profit margins. You can also add more robust freight add-on controls based on the type of freight terms used for customer and vendor records.

When AP freight allocation is enabled, freight terms are required for customers and vendors. Because freight charges can be passed from purchase orders to tied direct orders, freight terms are also required in order entry. When AP freight allocation is enabled, the **Freight Terms** field is a required field in these functions:

- **Customer Setup-Ordering** and **Customer Ship To Setup-Ordering**
- **Vendor Setup-Ordering** and **Vendor Ship From Setup-General**
- **Sales Order Entry-Customer Order Settings**
- **Purchase Order Entry-Purchase Order Settings**

A new **Freight Terms Type** can be associated with a freight term. This freight terms type is used to control how freight charges are assigned to sales orders, purchase orders, and vendor invoices in Distribution SX.e. The **Freight Terms Type** is set for each freight term record in **SA Table Code Value Setup**.

Use the **Freight Terms Type** to define a customer or vendor's freight terms as one of these types, or you can leave it blank:

- **Prepay and Add**  
Customer: You pay the freight up front, and pass it to your customer with an upcharge.  
Vendor: The vendor pays the freight and passes the charges to you, the distributor, on their invoice.
- **Destination**  
Customer: You pay the freight and do not pass the freight charge to your customer.  
Vendor: The vendor pays the freight, and no freight is charged to you or the customer.
- **Collect**  
Customer: The customer pays the freight on their account.  
Vendor Ship From Vendor: You pay the freight on an account of your choice.
- **3rd Party**  
Customer: The customer designates another company to bill freight charges to (usually a corporate account).  
Vendor: You designate another company to bill freight to (usually a corporate account).
- **Pickup**  
Customer: The customer picks up the delivery. No freight is charged to customer.  
Vendor: You pick up the goods or arrange the pickup and pay your own freight.

### Purchase Order Entry

When AP freight allocation is enabled, the **Freight Terms** value in **Purchase Order Entry-Purchase Order Settings** defaults from the **Vendor Setup** or **Vendor Ship From Setup** record, unless overridden. **Freight Terms** is a required field.

When tying an order line to a purchase order, the **Freight Terms** and **Ship Via** values on the **Sourcing** view in **Sales Order Entry-Advanced Line Entry** default from the sales order or the vendor record,

depending on the **Freight Terms Type**. The values from the **Sourcing** screen are carried to the new purchase order header.

### Sales Order Entry

Freight terms entered for a sales order are used to determine if freight and third-party addons from the purchase order should be distributed to the tied sales order. When AP freight allocation is enabled, the **Freight Terms** value in **Sales Order Entry-Customer Order Settings** defaults from the **Customer Setup** or **Customer Ship To Setup** record, unless overridden. **Freight Terms** is a required field.

A new **FreightSA Order Entry Addon Setup**, which identifies the addon as being a freight type addon. This option allows Distribution SX.e to correctly update the freight amounts on a sales order. option is added to

### Vendor invoice costing

Several modifications were made to these views in **Vendor Invoice Center Entry** to allow for entry and tracking of additional freight related information:

- **Invoice Detail-Create/Update**
- **Purchase Order Header-Create/Update**
- Invoices grid

Modifications are made to **Vendor Entry Group Update/Reconcile Invoices Report** to process the new fields added to **Vendor Invoice Center Entry**. Depending on the **Freight Terms Type**, freight charges can be passed from the purchase order to the sales order for direct orders, populating the actual **Freight** field and including a freight upcharge from **Customer Billing Setup**. When sales order lines are tied to multiple purchase orders, and costed together in a single batch, all freight charges are accumulated into a single freight amount on the sales order.

A new **Packages** view is added to **Purchase Order Inquiry** which displays the purchase order tracking information entered in **Vendor Invoice Center Entry** and updated during **Vendor Entry Group Update/Reconcile Invoices Report** processing.

The SupplierInvoice BOD is updated to include these new elements:

- apei.checkref
- apei.internalref
- apei.mailroomdt
- apeid.trackerno1
- apeid.trackerno2
- apeid.shipviaty
- apeid.thirdpartyfreight

### Feature activation

To enable AP freight allocation, select the **Enable AP Freight Allocation** option in **SA Administrator Options-Vendors-Invoice Defaults**. The freight allocation fields, tabs, and sections in related functions are available after enhancement activation.

