



TAMS II Release Notes

Versions 3.05 - 3.08

May 3, 2022

What's in this release

These release notes cover versions 3.05.03.00 to 3.08.05.00.

- **New!** Email invoices and statements to your customers:
 - **Email invoices** field lets you email customers invoice receipts.
 - **Email statements** field lets you email interim statements and closing statements.
 - Send past invoice receipts to different email addresses at your customers' requests.
- **New!** Source parts from NAPA Xpress to fulfill BOPIS orders:
 - The user interface walks you through the process from acknowledging messages to invoicing the customer without losing the online order.
 - Clear messages help you make the right choices at key steps in the process.



This feature is being rolled out in phases over the next few months; we will notify you when it is available at your location.

See below for details on all new features, improvements, and fixes in this release.

New

Invoices and statements

Customer information Interim and closing statements

TNSS-2880/2881



Phased rollout

- Enroll customers in **Email invoices** on the **Invoicing info** tab in **Customer information**. They will receive invoice receipts when you print and complete invoices from the point of sale.

The screenshot shows the 'Invoicing Info' tab with fields for 'Delivery Tax Table', 'Default Tax Table', 'Tax Status', 'Tax Exempt Number', and 'Tax Exempt Expiration Date'. Below these are 'Miscellaneous' options like 'Print MSDS on Invoice', 'Print Catalog Notes on Invoice', 'Print Balance on Invoice', 'Extra Invoice Copies', 'Allow Backorders', 'Allow Special Orders', 'Exempt from Environment Charges', and 'Customer Present? Default'. The 'Email Invoices' field is highlighted with a yellow box and contains the email address 'tomgione@bellfarm.com'.

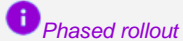
- Enroll customers in **Email statements** field on the **A/R Info** tab in **Customer information**. They will receive interim and closing statements by email when you generate statements.

The screenshot shows the 'A/R Info' tab with fields for 'Credit Limit', 'Statement Type', 'AR Terms Code', 'Extra Statement Copies', 'Store Responsibility', 'Send Invoice Copies Every', 'Send Account Summary Every', 'Age Customer', 'Bad Debt Account', 'Online Statements', 'Date Added', 'Last Purchase Date', 'Last Date on COD', 'Number of Times on COD', and 'Highest Days Past Due'. The 'Email Statements' field is highlighted with a yellow box and contains the email address 'sammybell@gmail.com'.

Invoices and statements

Interim and closing statements

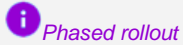
TNSS-2881/3159



Customers receive an email when you generate interim statements and closing statements to the **Email statements** address in their **Customer information**.

Review and change transactions

TNSS-2880



When customers request an invoice from past sales transactions, email an invoice receipt to their **Email invoices** address or to a different address.

1. Go to **Review/change transactions**.
2. On the **Selection criteria** tab, enter a **Customer number**.
 - To choose invoices from a single day, enter the same date in the **Date** range fields.
 - To choose invoices from a specific timeframe, enter a **Date** range.
3. On the **Transaction list** tab, select one or more invoices.

4. Select **Email invoice**.
The **Email e-invoice** message shows the **Email invoices** address by default. If the customer wants to receive the invoice at a different address, enter it in the **Email address** field in the **Email e-invoice** message.



This does not change the email address on the customer's information for future email invoices.

5. Select **Send email**. The customer receives an email invoice at the address entered in **Email address**.

Buy online pick up in store

Intuitive buy online pick up in store process

TN55-3363

The new buy online pick up in store order process walks you through the steps you need to invoice online orders whether you're sourcing from NAPA Xpress or locally.

After acknowledging the message, you are prompted to print the pull list, and then the **Invoices** screen opens with the customer's invoice created:

1. Review the NAPA online message.
2. Select **Acknowledge**.
3. Print the pull list.

The screenshot shows the 'Review Messages' window with a customer message from '41050 Buy Online Pickup In-Store Customer'. A 'Print Options' dialog box is open, allowing the user to select a printer and print options. The dialog box includes fields for 'Sort Option' (Location / Product Line / Part Number), 'Page Break Option' (Page break by first location), and 'Select Printer'.

4. **Invoice** screen opens with the customer's invoice created.

