Tradestone 2019R2

Upgraded Features and Improvements

(*This document is intended for Internal Use Only)*

2019R2 Upgrade Overview

- Tradestone is upgrading from current version of 2016 to 2019R2
  - Our current version is 6 version behind the latest available
  - By upgrading, we will be up-to-date to better position us to deliver continuous improvements
  - Our upgrade will be a Vertical Upgrade
    - The upgrade itself will bring minor changes to the user experience (e.g. newer screen layouts) but the overall system functionality and processes will remain the same.

- Overview of Changes
  - Enhanced Navigation
  - New Tabbed Screens
  - New Features
  - Updated User Interface

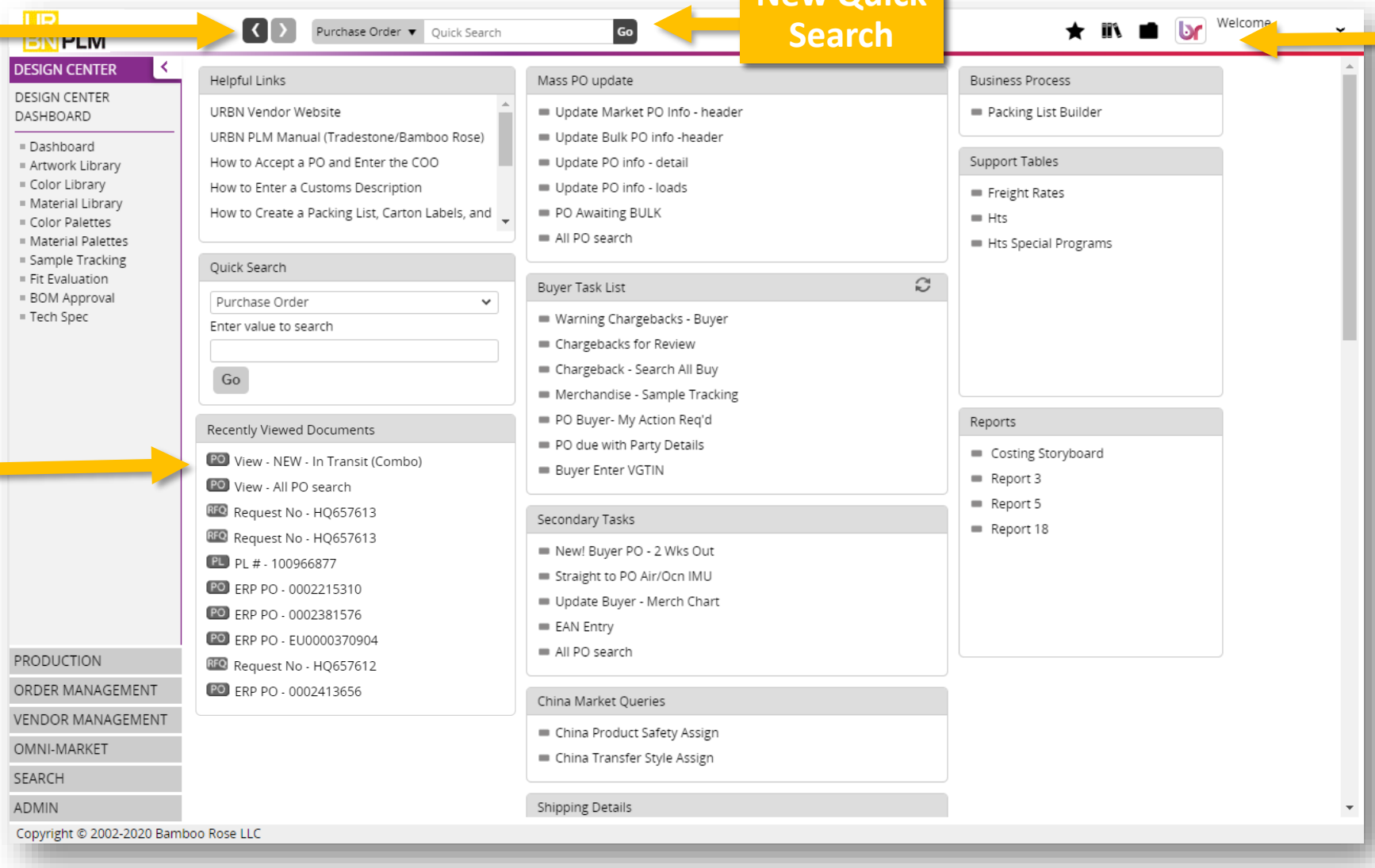
- What hasn't Changed?
  - All process and rules remain as they do today, with added features for better workflows
  - Packing List, Invoice, BOL screens have not changed
  - User Access

Enhanced Navigation

Enhanced Navigation

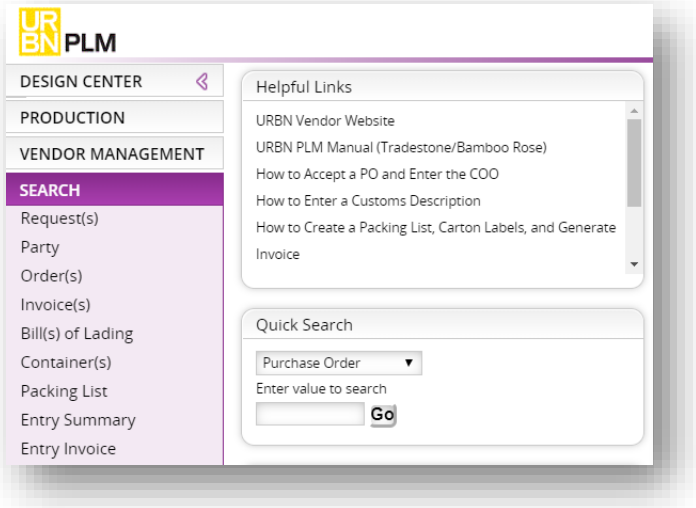
- In 2019R2, there have been some enhancements made to how you navigate
  - New Quick Search:
    - Quick search is now available from every screen allowing you to quickly navigate to a different screen without going back to your main dashboard to search
  - Back/Forward Button:
    - Users can now go back to previous pages!
    - Users can also go forward to help navigate easily between 2 different screens
    - This new feature also allows users to go back to the last 10 pages viewed as well
  - Recently Viewed Documents:
    - You will now have reference to the recently viewed queries you have viewed
      - This is a great way to find frequently used queries instead of using ctrl + F on your keyboard to search for queries
  - Left Navigation:
    - Users can now access new screens in a more targeted search with advanced search options

Enhanced Navigation: Dashboard



Enhanced Navigation: Quick Search

Before



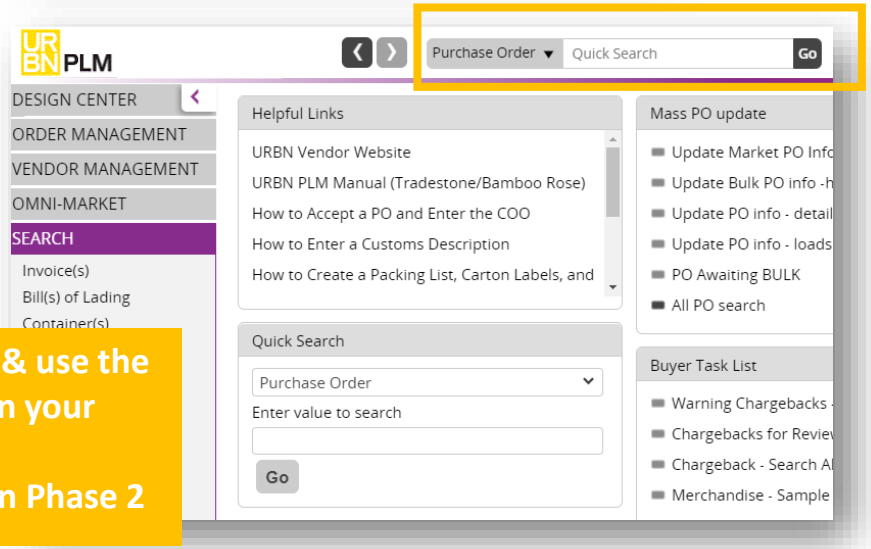
Quick Search is now available at the top on your screen and will be visible from all screens