After AP freight allocation is enabled, assign a **Freight Terms Type** for each of your Freight Terms in **SA Table Code Value Setup**. You can also leave **Freight Terms Type** blank. Then, review all customer and vendor records to assign the appropriate **Freight Terms**. When AP freight allocation is activated, the **Freight Terms** field is required in **Customer Setup** and **Vendor Setup**. If you do not assign a **Freight Terms** value, then an error is displayed when you next access a customer or vendor record to maintain it. To exclude a customer or vendor from freight allocation, assign a **Freight Terms** value that contains a blank Freight Terms type. Last, update any existing OE addon freight type records in **SA Order Entry Addon Setup** and set the **Freight** option accordingly.

Orders that were created before AP freight allocation is enabled are processed without errors even if the required **Freight Terms** field is blank in **Sales Order Entry-Customer Order Settings**.

**Note:** AP freight allocation is independent of the existing **Bill Direct PO Addons** option selected in **SA Administrator Options-Documents-Sales Orders-Back Orders**, which passes invoice addons back to direct orders on an order-by-order basis. We recommend choosing one method to bill purchase order freight addons to customers. If you select AP freight allocation, you can still use Bill Direct PO Addons other than freight.

## Product improvements

These product improvements were made to the Vendor module.

### Record Limit added to Vendor Change PO Stage Entry grid

A **Record Limit** field is added to the Search panel in **Vendor Change PO Stage Entry**. Use the record limit to restrict the number of records returned when performing a search. If the number of records that match the search criteria exceeds the specified record count, a warning message is displayed. Use additional search criteria to narrow the search results.

Limiting the record count expedites the inquiry process when a large number of records meet the search criteria. It also helps to avoid a system timeout if the number of qualifying records is so high that the search does not complete before timing out.

## Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

## Upgrade path

To upgrade to Infor Distribution SX.e 11.x, you must be on a version of 4.0 or later. Older releases should be upgraded to 4.0 before upgrading to 11.x.

## Progress OpenEdge version requirement

Progress OpenEdge version 11.7.2.011 is the minimum requirement for Distribution SX.e version 11.19.1 and later.

If you upgrade your on-premises installation, you must install it on the Windows client machines, and then re-install the clients to use the new version of OpenEdge. After upgrading the database to a new version of OpenEdge, all shared memory connections require the new version.

Contact Infor Support if you have questions regarding installation or upgrade issues.

See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.

## Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English

## Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.

## Chapter 7: January 2021

This section describes the details of the 11.21.1 release. This update includes new features and product improvements for the application.

The version number format is 11.21.x, where 11 = the primary version, 21 = the release year (2021), and x = the release sequence. Version 11.21.1 is the first release of version 11 for 2021.

The 11.21.1 update can be downloaded from the Infor Download Center.

See the *Infor Distribution SX.e Installation Guide* or *Infor Distribution SX.e Upgrade Guide*.

### Solution enhancements

This section describes the enhancements available in this update of Distribution SX.e, organized by module or component.

### Deployment information

This section describes any changes to the deployment of Distribution SX.e.

### Recommended version of Progress OpenEdge updated

Progress OpenEdge version 11.7.6.x is now supported for use with Distribution SX.e version 11.21.1 and later. It is the recommended version. Progress OpenEdge version 11.7.2.011 is the minimum required version for Distribution SX.e version 11.19.1 and later.

See [Progress OpenEdge version requirement](#) on page 24.

### EDI

These new features or product improvements were made to support the integration to Electronic Data Interchange (EDI).

## Product improvements

These product improvements were made to support EDI documents.

### SXVendorRebateClaim BOD modified to include rebate reference

The **Reference** field on rebate records in **PD Pricing Setup** is now included in the SXVendorRebateClaim BOD. The `pder.ref` element was added to the SXVendorRebateClaim/RebateClaim/Invoice/InvoiceLine section of the BOD. The SXVendorRebateClaim BOD is generated when you run the **SM Rebate Report**.

See *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

## Infor CloudSuite Field Service integration

These new features or product improvements were made to support the integration to Infor CloudSuite Field Service.

## New features

These new features were added to support the integration to Infor CloudSuite Field Service.

### Pick ticket printing for planned materials supported

You can now implement an alternate workflow to print pick tickets for planned material transactions on service orders in Distribution SX.e, instead of Service Management. You can use the standard picking process for Distribution SX.e.

You can print pick tickets using the **Sales Entry Processing Pick Ticket Report** or on demand in **Sales Order Entry**. Pick ticket printing is based on the promised at the header and line levels. The promised date at the header level is the start date of the service order. The promised date at the line level is the transaction date for the planned material transaction.

Pick tickets for planned material transactions show the shipment type from Service Management, either Customer Ship, Customer Return, Inventory Issue, or Inventory Return. Pick tickets can also include the technician truck identifier if the shipment type is Inventory Issue. The technician truck identifier indicates which truck to load with the product. To include truck identifiers on pick tickets, you must set up your trucks as alternate warehouses in **Product Extended Warehouse Cross Reference Setup**. You must also select the new **Service Truck Stock Inventory** option to identify the alternate warehouse as a stocked truck.

