What's New in Propello 2024.2

Propello 2024.2 includes enhancements in Age Verification Workflow, Global and Declining Credit Limit, New Transfer UI, Enhanced Customer Overview page, and much more.

Let's start with the **Age Verification workflow**.

Now, during a transaction at the Point of Sale (POS), if an item is configured with an age restriction, a prompt for '**MINIMUM AGE VALIDATION REQUIRED**' appears. POS Clerks can enter the customer's Date of Birth (DOB) to continue the transaction.

If the customer meets the required age, a message with the Date of Birth is displayed in the line item.

If the customer does not meet the required minimum age to purchase an item, the system displays a warning message and prevents the POS clerk from posting the item.

Global Credit Limit allows you to assign a consolidated credit limit for all jobs. This is applicable only for the customer accounts with a job.

In the **Job** setup page, you can select **Yes** in the **Use Main Account's Global Credit Limit for Job Accounts** dropdown to set up a consolidated credit limit for all job accounts.

A new **Global Credit Check** field is now available under the **Credit Info** tab on the Customer Overview page.

When you select **Yes** in **Global Credit Check** in the Main Account, it changes **Credit Limit** to **Global Credit Limit**. However, in all your Job Accounts, it remains as a **Credit Limit** in a view-only mode.

The **Global Credit Check** field is available on the **Customer Mass Update** page as well.

Declining Credit Limit is an independent option for each Main and Job account. You can either set a Credit Limit or a Declining Credit Limit.

For example, if a customer is assigned a credit limit of $500 and makes a transaction of $100, the credit limit drops to $400. However, if a payment of $100 is made, the credit limit returns to $500.

In contrast, with a Declining Credit Limit, the available credit remains at $400 even after payments are made, as it does not increase with payments.

The new **Declining Credit Limit** field is now accessible under the **Credit Info** tab on the **Customer Overview** page.

It's available for Non-Job, Main, and Job accounts. Enabling this field defaults **Global Credit Check** to **No**.

The **Use Declining Credit** is available on the **Customer Mass Update** page.

The **Global Credit Check** field is available in the Layout information of the **Customer Import** page and the **Update Dataset** page.

The redesigned **Transfer** grid in Propello helps you organize and manage transfer information efficiently.

Use the enhanced transfer grid to execute manual transfers, and efficiently move products between stores.

New filters have been added to refine search results, allowing you to focus on key rows and columns for your data analysis.

The multi-column sorting feature enables simultaneous sorting of multiple columns and is beneficial when single-level sorting doesn't suffice for your analysis.

A **Delete** icon is available in the grid, which becomes visible and active once you select one or more rows.

You can select the Add icon on the transfer overview grid to add a new transfer request.

If Distribution Transfers are enabled and you have the necessary permissions, the system directs you to a prompt to define the type of transfer you are adding.

Two new fields have been added to the **Add New Transfer Request** prompt. These fields are available for both the **Request From Store(s)** and **Send To Store(s)** options. The fields include:

- Use QOO in Calculation
- Use Committed Qty in Calculation

The **Transfer Request** page allows you to view the details of a Transfer Request in a detailed grid.

The **Transfer Total** dropdown shows the total cost of the transfer. Use the expand or collapse icon to see the detailed totals for the transfer. You can edit or update the required fields present in the dropdown.

Use the *clipboard* icon to add or edit a note.

The Right-hand side flyout includes the following tabs:

- Select the Source tab to view the stocking information and the source of the Transfer request.
- Select the Product tab to view the product details, history, and stock of the item.

After selecting the **Send Request** button on the navigation bar, the **Send Transfer Request** drawer appears.

It shows each store from which the product is requested and the totals that will be generated for each transfer request.

You can create a transfer request for an item by selecting the **Create Requests** button. To email or print this Transfer request, check the respective boxes for **Email Request** and **Print Request**.
Use the newly enhanced **Customer Overview** page to view and access customer information with ease.

You can search for a specific customer using the search field in the Customer Overview grid.

On the **Customer Overview** page, you can select the **Edit** icon to change the customer information such as Account details, Shipping address, Primary Contact, etc.

When you select the **Edit** icon, a right-hand flyout appears where you can add or edit all the required fields and then select **Update**.

The **Note** tab displays the existing Notes related to the Customer. Here, you can add new notes, edit an existing one, or delete any notes if required.

The Product Overview grid now allows you to delete multiple products at one time. This is particularly useful when an imported product record is incorrect or when inventory cleanup is required.

To perform this task, a new permission **"Access to Delete Product Records from Product Grid,"** has been made available on the **Manage Role** page, under the **Product Application**.

You can perform the multiple deletion process by choosing items from the grid and then selecting the delete icon.

Select **Yes** in the confirmation prompt.

When the task is completed, the system removes the items from the grid and a notification with a generic message appears noting that the task is complete.

You can save your views for straightforward and consistent exports from Propello for 3rd party accounting systems imports.

You can use the new **GL Category** filter dropdown available on the **GL Transaction Viewer** page to filter the data for a specific G/L account.

To access the **GL Category** filter, select a date range or specific Date in the **Date** filter.

In addition, the **Group By** filter is available as a dropdown with three options: a blank selection line, Group by Source, and Group by 3rd Party Account.

AR jobs are now accessible for cash customers. You can create and edit a Job Account for Non-Charge Allowed Customers.

After setting up a Job Account for a Non-Charge Allowed Main account, you can set that particular job account as Charge Allowed.

Now in the **Actions** dropdown the **Add Customer Job** option is available irrespective of Charge Allowed customer and non-charge allowed customer.