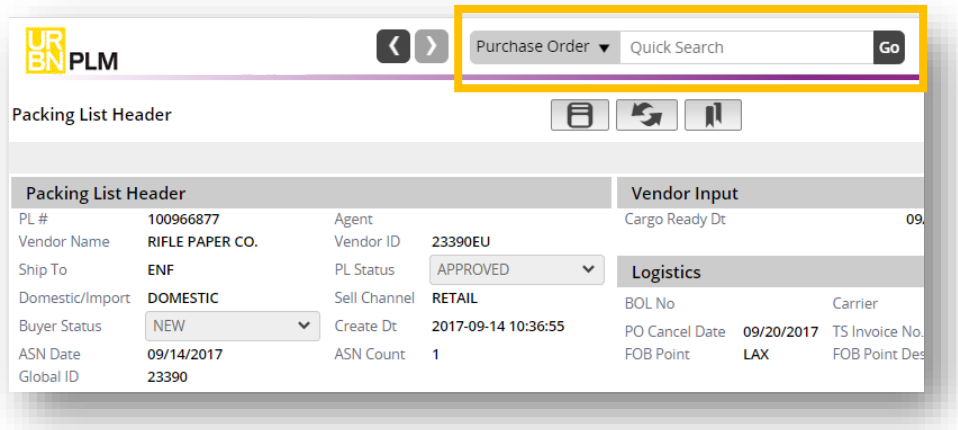
Functionality of Quick Search will work the same as before

- Select from the dropdown what screen you would like to search (Purchase Order, Style, Packing List, etc)
- Type in the exact record you are trying to search and click 'Go'

This allows for easy navigation to another area without going back to your dashboard to search

After



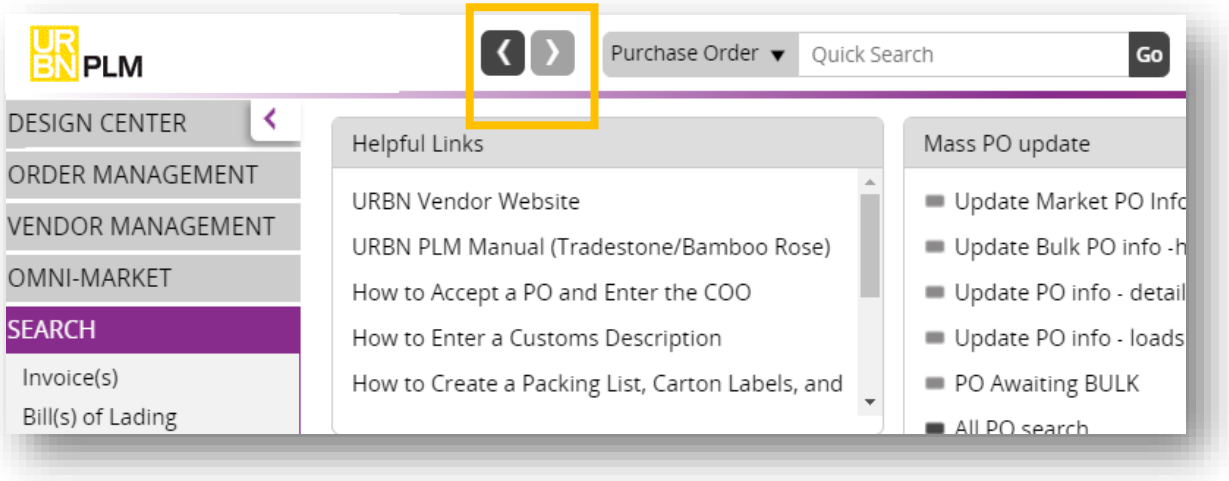


Note: You can still see & use the old Quick Search on your dashboard.
This will be removed in Phase 2

Enhanced Navigation: Back/Forward Button

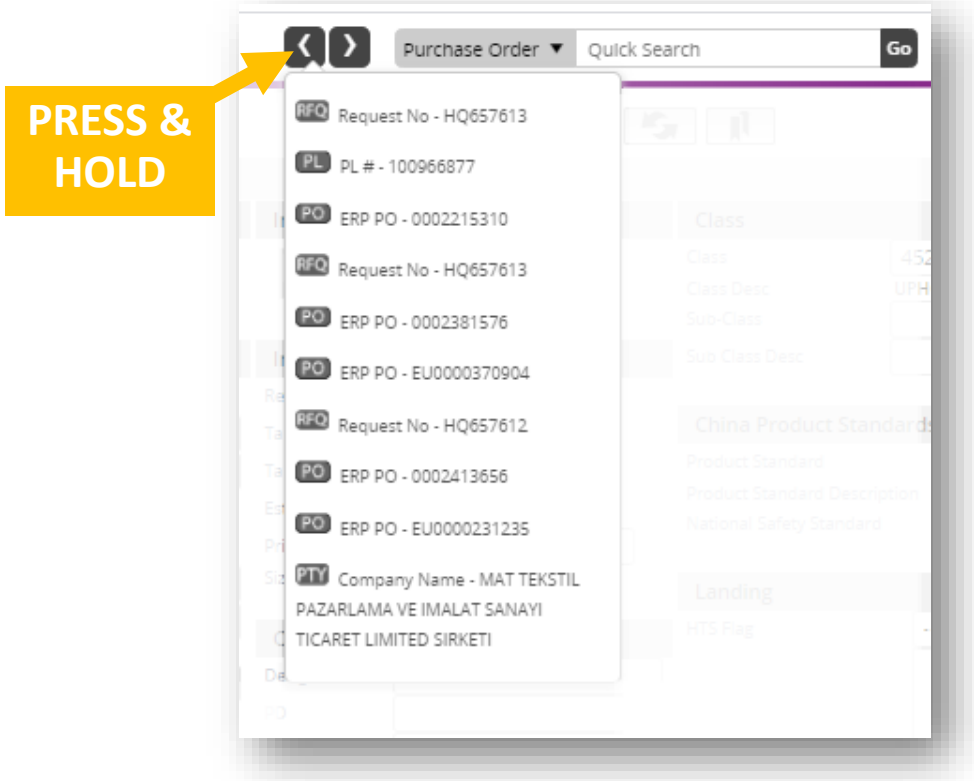
The Back/Forward Button is an exciting new feature that was not available previously!

