



# Infor SyteLine Release Notes for 2021

Release 10.00

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## Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

The latest documentation is available from [docs.infor.com](https://docs.infor.com) or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).

## Chapter 1: October 2021 Production updates

These updates are available as of October 2021.

**Note:** The SyteLine help at <https://docs.infor.com> includes descriptions of the most current features and enhancements. Depending on your environment, you might not yet have access to all of these features and enhancements.

### General Application updates

#### Microsoft Project Import/Export for SyteLine Web Client (RS 9142)

The Microsoft Project Import/Export has been redesigned to support the SyteLine Web Client. You can now export your online projects to Microsoft Project Online, then import any revisions back into a SyteLine web client session.

**Note:** To start this integration, your SharePoint Project Online application must first be registered in Microsoft Azure. Your SyteLine system administrator will use that registration information to configure the Microsoft Project integration on SyteLine's **Project Parameters** form.

The new **Microsoft Project** area on the **Projects** form lets you:

- Use the **Create** button to export an entire online project from the web client out to MS Project Online.
- Import all updates published in MS Project Online back into the web client using the **Update ERP** button.
- Open any online project that you have already linked to MS Project Online using the **View** button.

The existing Microsoft Project Import/Export for Smart Client deployments continues as a separate integration.

### Financial updates

#### A/R quick payment multi-currency residual calculation (RS9071)

**Note:** This feature was released in April 2021, but it required a feature key to activate. This feature is now available without the requirement of a feature key.

We have enhanced the functionality so you no longer have to convert multi-currency payment distribution into domestic currency and then back to payment currency. These are the specific changes:

- Invoices and credit memos in any currency are translated into a single currency which is the currency of payment. After translation, both invoice balance and payment amount are represented in the same currency.
- The payment amount is distributed among Invoices. That value is represented as payment currency.
- Calculation of payment applied is performed based on distributed payment amount in the payment currency, which doesn't require further currency conversion.

On the **A/R Quick Payment Application** form, the **Amt to Pay (Payment Currency)** and the **Amt to Pay (Domestic Currency)** columns have been added to the grid. On the **A/R Payment Distributions** form, the **Payment Dist Amount** and **Exchange Rate** fields have been added.

## Chapter 2: September 2021 Production updates

These updates are available as of September 2021.

**Note:** The SyteLine help at <https://docs.infor.com> includes descriptions of the most current features and enhancements. Depending on your environment, you might not yet have access to all of these features and enhancements.

### Service update

#### Add Ship Date to Unit Configuration Create Utility (RS9072)

A new **Ship Date** field has been added to the **Unit Configuration Create** form to choose a shipment date range. You can now use this form to generate unit configurations for serialized parts as they are used and shipped. This lets you deselect the **Auto Build Unit Configuration** and **Auto Create Unit On Shipment** settings on the **Service Parameters** to enhance order shipping performance. This date range also has a new **Increment Date** check box, allowing the utility to be placed on the background queue for automated runs on a set schedule.

### General Application updates

#### Northern Ireland added to list of country codes (RS9227)

Northern Ireland (XI) has been added to the list in the **Countries** form with XI as the EU Code and SSD EU Code. You can find Northern Ireland in the **Country** field selection list on the **Customers** and **Vendors** forms when adding new records. An ISO Country Code for Northern Ireland has not been officially defined by the ISO so is not listed on the **ISO Countries** form.

#### Manufacturing window enhancements (RS9223)

The new **Engineering Window** provides access and linking between the **Engineering Workbench** and **Engineering Board** within a single form. You can right-click on a BOM from the **Engineering Workbench** (left side) and drill down to see the BOM's multi-level graphical view on the **Engineering Board** (right side). The **Engineering Workbench** has new **Percent Complete** columns (Job view):

Drill down to see the Job's operations and materials status with red, amber, green, and blue backgrounds color-coded for the amount issued. New **Issue Material** and **Issue Labor** buttons (Job view) open pre-filtered **Job Material Transactions** and **Unposted Job Transactions** for your selected Job.



## Chapter 3: August 2021 Production updates

These updates are available as of August 2021.

**Note:** The SyteLine help at <https://docs.infor.com> includes descriptions of the most current features and enhancements. Depending on your environment, you might not yet have access to all of these features and enhancements.

### General Application updates

#### Reduce memory footprint of large reports (RS9075)

This enhancement results in increased performance when running large reports. There is no UI or process change.

