Ostendo Update 238
Release Notes (Dec 2019)

Release notes relating to significant changes since Update 211

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Overview:

This document presents all significant new functionality within Ostendo since Update 211. As a number of sites have been using Pre-Release Update 237, we have noted (Update237) alongside the new functionality that was available within 237. These sites need only focus on Update238 added functionality. All other functionality without Update 237 or 238 specified has been released in Pre-Releases since Update 211

Update Download Link:
http://www.ostendo.info/downloads/ostendo/update238.exe

- As with any update you should perform a Firebird Validation / Backup and Restore of all databases prior to running the Upgrade.
- If you have multiple instances of the API service running, ensure they have all been stopped prior to the upgrade and re-started upon completion.
- If Queue / Web Services are active, these should be stopped prior to the upgrade and re-started upon completion.

Full Install Download Link
http://www.ostendo.info/downloads/ostendo/ostinstall.exe

Upgrade Process from 211 to 238

Before attempting to upgrade any database, you must perform a Firebird Validation / Backup and Restore, otherwise the Upgrade process will not update the database.

It is possible to upgrade from 211 or any update after 211 through to 238, however you should check the DBUpdate_.Log files for any errors after the update is complete. If there are any errors, you should follow the process below to apply individual updates from 211 through to 238.

These instructions describe the process of upgrading from 211 to 214, to 233, and then finally to 238. You may apply the appropriate update version if you are already running above 211.

- As with any upgrade, it is suggested you take full backup of your databases before commencing the upgrade.
- As the Upgrade replaces the existing BaseOstendoWorkflow.dat file in the Ostendo folder, it is suggested you make a copy of this prior to the Upgrade if you have previously modified this file.
- Perform a Firebird Validation / Backup and Restore on all databases to be upgraded
- Download Update 214 from this link and run this Update
  http://ostendo.info/downloads/ostendo/update214.exe
- Once complete, perform a Firebird Validation / Back and Restore on all databases to be upgraded
- Download Update 233 from this link and run this Update

- http://ostendo.info/downloads/ostendo/update233.exe
- Once complete, perform a Firebird Validation / Back and Restore on all databases to be upgraded
- Download Update 238 from this link and run this Update http://www.ostendo.info/downloads/ostendo/update238.exe

- Once complete, perform a Firebird Validation / Back and Restore on all databases.
- It is also recommended at this point to update to Firebird V2.5.8.27089

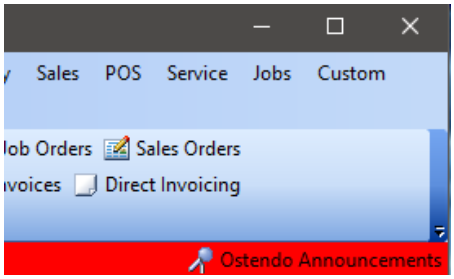
General:

Ostendo Announcements (Update238)

Ostendo now has the capability of receiving announcements directly from Development-X. This is useful for Development-X to convey new features and fixes that have been included in automatic Minor Updates or general communications from Development-X to end users. You can then optionally email these onto Non Ostendo users.

Unread announcements can then be marked as 'Read'. All announcements (Read or Unread) remain in the log thereby allowing users to review previous entries.

The Main Header Bar of Ostendo now shows a heading "**Ostendo Announcements**" (If there are no Unread announcements)

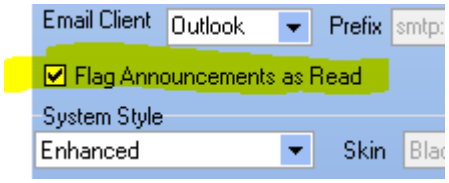


Alternatively, a count of Unread announcements will be displayed

If you click on this heading, an Announcements screen will be launched, which provides a log of read and unread announcements.

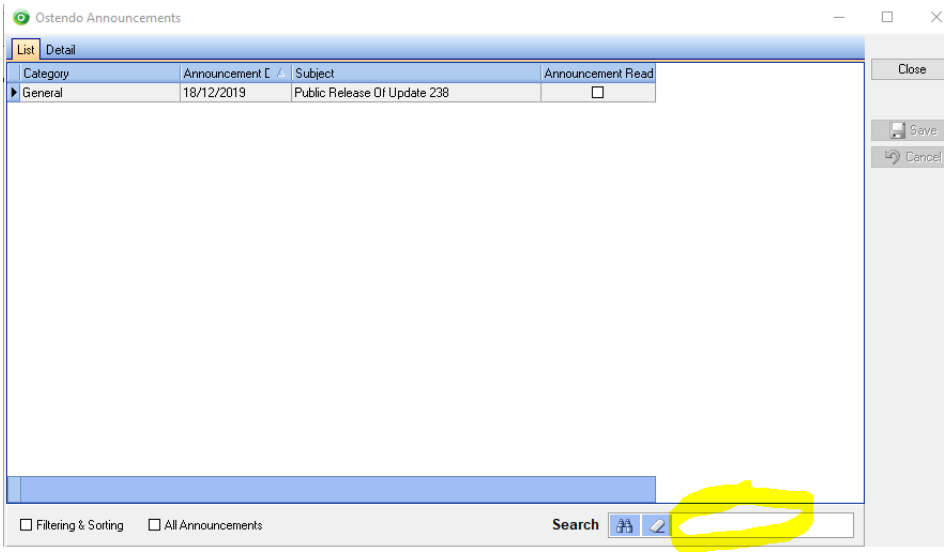
Setup:

Users who you wish to be able to mark an announcement as Read must be defined. There is a new option in User Security and Options to 'Allow Marking Announcement as Read.
NB: By default, no users can mark announcements as read, therefore this setting should be updated for at least one user.



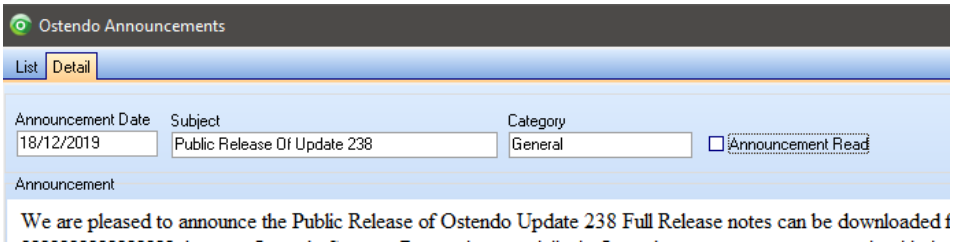
Process:

- Display unread announcements by clicking on the heading to display the Announcements List screen.



Hint: The search bar allows you to search text in the announcement body as well.

- Display the Announcement detail by pressing the Detail tab



- From this screen you can email this announcement to anyone by pressing the Email button.

- To flag the Announcement as "Read" simply tick the "Announcement Read" box. This will remove this announcement from the Announcement count on the Main Header Bar. *NB: Only users with this option allowed in User Security and Options can control whether an announcement is read or not.*

Partner Support Information (Update238)

There is now a new screen to capture details of Support Partner details within Ostendo. This is useful for third party providers (eg: IT Professionals) to easily obtain the site Ostendo Partner Support details.

Setup:

Go to System Configuration -> Ostendo Support Detail

This screen allows you to capture the following Ostendo Partner contact information should it ever be required.

- Name
- Contact
- Web link
- Email Address
- Notes

This information is displayed on the Help -> Ostendo Support page

Download Demo Ostendo Database (Update238)

A new button called "**Download the latest Ostendo 238 Demonstration Database from Development-X Limited**" is now available on the Multiple Companies screen. This links to a downloadable file containing a refreshed copy of a 238 Demo database.

Documentation:

Help Files (Update237)

Over time there have been issues with Help files not displaying in a Client Server environment. This has been caused by Microsoft tightening up Server security permissions. This issue has been resolved in Update 238 by Ostendo now automatically coping all help files from the Ostendo folder to each client machines "My Documents" folder when Ostendo is first launched by the user. At this point, Ostendo will also check the version of the help files contained in that client folder and replace where necessary. This will not only keep the help files in sync with that on the server, but also remove the current security issues that have affected this previously.

Release Notes (Update238)

There is a new option under Help drop down menu called "Release Notes". This option will take you to the latest Release Notes relating to this Ostendo Update. (Internet connection required)

API Documentation (Update238)

There is a new option under Help drop down menu called "API Documentation". This option will take you to the latest API Documentation. (Internet connection required)

General Documentation White Papers:

New functionality documents have been introduced for the following modules:

Sub Contractors:
http://ostendo.info/downloads/ostendo/Freeway_For_Subcontractors_Explained.pdf

Freeway B2B:
http://ostendo.info/downloads/ostendo/Freeway_For_B2B_Customers_Explained.pdf

Freeway Custom Inquiries:
http://ostendo.info/downloads/ostendo/Freeway_Inquiries_Tutorial.pdf

http://ostendo.info/downloads/ostendo/HowToCreateAFreewayInquiryPack_474.pdf

Qty's and Statistics:
http://ostendo.info/downloads/ostendo/Freeway_Recording_Qtys_And_Stats_Explained.pdf

Freeway Tutorial:
http://ostendo.info/downloads/ostendo/OstendoFreewayTutorial.pdf

Branding: (Update237)

New Ostendo and Freeway branding have been developed. Therefore, the Icons have now been updated.

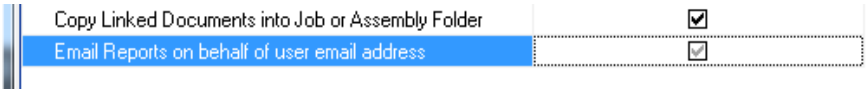
- Ostendo is now branded as "Ostendo Operations"

- Freeway is now branded as "Ostendo Freeway"

General Rules

Emailing On Behalf

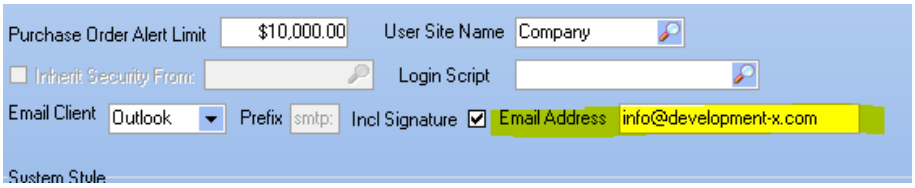
- A New Rule has been added "Email Reports on behalf of user email address



This controls batch invoicing and statement "From" email Address to be used for the outgoing email. When ticked, this setting instructs Ostendo to use the email address setup for that Ostendo user's security options.

This setting is useful when multiple Ostendo databases are in operation so that batch generated emails are sent from the appropriate email address.

NB: There may be some Outlook setup required to enable Outlook to send using this different address.
(Refer to this article for more details https://kb.intermedia.net/Article/2165)



This setting does not control single generated report emails eg: Quotes / Invoices etc...

Labour Rules

Timesheet Interpreted Logic:

The default is 'Standard Procedure', which operates as it does currently. The new option is 'Custom Procedure'; this allows for the interpreted logic to be tailored to suit the specific company's requirements (the actual custom procedure name is entered in the second of the new rules called 'Interpreted Custom Procedure Name').

Please Note: We have also allowed for a custom script to be used to Interpret Timesheets, by defining the script as a 'System Action' style, and then linking to the 'Labour; Interpret Timesheet' selection option. By providing both the custom script and the custom procedure option, any level of award interpretation is possible. It should also be noted that labour codes can also be swapped out for where charge rates are also driven off time entry variables (i.e. The customer is charged extra if the employee is paid extra).

No Cost Non-Charge Cost Centre:

A new rule 'No Cost Non-Charge Cost Centre' has been added to allow the recording of time only type labour tracking. There will not be any financial transactions generated for any postings to this cost centre. This is used mainly for "Internal" time recording which have no financial impact. You may need to add a new Cost Centre to your existing list of Cost Centres to allow for this if you use this.

Hazards:

Linking to Specific Address

- The ability to link a Customer Hazard directly to an 'Address Name' has been added. This applies when a Job is selected in Freeway (the Style Template requires that the Type called 'HAZARDS' has been included in the Template); the hazards linked to the Customer as a whole (with no Address Name), and any hazards linked to the specific address for the Job are then included in the Data Sheet.

Item Hazards – MSDS (Material Safety Data Sheets)

- We have added the ability to link Hazard Codes or Groups directly to an Item Code. This can be used in Freeway to include any safety instructions/hazards that relate to that product when used in either Jobs or Assemblies. Like the Customer Hazards, you will need to include the 'HAZARDS' type in the Style Template.

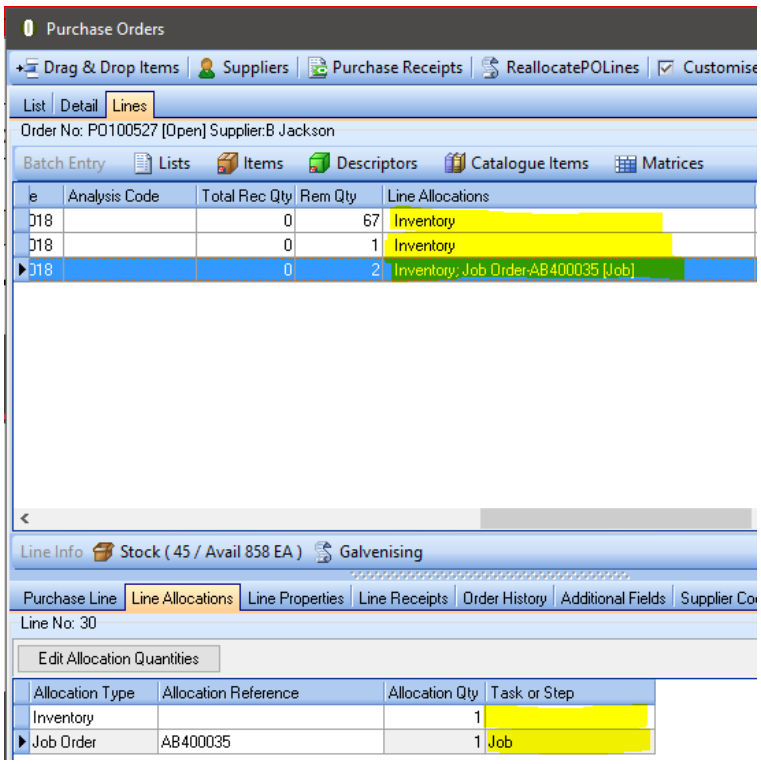
Job Types – Hazard Groups

- We have added the ability to link a Hazard Group to the Job Type definition. This enables a list of hazards to automatically be inserted into the Job Hazards screen on generation of a new Job. Useful if the hazards/instructions that are introduced/needed can be attributed the type of work that is being carried out. Again, like the Customer Hazards & Item Hazards, you will need to include the 'HAZARDS' type in the Style Template definition.

Purchasing:

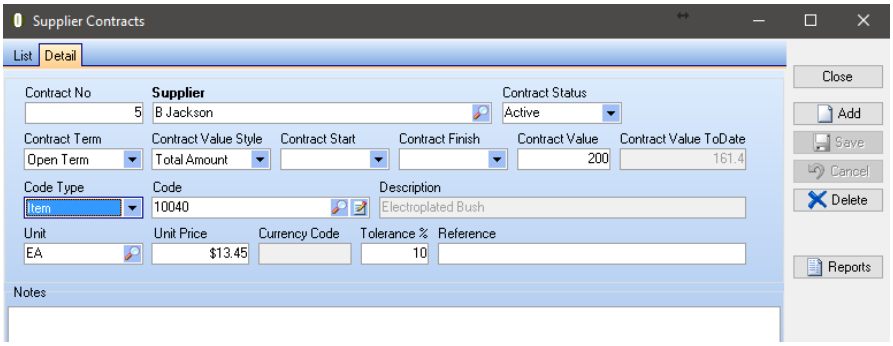
Allocation Summary:

We have added a display-only Allocation Summary field to the Purchase Lines grid. This provides a quick view of the specific allocation (order, inventory etc...) without having to drill down on the allocation tab for each line.
Note: *We have also added a new field in the Allocation tab to display either the Task or Step name, where the line is linked to a Job or Assembly.*

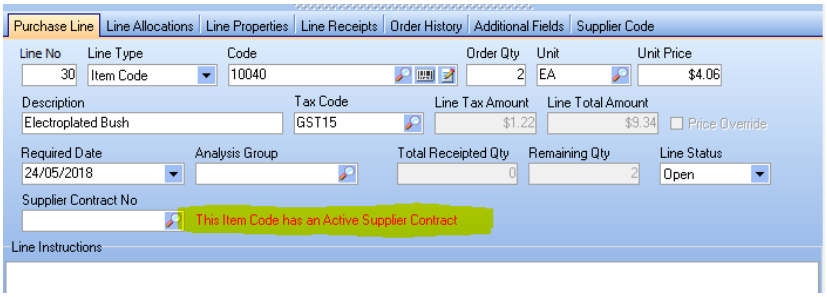


Supplier Contracts:

We now have the ability to setup Supplier Purchasing Contracts in Ostendo allowing for special pricing for specific items / descriptors based on either an open or fixed period of time. A purchase order line can be linked to a specific contract for that Supplier / Code combination.