You can go back to the previous screen you were on

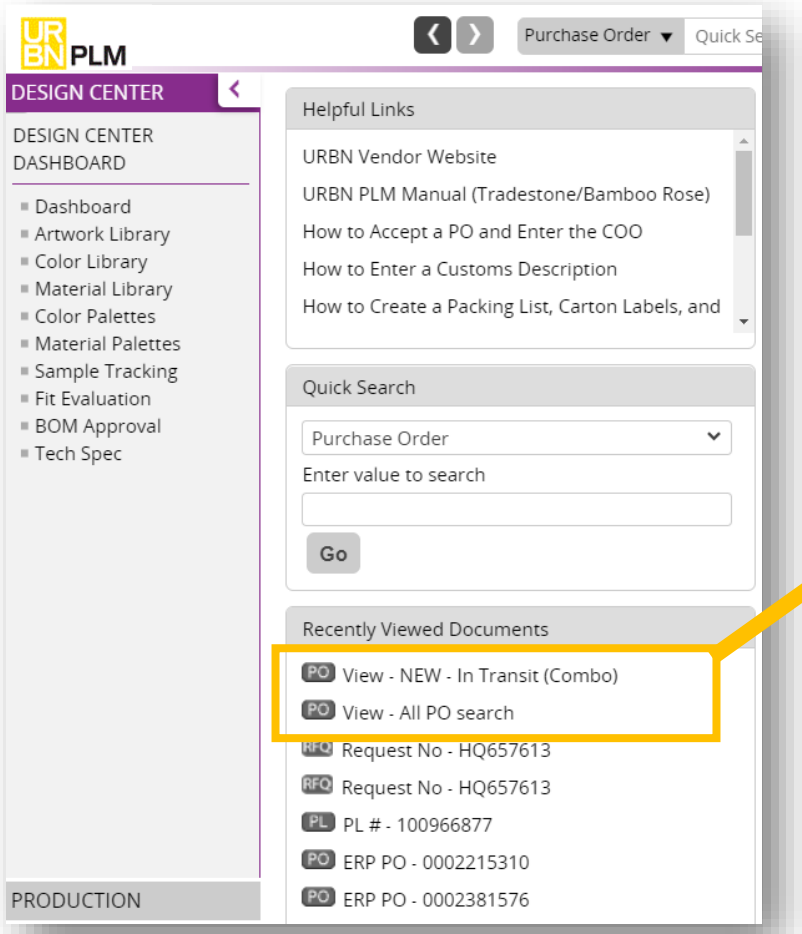


Note: Back/Forward Button will always bring you back to the Overview Page of a Tabbed Screen

If you press and hold the Back or Forward button you can see a history of records and jump directly to a specific screen



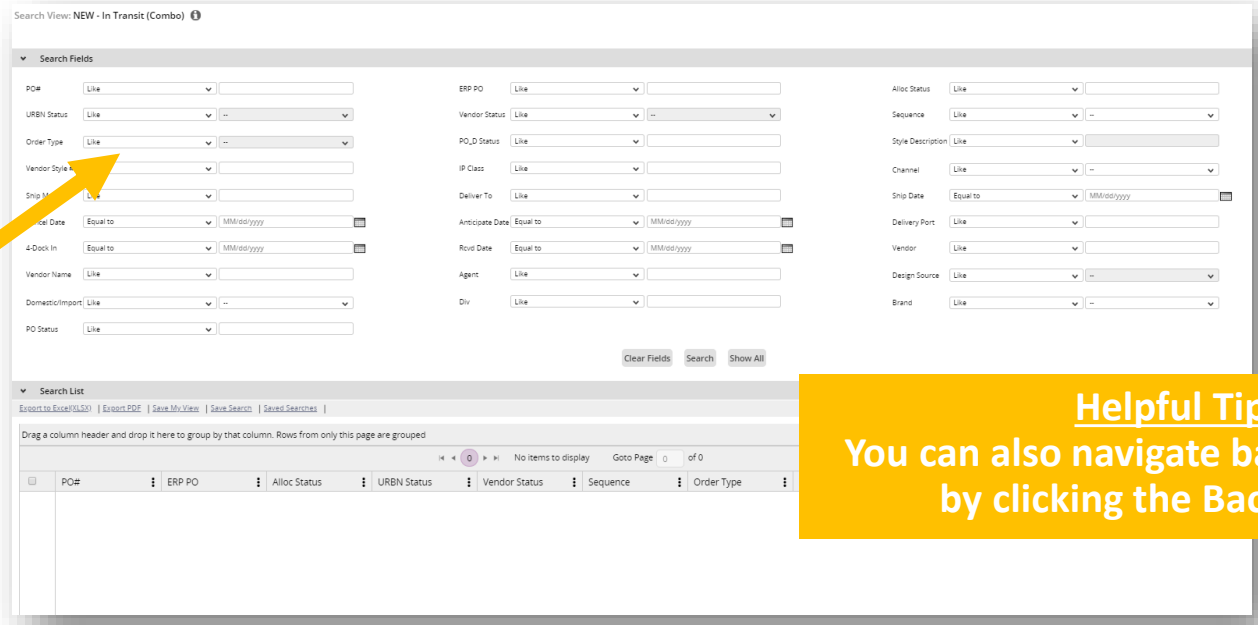
Enhanced Navigation: Recently Viewed Documents



Recently Viewed Documents now shows recently view queries as well

This is a shortcut to jump back into a query if you navigate out of it

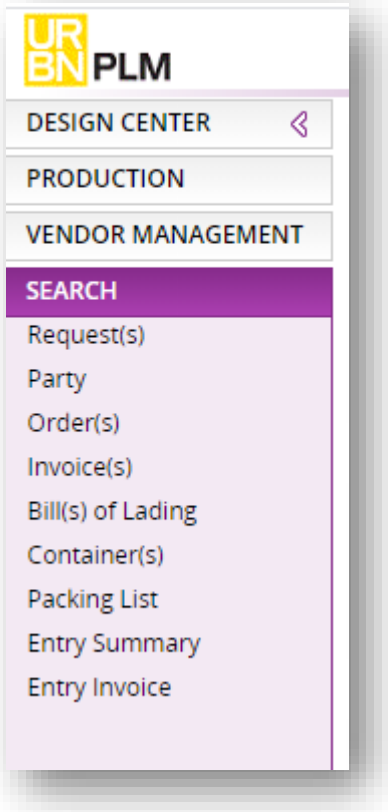
Also to note, Queries in Tradestone are now referred to as ‘Views’



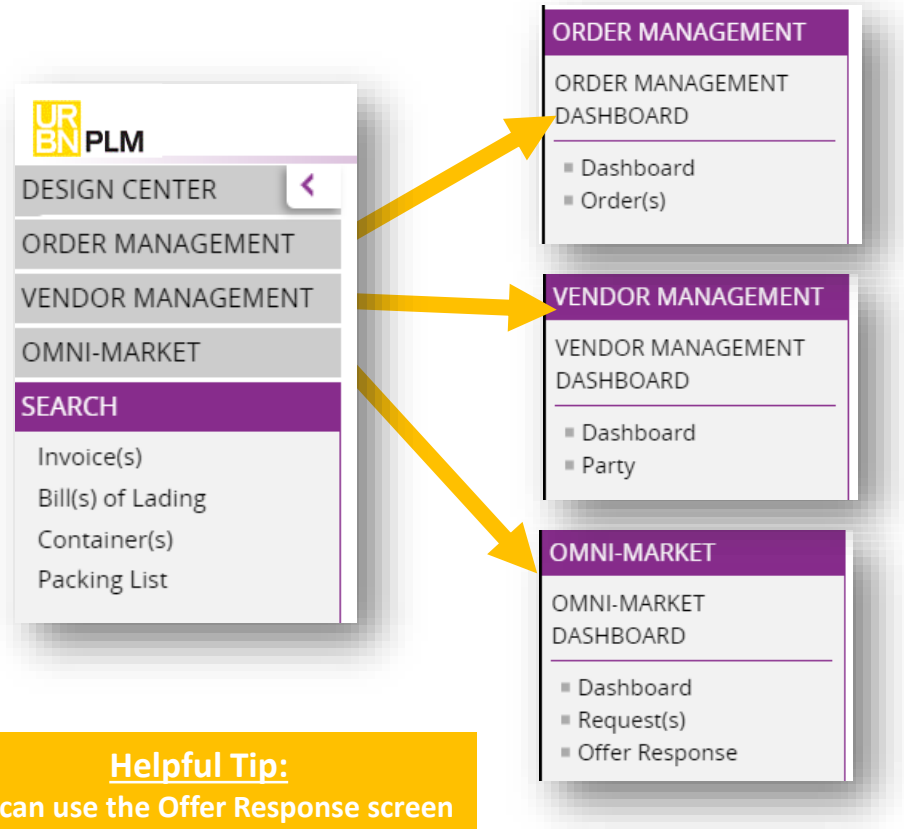
Helpful Tip:
You can also navigate back to a Query by clicking the Back button

Enhanced Navigation: Left Navigation Panel

Before



After



Helpful Tip:
You can use the Offer Response screen to quickly navigate between different offers for a style

Left Navigation has changed slightly.