The shipment type and technician truck identifier are included on Format 1 print output for pick tickets. If you use Format 4 output, you must map the new fields to your custom pick ticket template.



During print ticket printing, an API call is used to update the service order in Service Management. On the **Service Order Transactions** form, the **Pick List Printed** indicator is selected for the planned material transaction. If the indicator is selected, you can process the service order for invoicing in Service Management. The Invoice BOD is generated, which updates the status of the order to **Shipped** in Distribution SX.e.

If you do not enable pick ticket printing at the system level in Distribution SX.e, you can authorize pick tickets to be printed on demand. Use the new authorization point, **Print Order Created by Service Mgmt**, to authorize users to print pick tickets on demand in **Sales Order Entry** and other functions.

### Feature activation

To activate the feature, clear the **Do Not Print Service Pick Ticket** option in **SA Administrator Options-Integrations-Service Management**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management*.

### Default return type can be assigned to dirty cores

You can now select a default return type for a dirty core on a service order. Use the new **Dirty Core Return Type** field in **SA Administrator Options-Integrations-Service Management** to select either **Core Return** or **Core Buy** as the core return reason at the line level.

If you select **Core Return**, you are required to allocate each dirty core return against an order with a corresponding remanufactured product. You must edit the return line in **Sales Order Entry** to allocate the dirty core. An allocation record is then created in **Product Adjust Core Allocation Entry**. You can also view the core allocation at the line detail level in **Sales Order Inquiry**.

You must allocate the dirty core before the service order is processed for invoicing in Service Management. Adapt your current workflow to meet this requirement. If you do not allocate the dirty core before the service order is processed for invoicing, an error occurs when the Invoice BOD is received from Service Management. This message is displayed in **SA ION Inbox/Outbox Inquiry**:  
`Core Allocation Proof Must be Zero to Continue`. You must then allocate the dirty core and reprocess the service order for invoicing in Service Management to generate an Invoice BOD.

You can allocate a dirty core against a remanufactured core product on the same order when the order is in **Ordered** or **Picked** stage.

Allocation is not required if you select **Core Buy** or retain the default value, **None** in the **Dirty Core Return Type** field. The processing of dirty cores remains the same as in previous releases.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management*.

## Nonstock products can be sourced through standard replenishment process

Nonstocks and catalog products on service orders can now be sourced through the standard PO replenishment process in Distribution SX.e.

A new option, **Create SX.e Purchase Order**, is available for nonstock or catalog products on a service order in Service Management. If the option is selected, a purchase order is automatically created in Distribution SX.e to source the product. If the option is not selected, the product is included in the **Purchase Entry Recommended Replenishment Action Report** (PO RRAR) in Distribution SX.e. PO RRARs are reviewed by buyers and converted into purchase orders in the **Purchase Demand Center**. Sourcing products through the RRAR process, although not immediate, can yield greater discounts.

In addition to the **Create SX.e Purchase Order** option, these new fields are also available for nonstock and catalog products on a service order:

- **SX.e Product Line**: Allows for better identification of the product
- **Rush Purchase Order**: Corresponds to the **Rush** option on the purchase order header.

The new fields are included in the `ServiceOrder/ServiceOrderLine/ServiceMaterialGroup/UserArea` element of the ServiceOrder BOD, and are consumed by Distribution SX.e.

### Feature activation

No activation is required. The process by which nonstocks and catalog products are sourced depends solely on the **Create SX.e Purchase Order** option in Service Management.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management* and the *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

## Nonstock cost updates now consumed

If the cost of a nonstock for a planned material transaction is included in the ServiceOrder BOD, it can now be consumed by Distribution SX.e. It is used to update the cost of the nonstock on the sales order and the price of the nonstock on the tied purchase order. Previously, you were required to enter the values manually.

In Service Management, the cost of the nonstock is specified when the catalog or nonstock product is entered. The cost is then displayed in the **Unit Cost** field on the **Service Order Transactions** form. If a **Product Catalog Setup** record was set up for the nonstock in Distribution SX.e, the cost from the catalog record updates the unit cost in Service Management. If the cost was not specified on the catalog record or a catalog record was not set up, user can manually specify the unit cost.