When the user enters a PO Line, Ostendo will check to see if there are any contracts in force for this supplier / item or descriptor combination and advise the user by way of an indicator message



If the user then selects the contract and links it to this line, that contracts pricing will override the existing default price. Further to this the Ext Nett Value will update the Contract Value to Date on the Contract. This will enable monitoring progress of this contract. There is also a Tolerance % on the Contract which allows a threshold all linked PO's may exceed the Contract Value in total.
Eg: Contact Value = $200 and Tolerance = 10%, therefore Ostendo will allow the Contract value to date to get to $220 before preventing further lines being linked to that contract.

Sales:

- The ability to alter the Sales Style (either Delivery or Counter) until lines have been picked
- The ability to define the number of days before the expiry date that products can be supplied to a customer (currently only applicable to Freeway Delivery Picking)
- Sales Tracking Statuses now can be made Inactive
- Tracking Statuses can now be marked to be excluded from Mobility therefore restricting Freeway use to relevant Tracking Codes
- A new rule "Use Order as Invoice No for Delivery Invoice" has been added to allow the invoice number to be recorded as the Sales Order number with a suffix

of -NN. The -NN represents a sequential number to allow for multiple invoices from the same Sales Order. **Note:** that you can either tick this box or the "**Use Delivery No as Invoice for Delivery Invoice**" rule, not both.

- A new rule **Use Line Notes for Purchase**: Tick this box if Line Notes are to be used in the Purchase Order Lines

Inventory:

Items Screen (Update237)

- A new field has been added to this screen called "Batch Requires QC"

  This field is used in conjunction with Item Batch Records, to control the initial Item Batch Status when the Batch Record is initially created via a receipt. This is useful when all purchases of new item batches must undergo a QC process prior to making them available for subsequent issues to jobs etc.. With this field ticked, all purchases will have a default batch status set to "QC Required" to prevent them from being issued. To release it from this status you must change the status either manually from within the Batch screen or via a Freeway Datasheet linked to that batch.

Item Units (Update237)

- can now be marked as Inactive providing there is no current inventory for that item / unit combination

No Cost Shrinkage

- A new field has been added on the Adjustment Type screen called "No Cost Shrinkage Type". The concept of this is to allow you to adjust stock Qty on hand without affecting the overall Stock Value. An example of this is in the alcohol industry where qty shrinkage (due to evaporation) needs to be accounted for without affecting overall stock value. Even though overall value is not affected, the unit Average Cost is updated.
  NB: Even though there is no overall cost implication, GL entries are still posted in and then out again, therefore this Adjustment Type should be linked to the "REVALUE STOCK" cost centre, otherwise one side of the entry will be posted to STOCK ADJUST and the other to REVALUE STOCK cost centres

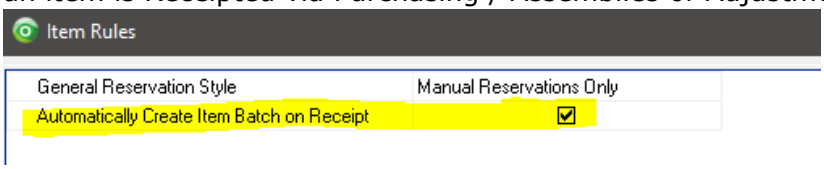
Inventory Change Log (Update238)

- We have now introduced an inventory change log to capture old / new values of inventory records when characteristics (eg: Batch No / Expiry etc) have been changed via the Inventory Change option. This new table records all inventory record information at the time the change was made. This will now provide full traceability taking into account any variant characteristic changes. Custom reports can be developed around this new table. (INVENTORYLOG)

Item Batches

Auto Creation of Batch Records (Update237)

- A New Item Rules setting now allows for the autocreation of Batch records when an item is Receipted via Purchasing / Assemblies or Adjustments



This will allow additional information to be trapped later against this batch either manually through the Item Batch screen or by Freeway

Item Batches Related Documents (Update237)

- Item Batch records can now be linked to Documents. The Related button on the Item Batches screen now allows you to link documents to batch records.

New Fields Added to Item Batches Screen (Update237)

- Item Batch records now contain the following fields to allow further data to be captured:
  - Batch Status

Approved	-	This batch is available to be issued
QC Required	-	No issues are allowed whilst in this state
Rejected	-	No issues are allowed whilst in this state
On Hold	-	No issues are allowed whilst in this state

  - Supply Style
  - Source
  - Manufacture Date
  - Expiry Date (NB: This cannot be amended on this screen. Use Inventory Change to amend these dates on existing inventory records)

Properties (Update237):

There is now a new Tab on the Item Batches screen to enable the linking of Standard Properties to a Batch for the purposes of recording test results. (Eventually Freeway will allow you to update these from a new "Property" field in a checklist)

Market Codes (Update237):

This concept of this is to restrict the issuing of specific items and batches to customers. An example of this is where a customer associated with a particular market eg: EU can only purchase items and Batches flagged as EU Market Code.
Only items or item batches that have restrictions need to be flagged with a Market Code. All other items (without that defined) will be available for sale to all Markets.

- There is now a new Related screen on the Item Master and new Tab Item Batches screen to enable the linking of the Item or Batch against one or more Market Code records.
  This allows the restriction of these batches to be only issued against customers with the same Market Code.
- Markets Codes are initially setup from Inventory->Settings->Market Codes
- The Customer Master now has a screen available from "Related" button to allow the addition of one or more Market Code records.

Status Change Log (Update237)

- A new tab has been added to this screen which automatically creates 'change' records when a batch status changes. eg: from Rejected to Approved etc..

Item Times: (Update237)

- The concept here is for Sales Deliveries. This feature allows you to specify and control Assignment Booking times on the basis of specific item pick times. For example, an item could take 30minutes to pick as you may have to get a forklift to pick it, whilst most other items take a much shorter time to pick. Therefore, the Assignment planned booking duration should reflect this.

  A new Tab on the Item Master called 'Times' now allows you to specify Planned Delivery Pick times for an item. When the Delivery is created, all item specific planned Times for that Delivery are accumulated into a new field on the Delivery called PLANNEDPICKMINUTES. (This can be viewed from the customised Delivery List Grid). Complimenting this is a new Sales Rule "AVG Line Pick Time in Minutes" (Default value is 5 minutes). Where there is no specific time defined for an item, the default setting will be added to each SO line planned pick time when the Delivery is created.

  There is also a new field in the Delivery header called ACTUALPICKMINUTES. This field accumulates the elapsed time between the Start Time of the Datasheet and the last item picked for that delivery. This is automatically re-calculated if there were multiple Datasheets involved in the picking of the Delivery. This field provides feedback to enabling an Ostendo site to determine the average time spent picking deliveries. By analysing this information, a site could determine what the default Duration setting should be within the Assignment Rules for "Default Sales Duration. This is used when assigning Deliveries for Picking.

Stock Reservations: (Jobs / Sales / Assembly Orders) (Update237)

The concept of this is to reserve stock in a specific location for a specific Order (Job / Sales / Assembly). The reason a site may wish to adopt this is so they can exclusively reserve stock for specific orders without issuing stock to WIP or Sales Picked.

Eg: A job may take 6 months to complete, however there is purchased "Source on Demand" stock for this job that needs to be ordered and receipted, however we do not wish to receipt this to the job when the stock is received. Instead we want to receive it into Inventory but reserve it exclusively for this job (so it is not issued to any other job) in advance of it being issued to WIP.

This approach is designed around "Source on Demand" Item Code type lines and can be configured to automatically occur or be manually controlled on an order by order basis.

Ostendo can automatically create a specific Order Inventory Location within a special Reservation warehouse relating to the specific site. These locations can be automatically created from the Order when the first 'Source on Demand' and PO is generated for the item or when a Source on Demand Item Code is allocated from a PO back to an Order.

This means that stock can be received into this Reservation location by default instead of using its default item settings. When the item is eventually required on the order, the issue / pick location for that item will be defaulted automatically to the associated Reservation location. You will not be able to issue / pick this (Source on Demand) item from any other "Order Reservation" location.

Warehouse Coding Structures (Update237):

(NB: This is automatically created when the appropriate Inventory rule is turned on)

Prefix = "RS#
Then the 1st 14 characters of each Site Name defined in the database
Then 001 or 002 etc..

Eg: Site Name = 'North Island' therefore the warehouse code will become
RS#North Island001

Reminder: *You may already have Cost Centres defined against other warehouses in the database. You may need to manually link Costs Centres to this new Warehouse*

Location Code (Created when first Source on Demand Item Code has a PO created)

'JOB#XXXXXXX'
'SALE#XXXXXXXXX'
'ASSY#XXXXXXXX'

Eg: Job Number = 'ST644656' therefore the location code will become
JOB#ST64456

The setup of Reservations relies on the following rules to be defined:

- ***Purchase Rules:***
  - Allocate Job Purchases to Stock must be ticked (if job reservations are used)
  - Allocate Assembly Purchases to Stock must be ticked (if assembly reservations are used)

Sales Orders: As receipts of Source on Demand Item Codes already receipt directly into inventory, there is no required Purchase Rules setting.

Stock Reservations Item Rules: (Update237)

There are three new Item Rules that control the creation behaviour of Reservation Stock Locations.

- ***Sales Reservation Style:***
  - *No Reservations*

        - Default rule. No reservation stock logic used

    - *Manual Reservations Only*
        - This will allow the user to manually setup the locations (must use the location coding structure as above) Useful when you wish to control this on an order by order basis.
        - This rule also automatically creates a Reservations Warehouse using the coding structure as above (if one does not already exist)

    - *Source on Demand Reservations*
        - This will trigger the auto creation of a Stock Location with the coding structure mentioned above when the first Source on Demand items PO is created.
        - This rule also automatically creates a Reservations Warehouse using the coding structure as above (if one does not already exist)

Jobs Reservation Style: (Update237)

- *No Reservations*
  - Default rule. No reservation stock logic used

- *Manual Reservations Only*
  - This will allow the user to manually setup the locations (must use the location coding structure as above) Useful when you wish to control this on an order by order basis.
  - This rule also automatically creates a Reservations Warehouse using the coding structure as above (if one does not already exist)

- *Source on Demand Reservations*
  - This will trigger the auto creation of a Stock Location with the coding structure mentioned above when the first Source on Demand items PO is created.
  - This rule also automatically creates a Reservations Warehouse using the coding structure as above (if one does not already exist)

Assemblies Reservation Style: (Update237)

- *No Reservations*
  - Default rule. No reservation stock logic used

- *Manual Reservations Only*
  - This will allow the user to manually setup the locations (must use the location coding structure as above) Useful when you wish to control this on an order by order basis.
  - This rule also automatically creates a Reservations Warehouse using the coding structure as above (if one does not already exist)

- *Source on Demand Reservations*
  - This will trigger the auto creation of a Stock Location with the coding structure mentioned above when the first Source on Demand items PO is created.
  - This rule also automatically creates a Reservations Warehouse using the coding structure as above (if one does not already exist)

General Reservations: (Update237)

This type of reservation enables you to reserve stock in a specific location when that location is linked to the "RS#" Warehouse. They can be used in two ways (Customer specific or Quarantine)

Customer Specific Locations (Update237*:*

The concept of this is that you can reserve any type of item (Source on Demand or Supply from Stock) against a specific location setup under the "RS#" Warehouse for that customer.

These locations are linked to the customer(s) via a Related option (Customer Reservations) from the Customer Master screen. You can even setup different customers and link them to the same Reservations Location. Customer Reservation location codes can be defined with any unique code.

Stock can be either transferred or receipted into that location. Stock can only be issued / picked to any order for that customer. You can however transfer out or process Stock Adjustments. If an "Order" reservation location for that customer has already been specified for Source on Demand items, Ostendo will default to that "Order" location in preference to the "Customers" location.

- ***New Customer Reservations Screen:***
    - Setup and link Customer Locations as necessary against the Related screen (Customer Reservations) accessed from the Customer Master.
- ***Job Type / Sales Types:***
    - Customer Reservation Locations can further be automated by setting a new "Customer Reservations" flag on the Job or Sales Type. This will automatically prefill the Job / SO Warehouse and Location Override fields on the order with the Customer Location when an existing Customer Reservation location already exists for that order customer.

Item Rules*:* (Update237)

There is a new Item Rule that controls General Reservation Locations.

- ***General Reservation Style:***
    - *No Reservations*
        - Default rule. No reservation stock logic used
    - *Manual Reservations Only*
        - This will allow the user to manually setup and link a Customer location so that any item (Source on Demand or Supply from Stock) can be receipted / transferred into it. When Customer locations are used, only issue / pick

transactions relating that Customer can be processed to that location
- If Quarantine type Locations are to be used, any item (Source on Demand or Supply from Stock) can be receipted / transferred into it, however items can only be transferred or adjusted out of that location.
- This rule also automatically creates a Reservations Warehouse using the coding structure as above (if one does not already exist)

General Reservations Style used for Quarantine Locations (Update237)*:*

The concept of this is means you can reserve any type of item (Source on Demand or Supply from Stock) against a specific location linked to the "RS#" Warehouse.

These locations allow you to transfer, adjust or receipt in, however nothing can ever be issued / picked out, only transferred or Inventory Adjusted.

This allows you to use these locations as true Quarantines to prevent them from being part of your mainstream stock.

The setup is similar to Customer Reservations except there is no Customer Reservation record.

Item Rules (Update237)*:*

There is a new Item Rule that controls General Reservation Locations.

- ***General Reservation Style:***
  - *No Reservations*
    - Default rule. No reservation stock logic used
  - *Manual Reservations Only*
    - This will allow the user to manually setup and link a Customer location so that any item (Source on Demand or Supply from Stock) can be receipted / transferred into it. When Customer locations are used, only issue / pick transactions relating that Customer can be processed to that location
    - If Quarantine type Locations are to be used, any item (Source on Demand or Supply from Stock) can be receipted / transferred into it, however items can only be transferred or adjusted out of that location.
    - This rule also automatically creates a Reservations Warehouse using the coding structure as above (if one does not already exist)

Inventory Counts

Creation Improvements There have been several enhancements to the creation criteria for Inventory Counts:

- We have added the ability to select a Site. This will then condition the Items to be counted based on the warehouses linked to that Site.
- We have added the ability to select a Location Group. This will then condition the items based on the locations that are linked to the Location Group.
- We have added the ability to enter a range for Location Sequences. This will then condition the items based on the locations that fall with that sequence range (this can be used to allocating areas for different counting teams).
- We have added the ability to select a Primary Supplier. This will then condition the items based on the Primary Supplier linked to each Item.

Inventory Counts – Mobility Restrictions

- We have added the ability to restrict the Inventory Count to a specific Mobility Team – in other words if this is filled in, only members of that team will have that specific count available on Freeway.
- We have added a checkbox to Prevent Mobility Editing. This is used where the count has been physically completed and the office is now vetting/checking the results before updating the count. If checked no changes can be made to the count via Freeway.