When searching new screens they will now be found in their own section

- Order Management: Purchase Order(s)
- Vendor Management: Party
- Omni-Market: Request(s) (Style) and Offer

Search section will still be your place to find

- Invoice(s)
- Bill(s) of Lading
- Container(s)
- Packing List

Design Center will remain as it

New Tabbed Screens

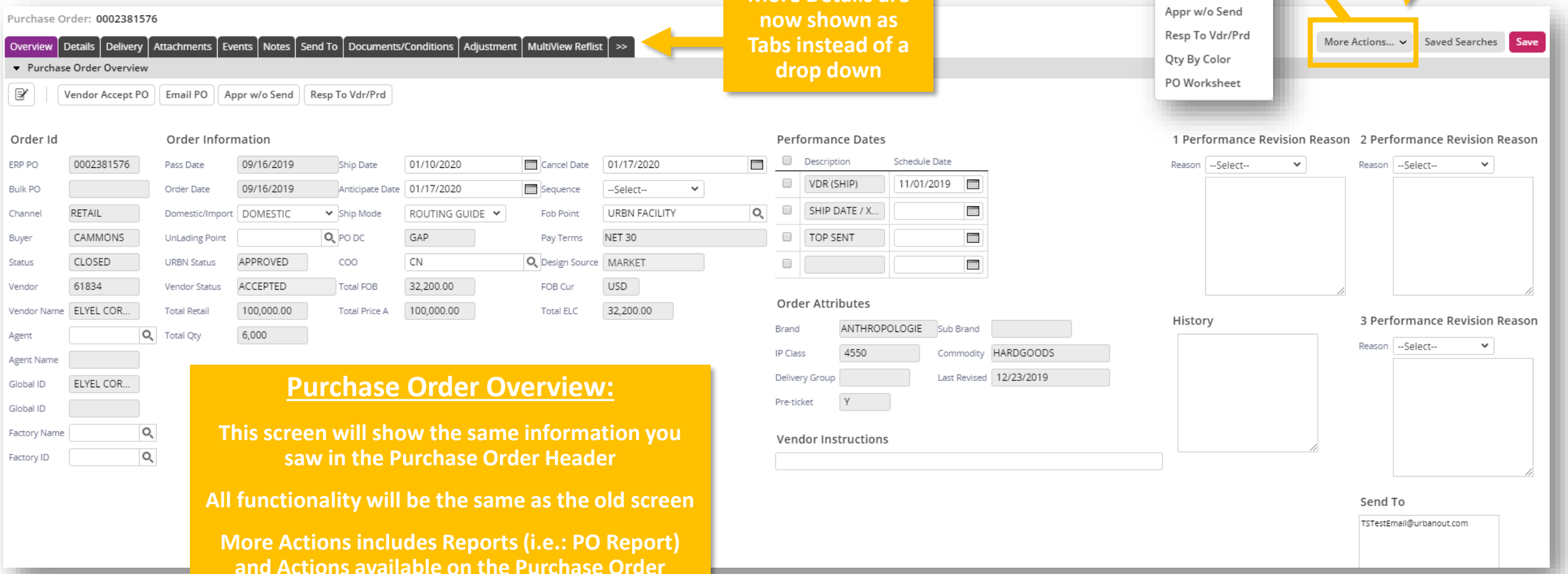
New Tabbed Screens

- In 2019R2 a few screens have been updated help navigate through using tabbed screens, similar to the Tech Spec screen today.

- The following screens have been affected
  - Purchase Order
  - Request For Quote (Style)
  - Offer
  - Party
    - Previously the Party screen was used for Vendor Registration only, but will not be used for all user

- Overview of Changes:
  - ‘More Details’ Drop down has been converted into Tabs along the top to easily navigate through the screen
  - Header information is available on the Overview screen
  - Detail information is available on a separate tab
  - Cost BOM is available to navigate to within the offer (in addition to the current way through Cost BOM on Tech Spec)

New Tabbed Screens: Purchase Order- Overview



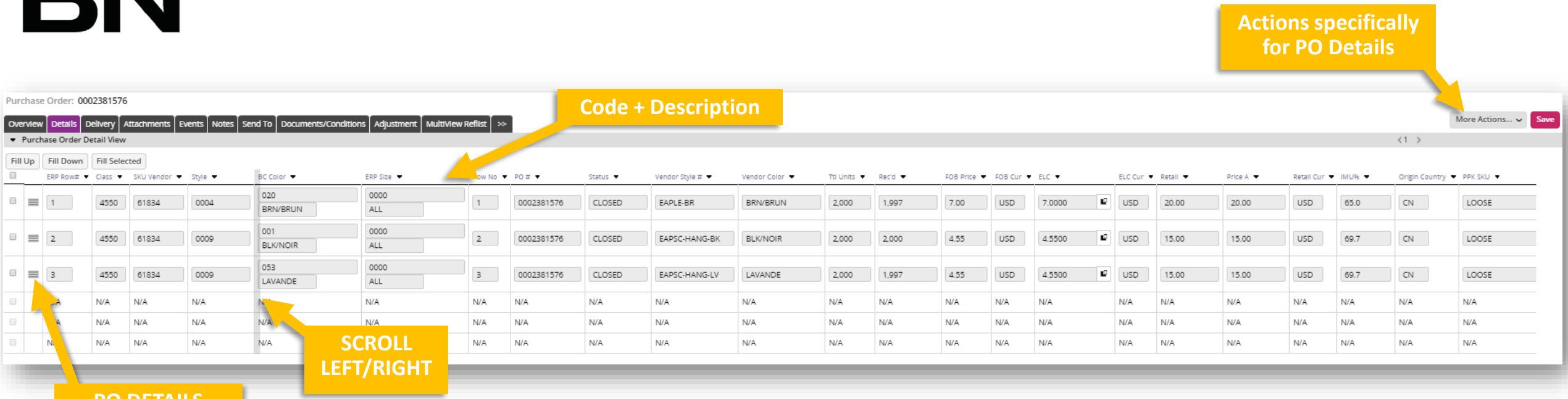
Purchase Order Overview:

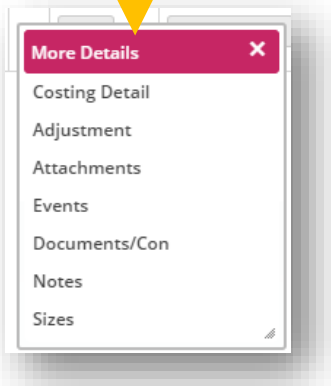
This screen will show the same information you saw in the Purchase Order Header

All functionality will be the same as the old screen

More Actions includes Reports (i.e.: PO Report) and Actions available on the Purchase Order Header