When a ServiceOrder BOD is generated, the unit cost is recorded in `ServiceOrder/ServiceOrderLine/ServiceMaterialGroup/EstimatedCostPriceAmount` element.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management* and the *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

## Notification of warehouse transfer receipt automated

If a warehouse transfer was created to source a planned material transaction on a service order, a ReceiveDelivery BOD is now generated when the warehouse transfer is received in Distribution SX.e. After the BOD is consumed by Service Management, these actions occur:

- The posting process for the planned material transaction is initiated.
- The ship quantity, receive quantity, ship date, and receive date values are updated on the line item record on the warehouse transfer and the planned material record.
- If the received quantity equals the ordered quantity, the line item record status is changed to **Close**.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service and Infor Service Management*.

## Product code updates product category on sales order lines

The product code on the **Service Order Operations** form in CloudSuite Field Service is now included as a **Pcat** value in the **ServiceOrder/ServiceOrderLine/UserArea** of the **ServiceOrder** BOD. The product code from the **UserArea** is used as the product category on sales order lines if these conditions are met:

- The product code is a valid product category from Distribution SX.e.
- The value of the **UsePcatOfOperCode** element, which is also in the **ServiceOrder/ServiceOrderLine/UserArea** of the **ServiceOrder** BOD, is true.

The product code is used as the product category for all sales order line in these sections within the same **ServiceOrderLine** section:

- **ServiceMaterialGroup/MaterialItem/ItemID/ID**
- **ServiceLaborGroup/LineCode**
- **ServiceOtherGroup/CostTypeCode**

If the product code from the **UserArea** is invalid or missing, the **Pcat** value of the item code in **ServiceOrderLine/ActivityTemplateCode** is used as the product category. The **Pcat** value depends on whether the product code override logic is enabled in CloudSuite Field Service. If the **Account Location** is set to **SRO Transaction**, the override logic is not enabled and the product code for the product on the planned material transaction is used. If the **Account Location** is set to **SRO Operation**, the override logic is enabled and the product code that is specified on the operation is used. It must be a valid product category in Distribution SX.e. If it is not a valid value, the product code that is related to the operation code is used.

See the *Infor Distribution SX.e Integration Guide for Infor CloudSuite Field Service* and the *Infor Distribution SX.e Inbound BOD Mapping and Descriptions*.

## Infor Distribution Proof of Delivery CE

These new features or product improvements were made to support the integration to Infor Distribution Proof of Delivery Cloud Edition.

## New features

These product improvements affect version 21.x of Infor Distribution Proof of Delivery CE.

### New configuration setting enables grid filtering

A new configuration setting in the Proof of Delivery Managers application can be activated to enable filtering of grid columns.

When the setting, **datagridFilteringEnabled**, is set to **true** in **Admin-Settings**, filtering options are available for all grids in the Managers application.

The type of filter available depends on the values in the column, for example, text, integer, checkbox, or date. Each type of filter offers several filter options, such as **Contains**, **Starts With**, or **Equals**. You can select **Clear Filter** from the grid options list to reset the filters to their default settings. Some filters offer a selection of values in a drop-down list. You can select the top, blank value to select all records, without applying that filter.

When filtering is enabled, the need to specify search criteria is eliminated in most cases. Search panes are removed in all grid views with the exception of the **Deliveries** view. The **Container ID** and **Manifest ID** cannot be added as grid columns, so these fields remain in the Search pane.

In some cases, a grid column does not have a filter. This is because the data is already filtered for that specific field and a filter is not necessary. For example, the Status column on the **Assign Route** screen always displays **Assigned**.

#### Feature activation

Set the system configuration setting **datagridFilteringEnabled** to **true** in **Admin-Settings**. The Managers application is reloaded automatically, and the filtering options are added to grids.

See the *Infor Distribution Proof of Delivery Managers Application Administration Guide*.

## Infor Distribution Storeroom CE

These new features or product improvements were made to Infor Distribution Storeroom Cloud Edition.

## New features

These new features were added to Infor Distribution Storeroom CE.

### BOR product vendor returns support serial and lot processing

You can now return Bill on Receipt (BOR) products with serial or lot control numbers to vendors, using these existing workflows:

- Return issued product to the vendor

When a customer returns an issued BOR product, you create a sales order return (OE RM) with a tied purchase order return (PO RM). The serial/lot control number is selected on the OE RM, and the returned quantity is automatically moved from the Customer On Hand balance to the Distributor Unavailable balance when the OE RM is invoiced. During PO RM receipt, the serial/lot control number from the OE RM is selected again, and the receipt quantity is removed from the Distributor Unavailable balance.

- Return an inventory product to the vendor

This type of return is not initiated by a customer return. You might return inventory products from a Storeroom warehouse because you received incorrect or damaged products.

When you create the PO RM, a tied OE RM is automatically created. The control number is not included on either of the documents. After the OE RM is invoiced, inventory is automatically moved from the Customer balance to the Distributor Unavailable balance. In Storeroom, you must then manually move the BOR product to unavailable inventory. Specify the control number during the inventory movement. During PO RM receipt, specify the control number from the inventory movement. When the PO RM is received, inventory is removed from Distributor Unavailable balance.