The screenshot shows the '050 Invoice - SERVER 108' window. It displays customer information for '41050 Buy Online Pickup In-Store Customer' and a list of items. The items list includes a 'NAPA GOLD OIL FILTER' with a quantity of 1.00 and a price of 9.99. The window also includes fields for 'Primary Tax Number' and 'Secondary Tax Number'.

i This applies to all stores except main counter stores: When you do not have parts in stock, the default is to source parts from NAPA Xpress; however, you can choose to Source locally.

Buy online pick up in store

New Continue to NXP and Ready for pickup buttons

TNSS-3418

After acknowledging and invoicing orders with parts flagged to source from NAPA Xpress, your next step is **Continue to NXP** instead of **Check out**. Your customer is not notified at this point.

The screenshot shows the 'V50 Invoice - SERVER 108' window. At the bottom, there is a row of buttons: 'Special Functions (Shift+Tab)', 'Barcode [F11]', 'Stock Check [F12]', 'Part Info [Shift+F2]', 'Continue to NXP [F2]', and 'Subtotal 9.99'. The 'Continue to NXP [F2]' button is highlighted with a yellow box.

When you recall the saved invoice, the **Ready for pickup** button displays instead of **Check out**. Use **Ready for pickup** when you are ready to notify the customer.

Ready for pickup does not require inventory adjustments

TNSS-3429/3441

You can flag online orders as *Ready for pickup* as soon as parts arrive without adjusting on-hand quantities. Here's the message you get:

The dialog box has a title bar 'Warning!' and a close button. It contains a question mark icon and the text: 'There is insufficient quantity on hand to complete this order. Do you wish to continue? If no, the order will be returned to Recall Saved Invoice.' At the bottom are two buttons: 'Yes' (highlighted with a yellow box) and 'No'.

- Choose **Yes** to email the customer the order is ready before posting quantities to inventory.
- Choose **No** to save the order to recall later.

Invoices

TAMS II version, Employee id, catalog

TNSS-3072/3073/3145

Ever wonder which TAMS II version your store is using? Or, which catalog revision you have? We added these along with the Employee number (user currently logged in) to the bottom of the **Invoices** screen.

The screenshot shows the bottom of the invoice screen. At the bottom, there is a row of information: 'Shift-Tab moves back a field', 'TAMSII Version: v.3.08.05.00', 'Employee: 1', 'Catalog Revision 22050 Expires 06/05/2022', and 'Wednesday, April 27, 2... 5:07 PM'. The 'TAMSII Version' and 'Catalog Revision' fields are highlighted with a yellow box.

Stock replenishment

Interstore transfer purchase orders

TNSS-2438

This fix applies to stores integrated with the JMO warehouse system

We added the **Shipped quantity** to Interstore purchase orders and removed the **Ordered quantity**.

Improved

Server version

Linux version	Look up your server's Linux version from Help > About TAMS .
TAMSIIS-2359	

Employee management

Job code	Commercial sales associate has been added as a Job code .
TAMSIIS-2545	<div><div>Sales Activities Inventory Communications Accounts Receivable System Mgmt Employee Mgmt Reports Logout Help</div><div><div>Employee 2 2 - BALDWIN, LEE</div><div><div>Employee Information</div><div><div>Main Security Pay Period History Yearly History Training</div><div><div>Employee Number 2</div><div><div>Job Code 1237 - Commercial Sales Associate</div><div><div>Last Name 1193 - Stock Associate</div><div><div>First Name 1194 - Governmental Parts Mgr</div><div><div>Middle Initial 1199 - Shipping Supervisor</div><div><div>Birth Date 1200 - Autocare Mgr</div><div><div>Address 1 1223 - Heavy Duty Specialist</div><div><div>Address 2 1235 - Battery Truck Sales Associate</div><div><div>City ALEDO</div><div><div>State IL - ILLINOIS</div><div><div>Country US - United States</div><div><div>Zip 1236 - Tools & Equip. Representative</div></div></div></div></div></div><div><div>Pay Type HOURLY</div><div><div>Profile Number Weekly Profile 1</div><div><div>Language ENGLISH</div><div><div>Invoicing Allowed <input checked="" type="checkbox"/></div><div><div>Catalog Preference Please Select ...</div><div><div>Store Dept Manager</div><div><div>AR Customer #</div><div><div>Timeout Minutes 10</div></div></div></div></div><div><div>Employee Password *****</div><div><div>Expires in Days 65</div></div><div><div>Employment Date 08/02/1999</div><div><div>Service Date / /</div><div><div>Termination Date / /</div><div><div>Pay Rate 0.00</div></div></div></div></div></div></div></div></div></div></div></div></div></div></div></div></div></div></div></div></div>

Fixed

Invoices

Customer invoices

TAMSIIS-2592

Expired supersede parts no longer display in **PartsPRO SE 2**.