New Tabbed Screens: Purchase Order- Details

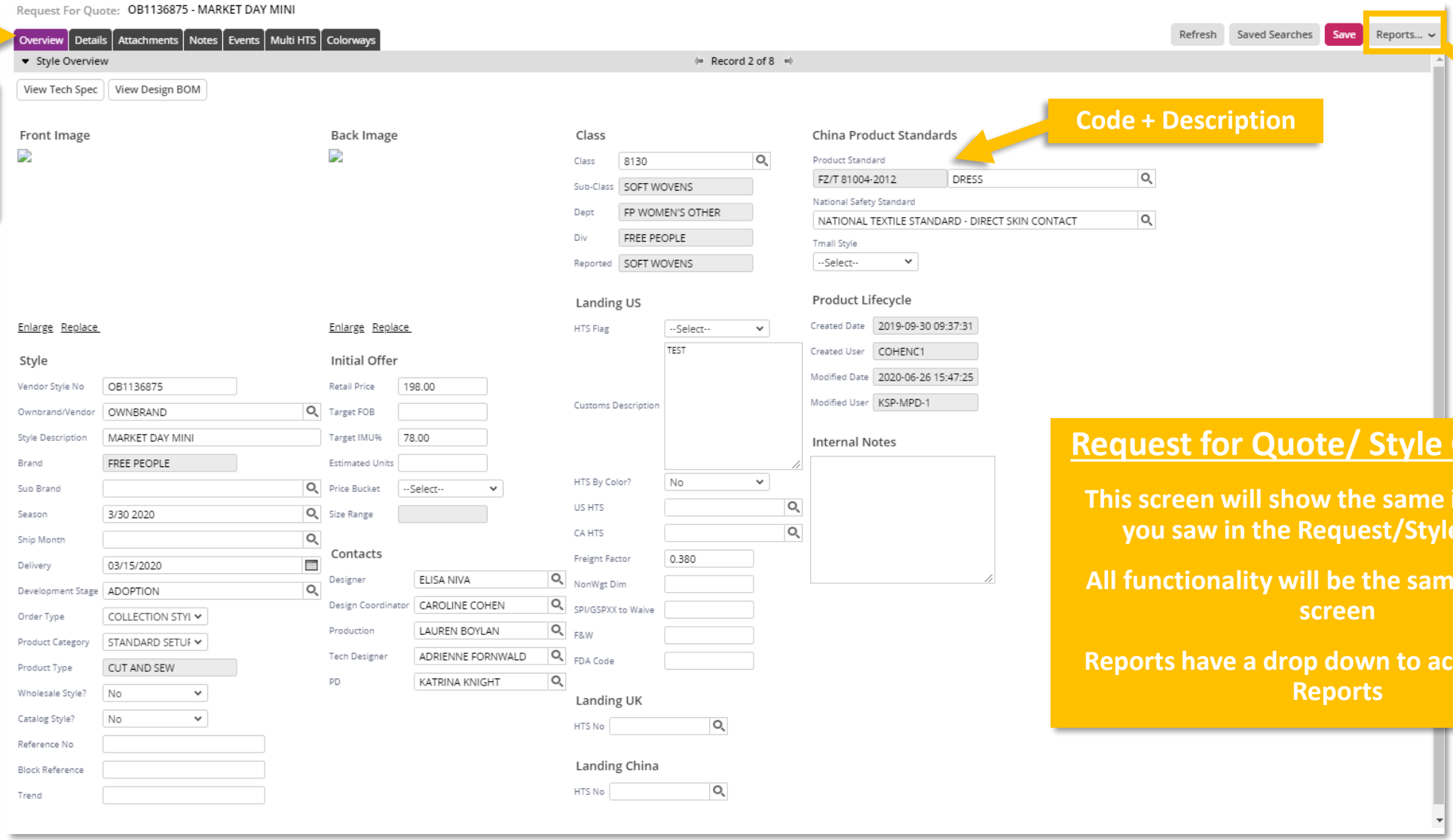




- This screen will show the same information you saw in the Purchase Order Details
- Use the vertical grey scroll bar to view left/right
- More Actions are customized on each screen to Actions for the detail only
- PO Details specific tabs are found in the ☰ icon all the way to the left.
  - When you click there, you will see PO Details More Details
- Some areas you will see stacked text- this now includes both the Code & Description for reference

New Tabbed Screens: Request for Quote (Style)-Overview

More Details are now shown as Tabs instead of a drop down



Request for Quote/ Style Overview:

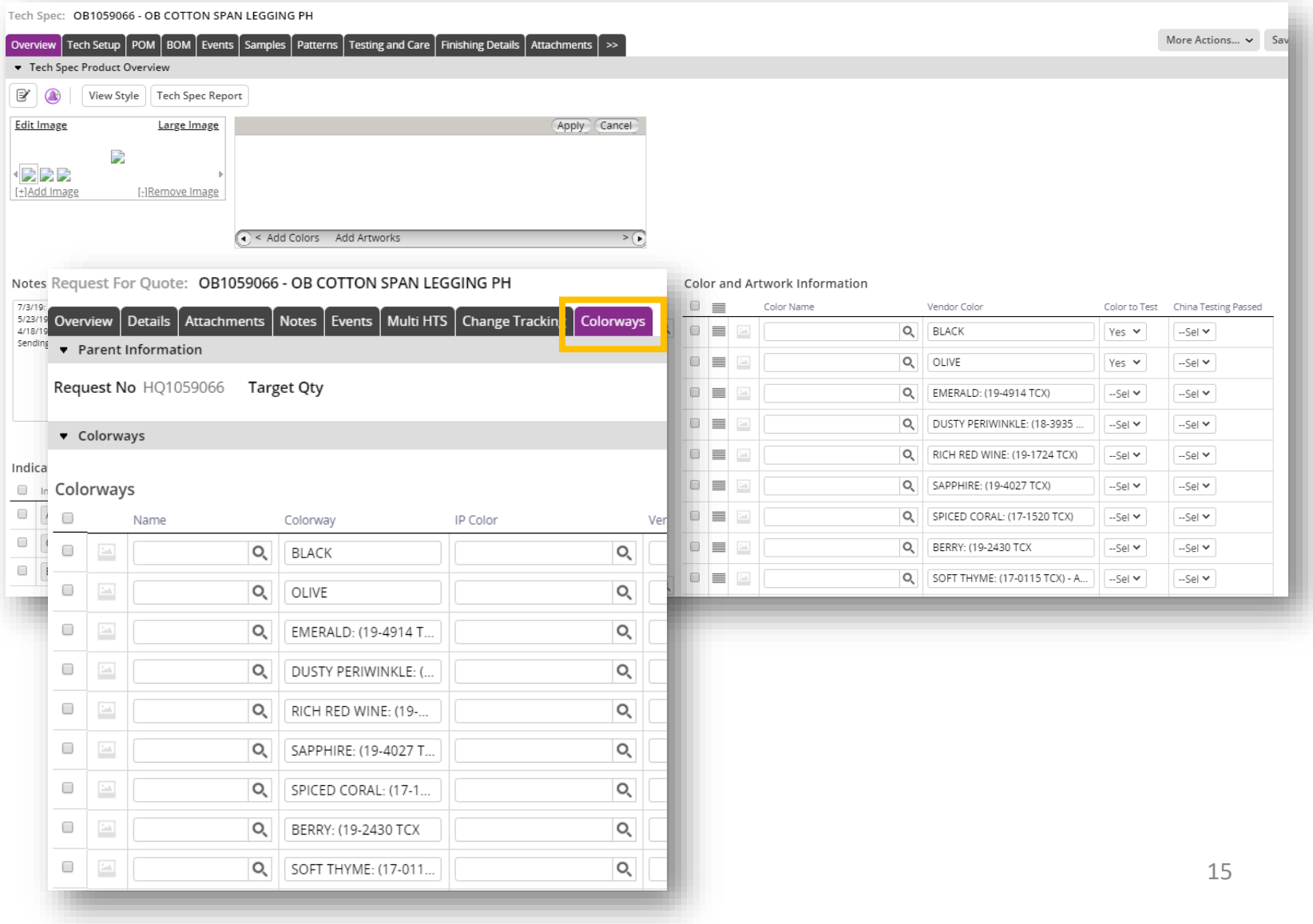
This screen will show the same information you saw in the Request/Style Header