Financial Configuration:

Payment Methods:

- The following changes have been made allowing further functionality:
    - Availability to Mobility: This option makes the method available to Freeway when taking Payments
    - Mobile Banking Method: This option allows you to control the banking method when used in Freeway
    - POS Banking Method: This is the banking method used specifically when taking payments via Freeway
    - Restrict to POS Site / POS Site: These allow you to specify Payment Methods to be used for specific sites in a multi-site environment
    - Script Name / Script Timeout: These options allow you to link this payment method to a script. The idea behind this, is that this script will run at the point of processing the POS Payment within Ostendo. An example of this is where a Payment Method eg: Tyro EFTPOS integration. Refer document http://ostendo.info/downloads/ostendo/TYRO_EFTPOS_PACK.zip
    - Method Status: You can now mark a Payment Method as Inactive

POS

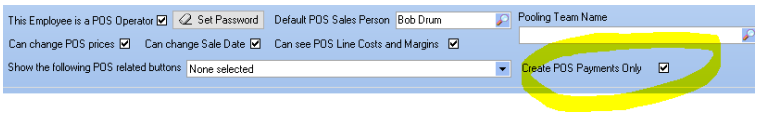
- The ability to change the delivery address details from within the POS Delivery screen
- The ability to define Segmented Barcode logic for scanning barcode labels printed from weigh scales. In other words where this a single barcode that embeds both the product and the quantity.
- The ability to override the picking warehouse for specific lines within a POS Order. This requires a new rule to be specified in POS Rules "Allow Warehouse Override"
- A new rule has been added, allowing deposits to be created by Station ID
- Payment Methods: The following changes have been made allowing further functionality:
    - Availability to Mobility: This option makes the method available to Freeway when taking Payments
    - Mobile Banking Method: This option allows you to control the banking method when used in Freeway
    - POS Banking Method: This is the banking method used specifically when taking payments via Freeway
    - Restrict to POS Site / POS Site: These allow you to specify Payment Methods to be used for specific sites in a multi-site environment
    - Script Name / Script Timeout: These options allow you to link this payment method to a script. The idea behind this, is that this script will run at the point of processing the POS Payment within Ostendo. An example of this is where a Payment Method eg: Tyro EFTPOS integration. Refer document http://ostendo.info/downloads/ostendo/TYRO_EFTPOS_PACK.zip
    - Method Status: You can now mark a Payment Method as Inactive
- (Update 238) POS now allows you to take payments from Customers whose Credit Terms are set to COD. (Previously you could not) NB: This excludes the Default POS Cash Sale Customer specified in the POS Rules.

New POS Rules: (Update237)

- There are three new POS Rules that control 'On Account' POS payment behaviour. When receiving Payments Only through POS, at present an unapplied Customer Payment is automatically created. These new rules allow the following from within the POS Payments screen. The advantage of having this available is that all money taken via POS will be taken into account with the POS End Of Day process.

    - Allow Creation of Sales Deposits:
        - This allows you to take a deposit from within POS and link it to a Sales Order.
    - Allow Creation of Job Deposits:
        - This allows you to take a deposit from within POS and link it to a Job Order
    - Allow Application of Account Payment:
        - This allows you to not only receive an On-Account payment, but further allows you to apply it to any outstanding invoices on that customers account. *NB: If the POS user does not have user security access to Customer Payments, they will not be able to apply the payment even if this rule is turned on.*

NB: There is a new field on the Employees screen enabling a POS user restriction to only Create POS Payments



Assemblies

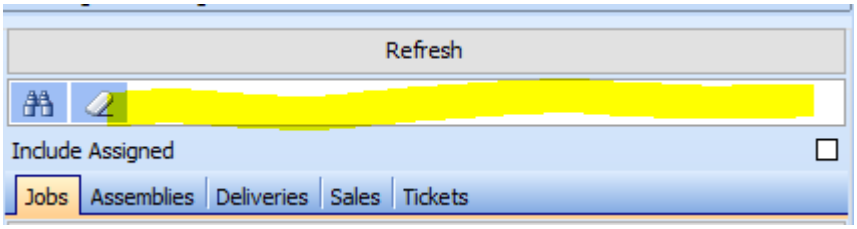
- The ability to flag Step Names as Inactive
- Assembly Tracking Codes can now be made Inactive
- Tracking Codes can now be marked to be excluded from Mobility therefore restricting Freeway use to relevant Tracking Codes
- Assembly Steps Names now have a new field 'No Scheduling'. This allows you to control whether an Assembly Step is displayed on the Assignment Board Order List. Those Steps flagged as 'No Scheduling' are Not displayed in the Assembly Order List on the Assignment Board.

Assignment Board:

Major Advances in the usability of the Assignment Board.

Searching Capability

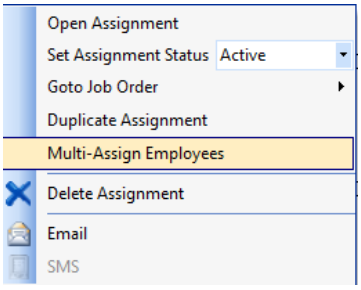
New Searching Capability to find Jobs / Assemblies etc.. from the list:



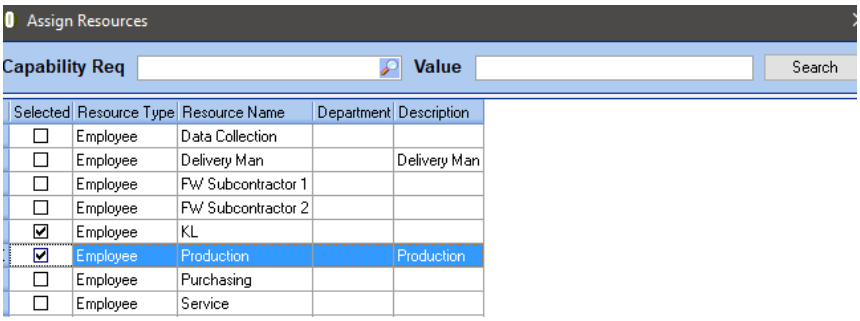
Multi Assigning Resources

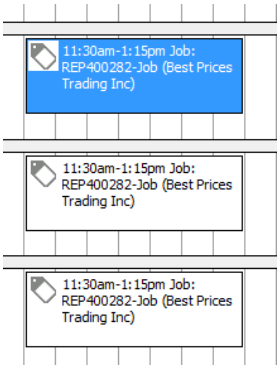
- implified Process for assigning multiple resources to an Assignment: NB: The Assignment ID is the same these new assignments

Once the Assignment has been assigned to one resource, simply right click on it and select "Multi-Assign Employees"



Then select the relevant Resources and press “Return” button

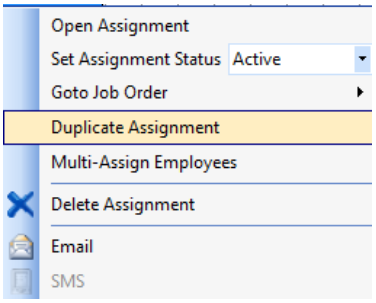




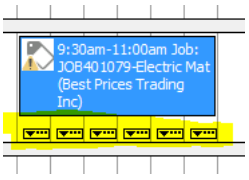
Duplicating Assignments

- This process creates duplicate Assignments but with a different Assignment ID than that of the initial Assignment.

  Right click on one of the assignments to duplicate and select “Duplicate”

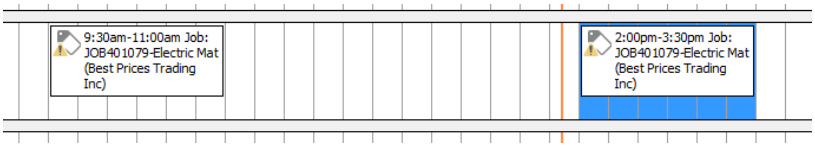


You now see indicates below the assignment which indicate there is another assignment. (This is the duplicated new assignment).



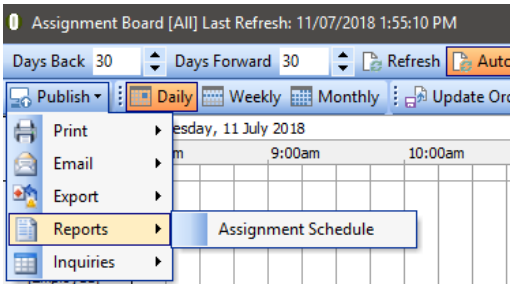
Click on one of these indicators to display this new assignment

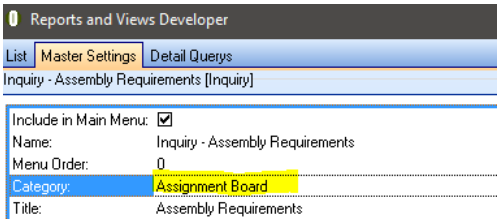
Drag this new assignment to another are on the Assignment ID where it is intended to start

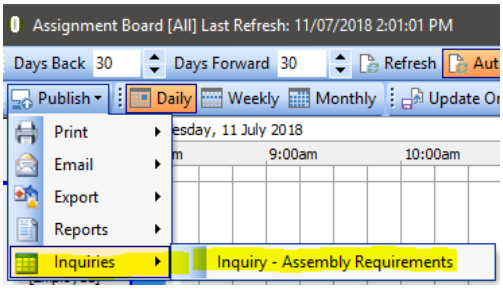


Linking Reports and Inquiries

- Apart from Reports being available to the Assignment Board, by specifying them in the "Specific Screen" in the Reports & View Developer, you are now able to specify Inquiries / Pivots and Analysis views to be available on the Assignment Board by specifying them with the Category of "Assignment Board" from the Reports & Views Developer.





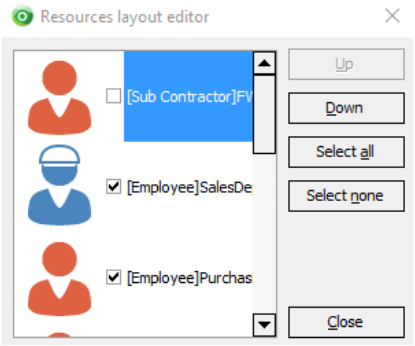


Linking Order Scripts to Assignments (Update238):

- Order Scripts can now be linked to Assignments on the Assignment board. These scripts can be run the right clicking on the assignment booking. This could be useful if you wish to run a script that emailing the Employee or customer from the actual assignment entry.

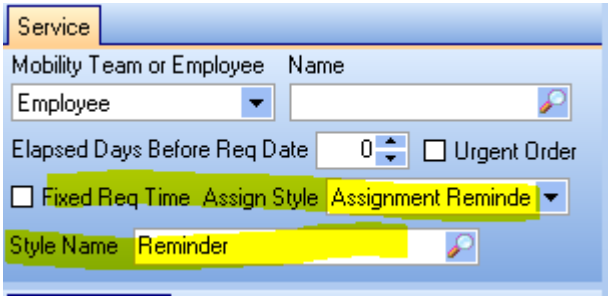
Resource Layout Editor: (Update237)

- Any changes made in the editor eg: Untick Resources as Non-Display, or Resource Sequence are saved by the Assignment Board profile. (Not by user).

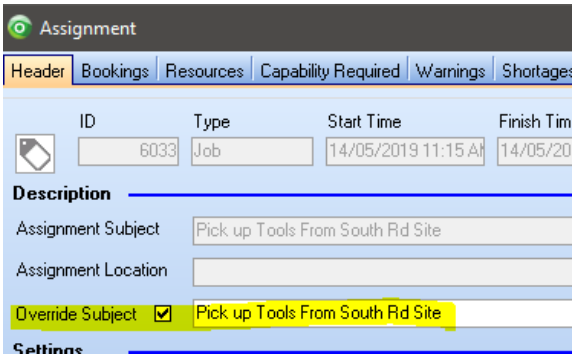


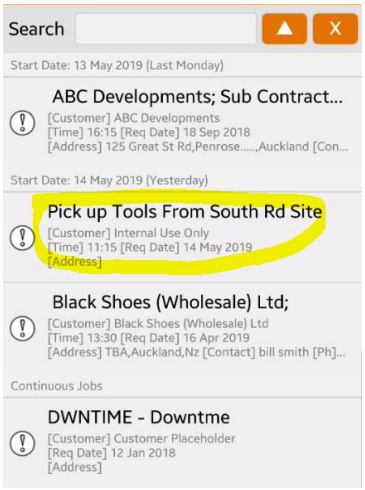
Job Assignment Reminder: (Update237).

- A new Assignment Style called "Assignment Reminder" is now available on the Job Detail screen.



This allows you to setup a job (that should remain open permanently) to become a booking placeholder. This then allows you to assign this job thru the Assignment Board and override the Assignment Subject so that the Freeway User see's it in their Jobs List. An example of this would be where you wish to include a booking to a Freeway Employee to remind them to do something.





This acts as a normal booking in that you can assign it to an employee(s) however in this case to instruct them to do something specific. This would be used in conjunction with a simple Style Template with a Checklist item "Reminder Complete". (The Style Name could be pre-loaded against the Style Name in the Job Header (Refer Above). The employee would simply create a Datasheet, tick the checklist box to say they've done it and then complete the Datasheet which would then close out the Assignment when it is sent back to Ostendo.

Jobs with this Assignment Style always remain available on the Job List area of the Assignment Board, to enable it to be used many times.

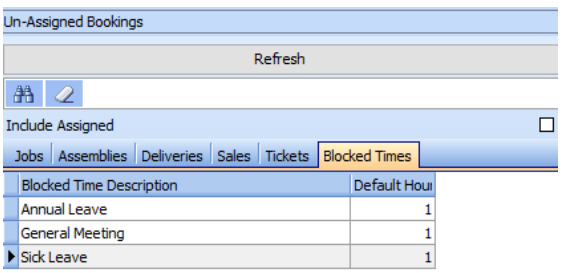
Blocked Times:

- We have now provided another method to handle Blocked Times.

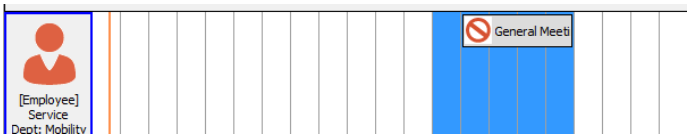
Labour Settings

- **Blocked Times:** This existing method allows you to create specific block times against a Resource for a specified Date and Time. Once a blocked time entry has been created, a corresponding Blocked Time entry will be place against the resource on the Assignment for that period of time. This method prevents the Assignment Board operator from manually dragging assignments onto the Block Time. Therefore, this adopts a strict policy of excluding assignments from overlapping blocked time.

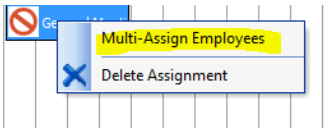
- **Blocked Time Descriptions**: (Update 238): This method allows for more flexibility around Blocked Times. You may setup generic Blocked Time Descriptions, eg: Sick Leave, Meetings Maintenance etc.. along with default duration in hours. The Assignment Board now has an additional Tab called Blocked Times where these std blocked times are held.

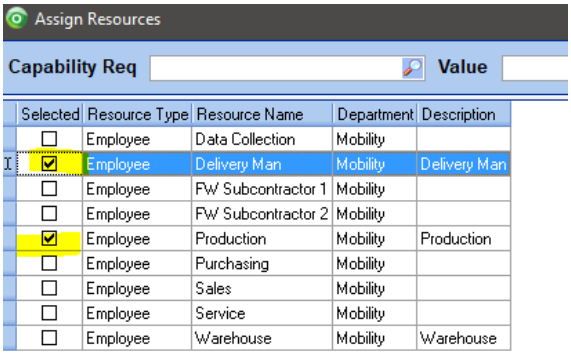


When the Assignment Board operator requires a Blocked Time entry to be assigned, they simply drag the appropriate entry across to the required time for the Resource.



From here the operator can easily manipulate the duration by extending or reducing the booking, and also copy this booking across to other resources by right mouse clicking on the blocked time booking and selecting "Multi-Assign Employees".





- It should be noted, that unlike the other stricter Blocked Time, this allows the assignment board operator to overlap genuine assignments with these blocked time bookings. However, Assignments automatically created from other than manually dragging across from the list will be automatically moved beyond the blocked time booking so there are no overlaps.

Servicing

Customer Assets – Warranty Information

- We have added 'Warranty Information' fields to the Customer Asset screen. These are display only fields indicating whether the asset is currently covered by a valid warranty, the warranty has expired, or warranties don't apply. The information is a summary view of any linked warranties to the asset, dynamically determining the status based on the current date and the warranty with the greatest expiry date (where there is more than one warranty for the asset).
- Grouping of Multiple Assets into single job from Service Orders Required screen. Asset selection from Freeway Datasheets to allow adhoc servicing
- Refer this document for details http://ostendo.info/downloads/ostendo/Freeway_Multi_Asset_Servicing_Explained.pdf
- A new Rule has been added to influence the Due Days Horizon date for the Service Orders Required Screen. Eg: 30 would show all service events 30 days beyond today
- A further rule has been added to Exclude Duplicate Planned Service events and Existing Job Horizon. This is explained in the Multi Asset Servicing Document
- The following fields have been added to the Service Orders Required Screen to allow for easier filtering and selection:
    - Service Type
    - Group Asset
    - Service Zone
    - Job Template
    - Customer Asset Additional Fields
- The Job Template Description is now used as a default Job Order description when Jobs are created from the Service Orders Required screen. Previously Ostendo would populate the Job Description with the Template Code. You are able to revert back to the use of Template Code by specifying a User Defined Constant named. "Use Template Code for Order Description" with a Constant type of "Yes/No" and ticking this field.