Buy online pickup in store orders

TAMSIIS-2521

The issue with customer invoices converting to purchase orders when the customer's name starts with the letters *PO* has been resolved.

Classification returns

TAMSIIS-2538

When you manually add parts to a classification return, they are automatically assigned with the *Class in progress* **Suspense code**.

Stock Check

Stock Check [Shift+F3] EJOEI [Shift+F4] Other Stores' Stock Check [Shift+F5] Messaging [Shift+F6]

Part Number: 2223 Line: FIL testing

Part Information

Supplier	NAPA
Group	0
Department	0
Current Class	0
Previous Class	0
Min Sale Quantity	0.00
Standard Package	1
Case Quantity	0
Per Car Quantity	1
Primary Tax	Optional
Secondary Tax	Optional
Reportable Sales	Yes
Season Code	

Quantities

Available	10.00
On Hand	10.00
Work In Progress	0.00
Returned Defectives	0.00
Returned Cores	0.00

Year To Date Sales

Quantity	Frequency
Total Sales	0.00 0
Lost Sales	0.00 0
Totals	0.00 0

Prices

Install	\$1.0000
Net Price	\$2.0000
G + 0.00	
Unit Designator	EACH
Core	\$0.0000

Locations

Location: Planogram

Stocking

Days	
On Order	0 0
On Back Order	0 0
On Factory Order	0 0
Minimum	1
Maximum	3
Suspense Code	Class in Progress
Min Max Status	Normal
Date Last Receipt	

Customer Information

Printing invoices

TNSS-3206

The configuration error message doesn't show up on invoices when printing to a Lexmark MS823 printer.

Employee management

Passwords

TNSS-3081

This fix is for stores converting from RPM

After changing a password, an employee could not log into TAMS, and you had to call TAMS support to reset the password. We fixed that issue, and now you can reset passwords when you need to.

Language setting

Review and change transactions

TNSS-3209

When using the French language setting, you can review the transaction to change the payment method. Before you could not change the payment method if you were using TAMS II in French.

Catalog on Invoices screen

TNSS-3145

We fixed the problem with the catalog version showing up in the wrong language. Now, any time you change your language, the catalog version shows in that language.

Employee information

TNSS-2839

When you change your language, **Employee information** now shows correctly in that language.

RPT115 Stock receipts purchase orders report

TNSS-2952

When using the French language setting, the subtotal for each purchase order was not showing correctly on the **RPT155 Stock receipts purchase order report**. We fixed that problem, and not subtotals for each purchase order are listed.

Inventory management

Purchase orders

[TAMSIIS-2503](#)

The issue with incorrect quantities on factory standard pack orders has been resolved.

Replenishment purchase orders

[TNSS-3119](#)

This fix applies to store groups using Multi Store When posting a purchase order for a factory order, duplicate invoices were created and saved: one for the store ordering the parts and a second invoice for a store not ordering the part. Now, when you post the purchase order, only one invoice is created and saved for the store ordering the part.

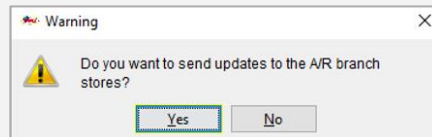
Accounts receivable

Customer information

[TNSS-3334/3324](#)

This fix applies to stores in a store ownership not using Multi Store with consolidated accounts receivable

When the main store adds a new **Email invoices** or **Email statements** address or makes changes to one, the following prompt displays when you close the **Customer information** screen. This message lets you send updates to the branch stores immediately.



Before this new message, you used the **AR Update to branch** store function to send the update to the branch stores.

System management

Tax tables

[TNSS-2675](#)

Tax tables now support 3 digits. Previously, you couldn't create a **Tax table** like 100, 101, or 300. Now you can.