All functionality will be the same as the old screen

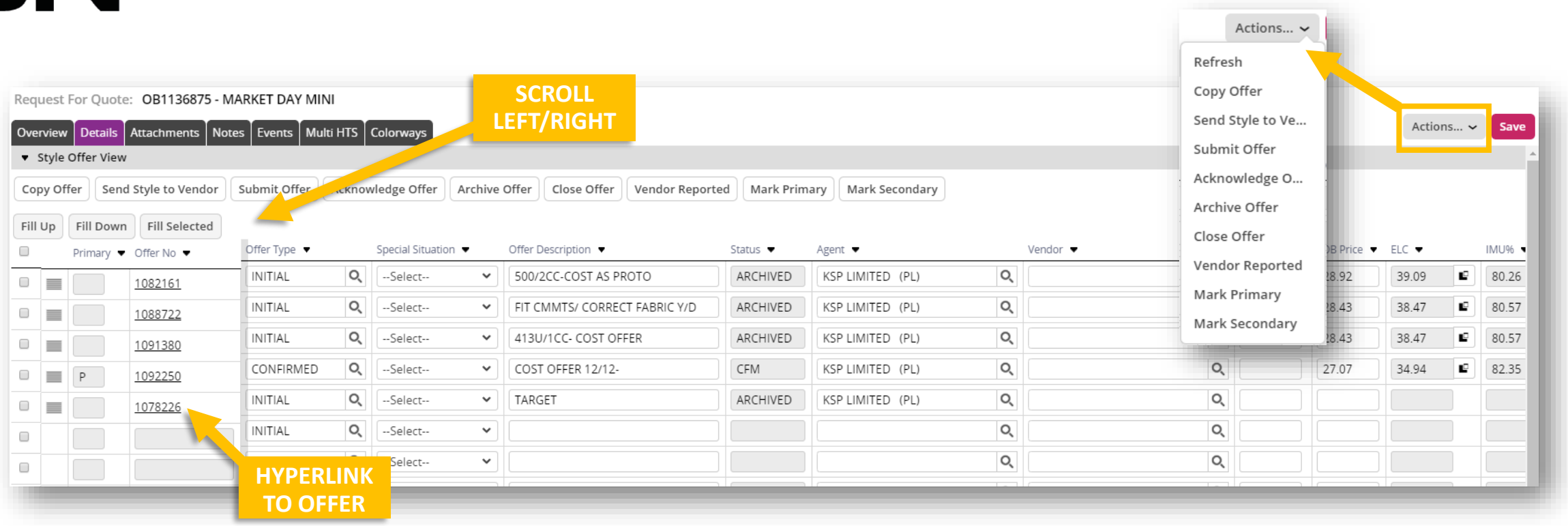
Reports have a drop down to access the MS Reports

New Tabbed Screens: Request for Quote (Style)- Colorways

- Colorway is now available on both Tech Spec & Request for Quote (Style) Screen
- On Request for Quote, Colorways can be found on the Tab Labeled “COLORWAYS”
- Colorways are needed for integration with TXT, so users can now enter this information without creating Tech Spec
  - This will be helpful for HOME users

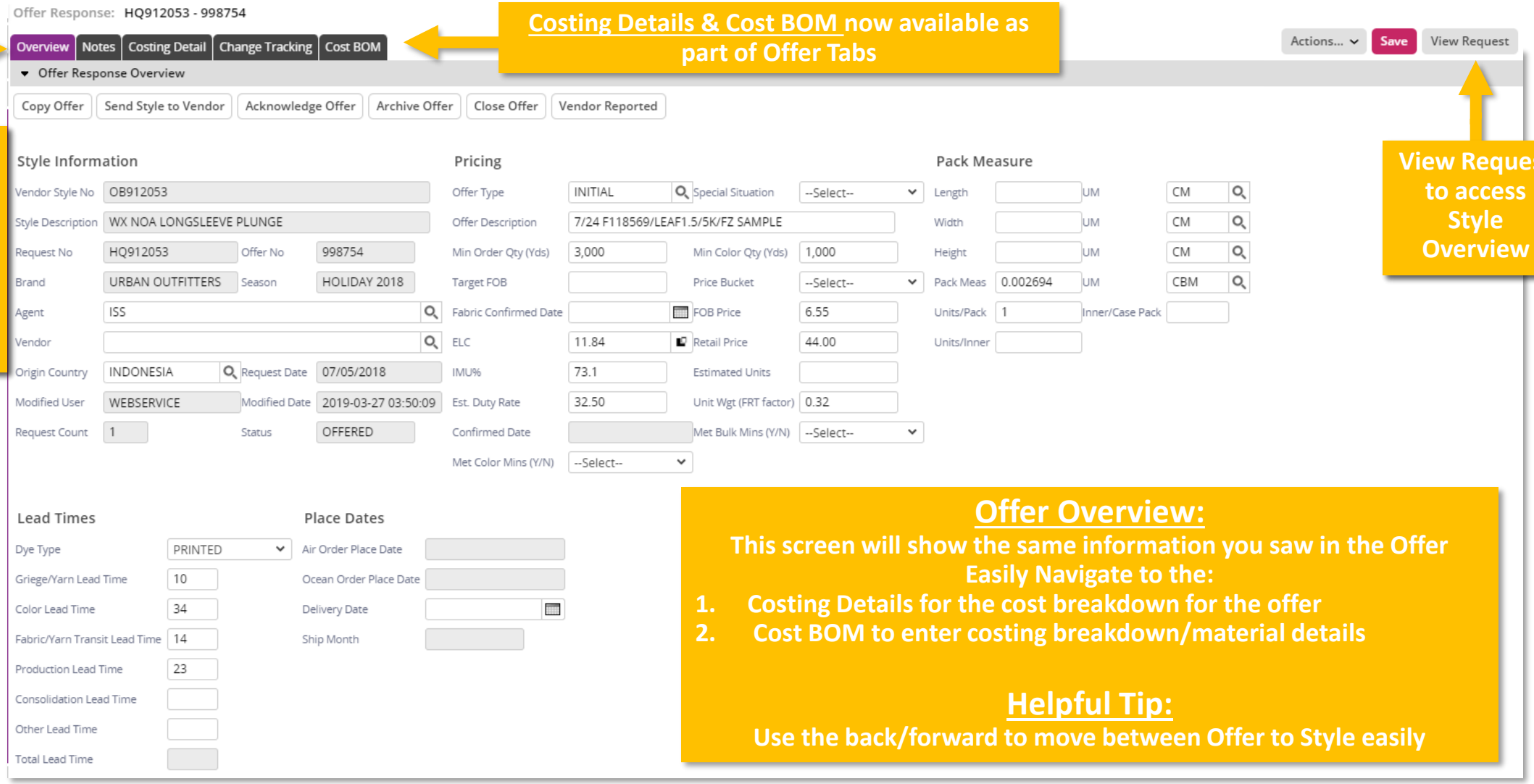


New Tabbed Screens: Request for Quote (Style)- Details (Offer)



- This screen will show the same information you saw in the Style Details/Offer on your main Style screen
- Use the vertical grey scroll bar to view left/right
- Actions are customized on each screen to Actions for the detail/offer only
- Hyperlink is available to jump directly into the Offer

New Tabbed Screens: Offer



Costing Details & Cost BOM now available as part of Offer Tabs

More Details are now shown as Tabs instead of a drop down

View Request to access Style Overview

Offer Overview:

This screen will show the same information you saw in the Offer
Easily Navigate to the:

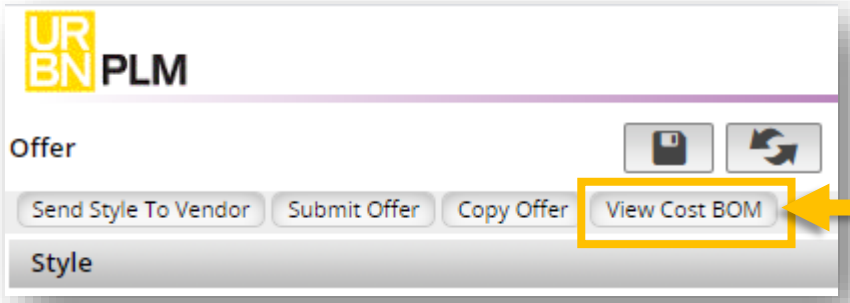
1. **Costing Details for the cost breakdown for the offer**
2. **Cost BOM to enter costing breakdown/material details**

Helpful Tip:

Use the back/forward to move between Offer to Style easily

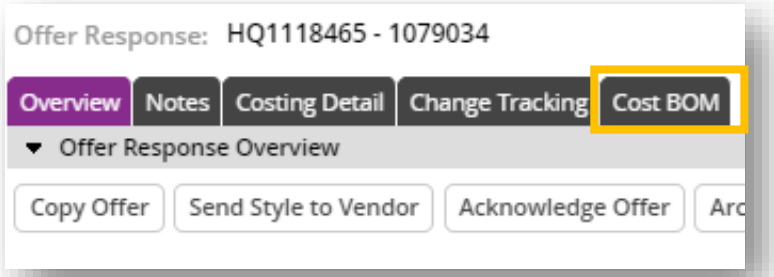
New Tabbed Screens: Offer- Cost BOM

Before

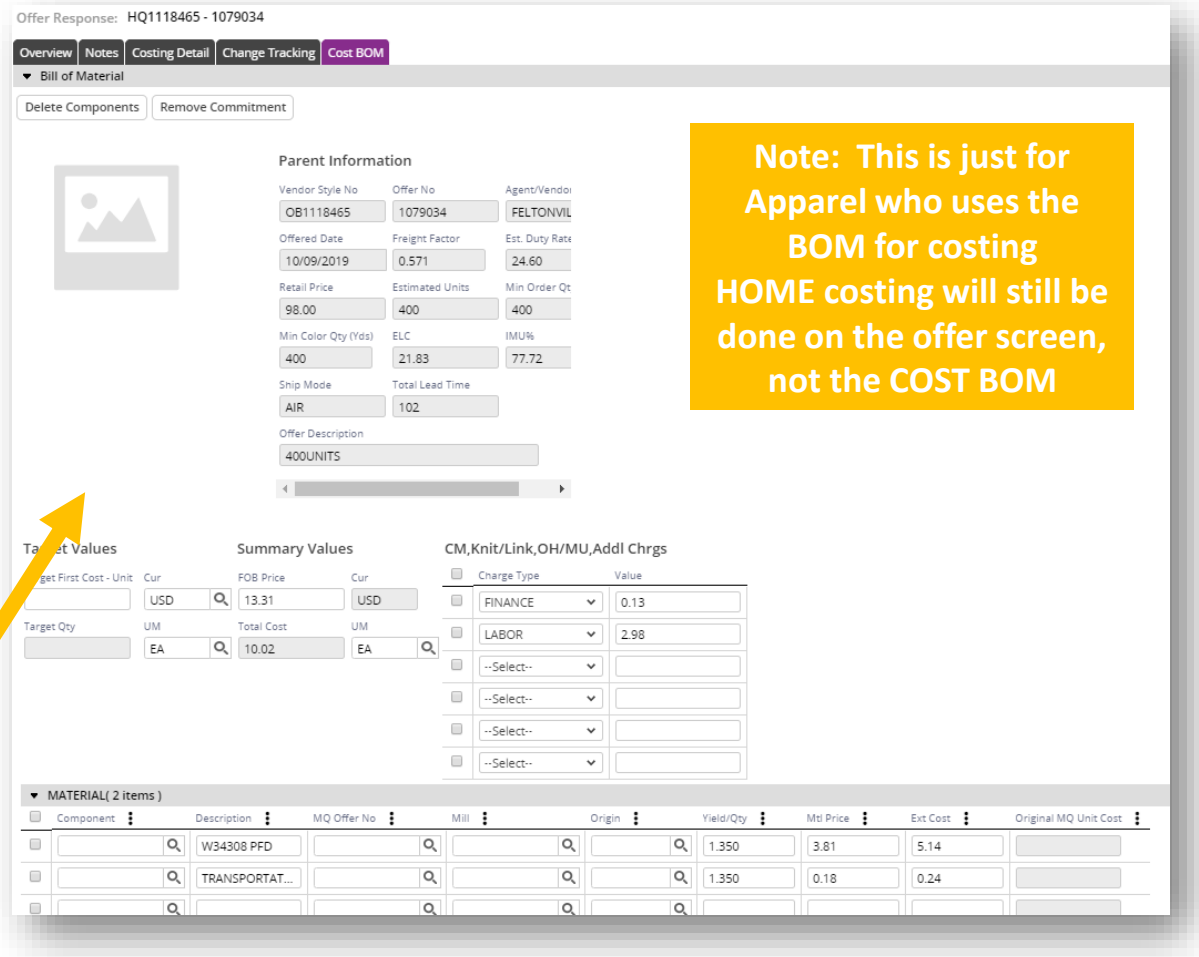


NAVIGATE TO TECH SPEC

After



STAY ON OFFER



Note: This is just for Apparel who uses the BOM for costing HOME costing will still be done on the offer screen, not the COST BOM

- COST BOM on Tech Spec & Offer page are the same.
- If you make a change in 1 screen, it will be reflected in the next screen

New Features

New Features

New Tradestone Features

- New ways to attach using Drag & Drop features via Bullseye and new attachment
- Advanced Search options for all new Tabbed Screen views
- Saved Search in queries & Advanced Search
- Change Tracking Counter
- Material Library- Copying Records
- Code + Description now available on screens and in queries

From the Tradestone Change Request Back Log:

- Itemized Smart Copy (TS-1015)
- My Views (TS-895)

New Feature: Bullseye Drag & Drop (Request)