View product balances and availability on these tabs in the Storeroom **Product Inquiry** function:

- **Product Detail**
- **Whse Availability**
- **Lots or Serials**

In Distribution SX.e, you can view product balances in **Product Warehouse Product Setup**. Information about product availability is also shown in these functions:

- **Product Unavailable Inventory Entry**
- **Product Extended Serial Number Setup** or **Product Extended Lot Number Setup**

When a serial-controlled product is returned to the vendor, the status of the product in **Product Extended Serial Number Setup** is **Retired**.

## Saving issues and returns as drafts

You can now create draft versions of issues and returns. You can edit and save a draft multiple times before you submit it. You can also delete a draft. To save an issue or return, click the new **Save Draft** button on the **Issue** or **Return** window. You can access the drafts from the **Issues & Returns** menu.

See the *Infor Distribution Storeroom CE User Guide*.

## Product improvements

These product improvements were made to Infor Distribution Storeroom CE.

## Assigning serial numbers on purchase order returns

If these criteria are met, you can now access the **Serial** button to select serial numbers when you receive serial-controlled products on a return merchandise purchase order (PO RM):

- The product was issued, or sold, to the customer.
- The serial number was assigned to the product when the product was issued to the customer.
- The PO RM is tied to a return merchandise sales order (OE RM) that was created when the customer returned the product to Storeroom.

When processing products that were assigned a serial number at sale on a PO RM, you must select the same serial numbers that were specified on the OE RM.

See the *Infor Distribution Storeroom CE User Guide*.

## Infor Document Management integration

These new features or product improvements were made to support the integration to Infor Document Management.

## Product improvements

These product improvements were made to support the integration to Infor Document Management.

## Credit data added to Invoice output for Format 4

Credit data is now included on the Invoice form when a credit memo is applied to an invoice.

For invoices printed as Print Format 4 (IDM and 3rd party), these elements are now included in the Invoice form's XML output:

- CreditAppliedLabel
- CreditApplied
- RemainingCreditLabel
- RemainingCredit
- NetAmountDueLabel
- NetAmountDue

The new elements are added to the Invoice form below the Invoice Total.

These invoice templates are updated to include the new elements:

- SXInvoiceTemplate
- SXConsolidatedInvoiceTemplate\_Order
- SXConsolidatedInvoiceTemplate\_Product

**Note:** The RemainingCredit element is included on the SXInvoiceTemplate only.

To use the updated invoice templates, download the `IDM_SX_Content_11.20.12.zip` file from KB 1887404. The zip file contains an updated `IDM_SX_Configuration.xml` file that must be imported in the IDM Control Center.

See the *Infor Distribution SX.e Configuration Guide for Infor Operating Service* for instructions for downloading and importing form templates in IDM.

**Note:** If you have customized your Invoice forms, you must change your templates to manually add the new credit detail elements. Instructions for customizing your Invoice form to include these credit data elements are attached to KB 2173970.

## Miscellaneous

These new features or product improvements affect multiple functions in the application.

### New features

These new features affect multiple functions in the application.

#### Batch call process implemented for large transaction processing

When processing large numbers of transactions, some processes do not complete within the application's 1-minute time-out constraint, and you receive time-out errors. A new process can be implemented to accommodate these service calls allowing them to complete and return data outside of the 1-minute time frame.

The new batch process is available in this version for **Customer Cash Receipt Entry** by selecting a new option in SA Administrator Options. When you select **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**, the new batch call process is implemented in **Customer Cash Receipt Entry** when these processes are initiated:

- Transaction grid is loaded
- **Auto Apply** of invoice payments is selected
- Invoices are marked and applied as **Paid in Full**
- **Original Discount** is selected to reset transaction discounts to their original values
- **Reset** is selected to reset selected transactions to their original values
- Final Update is performed

As the batch process runs, a poller is initiated that tracks the status of the batch call using a database table that is updated as the batch process progresses. This status can be requested, in process, completed successfully, or completed with errors. If there are errors, a message is displayed to the screen with the specific error. When the status is completed successfully or completed with errors, the poller stops for that specific call and processing continues as normal.

The batch process is available for **Customer Cash Receipt Entry** only at this time. Infor shall review other transaction processing service calls in Distribution SX.e to determine where the new batch process would reduce time-out issues for large transaction sets.

### Feature activation

The batch process must be activated by setting the **Use Batch Call Process for Designated Slow Service Interface Calls** in **SA Administrator Options-System-General**. We recommend you select this option if you process very large transaction sets in **Customer Cash Receipt Entry** and experience time-out errors.

