



TAMS II Release Notes

Versions 3.07 - 3.08

May 3, 2022

What's in this release

These release notes cover versions 3.07.04.00 to 3.08.05.

We've made the BOPIS process easier to follow when you source parts from NAPA Xpress.

- The improved 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.
- Parts sourced from NAPA Xpress are immediately visible on the customer's order on the Invoices screen.

We also addressed several issues you reported, including:

- Immediately update branch stores with new or updated **Email invoices** and **Email statements** when closing the Customer information screen.
- No need to call TAMS support after changing employee passwords, now they can log in after their passwords are changed.
- The 2-digit **Tax table** name restriction is removed, now 3-digits are supported.

See below for details on all improvements and fixes.

Improved

Buy online pick up in store

Intuitive buy online pick up in store process

TN55-3363

The improved buy online pick up in store orders process follows a logical flow that ensures the customer is invoiced. 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 in the TAMS II application. At the top, it displays 'Customer: 41000 Buy Online Pickup In-Store Customer', 'Date: 11/10/2021', and 'Time: 12:58:48'. Below this is a table with columns: Seq #, Line, Part #, Description, Requested Quantity, Status, Available Quantity, Invoice Quantity, and Price Quoted. The table contains one line item: 'NAPA GOLD OIL FILTER' with a requested quantity of 1.00 and an available quantity of 25.00. Below the table, there is a section for 'Order Note, Pickup in 30 Minutes' and 'NOL BOPIS 25305011'. A 'Print Options' dialog box is open in the foreground, showing 'Print Option: Location / Product Line / Part Number', 'Page Break Option: Page break by first location', and 'Select Printer: [Printer Name]'. The dialog box has 'OK' and 'Cancel' buttons. At the bottom of the 'Review Messages' window, there is a navigation bar with buttons: 'Print [F2]', 'Special Order [F4]', 'Incoming Orders [F1]', 'Acknowledge [F2]', 'Previous Message [F7]', 'Next Message [F8]', and 'Close [Esc]'.

Buy online pick up in store

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

050 Invoice - SERVER 108

Other Functions Logout Catalog Help

Employee: 1 SERVER 108
Customer: Buy Online Pickup In-Store Customer
Salesperson: 0 Salesman 20

Message [F4] Catalog [F9]
ROA [F6] Recall Saved Invoice [F7] Stock Check [F12]

Customer Information
41060 Buy Online Pickup In-Store Customer
Thank you for shopping NAPA
VISIT US AT WWW.NAPAONLINE.COM
ALCDD - IL 99999
Attention: 8971592415,AutoNAPA AUTOMATION
Open Cores [Shift+F9]

Phone: (909) 999-9999 Fax:
Billing Type: Cash Only Available: No Limit Limit: No Limit
Tax: Primary Always IL Secondary Always IL
Note:

Authorized Buyer: -

Primary Tax Number: Secondary Tax Number:

Part #	Line	Description	Quantity	List	PD	Price	Total	Tax	Codes
1515	1	1 NAPA GOLD OIL FILTER	1.00	15.8200		9.9900	9.99	Y	XT

Order Now, Pickup in 30 Minutes
AutoNAPA AUTOMATION;8971592415;8971592415@gmail.com

Part Number Line Description Quantity List PD Price Unit Tax OK
Delete [F5] Supercede [F4]

Special Functions (Shift+Tab) Barcode [F11] Stock Check [F12] Part Info [Shift+F2] Continue to NXP [F2] Subtotal 9.99

Previously, you did not have to invoice the customer in a continuous process.



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.

COD account message removed

TNSS-3357

You no longer get the following COD alert when creating BOPIS invoices from Messages.

Question

This is a COD account. The invoice will be cash only.
Do you wish to continue?

Yes No

Continue to NXP and Ready for pickup in the right order

TNSS-3418

The **Continue to NXP** and **Ready for pickup** buttons are now in the right order making it easy to follow the process.

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.

050 Invoice - SERVER 108

Other Functions Logout Catalog Help

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Message [F4] Catalog [F9]
ROA [F6] Recall Saved Invoice [F7] Stock Check [F12]

Customer Information
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ALCDD - IL 99999
Attention: 8971592415,AutoNAPA AUTOMATION
Open Cores [Shift+F9]

Phone: (909) 999-9999 Fax:
Billing Type: Cash Only Available: No Limit Limit: No Limit
Tax: Primary Always IL Secondary Always IL
Note:

Authorized Buyer: -

Primary Tax Number: Secondary Tax Number:

Part #	Line	Description	Quantity	List	PD	Price	Total	Tax	Codes
1515	1	1 NAPA GOLD OIL FILTER	1.00	15.8200		9.9900	9.99	Y	XT

Order Now, Pickup in 30 Minutes
AutoNAPA AUTOMATION;8971592415;8971592415@gmail.com

Part Number Line Description Quantity List PD Price Unit Tax OK
Delete [F5] Supercede [F4]

Special Functions (Shift+Tab) Barcode [F11] Stock Check [F12] Part Info [Shift+F2] Continue to NXP [F2] Subtotal 9.99

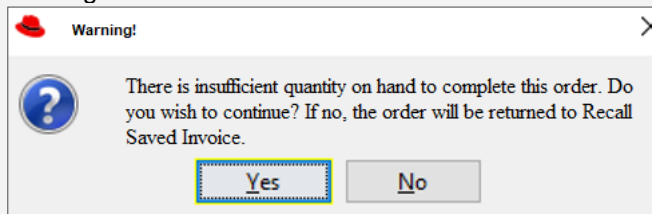
Buy online pick up in store

Ready for pickup does not require inventory adjustments

TNSS-3429/3441

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.