Corrective Actions:

- Allowing you to create a Call Ticket / Job (or both) based on a Corrective Action that is required.
- Refer document http://ostendo.info/downloads/ostendo/Freeway_Corrective_Actions_Explained.pdf

Jobs:

- A new Job Rule allows you to automatically roll-up contents prices from Kitsets and Task Bills to update the Job Line price (this option is mutually exclusive to the existing 'Price Changed with Cost'.
- The ability to flag Task Names as Inactive
- Job Tracking Codes now can be made Inactive
- Tracking Codes can now be marked to be excluded from Mobility therefore restricting Freeway use to relevant Tracking Codes

- Job Categories can now be made Inactive
- A new rule has been added "Default Assign Style" to control the default Assignment Style in the Service Tab of the Job Detail screen. Eg: For some environments they may wish the default style to be 'Continuous Job' as opposed to 'Standard' or 'Continuous Assignment'
- The Job Order Description is now automatically prefilled with the Job Template Description if the Job was created via the "Service Orders Required" screen. Previously this would be prefilled with the Job Template Code. If you wish this to now behave as it did previously, then insert a new User Defined Constant called **Use Template Code for Order Description** (ensure it is defined exactly as this name) with a type of "Yes/No". If this is set to Yes (True), Ostendo will behave as it did previously.

CRM:

Operations Centre: Outlook Add In 3.9

The Outlook Add-In used with the Operations Centre has been modified to run with Outlook 2016. This update includes a new OutlookAddIn.exe which is stored in the Ostendo folder.

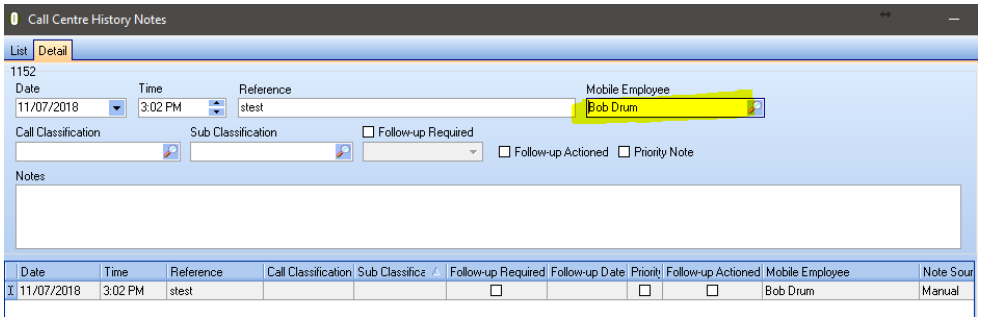
Download the latest Version from: http://www.ostendo.info/downloads/ostendo/OutlookAddIn.exe

To apply this update to an existing installation of the Add-In, perform the following:

- Ensure you fully close Outlook
- Run the OutLookAddIn.exe as Administrator
- Uninstall the Existing Add In on each machine and reinstall the new version.

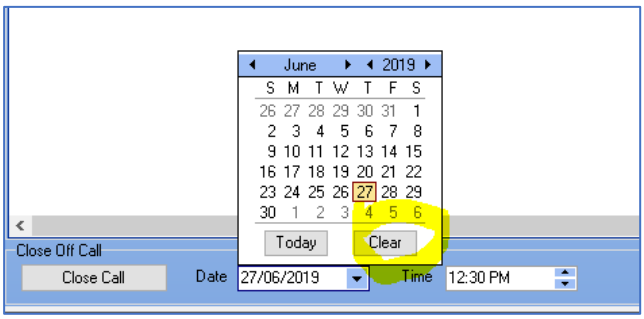
History Notes

All History Notes, (Call Ticket / Job etc..) now have a new field “Mobile Employee” available. If specified along with a Followup Required and Date, this note becomes available to the Freeway Employees “To Do” List.



Re-Opening Call Tickets

- A previously closed Call Ticket can now be re-opened by Clearing the “Close Call Date” from within the ticket.



Accounting Integration:

Xero (Update238)

Xero have recently announced they will be using a new authentication standard for private apps to connect to Xero. Ostendo currently uses only OAuth1.

Xero have also announced that existing OAuth1 connections will be supported for the time being, however, will eventually need to be changed to OAuth2 by 31/12/2020.

Recognising this, we now allow both OAuth1 and OAuth2 capability in this Update with Xero.

Refer to this document for either setup
http://www.ostendo.info/downloads/ostendo/OSTENDO_XERO_INTEGRATION.pdf

MYOB AR Live (Multi Currency Capability):

A Minor Update will be automatically applied soon to all Ostendo databases using Update 238 allowing this new configuration option. This will be published by Development-X via the new Ostendo Announcements function.

This capability will ultimately allow you to turn off the '*Post all Foreign currency transactions as Local currency Ledger transactions*' flag on the System Settings -> Accounting Link screen when the Accounting Link Style is set to AccountRight Live.

Reckon Hosted:

Integration to Reckon Accounts Hosted - New Link Program. This operates very similar to the existing Reckon Link program, however it has its own program specifically used for Reckon Hosted available from:

http://www.ostendo.info/downloads/ostendo/reckonostlink.exe

QBO (Quickbooks OnLine):

QBO has now been included in the Accounting Integrations. A new integration document explains the setup process.

http://www.ostendo.info/downloads/ostendo/OSTENDO_QBO_INTEGRATION.pdf

System Settings:

Company Information Tab:

- A new field '**Company Logo'** has been introduced allowing you to store an image file to be used on Freeway Print Names in the Override HTML Code section

Accounting Link Tab:

- A new field "**Post Daily Summaries the Following Day**" has been added to this screen. This field is used in conjunction with the Post Daily Summaries options on the same screen.
  A journal will be created for all transactions dated "today". All transactions dated "today" will be accumulated within this Journal for the entire day, effectively making this journal a summary of the day's transactions. The journal will remain with a "Ready to Send" Batch Status however will not have a Financial Batch Number allocated until the first user logs into Ostendo the following day.

  NB: Any transactions that are backdated are posted to the accounting software immediately rather than being delayed for accumulation. Only those transactions dated "today" are held back and accumulated.

  The purpose of this option is to reduce the volume of data posted thru to the accounting software, along with reducing the number of connection attempts to that software.

QR Codes (Update237):

- The ability to generate QR codes (3 dimensional barcodes) within the report writer

You can use an existing report function to use the Metafloor API, see the below link for details on how to use Metafloor API.

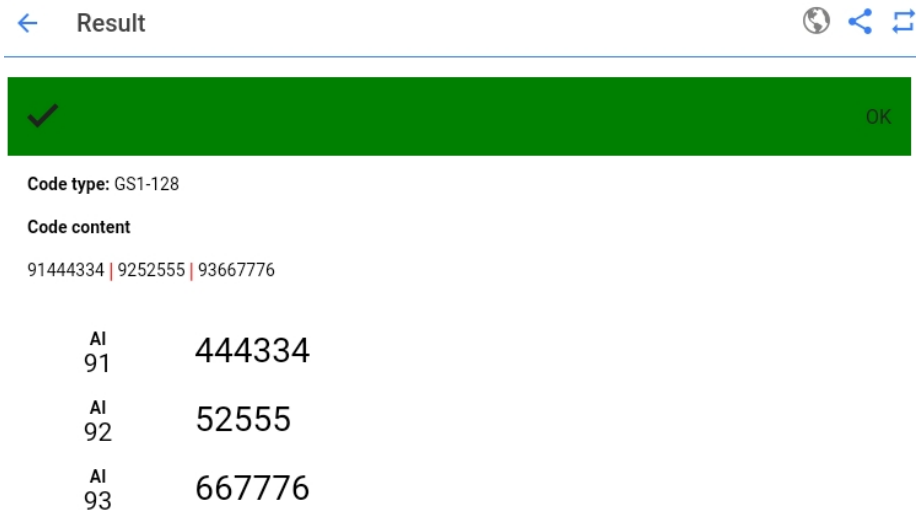
https://github.com/metafloor/bwip-js/wiki/Online-Barcode-API

detailed docs here

https://github.com/bwipp/postscriptbarcode/wiki

Your results be tested directly through a browser to get it correct before doing the report itself.

We did the following and it produced the results show below, correctly finding the AI's and associated variable length data.
http://bwipjs-api.metafloor.com/?bcid=code128&text=%5EFNC191444334%5EFNC19252555%5EFNC193667776&parsefnc&alttext=%2801%291237567890



As for including in report you can use an existing function “GoogleAPIQRCode” an alias will be added to next version of Ostendo “OnlineBarcodeApi” but “GoogleAPIQRCode” will remain and performs the same function.

Add a Picture Object to the report (Picture1 in this case) and put the following code into “Picture1OnBeforePrint”
Note: We have used different fields however logic is the same, can change any parameters as needed, this is just an example, note the alttext parameter is where you can format the readable text shown under the barcode.

Check online docs for more details

```
procedure Picture1OnBeforePrint(Sender: TfrxComponent);
begin
  GoogleAPIQRCode('http://bwipjs-api.metafloor.com/?bcid=code128&text='
  + '%5EFNC191'
  + <MD_."CUSTOMERTYPE">
  + '%5EFNC192'
  + <MD_."CUSTOMERSTATUS">
  + '%5EFNC193'
  + <MD_."CUSTOMERSTYLE">
  + '&parsefnc&alttext='
  + '(91)' +<MD_."CUSTOMERTYPE"> + '(92)' +<MD_."CUSTOMERSTATUS"> + '(93)'
+<MD_."CUSTOMERSTYLE">
  ,Sender.Name);
end;
```

- We will be making more use of this for Freeway (where a QR code can be generated dynamically for tagging and tracking of equipment)

Technical:

Additional Fields: (Update237)

- All Additional Field lengths have been increased from 30 characters to 100

Firebird V2.5.8.27089:

A New version of Firebird has been released.

To check what version you are currently running, launch Ostendo and go to Help->About and press the "Firebird Database Information" button. No need to proceed if you are already running this version.

This version of Firebird resolves a problem that we have seen within Ostendo in that sometimes an Ostendo database may increase in size dramatically in a very short period. This problem was identified as an issue with an earlier version Firebird and has been addressed in this version.

NB: If the database is already large, simply applying this upgrade will prevent further 'bloating' of the database. However, it is recommended that you perform a full Firebird Validation / Backup and Restore of all Ostendo databases used on the machine immediately prior to applying this upgrade.

Process To Upgrade Firebird:

1) Download Firebird 2.5.8.27089 installation program from http://www.ostendo.info/downloads/firebird/firebird25.exe

2) Ensure all Users are logged out of Ostendo and the "Ostendo Rest API" service is stopped.

3) Validate / Backup and Restore all Ostendo databases currently being used

4) Stop any other services currently connecting to the Ostendo Database(s). They include

    - Firebird Guardian Service and Firebird Server itself
    - Web Services
    - Queue Services
    - Any other program that can connect to the Database eg: IB Expert / EMS etc..

5) From Control Panel Uninstall The current Firebird 2.5 version

6) Run the new Firebird installation program (Run as "Administrator") and follow the prompts and answer the defaults as usual.

7) Re-Start all the services again (Firebird will probably be already re-started)

8) Launch Ostendo and go to Help->About and check the latest Firebird Database Information to ensure you are now running 2.5.8.7089

Database Pre-Update Check

We have enhanced the Database Update routine so that if it detects that the database hasn't been backed up and restored for a while – it will jump out of the update and log this in the DBUpdate###.log file that is automatically created every time a database is updated (found in the Ostendo Directory). This safeguard is to prevent issues with database integrity – there are internal limits as to how many times the structure of a database can be changed/altered before a backup and restore is required. **It is always a good practice to do a validation, backup and restore before running any update.**

Running multiple API instances:

By default, Ostendo allows only one API instances to be running at any point, however there are instances where you may need multiple API's to be running.
An example of this is where you may have multiple Ostendo databases requiring Freeway. This document explains how to configure additional Ostendo API instances for multiple databases.

As this update replaces the existing Ostendoapi.exe file you should copy this to any other Ostendo API configurations as described in the document below.

http://ostendo.info/downloads/ostendo/Multiple_Ostendo_API_Instances.pdf

Firebird Stop / Start process (Update237)

Large Ostendo sites running 20+ users should stop and re-start firebird on a regular basis to ensure performance is maintained. The major issue to automating this process in the past has been the worry that users may have set a process (eg: Batch Invoicing) running and if the database is disconnected by shutting down Firebird, you would run the risk of generating an incomplete transaction. By its nature, Batch Invoicing is the only batch process in Ostendo that could cause this, as other batch processes eg: MRP, Cost Rollup etc.. would roll back in the database if the connection was interrupted. Batch Invoicing can take a while to complete because of the complexity involved. Therefore, there is potential for this to be running at the same time a shutdown of Firebird is initiated if a shutdown was automated.

This utility program would be setup to run via the server Windows Task Scheduler to run at a time (typically well out of business hours) it is believed that no users should be actively entering or processing data within Ostendo.

When this program is triggered to run, it will check the last modified date and time of the SALESINVOICEHEADER, SALESINVOICEGROUPING, SALESINVOICELINES records and determine the minutes difference from these records to NOW (NOW being when the utility is run) and compares this to a specified parameter in a configuration file. If the routine determines any of these records are within this parameter, the routine will not proceed, otherwise it will automatically shut down Firebird and Restart it. This will also have the effect of removing any active connections to the database. Further to this a log file will be generated to confirm what action if any has been performed by this program.

NB: Currently this program only checks one Ostendo database, therefore it is not recommended for sites with multiple Ostendo databases at this stage. (development is underway to cater for this)

Setup:

All files must reside in the Ostendo folder

fbstart.ini contains the configuration settings for the utility. Generally speaking, you will only need to specify the DBFilename parameter. The syntax would be as follows: (Modify this using Notepad)

DBFilename=SERVERNAME:C:\Program Files (x86)\Ostendo\Database\Ostendo.fdb

```
[Settings]
MinutesBack=30                          {Time between now and last modified record}
TimeoutSeconds=5                        {Timeout when starting or stopping FB service}
DBUser=                                 {DB Username if not default}
DBPass=                                 {DB Password if not default}
DBFilename=                             {Database file including port and server when applicable}
ServiceName=FirebirdServerDefaultInstance      {Service name Not the display name}
WriteLogFile=1                          {Write log file 1 or 0}
AutoClose=1                             {automatically close Program when done}
```

If multiple instances of Firebird exist, thereby using different ports for firebird, the database syntax would be as follows:

DBFilename=SERVERNAME/3051:C:\Program Files (x86)\Ostendo\Database\Ostendo.fdb

We suggest all other settings are left as the defaults

Fbrestart.exe is the actual utility program that needs to be scheduled

Setup a Windows Task schedule to run this application at a time when you believe no users should be actively using Ostendo.

When the routine has run, it will save a log file in the Ostendo folder called ***fbrestart.log*** *NB: This log file will be overwritten each time the routine it run.*

This program and base ini file are available from
http://ostendo.info/downloads/ostendo/fbrestart.zip

Google Maps (Employee Locations): (Update237)

Recently, Google removed the ability for third party applications to connect freely to 'specific' Google Maps features. They have since changed this policy, to force any connection to google maps to subscribe to their paid service in order to use their API. Subscribed users will then be issued with an API key from Google which can then be loaded into Ostendo. Mobility->Settings->Mobility Rules-Map API Key

Because of this new policy, the Employee Locations screen will only function for those Ostendo sites who have a valid Google Maps API key.

We suggest you use the "Map Javascript API" google key. (refer below)

Information is available from:
Costs:
https://developers.google.com/maps/billing/understanding-cost-of-use

Obtaining An API Key:
https://developers.google.com/maps/documentation/embed/get-api-key

User Guide
https://cloud.google.com/maps-platform/user-guide/

NB: This does not apply to the "Location Map" function, found against Jobs & Sales which uses a different form of Google Maps.

Ostendo Report Writer Upgrade: (Update237)

We have upgraded the Ostendo Report and PDF Writer to address a number of issues when PDF documents were created from within Ostendo. This addresses the character spacing problem on PDF documents that are generated. It also caters for Extended Fonts.