**Note:** Any value specified in the **Batch Size** field in **SA Administrator Options-Customers-Cash Receipts** is ignored if this new option is selected.

## Product improvements

These product improvements affect multiple functions in the application.

### Client date and time added to report headers

The client system date and time is now added to the report header and is displayed to the left of the server date and time on all reports. The server time is noted with the label **Server**:. The client is the operator running the report.

Reports that open GL journals now display the client date and time in open journal warnings, as in this example:

```
WARNING: Journal #:nnnnnnnn is Currently Open for  
Function: OET Operator: gc Date: 12/15/20 Time: 11:39 Client: 12/15/20  
12:39:00.000-06:00
```

The additional client date/time for open journal warnings is included on these reports:

- **Customer Trial Balance Report**
- **GL Administrator Change Account Number Report**
- **GL Balance Order Entry Report**
- **GL Balance Purchase Order Report**
- **GL Balance Transfers Report**
- **GL Budget Master List Report**
- **GL Trial Balance Report**
- **Product Trial Balance of Stock Inventory Report**
- **Vendor Trial Balance Report**

The client date/time is recorded when you select the **Use Client Time Zone to Load Date/Time on System Records** option in **SA Administrator Options-System-General**.



**Note:** Any dates and times saved before this change are assumed to be the server's time. All dates/times are adjusted to the time zone of the operator running the report.

## Pricing and Discounting

These new features or product improvements were added to the Pricing and Discounting module.

### New features

These new features were added to the Pricing and Discounting module.

### Product costs based on vendor contracts supported

The product cost on a sales order line can now be calculated from sales cost values on Level 1-4 **PD Pricing Setup** records. Sales costs reflect the cost of products based on your vendor contracts. A sales cost is used as the product cost when the pricing record is applied to a sales order line.

You can include a sales cost on these types of pricing records if the pricing record is based on a cost-related value, such as cost, margin, rebated cost, or rebated margin:

- Customer/Product (Level 1)
- Customer/Product Price Type (Level 2)
- Customer Type/Product (Level 3)
- Customer Type/Product Price Type (Level 4)

The sales cost can be a fixed amount or a percentage of one of these product values:

- Base or list price
- Replacement or standard cost

You can specify a percentage on Level 1-4 pricing records, but you can only specify a fixed amount on Level 1 and 3 pricing records. The sales cost is calculated from these new fields in **PD Pricing Setup: Sales Cost, Sales Cost Based On**, and **Sales Cost Amount**.

Typically, the product cost is determined by settings in **SA Administrator Options-Products-Costs** and is based on values from **Product Warehouse Product Setup** records. If a sales cost is applied to a line, it is not considered an override of the cost that is based on a **Product Warehouse Product Setup** record. A sales cost can be applied to a sales order line whenever line pricing occurs, including line creation through BODs, API calls, and imported spreadsheets.

If a sales cost was applied to a special line or direct order line, it is not updated when the tied purchase order or warehouse transfer is received. Instead, the cost from the receiving line is saved internally and is used to calculate GL cost during invoice processing.

If you use the pricing worksheet in **Sales Order Entry** and **Sales Customer Pricing Inquiry**, the sales cost affects pricing calculations if you apply Cost + or Margin % pricing. Additionally, as part of this

enhancement, the percentage fields for Cost +, Margin, and Discount on the pricing worksheet now support four decimal places.

In support of this enhancement, the `sxapiPD PricingMnt` call, which is used to create or maintain pricing records, now includes the new sales cost fields. Additionally, you can extract the sales costs values from pricing records to the Infor Data Lake using the **SA Administrator Birst Extraction Report**. Updates were also made to these functions:

- **PD Mass Maintenance Entry**
- **PD Customer Pricing Master List Report**
- **Sales Order Audit Report**
- **Data Conversion PD Customer Pricing PDSC Reports**

### Feature activation

To activate the feature, select the **Use Sales Cost** option in **SA Administrator Options-Products-Pricing**.

## Product

These new features or product improvements were made to the Product module.

## New features

These new features were added to the Product module.

## Customer forecasting enhancements

Using customer forecasting, you can accommodate anticipated new sales in addition to the actual usage for the previous 25 months when you factor anticipated volume and its effect on purchasing recommendations for the next 12 months. When you use customer forecasting, the total forecast quantity to purchase for all active forecasts is included in the purchasing recommendations of the **Purchase Entry Recommended Replenishment Action Report** and the **Transfer Entry Recommended Replenishment Action Report**.

However, these reports currently only review forecasts for periods specified when the replenishment functions are run. They do not consider forecasts outside of the date range for which the reports are run. This does not allow distributors to procure inventory needed when customer forecast periods start, especially for products with longer lead times.