### Integration update

#### WMS Integration - QC inspection flag (RS9168)

As part of the WMS integration, SyteLine now creates the QC Receiver when the SyncReceiveDelivery BOD is received from WMS. Items are now received into the location which passed from WMS. Quantity Inspector now performs the QC Process in SyteLine. WMS gives the QC Result with the SyncInventoryHold BOD to SyteLine to do the Quantity Move. To support this enhancement, we have added the **Whse** field to the **Disposition Receiving** and **Disposition MRR** forms. This field displays the value from the **Supplier Inspect/Disposition** form. Logic has been changed on the **Supplier Inspect/Disposition** form so that material transaction forms are no longer launched if **Whse** is external and the **Auto Accept Receiver** button is clicked.

#### WMS Integration – Add non-nettable stock (RS9166)

As part of the WMS integration, you can now set a default non-nettable location for an external controlled warehouse on the **Warehouses** form. When it is set, item stockroom location records are created for the non-nettable location. For an external-controlled warehouse, an item can have one nettable stock location and one non-nettable stock location.

You can maintain the non-nettable hold codes on the new **Non-Nettable Hold Codes** form. The form is only used for WMS BOD processing and not for SyteLine functionality.

## Pick, pack, ship update

### Assigned to be Picked (RS9193)

New **Assigned To Be Picked** fields have been added to the **Item Lot Location** and **Item Stockroom Locations** forms to show item quantity after pick, pack, and ship transactions. You can now use the **Rebalance Item Quantity Reserved** utility to update those quantities, if needed. The **Serial Numbers** form also shows a new auto-selected **Assigned To Be Picked** check box for any serialized item assigned to a pick, pack, or ship process.

## Chapter 4: July 2021 Production updates

These updates are available as of July 2021.

**Note:** The SyteLine help at <https://docs.infor.com> includes descriptions of the most current features and enhancements. Depending on your environment, you might not yet have access to all of these features and enhancements.

### General Application update

#### WMS integration - support added for PO return processing after voucher (RS9171)

We have added support for processing PO Return transactions in SyteLine, received from WMS when the PO Line has been vouchered or partially vouchered. SyteLine will process the WMS transaction as it would normally by a user when the PO Line is vouchered.

If the received items have been fully vouchered, SyteLine will perform a DR return for the un-received items. In this scenario, the formula is:

DR Return Qty (CSI) = Un-Received Qty (WMS)

If the received items have been partially vouchered and the returned quantity is greater than the received but not vouchered quantity, SyteLine will perform a PO negative return against the not-vouchered quantity. The rest of the un-received items are taken care of with a PO DR Return in SyteLine. In this scenario, the formulas are:

Negative Return Qty (CSI) = Received Qty - Vouchered Qty

DR Return Qty (CSI) = Un-Received Qty (WMS) – Negative Return Qty

To support this new feature, the **External Warehouse PO Return Reason Code** field was added to the **Purchasing Parameters** form.

# Integration update

## **Energize various forms for IDM / Web Containers with JSON (RS8477)**

37 forms can now broadcast JSON context for SyteLine Entities. Those forms are:

Attendance

EmergencyContacts

EmployeeAwards

EmployeeCertLicense

EmployeeEducation

EmployeeExams

EmployeeInjuries

EmployeeInsurance

EmployeePerformanceReviews

EmployeeReimbursementPlans

EmployeeSalary

EmployeeSickLeave

EmployeeVacation

Positions

Skills

TrainingCourses

WorkExperience

ServiceOrders

ServiceOrderLines

ServiceOrderOperations

JobWorkbench

CurrentOperations

QC\_Cars

QC\_ChangeRequestManagement

QC\_COInspectDisposition

QC\_CustomerComplaints

QC\_Customers

QC\_IPJobInspectDispositions

QC\_Items

QC\_ItemTests

QC\_MRRs

QC\_RMALnspectDispositions

QC\_SupplierInspectDispositions

QC\_TestResultsEntry

QC\_VendorRMAs

QC\_Vendors

QC\_QAProcesses

## Chapter 5: June 2021 Production update

These updates are available as of June 2021.

**Note:** The SyteLine help at <https://docs.infor.com> includes descriptions of the most current features and enhancements. Depending on your environment, you might not yet have access to all of these features and enhancements.

### General Application updates

#### Fraud prevention headers for making tax digital (RS9192)

Fraud prevention headers have been updated to meet Her Majesty's Revenue and Custom (HMRC) requirements.

## Chapter 6: April 2021 Production update

These updates are available as of April 2021.

**Note:** The SyteLine help at <https://docs.infor.com> includes descriptions of the most current features and enhancements. Depending on your environment, you might not yet have access to all of these features and enhancements.

### General Application updates

#### Improved UI for Jobs (RS9167)

We improved the UI on the **Jobs to Release** and **Jobs to Complete** home and mobile forms, making automation easier. Easily select a date to view jobs, then click the new Job Count link to see the job list and release or complete the jobs.