Unfortunately, the downside of this is that some IOS devices with their default pdf viewers cannot display certain fonts that have been generated in a PDF. These fonts include: Calibri, Cambria, Vivaldi.

(It should be noted that the same pdf file can be viewed without issue on an IOS device using PDF viewer software like Adobe.)

Most other fonts eg: Arial, Verdana, MS Sans Serif, Courier, Century, Century Gothic, Microsoft Sans Serif and Tims New Roman present without problem in IOS

There may be other fonts outside of those indicated above however they would not be a typically used by most organisations.

The only shortcoming of embedding fonts will be the PDF file generated will have a larger file size.

NB: Displaying PDFs on Android devices irrespective of these settings does not seem to present the same problem.

> As the Report Writer has been updated, there are now some new features that were not previously available. Eg: saving outputs to Dropbox, OneDrive etc.., more property attributes etc..
>
> NB: Update 237 initially introduced an Upgraded Report Writer. As this new Report Writer has features within it that did not exist in the prior versions it is strongly recommended that reports created / modified in either 237 or 238 are not moved to databases running prior to 237. If you need to create or modify a report for an Ostendo database running a version prior to 237, ensure you do this against an earlier version of Ostendo prior to 237.

Web Hooks: (Update237):

Ostendo now has the capability of capturing “Web Hook” data in a new table from third party applications when an event occurs in that application. The data captured in this table can then be used to access key data back in the third-party application.

An example of this is if a Third-Party Application (eg: CRM application) was used to capture New Customer details, Ostendo isn’t aware of that immediately without constantly interrogating that application for changes. Web Hooks allows the third-party application to write a key ID piece of data to a web hook table in Ostendo. By Ostendo poling and checking this table for new values, it would know that a new customer had just been created in the third-party CRM software. Then Ostendo could use this key data value to interrogate the CRM and read the relevant data fields into Ostendo in order to create the new customer record.

Freeway Technical:

Fastcodes

Once Fastcodes have been generated, they are now retained in the cloud for the amount of time nominated in the Mobility Settings screen.

Further to this, that same Fastcode can be used multiple times up until it's expiry. Previously it was removed once it was picked up at the Mobility device, now it is retained.

Updating of Mobility Keys (Update237)

Previously it was difficult to deploy new Mobility keys to existing Freeway users when a new annual license was applied. This would result in all Freeway users having to apply new Fastcodes to load their replacement keys.

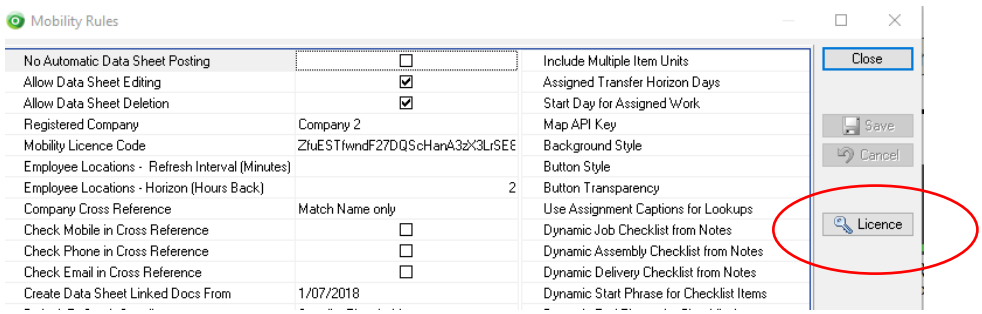
We now hold both the old and the new mobility keys in the cloud. This means when a new replacement company and API key is loaded into Ostendo. The new key is automatically updated in the cloud. Then when a Freeway user synchronises their device, Freeway will compare the keys on the device to that in the cloud and apply the new key if the old key matches that on the device.

NB: Ostendo will only store the 'Current' key in the cloud, therefore if you have applied more than one keys within a 12 month period to Ostendo, and have not synced devices, you will need to generate Fastcodes as previous and have the Freeway users apply those to their devices.

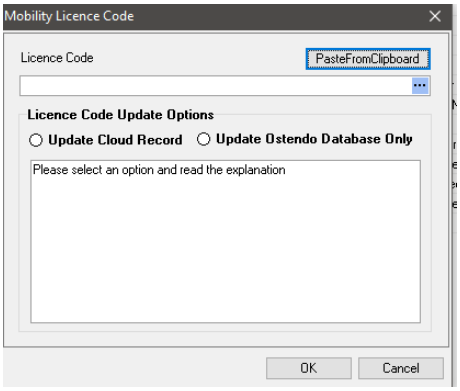
Setting the Mobility License Code (Update237)

Because we are now automatically swapping out the old API key with a new API key when one is applied, there is now a slightly different process for applying a new API key.

There is now a new button on the Mobility Rules screen that allows you to apply a replacement license code.



This new button will pop up a Mobility License Code screen. After browsing and selecting the new replacement Mobility license, you must select one of the two License Code Update Options:



- Update Cloud Record
  - This Option will update the cloud record. If updated, all mobile devices with the current licence code from here on will use the host/ip addresses configured for the API service that is connected to this Ostendo database. ***This option is appropriate for updating an expired/expiring licence code***.
- Update Ostendo Database Only
  - This Option will only update the Ostendo database with the new licence code. ***This option is appropriate for consultants who are testing mobile devices with a client's database and want to change the licence code to their own without changing the clients cloud record.***

Freeway Display Styles: (Update237)

Freeway now allows for multiple styles. These styles can be set globally under Mobility Rules or independently against each Mobility user.

After applying Update 238 and when Freeway next synchronises (Re-Initialise Sync) their device, **the new button style will be the default**.
The previous 'Classic' style buttons still exist and can be re-set back by amending the Mobility Employee Style settings back in Ostendo.

A new default background will also be introduced with this update. This background is set independently of the button styles. Therefore, you may retain the 'classic' style buttons with the new background or replace the background with your own to be used with the new button styles.

Buttons now have a transparency option, which allow you to control their transparency independently of the background.

Global Mobility settings can control these styles at a company level or alternatively at and employee level from the Employee Mobility settings.

Mobility Rules: (Update237)

Freeway Styles

- 3 new fields have been added to influence the user 'look and feel' of Freeway
    - ***Background Style***
        - Default (new style)

        - Classic (original Freeway style)
    - ***Button Style***
        - Black (Default)

        - White

        - Classic (original Freeway style)
    - ***Button Transparency***
        - No Transparency
        - 10 Percent
        - 20 Percent
        - 30 Percent
        - 40 Percent (Default)
        - 50 Percent
        - 60 Percent
        - 70 Percent
        - 80 Percent
        - 90 Percent

Assignment Captions

- New Mobility Rule **"Use Assignment Captions for All Jobs/Assemblies/Deliveries"** Previously, these Captions only applied when assigning from the Assignment Board. This rule allows these Captions to apply to non assignment board assignments (ie: when Assignment Board is not used)

  Assignment Captions are defined from Requirements->Settings->Assignment Captions (Caption Type "SUBJECT")

  Customer Asset fields are also available for assignments where an asset is linked to the Task.

Employee Mobility Settings: (Update237)

Previously, the backgrounds were stored against each employee on the Employee Mobility Settings screen under the "Device" tab. These have now been moved to a new dedicated tab within the Employee Mobility Settings screen call "Buttons and Backgrounds". This allows you to define the following at a mobility employee level. These settings will effectively override those settings within the general Mobility Rules.

- Background Style
- Button Style
- Button Transparency

We now offer a new default Freeway background along with new button 'out of the box' styles. Both background and button styles can be further extended by allowing you to use your own styles.

NB: If these are not specified against the employee, the settings in the Mobility Rules will take precedence

- ***Background Style***
  - Default (new style)

  - Classic (original Freeway style)
- ***Button Style***
  - Black (Default)

- White

- Classic (original Freeway style)

- ***Button Transparency***
  - No Transparency
  - 10 Percent
  - 20 Percent
  - 30 Percent
  - 40 Percent (Default)
  - 50 Percent
  - 60 Percent
  - 70 Percent
  - 80 Percent
  - 90 Percent

NB: All existing employee settings (backgrounds and layouts) will be copied over to this new area when Update 238 is applied.

- New Portrait and Landscape ratios have been created for devices using 19.5:9 aspect ratio's eg: Galaxy Note devices iPhone XR.

How Previous Employee Settings will be handled when Upgrading to 238

Buttons:
The new Black Style buttons will replace the Classic style (The Classic style can be set back manually after the update if you prefer this style)

Background Images:
If you had previously set a background image for a mobility user prior to upgrading to 238, this image will be retained and used by default.

If no background image had previously been defined, the new default background will be used.

Button Layout:
All existing Button Layout settings will be retained for each Mobility user

Freeway Functionality:

Since Update 211 there have been major advances in Freeway functionality. Those sites already using freeway will most probably be using it with Pre-Release 233 and therefore will be using numerous features brought in since Update 211. The following functionality documents features that have not been published to date.

PreStart Checklists:

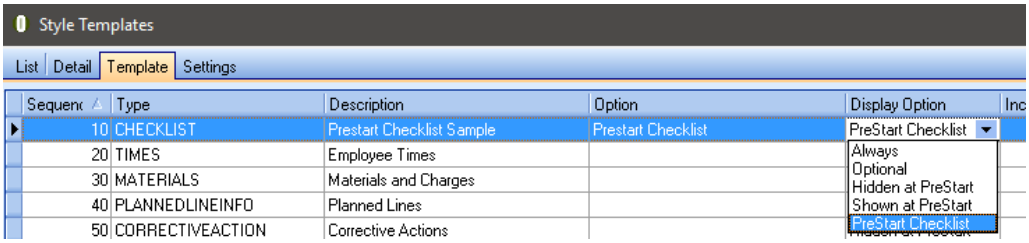
- The concept of this is to force the Freeway user to complete various functions within the Datasheet prior to commencing the work in full. For example, you may have a PreStart checklist to identify hazards prior to starting the work. Once these are completed, only then does the Datasheet reveal all other template options available to the user.

  A PreStart checklist is setup the same as any other checklist, however one or more groups in it must be set to 'Mandatory'.

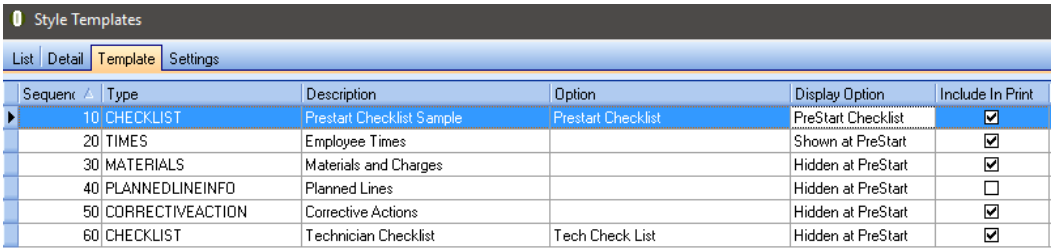
  The Checklist is then defined against the Style Template with a "Display Option" set to 'PreStart Checklist'. (Only one checklist maybe defined in a Style Template as "PreStart")

  Once a PreStart Checklist "Display Option" is specified for that Template, all other Template lines must be specified either as "Shown at PreStart" or "Hidden at PreStart". This controls **when** they are displayed in the Datasheet

  Always = Not applicable for use with PreStart Checklists
  Optional =Not applicable for use with PreStart Checklists (Refer Below)
  Hidden at PreStart = This entry is hidden from the Datasheet until the PreStart Checklist has been completed / or mandatory satisfied.
  Shown at PreStart = This entry is displayed in the Datasheet when the PreStart Checklist is presented
  PreStart Checklist = This is the checklist that is defined as PreStart. (There can only be one specified for the Template)

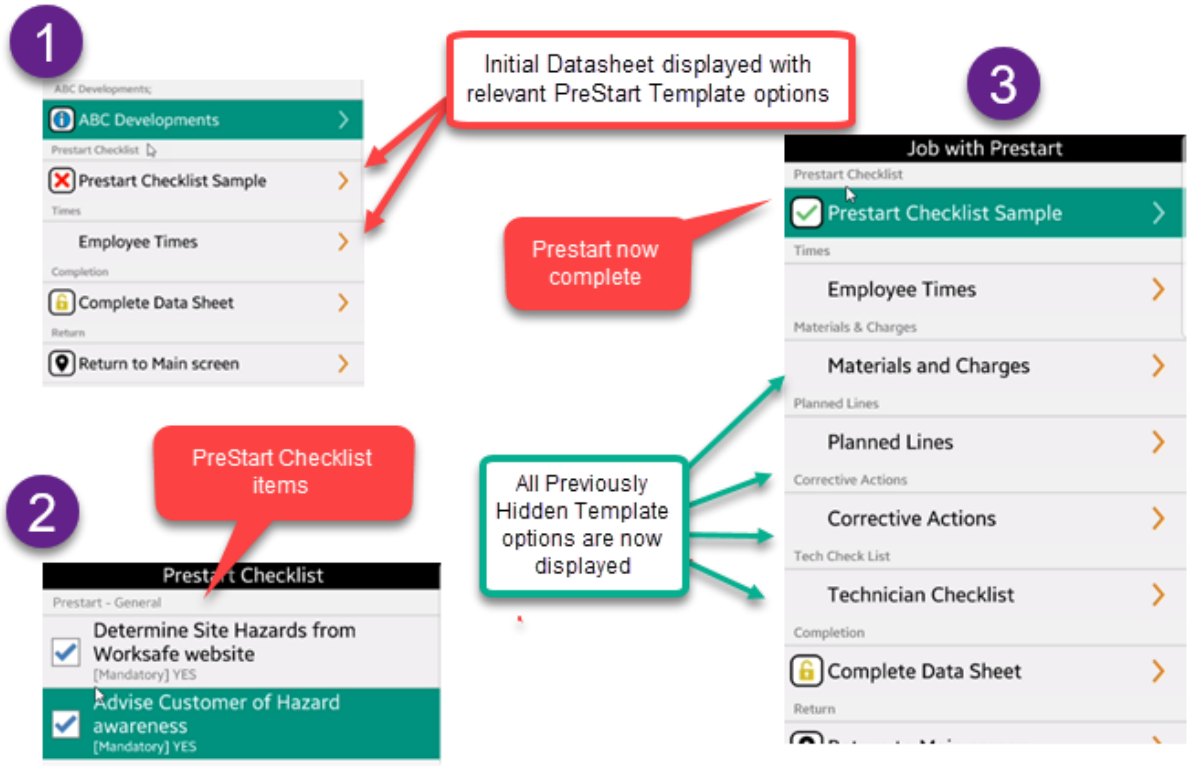


Below is an example of how this would be used. Notice, that we are allowing Times to be entered at PreStart, whilst Materials, Planned Line Info and Corrective Action will only be displayed once the Prestart Checklist has been fully completed.



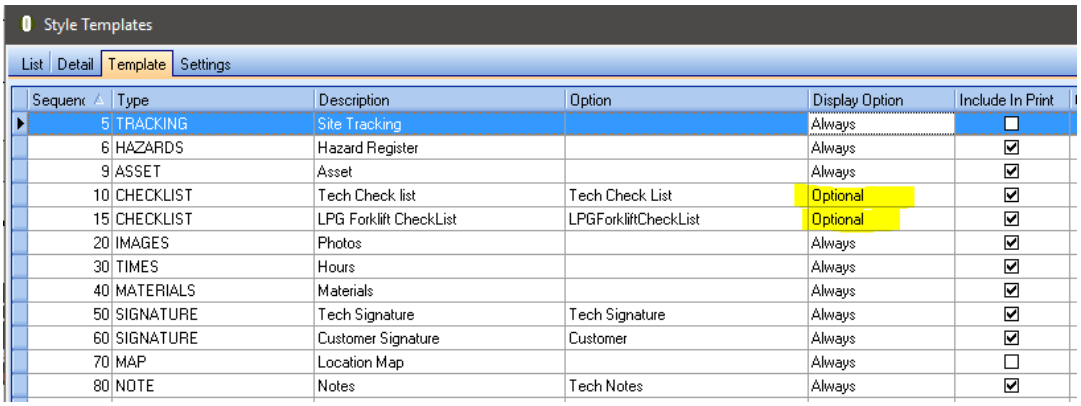
Sequenc	Type	Description	Option	Display Option	Include In Print
10	CHECKLIST	Prestart Checklist Sample	Prestart Checklist	PreStart Checklist	☑
20	TIMES	Employee Times		Shown at PreStart	☑
30	MATERIALS	Materials and Charges		Hidden at PreStart	☑
40	PLANNEDLINEINFO	Planned Lines		Hidden at PreStart	☐
50	CORRECTIVEACTION	Corrective Actions		Hidden at PreStart	☑
60	CHECKLIST	Technician Checklist	Tech Check List	Hidden at PreStart	☑

Example of how the Datasheet will be displayed in Freeway:



Optional Checklists:

These are defined to allow the Freeway User to optionally select from within the Datasheet. They are defined as normal Checklists but their "Display Option" in the Style Template is set to 'Optional'. (NB: These cannot be used when a PreStart checklist is defined.)