This enhancement adds controls to allow consideration of product lead times for products when calculating the impact of customer forecast usage on PO and WT replenishment recommendations.

Two new options are added to **SA Administrator Options-Products-Replenishment** to be used by **Purchase Demand Center Entry** and **Transfer Demand Center Entry** when you run a replenishment report. When **Include Lead Time** is selected, a product's lead time is added to the current date when searching for active customer forecasts to include in the replenishment report. In addition, the **Product**

**Line Setup Review Days** value is not included when calculating a quantity to purchase. Instead, lead time is factored in when calculating the days until the end of the forecast, and the quantity to purchase is the remaining forecast quantity or the estimated monthly forecast, whichever is less.

A second option, **Ramp Up Days**, can be used to specify a number of days to add to the calculated forecast date when searching for active forecasts. This is optional and is recommended when products have particularly long lead times.

The current restriction in **Product Customer Reservation/Forecast Setup** preventing more than one active forecast for a specific forecast type and customer/ship to/warehouse combination is removed. You can create multiple forecasts in this case, but the begin and end dates must not overlap.

### Feature activation

New options are added to **SA Administrator-Products-Replenishment** to enable this feature:

- **Include Lead Time?**
- **Ramp Up Days**

If **Include Lead Time** is not selected, lead times are not added to the start and end dates when searching for active forecasts, and the calculations used to determine the quantity to purchase for forecasts is unchanged.

## Product improvements

These product improvements were made to the Product module.

### Cost/Price added to Product Inquiry-Transactions grid

A new **Cost/Price** column is added to the **Product Inquiry-Transactions** grid to display either the cost or price associated with each transaction. If the transaction is a sales order, the value displayed in the column is the price of the product from the sales order line. If the transaction is any other type, the value displayed in the column is the cost of the product from the GL entry made when the product was purchased.

Cost is per stocking unit, and includes any PO add-ons or the SM/GL cost. Cost is shown in domestic currency.

**Note:** If an item is a special cost/price item, the cost represents the cost per special price/cost unit, not per stocking unit. This is referred to as the 'raw' cost.

### Feature activation

The Cost/Price column is visible to operators with either **Allow Entry** or **Allow Viewing Only** selected in the **Price Discount Info** field in the OE/PO Entry Options section of **SA Operator Setup-Entry Options**.

## Project Job Management integration

These new features or product improvements were made to support the integration to Project Job Management (PJM).

### Product improvements

These product improvements were made to support the PJM integration.

### Project Job Management v3.21.1 certified

Distribution SX.e now supports a certified integration with Project Job Management (PJM) version 3.21.1. PJM is an MVPP application that manages small contract bids and large commercial jobs.

See the *Infor Distribution SX.e Integration Guide for Project Job Management*.

## Sales

These new features or product improvements were made to the Sales module.

### Product improvements

These product improvements were made to the Sales module.

### Delivery note option added for sales order notes and comments

You can now specify a product note, catalog note, or line comment to print on a Delivery Document in **Sales Order Entry** from notes and comment entry functions. The **Delivery** option is added to the Notes context application and can be selected when you add notes to a stocked or catalog product on a line. You can also select the **Print On Delivery** option in the **Comments** window to print line comments on the Delivery Document.

The **Delivery** option is only available in these situations if you are printing your Delivery Documents as Format 4. Print Format 4 is selected in **SA Administrator Options-Documents-Sales Orders-Printing** in the Delivery section. Print Format 4 generates XML output for Infor Document Management or a third-party forms printing application.

### Dirty core allocation allowed for picked orders

You can now allocate a dirty core product against a remanufactured core product on the same order when an order is in Picked stage. Previously, you could only allocate a dirty core if the order was in

Ordered stage. This improvement addresses a timing issue that can occur if the order is processed by the **Sales Entry Pick Ticket Report** before the dirty core is returned and added to the order.

## System Administrator

These new features or product improvements were made to the System Administrator module.

### Product improvements

These product improvements were made to the System Administrator module.

### Security Flags section of SA Operator Information Report updated

The Security Flags section of the **SA Operator Information Report** is updated to include all Security Flags settings and fields from **SA Operator Setup-Entry Options**, **SA Operator Setup-Controls**, and **SA Operator Setup-Other Options**.

Additionally, the report layout was updated to resemble the layout of **SA Operator Setup** and to widen its page formatting from 80 characters to 132.

### Conversion program to purge all BODs after 180 days

A conversion program is now included in the standard CONV routines that are initiated each time you upgrade Distribution SX.e to purge all inbound and outbound BOD records in the ION inbox/outbox, regardless of status, that are older than 180 days.