When you add a job account to the non-charge allowed customer, the new Job inherits all settings from the main account and uses contacts from the main account if you don't add any contacts.

You can allow charges for the Job Accounts of a non-charge allowed customer.

In the **Edit Customer Overview** screen, just set the job account's **Charge Allowed** dropdown to **Yes**.

Note: To set Charge Allowed to a Job Account, you must add an Authorized to Charge contact.

In the **Customer Overview** grid, the non-charge allowed customer shows a tick mark in the **Has Jobs** column and the **Charge Allow** column shows a tick for the Charge Allowed Job Account.

You can delete Charge Allowed customer accounts.

From the **Edit Customer Overview** screen, select the **Delete Customer** option in the **Actions** dropdown.

Note: You should confirm there are no outstanding AR transactions for the customer before proceeding with account deletion.

The newly added **Special Order** transaction type is available in the **Activity Viewer**, **Saved Transaction**, and **Line Item Detail Viewer** pages.

Now, you can utilize the **Order** and **Special Order** filters to view the data on the grid.

The **Deposits** page now features two new tabs, **Orders** and **Special Orders**, under the **Deposit Range Calculator**.

A new toggle **Calculate suggested deposit for Orders based on the grid below** is available under the **Deposit Range Calculator**.

If the toggle is **ON**, you can add the deposit range to the grid.

If the toggle is **OFF**, you cannot add the deposit range.

When the **Calculate suggested deposit for Orders based on the grid below** toggle is **ON**, even if the deposit range grid is empty, you can manually add a deposit in POS using the **Deposit Due** button.

If the toggle is **OFF**, the **Deposit Due** button will not be available in POS.

Note:

1. The validation is applicable only for Delivery items, not for Over the Counter (OTC) items. Therefore, if a transaction includes only OTC items, the Deposit Button will not be available.
2. If an item added doesn't belong to the delivery or mix category, the system will not calculate the deposit, even if the deposit range is set.

Using the new permission **Ability to Invoice Special Order items without finalizing PO**, you can now invoice a special order item even if the respective PO is not finalized.

If an Item is invoiced before PO finalization, you can finalize the PO despite now having an active sale line associated with it.

A new transaction type, **Special Order** is now available in the POS. All the items sourced via Purchase Order will now be Special Orders.

The shipping method is now simplified for the Ship Via page. There are two options that include:

1. Over the Counter
2. Delivery

In the **Over the Counter** option, items need to be Invoiced immediately.

In the **Delivery** option, the items can be invoiced at a later stage when recalled.

Also, two new toggles **Order Default** and **Special Order Default** are available for default setting at POS.

In the **Ship Via** overview grid, you can view the **Order Default** and **Special Order Default** columns.

The **Due Today** field includes expanded functionality to include **Delivery** and **Over-the-Counter** items in the POS Orders and Special Orders.

For example, only the **Deposit Due** amount is to be paid for orders with **Delivery** type Items.

You can now delete an old or inactive Charge Allowed customer who does not have any unresolved or open AR transactions.

After deleting a transaction, the A/R Transaction viewer displays the records with [Deleted] appended to the name.

A new **Default Salesperson** setting is available under the **Stores** tab in the **Organization Maintenance**.

Use the **Default Salesperson** dropdown to assign a default salesperson for a store.

The system automatically assigns the default salesperson in POS transactions when the customer account or logged-in clerk is not associated with any salesperson code.

The Customer Module is now accessible in the Mobile+ app. It offers information related to the history, loyalty programs, contacts, and credit status of existing customer accounts.

From the *main menu*, select **Customers** and choose **Customers** to navigate to the **Customer Overview** page.

You can search for a desired customer using the search filters.

The **Customer Details** page displays the **GENERAL**, **HISTORY**, **CREDIT**, **CONTACTS**, **LOYALTY**, and **PAYMENTS** information.

You can use the show password icon to view your password entry on the **LOGIN** page.

Note: The show password icon only appears when the password isn't stored in the App Setting or login, and it doesn't display an existing password.

A new gift card type called **FDMS Gift Card** is available in the Mobile+ app. This new gift card type is tied to the FDMS processor and stores to process FDMS-based gift cards.

The **Price Adjustment Reason** drop-down in the **Price Adjustment** pop-up allows for a quick selection of predefined reasons, eliminating manual entry and speeding up adding a price override reason.

Use the Additional info field to enter more details regarding the above Price Adjustment Reason.

When you have an Enterprise PO license, the Enterprise PO field displays in the PO header, and you have the option to set this field as either **Yes** or **No.**

The following pages will display the PO and PO lines based on the **Yes** or **No** value you have selected in the **Enterprise PO** Field.

The Manage PO page displays all the purchase orders available for your logged-in store and you can select the desired store.

Once you select a PO from the **Manage PO** list, the system will direct you to the **PO Details** page.

- When the **Enterprise PO** field is set to **Yes**, the **PO Detail** page now displays PO lines for all the stores (including the previously logged-in store) even if you log in to another store.
- When the **Enterprise PO** field is set to **No**, the **PO Detail** page displays PO lines for only the current logged-in store.

Receive PO now supports the multi-store and Enterprise POs.

- When the **Enterprise PO** field is set to **Yes,** all the POs from the current logged-in store display in the Receive PO list.
- When the **Enterprise PO** field is set to **No**, all the POs from the logged-in store, with at least 1 PO line from the store, will be displayed in the Receive PO list.

For a complete list of new features and enhancements in the latest Propello release, refer to the **What's New** document in the **Help** menu.

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