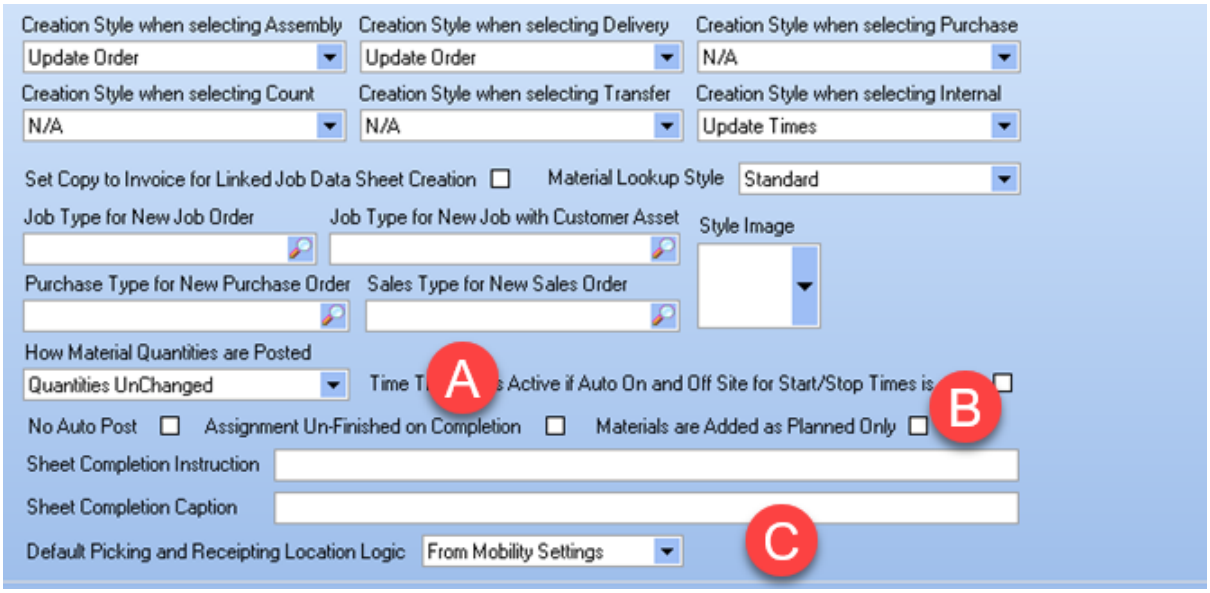
Sequenc	Type	Description	Option	Display Option	Include In Print
5	TRACKING	Site Tracking		Always	☐
6	HAZARDS	Hazard Register		Always	☑
9	ASSET	Asset		Always	☑
10	CHECKLIST	Tech Check list	Tech Check List	Optional	☑
15	CHECKLIST	LPG Forklift CheckList	LPGForkliftCheckList	Optional	☑
20	IMAGES	Photos		Always	☑
30	TIMES	Hours		Always	☑
40	MATERIALS	Materials		Always	☑
50	SIGNATURE	Tech Signature	Tech Signature	Always	☑
60	SIGNATURE	Customer Signature	Customer	Always	☑
70	MAP	Location Map		Always	☐
80	NOTE	Notes	Tech Notes	Always	☑

Style Template Detail: (Update237)

A) **Assignment Un-Finished on Completion:** A Template can be set to prevent the Assignment booking from being updated to 'Finished' when the Datasheet is completed, which would otherwise make the booking unavailable to the Freeway user until it is re-booked. This is useful if some Pre-Work needs to be conducted prior to the actual work itself.

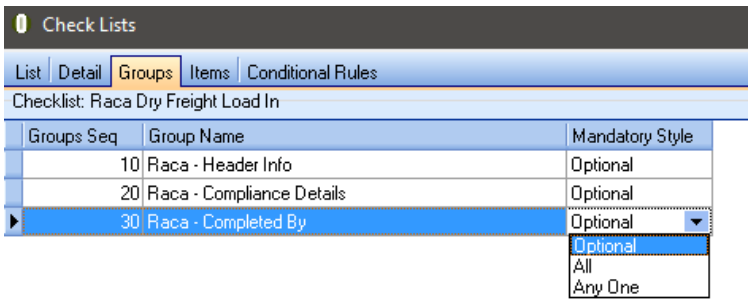
B) **Materials are Added as Planned Only:** This means that all Materials and Labour that are added to the Datasheet will only populate as Planned Lines rather than Actual issues. (Relevant for Jobs and Assy Orders)

C) **Default Picking and Receipt Location Logic:** This rule takes precedence of the Employee Mobility rules enabling datasheets to behave differently to the standard Employee settings.



Register Checklists: (Update237)

- These checklists can now use the Checklist Mandatory Style setting. They now behave the same as any other standard checklists. Ie: Checklist Group Names can be defined with a Mandatory Style of "Optional / All or Any One



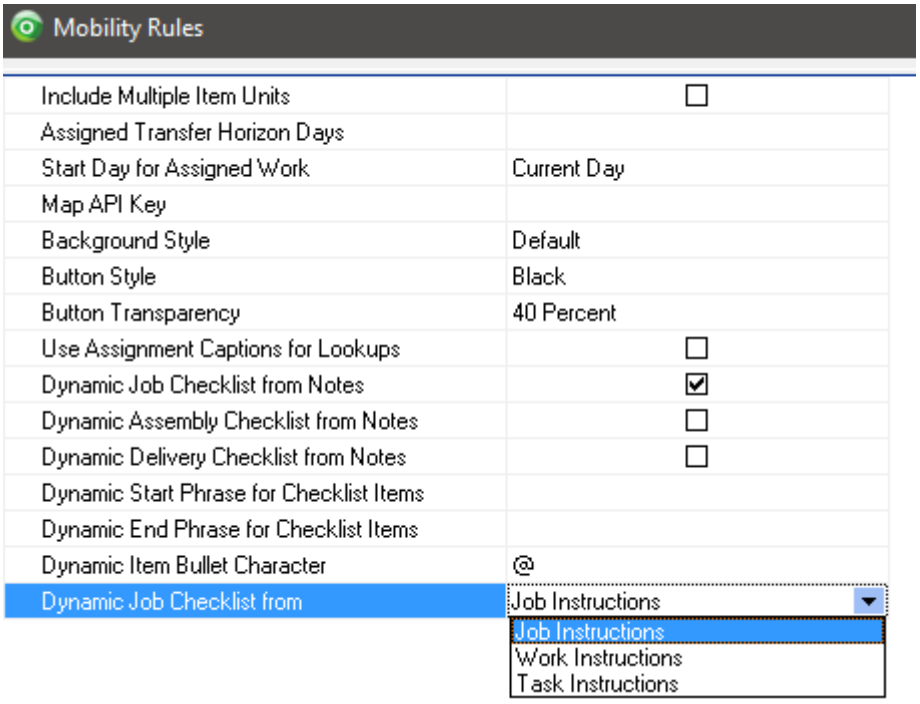
Dynamic Checklists: (Update237)

- The idea behind this is that you may want to include some specific Checklist items in your Style Template to the mobility user when they create the Datasheet for this specific Job, Sales Delivery or Assembly Order.

  An example of this is where you may have defined a standard checklist in the Style Template, however for this specific job you require the mobility user to capture some specific data relating to this order.

  Setup:
  - New Mobility Rules:
    - Dynamic Job Checklist from Notes
    - Dynamic Job Checklist from:
      - Job Instructions
      - Work Instructions (Jobs Only)
      - Task Instructions (Jobs Only)

    - Dynamic Assembly Checklist from Notes
    - Dynamic Delivery Checklist from Notes



  - Dynamic Start Phrase for Checklist Items (blank = {Checklist}
  - Dynamic End Phrase for Checklist Items (blank = {End}

Dynamic Checklist Syntax:

Syntax to Be entered into the relevant Instructions field on the Job / Assembly or Delivery (NB: For convenience, these could be predefined in General->Frequently Used Text)

Keywords (case insensitive) for determining Checklist Item Type

- 'PHOTO', 'IMAGE', 'PICTURE', 'PHOTOGRAPH' = PhotoNote
- 'DATE' = Date
- 'TIME' = Time
- 'QUANTITY', 'QTY' = Integer
- 'NUMBER', 'VALUE' = Number
- 'CHECK' = CheckBox
- 'NOTE', 'NOTES' = Memo
- 'SIGN', 'SIGNATURE' = Signature
- 'LIST' = List followed by the list values eg: List (value1,value2,value3…)
- 'GPS' = GPS
- If there is no keyword, then the Type is assumed to be Text
- You are also able to set the Check Item to mandatory using the keyword 'MUST'
- Syntax of 'List' keyword values are delimited by commas and enclosed in brackets as follows: (value1,value2,value3…)

Ensure you define a Template Type of "DynamicChecklist" in the Style Template to be used

Syntax Example: *(*Not case sensitive)

An example is as follows to be typed into Order Notes / Job or Task Instructions:

{checkList}
- you **must** take a **picture** of the washing machine
- please record the **date** of the work
- enter the **time** when the work as done
- take another **photo**
- you **must** enter some **notes**

{end}

NB: Avoid having checklist items with multiple keywords in it. eg:
- Please sign and check the date is correct
The above phrase will only look at the first keyword eg: 'sign' keyword, not the 'check' or 'date' keywords.

Custom Inquiries: (Update237)

These inquiries can now be specified within the Style Template (Type = "INQUIRY" and Option = Inquiry Pack Name) thereby making them available to be run from within a Datasheet. Eg: A Tech could be in the middle of a datasheet and want to inquire on information relating to the job they are on.
NB: It should be noted that only relevant inquiries relating to key Datasheet source can be run
Eg:

- A Datasheet created for a job will only be able to run a JOBINQUIRY Type
- A Datasheet created for an Assembly Order will only be able to run an ASSEMBLYINQUIRY Type

Datasheet Custom Inquiries will not be available to Templates for Stock Counts or specific Products

Standard Freeway Inquiries will not be available within the Datasheet
eg:

Job Information
Customer Information
Assembly Information etc….

Freeway requires an internet connection in order to run these real time inquiries.

- There is now the ability to pass another parameter to the Detail Inquiry rather than just the :Header Key. These now allow the :PassedEmployee parameter to the Detail Query. Eg: You could have a Header Query showing Job Order Information, whilst the Detail Query could show Timesheet entries captured for that same job for the Freeway User.

- Detail Queries can now run independently of the Header Query. Eg: Header Query could display total value of all orders for the month, whilst the Detail Query could display all individual orders for the month.

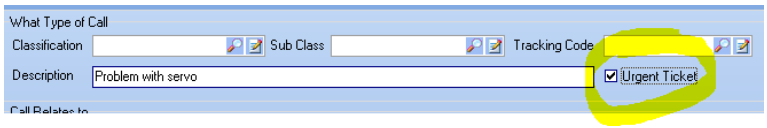
Refer to these documents on getting started with Custom Inquiries

http://ostendo.info/downloads/ostendo/Freeway_Inquiries_Tutorial.pdf
http://ostendo.info/downloads/ostendo/HowToCreateAFreewayInquiryPack_474.pdf

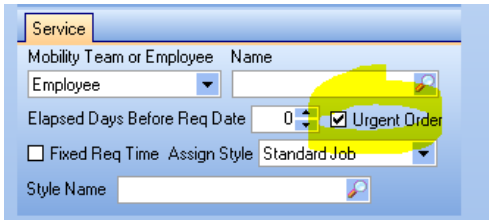
Urgent Flag on Call Tickets / Jobs and Sales Deliveries and Assembly Orders

- Each of the above transactions now has a field (Urgent Ticket or Urgent Order)

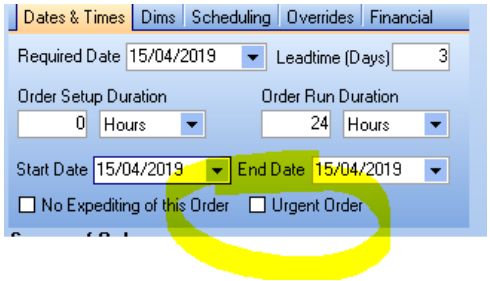
Ticket:



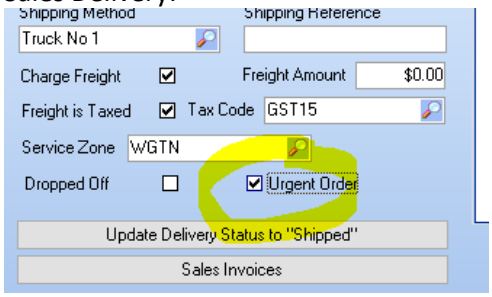
Job Order:



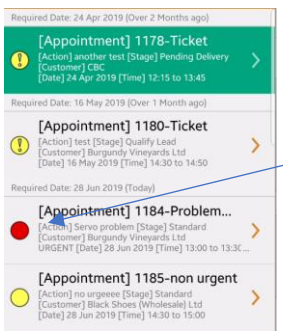
Assembly Order:



Sales Delivery:



When one of these is sent to Freeway, it will display on the Jobs / To Do List etc.. at the top of the list for the Start Day it is assigned to. It will also be marked with a Red Indictor as shown below:



Notifications From Within A Datasheet: (Update237)

The idea of this is to define formal "Control Points" during a process when completing a Freeway Datasheet. This allows the user to send a Freeway Notification (Txt or Email) from specific point(s) within a Datasheet. An example of this could be when the customer requires a notification from the Tech they are on their way to the job after already opening the Datasheet to record Travel Time. This could also be used to force the Freeway user to send a Txt or email when a specific point of the Datasheet has been reached.

This approach also allows the message to be stored within the Datasheet, thereby retaining a record of these communications at defined control points within the process.

Multiple Notify "Control Points" maybe defined within a Style Template

Setup:

A new screen is available allowing you to create a "Notify Group Name". This also allows you to define whether this group is Mandatory or Optional as a whole.

The Notifications screen now includes an additional "Notify Level" option called 'Notify Group'. The Group is then defined in the "Level Name" field.

A new Template Type field called "NOTIFY" allows you to link the "Notify Group Name" to the Template line Option.

Freeway Picking – Job Lines and Delivery Line Details for Freeway Printout: (Update237)

- Freeway now stores details of all lines that have been "Picked" in a Datasheet. Because previously these lines were not stored on the device, this meant that once picked or delivered, the Freeway user could not generate any printed output showing those lines
    - Delivery Drop Off Printout:
        - Ensure you have a "PRINT" Type specified in your Style Template.
        - Ensure the DELIVERYDROPOFF type has been flagged to be "Include In Print"
    - Delivery Picking:
        - Ensure you have a "PRINT" Type specified in your Style Template.
        - Ensure the DELIVERYLINES type has been flagged to be "Include In Print"
    - Job Picking:
        - Ensure you have a "PRINT" Type specified in your Style Template.
        - Ensure the JOBPICKING type has been flagged to be "Include In Print"

Frequently Used Style Templates (Update237):

- Previously any template that was used more than once, was moved on the device to a section called "Frequently Used". This enabled users to easily select those Style Templates they used most often. The problem was that even if a template was only ever used once, it would appear in this list. Further to this, the Frequently Used list is really only relevant for those Freeway users whose must select from a selection of multiple Style Templates on a regular basis. Therefore, it is of no real benefit to those users who are only required to select from a small list of Templates.
  There is now a setting in the Freeway "Settings" screen to turn on / off the Frequently used templates area when creating a new Datasheet. This update will automatically turn "Off" this function, however it can be easily turned back on from the Freeway Settings screen on the device.
  NB: (Only relevant if Upgrading) If you decide to turn this on immediately after upgrading, it will move back the same Templates that were previously appearing in that area under the previous Freeway Version based on their previous statistics

  To re-set Frequently Used templates list anytime, perform the following:
  1) Turn Off Frequently Use Function
  2) Turn On Frequently Used Function

  This will eliminate all Style Templates from the Frequently Used area and return them under their respective Template Groups.