This is to prevent the inbox/outbox from filling up with BOD records and impacting system performance.

This automatic purge process is in addition to the conversion program added in version 20.12 that purges successfully processed (inactive) inbound and outbound BODs older than 60 days.

### Tables added to content extracted to Data Lake

These tables are now included with the Distribution SX.e database tables that can be extracted to Data Lake:

- counthistory
- gleb
- pick
- vaelo
- vaesl

## Total Warehouse Logistics

These new features or product improvements were made to the TWL module.

### Product improvements

These product improvements were made to the Product module.

### Products with immediate shipping prioritized in cross docking

Products that require immediate shipping are now being placed in cross dock zones near the shipping dock. This reduces products being staged in the cross dock zones by only staging products with prioritized shipping. New functionality has been added to give warehouse personnel control of the number of days forward from the promise date they would like to cross dock material.

Previously, all cross-docked products on sales orders and warehouse transfers had been consolidated into cross dock zones regardless of their due dates. Additionally, you can now mix cross dock zones onto a single pallet. This can reduce the number of pallets needed in your cross-dock area.

#### Feature activation

A new TWL system parameter, 6266-Cross Dock - Days Forward, is added to activate the days forward functionality from the promise date as required. The parameter defaults as zero, which means there is no date limit. An additional TWL system parameter, 6267-Cross Dock - Allow Zone Mix, is added to activate the zone mix of pallets destined for cross dock locations. The parameter defaults with no effect on current restriction setup.

See the *Infor Distribution SX.e Total Warehouse Logistics User Guide for Receiving and Putting Away*.

### Warehouse zone performs validations during updates

Validations are now being performed in **TWL Configuration-Warehouse Zone** during the update of a zone record. Previously, validations were not being performed during the add procedure to ensure you were not changing the pick and putaway sequences another zone had.

### Cross docking prompts consistent after first partial receipt of inventory

Cross dock prompts are now consistently displaying during product inventory receipts. When calculating cross dock quantity, it now takes into account receipts that are waiting in **WL Transaction Inquiry** for **WL Entry Batch Receiving** and only sums up totals already in cross dock for receipts that have not been closed.

## Transfer

These new features or product improvements were made to the Transfer module.

### Product improvements

These product improvements were made to the Transfers module.

### New columns added to Transfer Demand Center grid

To provide more information relevant to reviewing suggested transfers, these new display-only columns are added to the **Transfer Demand Center Entry-Line Items** grid:

- Purchasing Net Available
- Sales Net Available
- Order Point
- Usage Rate
- Standard Cost
- Transfer Package Quantity
- Vendor Package Quantity
- Warehouse Rank

These values, except for Sales Net Available, are from the **Product Warehouse Product Setup** record in the ship to warehouse. Sales Net Available is from the **Product Warehouse Product Setup** record in the ship from warehouse.

Additionally, these display-only columns are added to the Surplus grid in **Transfer Demand Center Entry-Line Item-Edit Details**:

- Line Point
- Sales Net Available

Both Line Point and Sales Net Available are from the **Product Warehouse Product Setup** record in the ship from (surplus) warehouse.

## Vendor

These new features or product improvements were made to the Vendor module.

### Product improvements

These product improvements were made to the Vendor module.

## New warning when default group selected

During **Vendor Invoice Center Entry**, if you click **Search** to view invoices in all groups and then click **New Invoice**, you can create an invoice without specifying a group. In this case, the first group found is defaulted in the **Group** field. A new message is displayed in this case: Since no group was entered, the first group found can be defaulted. Please confirm to proceed with using Group (xxxx). You can click **Yes** to use the defaulted group, or **No** to specify a group.

## Compatibility information

See the [Online Compatibility Matrix](#) on the Infor Support Portal.

## Upgrade path

To upgrade to Infor Distribution SX.e 11.x, you must be on a version of 4.0 or later. Older releases should be upgraded to 4.0 before upgrading to 11.x.

## Progress OpenEdge version requirement

Progress OpenEdge version 11.7.2.011 is the minimum requirement for Distribution SX.e version 11.19.1 and later.

If you upgrade your on-premises installation, you must install it on the Windows client machines, and then re-install the clients to use the new version of OpenEdge. After upgrading the database to a new version of OpenEdge, all shared memory connections require the new version.

Contact Infor Support if you have questions regarding installation or upgrade issues.

See the *Infor Distribution SX.e Hardware and Software Recommendations Guide*.

## Language availability

The Distribution SX.e user interface is available in these languages:

- Canadian French
- Mexican Spanish
- English



## Country availability

Distribution SX.e is available only for companies doing business in North America and the United Kingdom.