Based on your feedback, we changed the *Ready for pickup* flag. Now, you can flag online orders *Ready for pickup* as soon as parts arrive in your store. We added this message:




So now you can choose:

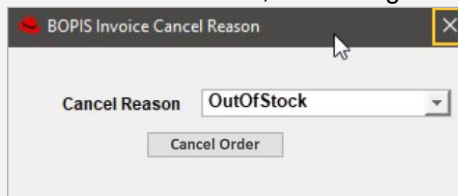
- **Yes** to notify the customer the order is ready before the quantity is posted to inventory.
- **No** to save the order to recall later.


Cancel online order

TNSS-1208/3387

We renamed the **Post status** button on the **BOPIS Invoice cancel reason** screen to **Cancel order**. Now, it's clear that the order will be canceled.

We fixed the  button, so clicking it closes the message screen.



Previously, the  button did not close the screen, and you had to cancel the order to close this screen. Now, you can close this screen without canceling the order.

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.

A screenshot of the "Invoices" screen. It features a table with columns: Part Number, Line, Description, Quantity, List, PD, Price, Unit, Tax, and OK. Below the table, there are buttons for "Special Functions (Shift+Tab)", "Barcode [F11]", "Stock Check [F12]", "Part Info [Shift+F2]", and "Checkout [F2]". A "Subtotal" of 0.00 is displayed. At the bottom, a status bar shows: "Shift+Tab moves back a field", "TAMSII Version: v.3.08.05.00", "Employee: 1", "Catalog Revision 22050 Expires 06/05/2022", "Wednesday, April 27, 2022", and "5:07 PM".

Stock replenishment

Interstore transfer purchase orders

TNSS-2438

This fix applies to stores integrated with the JMO warehouse management system

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

Fixed

Invoices

BOPIS orders Kit component parts no longer display as NAPA Xpress

TNSS-3502

After sourcing kit component parts from NAPA Xpress, you'll see the sourced part with an **O** code on the customer's invoice instead of an **XT** (NAPA Xpress) code.

Part #	Line	Description	Quantity	List	PD	Price	Total	Tax	Codes
1) 728AMPFK10	NBK	VIRTUAL KIT	1.00	262.6800		168.9700	168.97	Y - Y	OT
2) PF-728AM	PFB	DISC PAD	1.00	0.0000	U	0.0000	0.00	Y - Y	XT
3) 4885564	NB	BRAKE ROTOR HUB	2.00	0.0000	U	0.0000	0.00	Y - Y	XT
4) Abdul M;7703512693;abdul_mohammed@genpt.com									
5) NOL order is saved, NOL Order Number : 26365602									

BOPIS orders Parts sourced from NAPA Xpress show on customer invoice

TNSS-3379

When you placed orders in NAPA Xpress, you expected the part to display when returning to the customer's invoice. But, it did not. Instead, you used **Recall saved invoices** to see the part on the invoice. We fixed that. Now when you place the order in NAPA Xpress and go back to TAMS, the part shows on the invoice.

050 Invoice - SERVER 108

Other Functions Logout Catalog Help

Employee: 1 SERVER 108
Customer: Buy Online Pickup In-Store Customer
Salesperson: 0 Salesman Z0

Customer Information
41059
Buy Online Pickup In-Store Customer
Thank you for shopping NAPA
VISIT US AT WWW.NAPALINE.COM
ALEDO, IL 60009

Phone: (999) 999-9999 Fax:
Billing Type: Cash Only Available: No Limit Limit: No Limit
Tax: Primary Always IL Secondary Always IL

Note: Open Codes (Shift + F10)

Authorized Buyer: [Field]
Primary Tax Number: [Field] Secondary Tax Number: [Field]

Part #	Line	Description	Quantity	List	PD	Price	Total	Tax	Codes
1) 1516	FL	NAPA GOLD OIL FILTER	1.00	15.8200		9.9900	9.99	Y - Y	OT
2) Qty: 1 from NTN - ETA: 04/22/2022 11:59 PM									
3) Order Now, Pickup in 30 Minutes									
4) AutoNAPA AUTOMATION;8971592415;8971592416@gmail.com									
5) NOL order is saved, NOL Order Number : 26365511									

Part Number Line Description Quantity List PD Price Unit Tax Tax 2 OK
Special Functions (Shift+Tab) Recall (F10) Stock Check (F12) Part Info (Shift+F2) Check (F2) Subtotal 9.99

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 orders reports**. We fixed that problem, and not subtotals for each purchase order are listed.

Inventory management

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.

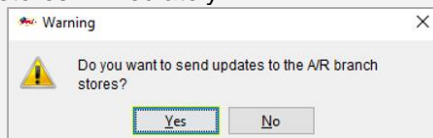
Accounts receivable

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.