Freeway Time Inquiry (Update237):

- The Standard Time Inquiry now allows you to drill down on the number of hours entered against each Datasheet currently on the device for each day. It will then list out the Total Hours by Date but also allow you to drill down and determine Datasheet Information eg: Total Datasheet Hours, Order Number, Labour Code and Customer (Job) or Item Code (Assembly)
  This allows the user to quickly determine total breakdown of daily hours they have recorded via Freeway.
  NB: It is important to understand that the data for this Standard inquiry is not being sourced from Ostendo, but from the individual Datasheets held on the device. These include those that are "In Progress", "Syncronised", "Forwarded" and "Completed" Datasheets. Therefore, if you intend to use this inquiry you should ensure the Mobility Settings for the Employee are set to retain enough Datasheets on the device for that employee.
  Mobility->Employee Mobility Settings->Device tab-> "Number of Syncronised Sheets Retained".

Receipting Multiple Serial/Batch Tracked Records Via Freeway Scanning (Update238)

- Previously when receipting (either Assembly or Purchase Receipts) via Freeway you had to scan the Item Code and then scan the Serial Number, for each receipt record even if there were multiple receipts of the same item code. Update 238 allows you to scan the item code once, and then scan the Serial Number (or Batch), then remains on that item code records thereby allowing you to scan another serial number for that same item. Once these multiple scans are complete, you simply press the back button to return to the item selection screen. This will provide a more efficient receipt process when multiple serial numbers are being processed.

Adding Adhoc Materials to Job and Assembly Picking:

- When picking from a Datasheet for a Job or Assembly Order, you can now add items not previously planned on the order. To do this simply press the '+' button from the Job Lines Remaining screen within Freeway. This will present you with your Materials list available to the employee. By selecting a "Charge (Descriptor) or Material (Item) and entering a Qty, will automatically insert a planned line onto the order back in Ostendo. Once you accept this in Freeway, the Job Lines Remaining screen will refresh to include that Charge or Material. You then proceed to pick this in the normal manner. NB: *This function will only work if you have a live internet connection.*

Updating Properties Via Freeway (Update237):

Updating General Property Values:

Significant work has been done in the area of recording 'properties' using Freeway. Ostendo now allows for Properties to be read and updated against the following areas in Ostendo

- Assemblies
- Jobs
- Customer Assets
- Jobs and Customer Assets combined
- Sales Orders (via Delivery)
- Customers (when Style Template is Data Only for a Customer)

Setup:

- Create a Checklist Item with a Type of "Property" and define the actual property name to be updated from this checklist.
- Define this checklist in the Style Template relevant to the Property that needs updating.

Updating Item and Item Batch Property Values and Batch Status for QC (Update237):

This can be used when you need to capture QC results for a specific Item or Item Batch combination by way of Item or Item Batch Properties and also optionally influence the Batch Status to control whether it can be subsequently issued or not.
The concept here is that you can scan or enter an Item into a Datasheet, then scan or enter a Batch in order to allow the capture of QC results (Properties Values) using Item Batch Properties

Once properties have been captured you can then mark the entire Batch record as either "Approved" or "Rejected" either from within Freeway or manually through Ostendo

An Item Batch record now has the following Statuses available to it.:

Approved	-	This batch is available to be issued
QC Required	-	No issues are allowed whilst in this state
Rejected	-	No issues are allowed whilst in this state
On Hold	-	No issues are allowed whilst in this state

Setup:

- Item Master: A new flag on the Detail screen allows you to control whether this item requires Batch QC. The result of this is when Item Batch record is created, its Status is automatically set to "QC Required" thereby restricting the issue of items with this batch until it has a Batch Status of "Approved". (Either influenced manually in Ostendo or triggered from a Freeway Datasheet). Goods can still be receipted against a "QC Required" batch.

- On a Style Template with a Creation Style of either "Internal – Data Only" or "Assembly Order" (Data or Update Order) specify a Template Type as "Item Batch"

    - "Item Batch Enter" (Typed in Freeway manually)
    - "Item Batch Scan" (Both Item and Batch are scanned into Freeway)
    - "Item Batch Scan / Enter" (Either Scan or Enter the Item or Batch into Freeway)

  When the Datasheet is created, two fields will be shown.

  Item: (Scan or type in Item Code) – Freeway will validate this real time (requires internet connection)

  Item Batch: Enter or scan batch. This Item / Batch combination is then validated real time to ensure a Batch record exists in Ostendo. NB: There does not need to be any stock records as this process simply allows for QC results to be entered prior to receipting of the item.

- The Item Batch Status can also be influenced directly from the Datasheet if a Template Type of "Batch Status" is specified.

  In summary you could have a Style Template that could:

    - Only Update Item Batch Properties
    - Only update Batch Status
    - Update both Item Batch Properties as well as Batch Status

Freeway Inventory Transfers (Update237)

- Freeway now provides the ability to transfer inventory between Warehouse / Locations. This process is real time, therefore requires an internet connection.

  Each datasheet is specific to a "From" Warehouse, however multiple "To" warehouses can be specified depending upon your Freeway Default Picking and Receipting Logic settings on the Style Template or on the Mobility Employee Settings screen.

  There are three types of Transfers available:

  Adhoc Transfers

  This type of transfer is suitable when you wish to manually select the items to transfer. These items are not restricted to your Materials List or any Item Restriction Conditions under the Employee Mobility Settings

  Job Stock Transfers

  This type of transfer pre-populates transfer lines with all sum totals of items which have remaining 'planned' quantities for jobs that have been assigned to this Freeway employee. The idea here is to suggest what items and total quantities are required (based on the remaining qtys of job planned lines) for all jobs assigned to this employee. The employee can then simply choose to transfer what they believe they will require. They are not forced to transfer anything if they choose not to. In addition to this, these transfers allow the user to also select materials from their "Materials" list if they choose.

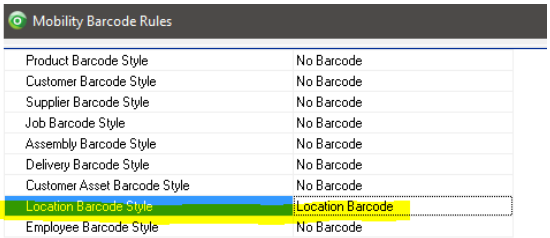
  Re-Stock Transfers

  The concept here is to create a Re-Stock Template (From Inventory-> Settings->Re-Stock Template), so that field staff can replenish vehicle stock back to their optimum levels. In addition to this, these transfers allow the user to also select materials from their "Materials" list if they choose.

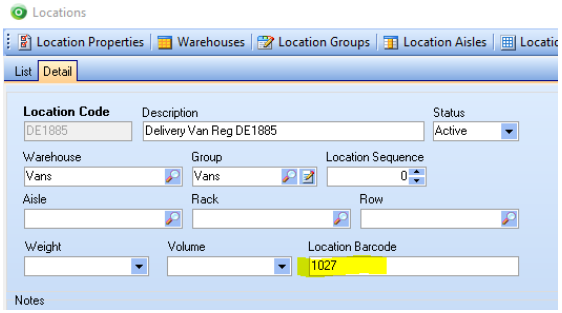
Adhoc Transfers Setup:

- Create a style Template to record Transfer Information

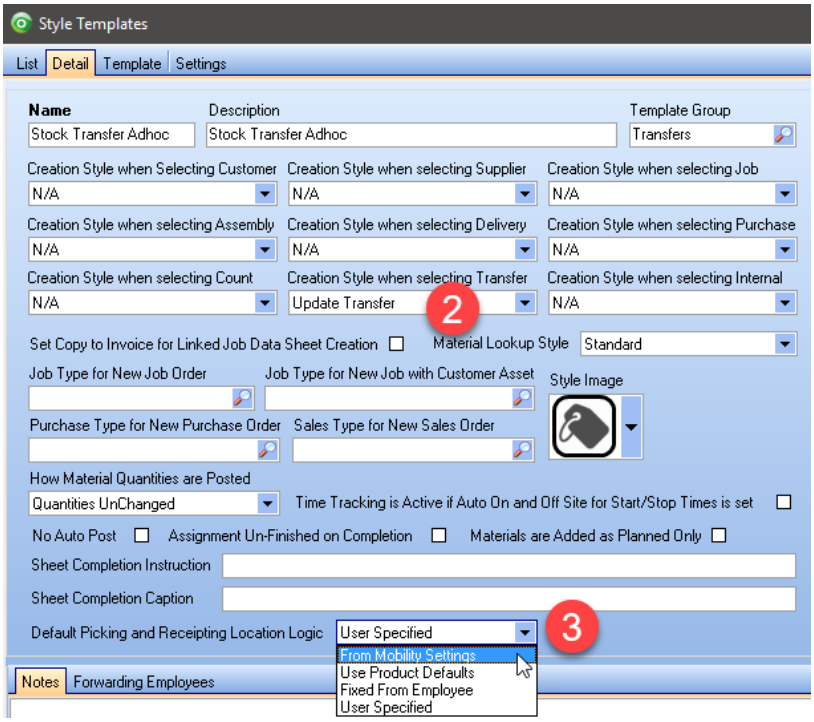
1. If you intend to specify the "To" transfer Location within the, you must select the Location Barcode Style to use from Mobility->Mobility Barcode Rules.



If you select “Location Barcode” as the Location Barcode Style, ensure all relevant Locations have their respective Barcode value defined in the Barcode field.

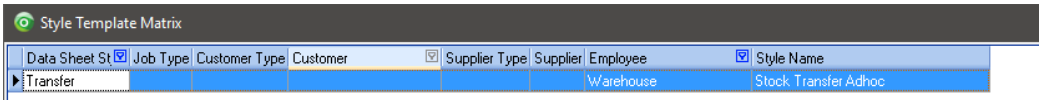


2. Select "Update Transfer" in the "Creation Style when selecting Transfer"
3. Select the Default Picking / Receipting Location Logic for this Template
    a. From Mobility Settings: This uses the Default Picking and Receipting Logic rule defined against the Materials tab for this Mobility Employee
    b. Use Product Default: This uses the Default Issue / Receipting Warehouse / Location setup against the Item
    c. Fixed From Employee: This uses the Optional Warehouse and Optional Location settings in the upper part of the Employee Mobility Settings screen for this Employee
    d. User Specified: This requires the Freeway user to scan the "To" Location Barcode before scanning the items into a Transfer. (The Barcode source is defined in Mobility->Settings->Mobility Barcodes screen. "Location Barcode Style" Refer Step 1). NB: You are able to scan another "To" Location barcode within the same Transfer.

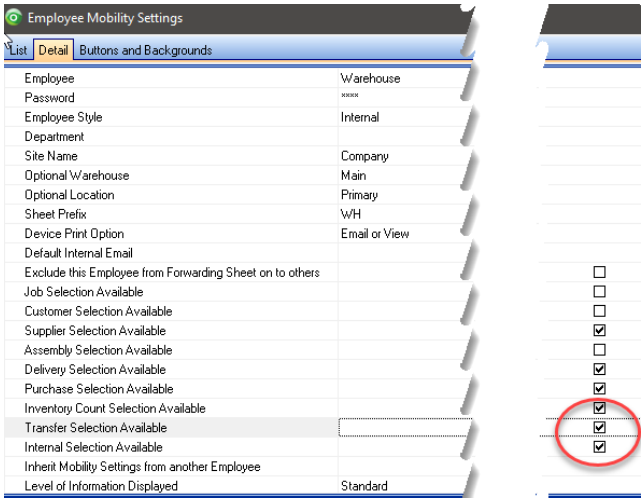


4. On the Style Template "Template" tab Add a TRANSFERADHOC type
5. Add any other Template types as applicable eg: Signature / Notes etc..

- Set up the Style Template Matrix record to include this Style Template to make available for the respective Employee(s)



- Update the Employee Mobility Settings to include "Transfer Selection Available"

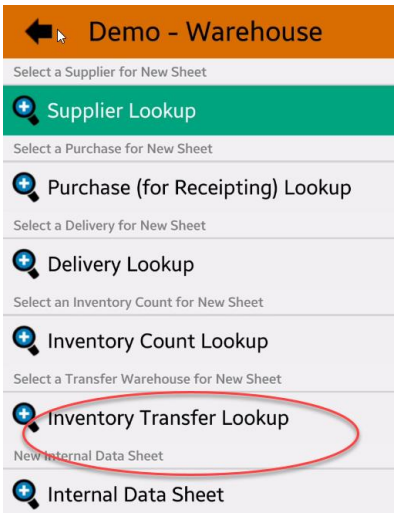


- The setup is now complete

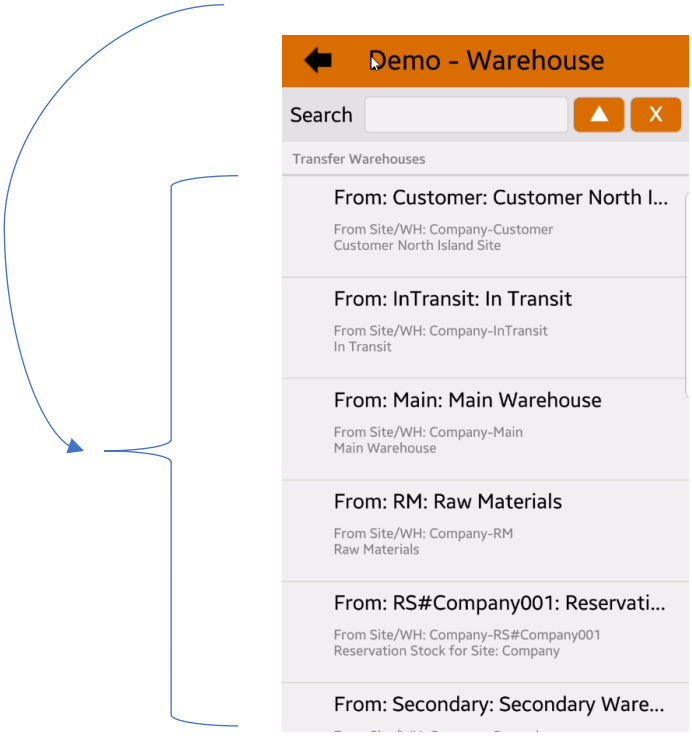
Creating an Adhoc Transfer on Freeway:

- Log onto Freeway and run a "Re-Initialise" Sync to download the new template and rules to the device.

