



Infor CloudSuite Distribution Release Notes

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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 excludes the vendor matching requirement, 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 using the new **Use Generic Rebates** option in **Vendor Setup**. The `sxapiAPVendorMnt` and `sxapiAPGetVendorDataGeneralV2` calls were 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.

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 to use to create invoices. You can select **Accounts Payable** or **Accounts Receivable**. The selected workflow also applies to all ship froms for the vendor.

Both invoicing workflows use the rental contract number to associate 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 the accounts payable workflow, 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.

Accounts Receivable workflow

If you select the accounts receivable workflow, 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 is 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*.

Sync.ItemMaster BOD supports product cross-reference data

You can now provide product cross-reference data to integrated applications using the outbound Sync.ItemMaster BOD. These types of product cross references, which are set up in **Product Extended Product Cross Reference Setup**, are supported:

- Supersedes
- Substitutions
- Upgrades
- Customer Products
- Vendor Products

Feature activation

Select the types of product cross-reference records to include in Sync.ItemMaster BODs in the Enable Product Cross Reference Publishing in Item Master BOD section in **SA Administrator Options-Integrations-ION Interface Options**.

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*.

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 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, then 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.

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

When you select **Enforce Allocation**, service order material transactions are not posted when the item/warehouse Item On Hand quantity is less than the Allocated Order quantity. This setting invalidates 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.

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 the quantity unit of measure for the line items are now 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 displayed in the `Invalid Quantity Unit of Measure` message and the price unit of measure from the flat file is displayed in the `Invalid Price Unit of Measure` message.
- A new header-level 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 or is missing a carriage return or line feed. 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.
 - 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*.

Line errors no longer cause cycle count failure

Line-level errors that occur when a cycle count is processed in Distribution SX.e are now correctly identified as line-level errors by Storeroom. Line-level errors were previously identified as header-level errors, causing the entire cycle count to fail and the run to remain active in Storeroom.

This fix restores standard cycle count processing. After cycle counts with line errors are processed successfully, the run is no longer accessible in Storeroom. The email notification generated after cycle count submission includes any line errors. You must correct the errors and then include the products in another cycle count.

New Storeroom user interface available

A new Storeroom user interface (UI) is available. The new Uplift UI conforms to the latest Infor standards for improved usability and efficiency. It features new screen patterns, updated icons, typography that is easier to read, a bright and modern color palette, and other improvements. You can use it with the light, dark, and high contrast themes.

UI language and date format based on browser language

The language displayed in the Uplift UI, the new Storeroom user interface, is based on your preferred language setting for your browser. These languages are supported by Storeroom:

- English (United States)
- Spanish (Mexico)
- French (Canada)

Note: The Spanish (Mexico) and French (Canada) translations of the UI are planned for a future release of Storeroom.

The date format in the new Uplift UI is also based on your preferred language. This table shows the supported languages and the corresponding date format:

Language	Date format
English (United States)	mm/dd/yyyy
English (United Kingdom)	dd/mm/yyyy
Spanish (Mexico)	dd/mm/yyyy
French (Canada)	yyyy-mm-dd

When English (United Kingdom) is your preferred language, only the date format is affected. The English (United States) language is displayed in the UI. The language setting from the legacy UI does not affect the Uplift UI.

Rebate processing for rebill line items updated

Rebate processing for rebill line items that are part of credit and rebill transactions on Correction Orders (CR) in **Sales Order Entry** was updated. These changes were made:

- When you change the price for a rebill line item with a manual rebate, the manual rebate amount is now recalculated.
- When you override a non-manual rebate on a rebill line item with a manual rebate, the manual rebate is now retained after the line is saved.
- When you apply a manual rebate to a rebill line item, the value in the **Freeze Rebate** field is now set to **Enter**, and you cannot change it. This restriction ensures that the manual rebate is not overridden by a non-manual rebate applied using the rebate hierarchy. When a non-manual rebate is applied to a rebill line item, then the default value for the **Freeze Rebate** field is displayed. The default value is based on the **Recalc Rebate Through** field in **SA Administrator Options-Documents-Sales Order-Processing**.

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.

Allocation is not required if you select **Core Buy** or **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*.