#### Offsetting VAT entries (RS9129)

We now show offsetting VAT entries on the **Generate A/P Transactions** form. These offsetting entries display if these criteria are met:

- 1 The user inputs an Exemption tax code type (with an offset category) in the **VAT Code** field on the **Purchase Orders** form and the item selected in the PO Line is tagged to a Rate tax code (with a tax percent rate).
- 2 On the **Generate A/P Transactions** form, the user navigates to the **Taxes** area and clicks the **Generate Tax** button. The tax amount in the **Sales Tax** column is shown in positive and negative amount (in separate lines).

**Note:** If the user added two or three PO Lines (Items) on the **Purchase Orders** form where each Item is tagged to a different Rate tax code, there will be offsetting entries (two lines per item where the first line is a positive tax amount and second line is a negative tax amount under the Sales Tax column) on the **Generate A/P Transactions** form when the user clicks the **Generate Tax** button.

On the **A/P Vouchers and Adjustments** form, when the user inputs the Exemption tax code (with an offset category) in the **VAT Code** field, this creates an offsetting entry. The two lines display where the first line is a positive and second line is a negative tax amount. In this case, since it is in the voucher process, the offsetting entry is seen when the user clicks the **Distribution** button.

On the **A/P Vouchers and Adjustments** form, when the user can not add an Exemption Tax code (with an Offset Category) in the **VAT Code** field but the **AR/AP Tax Code** field on the **Tax Systems**

form has a Rate tax code (with offset category) set, the offsetting still occurs and is seen when the user clicks the **Distribution Generation** button and then the **Distribution** button.

### Support for Order Notes in BOD Processing (RS9160)

We now support the exchange of Customer Order, Purchase Order, and Transfer Order notes from SyteLine through BOD data exchange to WMS.

### Transport Layer Security (TLS) support (RS8720)

We have removed support for older TLS 1.0 and 1.1 protocols. You must enable the TLS 1.2 protocol.

If you are an Infor Cloud customer, and you use non-current versions of the Microsoft Office Add-ins or CadLink, you must upgrade those to the current versions. If you have built any custom code or automation leveraging SyteLine web services directly, the custom code must support TLS 1.2 communication.

### Data Lake hybrid environment support (RS8802)

This is an adoption of a previous Mongoose update. We now support Data Lake usage in hybrid environments where SyteLine is on-premises integrating to Data Lake in the cloud.

## Country Pack updates

### Poland Local.ly adoption (RS8518\_5)

These Local.ly reports are now available for Poland using existing SyteLine BODs:

- 100010 - Bank Statement Posting & Automatic Reconciliation (Inbound)
- 100026 - Credit Transfers
- 100028 - EU Sales Listing
- 100031 - GL Journal Report
- 100032 - GL Transaction Report
- 100033 - GL Trial Balance Report
- 100072 - VAT EU Intrastat
- 100078 - Accounts Receivable Trial Balance Report
- 100079 - Accounts Payable Trial Balance Report
- 100089 - Direct Electronic Sales Invoicing
- 100181 - Tax Delivery Confirmation
- 100290 - Inventory Movements Report



## Financial updates

### **A/R quick payment multi-currency residual calculation (RS9071)**

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## Chapter 7: March 2021 Production update

This update includes resolved issues only.

**Note:** The SyteLine help at <https://docs.infor.com> includes descriptions of the most current features and enhancements. Depending on your environment, you might not yet have access to all of these features and enhancements.

### General Application updates

#### Improved UI for Jobs (RS9167)

We improved the UI on the **Jobs to Release** and **Jobs to Complete** home and mobile forms, making automation easier. Easily select a date to view jobs, then click the new Job Count link to see the job list and release or complete the jobs.

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On the **A/P Vouchers and Adjustments** form, when the user can not add an Exemption Tax code (with an Offset Category) in the **VAT Code** field but the **AR/AP Tax Code** field on the **Tax Systems**

form has a Rate tax code (with offset category) set, the offsetting still occurs and is seen when the user clicks the **Distribution Generation** button and then the **Distribution** button.

## Chapter 8: January 2021 updates

These updates are available as of January 2021.

**Note:** The SyteLine help at <https://docs.infor.com> includes descriptions of the most current features and enhancements. Depending on your environment, you might not yet have access to all of these features and enhancements.

### Country Pack updates

#### Thai country pack update (RS8710)

For Thai country pack users, a payment number is now displayed for tracking A/R and A/P payments. Additionally, a new option is available to indicate that a tax code is used for service tax.