- Press the "New" button and select "Inventory Transfer Lookup"



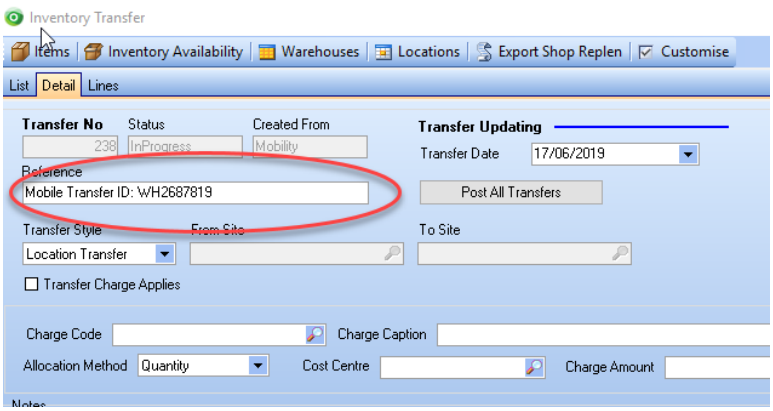
- You are now presented with all Warehouses available to this user. Select the appropriate "From Warehouse"



1. Select "Transfer Adhoc Items option
2. Press the Scan button
3. As this example is set to User Specified (This means the user must first scan the

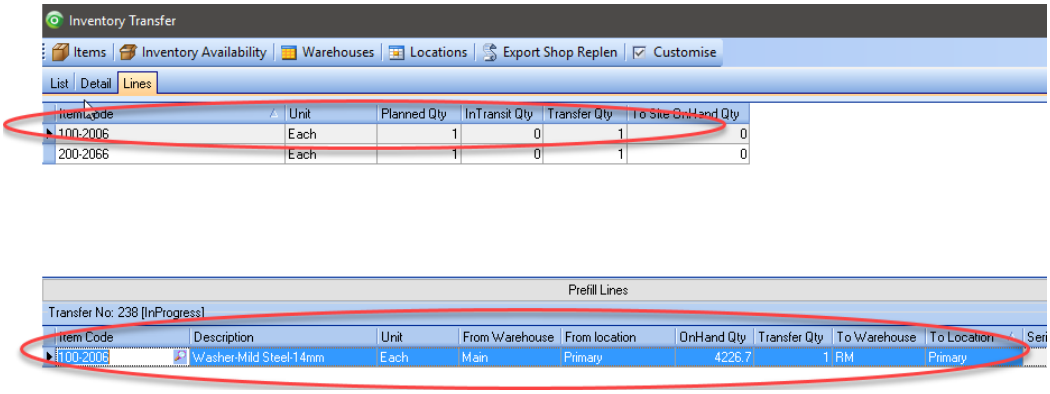
4. "To" location notice that it is initially blank). If the settings automatically set the "To" location, this would already be prefilled.
5. Now scan the Item Code to select.
6. Type in the Qty you wish to transfer. (NB: Only items with inventory qty's can be included in a Transfer. Ie: any qty on hand not equal to Zero).
7. Repeat this exercise for all remaining items

- In Ostendo a Planned Transfer has been created referenced back to the Datasheet

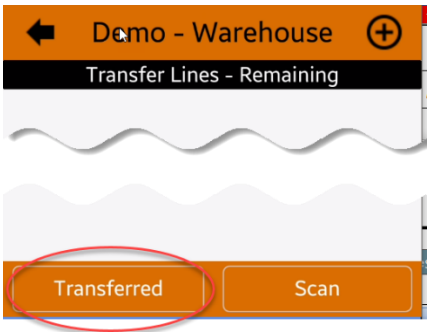


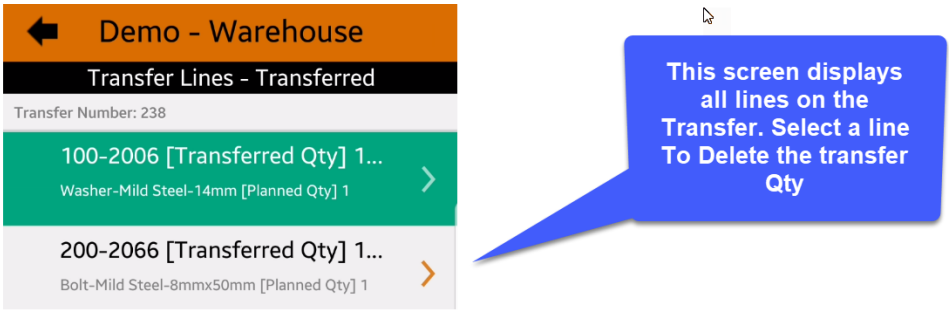
- All items to be transferred are displayed in the upper part of the screen, whilst the lower portion displays the actual transfer record.

- This transfer is updated as items are added to the Datasheet.



- On Freeway, these lines can be displayed from the "Transferred" screen. This screen allows you to delete a transfer line if required.





- Once all items have been entered, the user must Complete the Datasheet. The Datasheet is then returned to Ostendo and Updated, the associated Transfer batch is posted, and the inventory items are transferred.

Job & Assembly Stock Transfers Setup:

Similar setup to Adhoc except for the following:

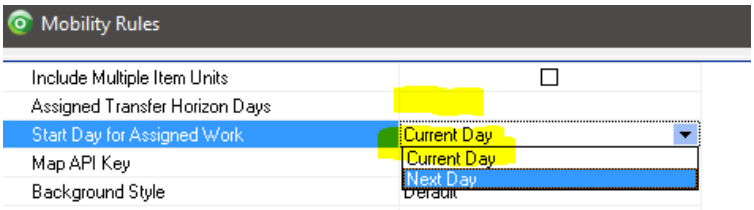
- Create a Style Template. In this case as the inventory will be moved into the Employees Location, you should set the Default Picking and Receipt Location Logic on the Template to either "From Mobility Settings" or "From Employee"

    a. From Mobility Settings: This uses the Default Picking and Receipting Logic rule defined against the Materials tab for this Mobility Employee
    b. Fixed From Employee: This uses the Optional Warehouse and Optional Location settings in the upper part of the Employee Mobility Settings screen for this Employee

    There are two new Mobility Rules that should be considered:

    Assigned Transfer Horizon Days: This global rule specifies how far Freeway needs to review stock requirements of assigned orders for all employees. If this entry is left Blank, Freeway will only look for jobs assigned 1 day out.
    NB: There is also an override "Assigned Transfer Horizon Days" setting on the Settings Tab of the Style Template. This takes precedence over the value in the Mobility Rules.

    Start Day for Assigned Work: This rule tells Freeway to only look at assigned orders with a Start Day from either the "Current Day" (Today onwards + Horizon Days) or the Next Day (tomorrow + Horizon Days) (Default is "Current Day")



- Select Template Style of TRANSFERASSIGNED in the Template screen

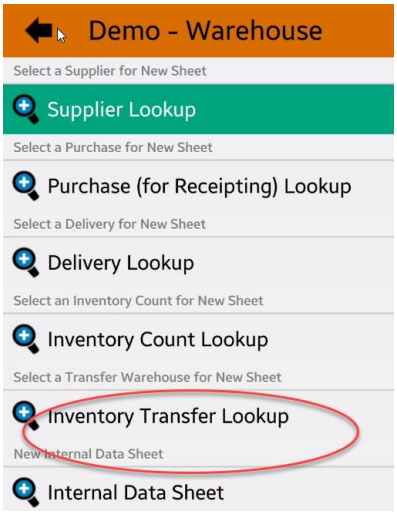
- Ensure you have a Style Template Matrix record specified for the Freeway Employee against this Style Template.

- Log onto Freeway and run a "Re-Initialise" Sync to download the new template and rules to the device.

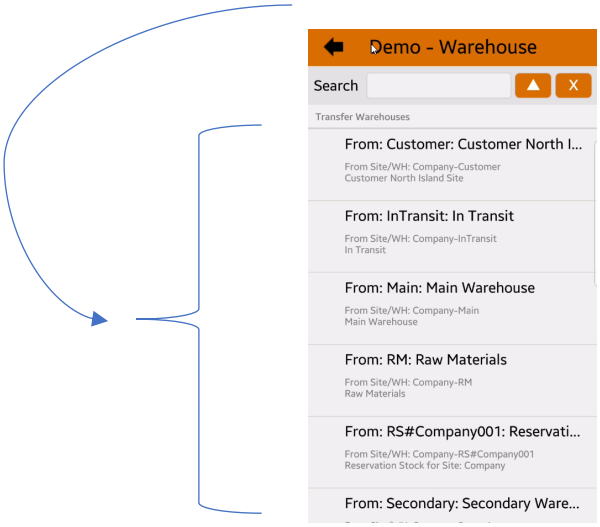
- The setup is now complete

Creating a Job (or Assembly) Assigned Transfer on Freeway:

- Press the "New" button and select "Inventory Transfer Lookup"

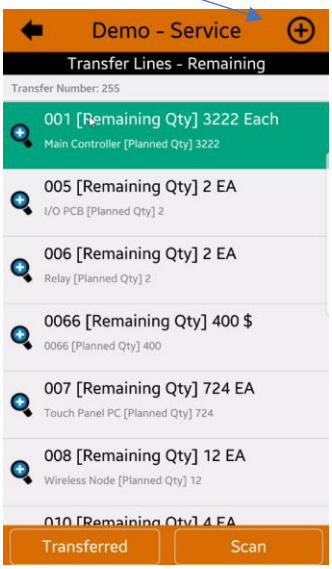


- You are now presented with all available Warehouses you have available. Select the appropriate "From Warehouse"

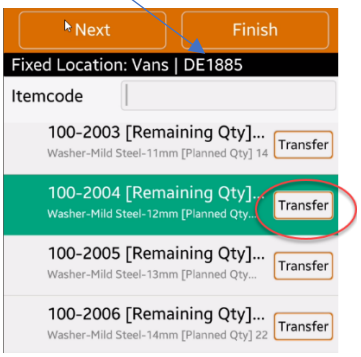


8. Select "Transfer Assigned Items option. This screen now displays a list of the total Remaining Qty of all "Planned" order Lines assigned to that employee based upon the Transfer Horizons in the Mobility or Template rules. (NB: Qty's displayed here ignore the current stock on hand levels within that Employees Warehouse / Location)

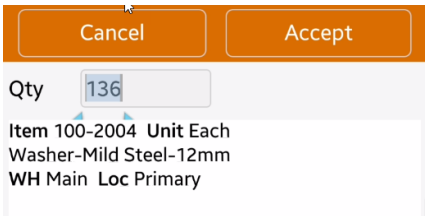
   Also notice the "+" button (top right corner of this screen). This allows you to add adhoc items from your materials list if they are outside of you Re-Stock Template.



9. Press the Scan button to start selecting items to transfer. NB: As this template has be set to automatically use the Employees Warehouse / Location logic, they have already been determined
10. Select the item to record a transfer Qty against by pressing the "Transfer" button



11. The Qty to transfer will default to the suggested Qty for all relevant orders assigned to this user. You may overtype this qty or accept it to transfer the stock.



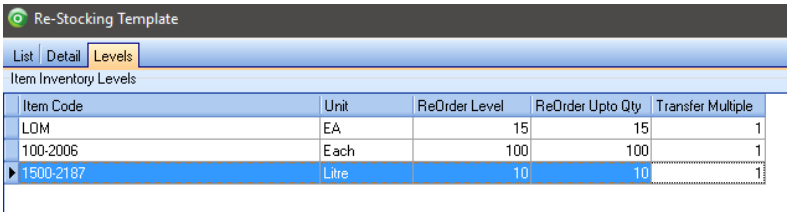
12. Repeat this process for all items you wish to transfer

13. Once all items have been entered within Freeway, the user must Complete the Datasheet. The Datasheet is returned to Ostendo and Updated, the associated Transfer batch is posted, and the inventory items are transferred.

Re-Stock Transfers Setup:

Similar setup to Adhoc except for the following:

- Setup a Re-Stock Template from Inventory->Settings->Re-Stocking Template



- Create a Style Template. In this case as the inventory will be moved into the Employees Location, you should set the Default Picking and Receipt Location Logic on the Template to either "From Mobility Settings" or "From Employee"

    a. From Mobility Settings: This uses the Default Picking and Receipting Logic rule defined against the Materials tab for this Mobility Employee
    b. Fixed From Employee: This uses the Optional Warehouse and Optional Location settings in the upper part of the Employee Mobility Settings screen for this Employee

- Select Template Style of TRANSFERRESTOCK in the Template screen and browse and select the appropriate Re-Stock Template in the "Option" field

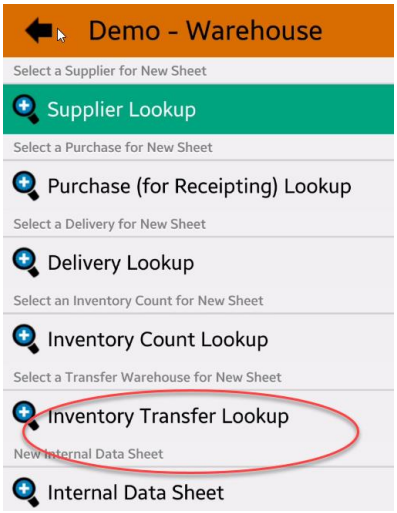
- Ensure you have a Style Template Matrix record specified for the Freeway Employee against this Style Template.

- Log onto Freeway and run a "Re-Initialise" Sync to download the new template and rules to the device.

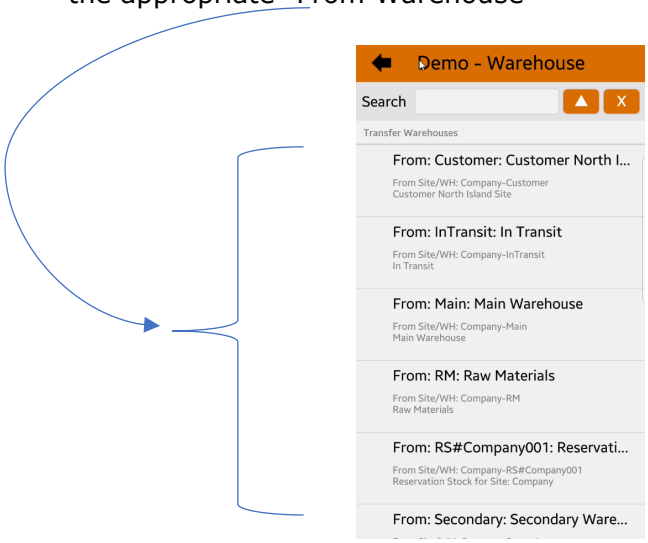
- The setup is now complete

Creating a Re-Stock Transfer on Freeway:

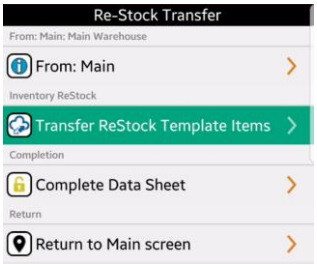
- Press the "New" button and select "Inventory Transfer Lookup"



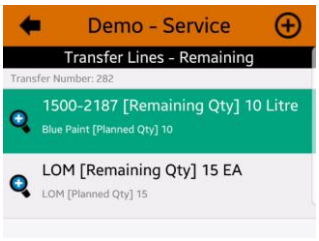
- You are now presented with all available Warehouses you have available. Select the appropriate "From Warehouse"



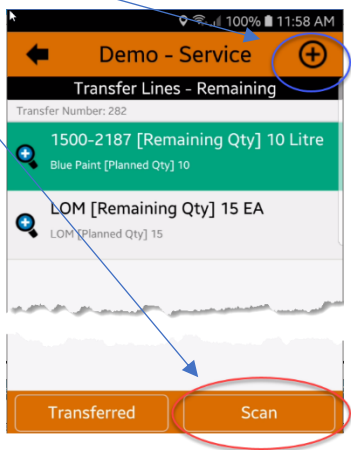
14. Select "Transfer ReStock Template Items.



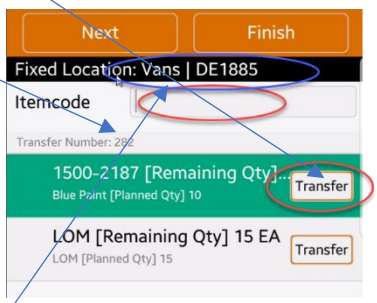
Freeway will then display all items requiring transfer based on the Re-Stock Template items along with evaluating current Stock levels for the receiving warehouse / location.



Press the “Scan” button to start the selection process for each item to be transferred. Also notice the “+” button (top right corner of this screen). This allows you to add items from your materials list if they are outside of you Re-Stock Template.



Either Scan or Press the Transfer button to initiate the transfer and accept the Transfer Qty.”



Notice the “Warehouse / Location have been automatically selected. This is because our Style Template was to use the Default Picking and Receipt Location Logic “From Mobility Settings” or “From Employee

Repeat this process for all item then return to the main Datasheet list to Complete the Datasheet, which will automatically post the Transfer back in Ostendo.

Accounting Integration Documentation Links:

MYOB AR Live
Documentation:
http://ostendo.info/downloads/ostendo/OSTENDO_MYOB_AR_LIVE_INTEGRATION.pdf

Xero
Documentation:
http://ostendo.info/downloads/ostendo/OSTENDO_XERO_INTEGRATION.pdf

QBO
Documentation:
http://www.ostendo.info/downloads/ostendo/OSTENDO_QBO_INTEGRATION.pdf

MoneyWorks
Documentation:
http://ostendo.info/downloads/ostendo/OSTENDO_MONEYWORKS_INTEGRATION.pdf

Sage Evolution V7.0
Documentation:
http://ostendo.info/downloads/ostendo/OSTENDO_SAGE_EVOLUTION_INTEGRATION.pdf

MYOB Classic
Link Program:
http://www.ostendo.info/downloads/ostendo/myobostlink_121.exe
Documentation:
http://ostendo.info/downloads/ostendo/Ostendo_MYOB_Classic_Mapping.pdf
http://ostendo.info/downloads/ostendo/Ostendo_MYOB_Classic_Posting.pdf

Reckon Desktop
Link Program:
http://www.ostendo.info/downloads/ostendo/qbostlink_90.exe

Reckon Hosted
Link Program:
http://www.ostendo.info/downloads/ostendo/reckonostlink.exe
Documentation:
http://ostendo.info/downloads/ostendo/Ostendo_Reckon_Hosted_Setup.pdf