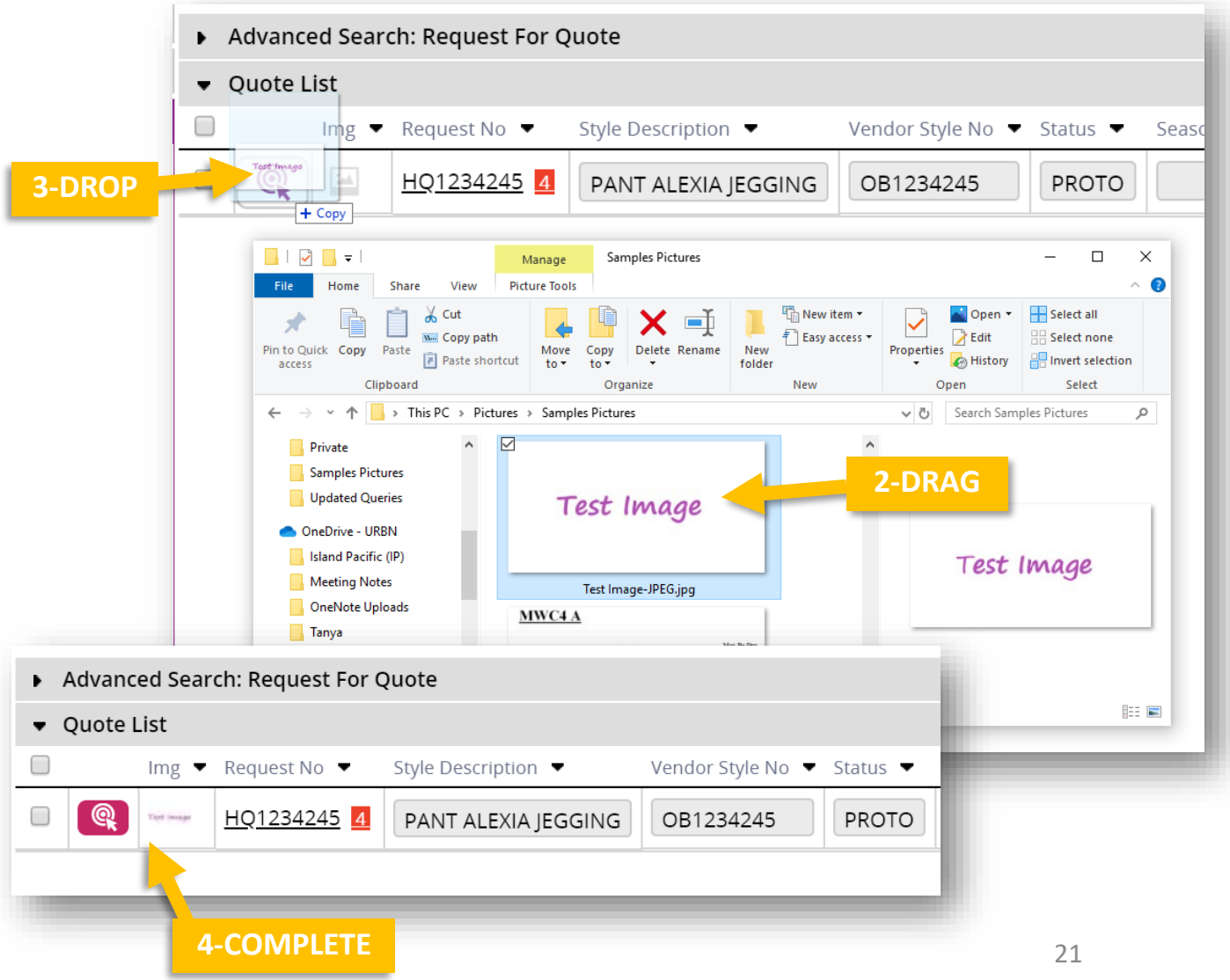
Request (Style) search screen now has a quick way to add attachments through the Bullseye Drag & Drop

You will see a Bullseye Drag & Drop icon where you can simply drag and drop a file from your computer to add to the Style.

To use the Bullseye:

1. Find your file saved on your computer
2. Drag the file from your computer directly over the bullseye. When you see the font turn purple, drop the file
3. It will take a few seconds, but the attachment will save automatically. No need to click Save
4. The icon will turn purple once complete & you will see the image displayed

Note: Today this will just add an attachment. It will not default to Front/Back Image. In Phase 2 we will look at adding Front/Back Image functionality



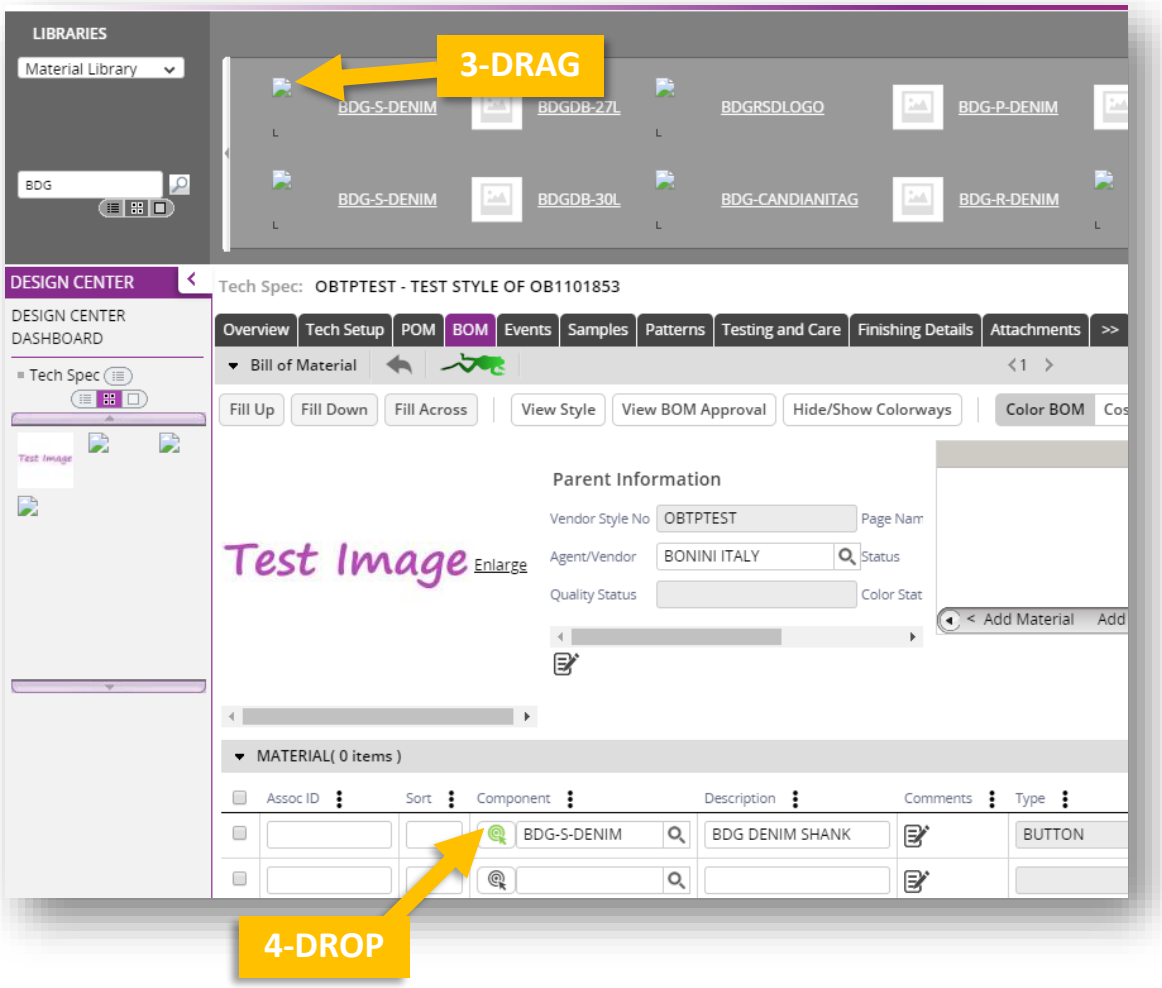
New Feature: Bullseye Drag & Drop (BOM)

The Bullseye Drag & Drop feature is available in the BOM You will see a Bullseye Drag & Drop icon where you can simply drag and drop a file from the Color, Material and Artwork library to add to the BOM.

To use the Bullseye:

1. Choose to open your library at the top
2. Select from the drop down for Material Library & search for your material
3. Drag the image from the library directly over the bullseye and drop the file. The Bullseye font will turn Green.
4. Click Save on the Screen
5. Repeat the same process for the Color Library

Note: You can still use the Box to add materials, colors, artwork. This will be removed in Phase 2



New Feature: New Attachment Pop Up

Add Attachment on Tech Spec Overview has a new look

- Adding Attachments will remain as is on all other tabs

When clicking **[+] Add Image** you will see a new pop up

You can drag and drop you file from your computer

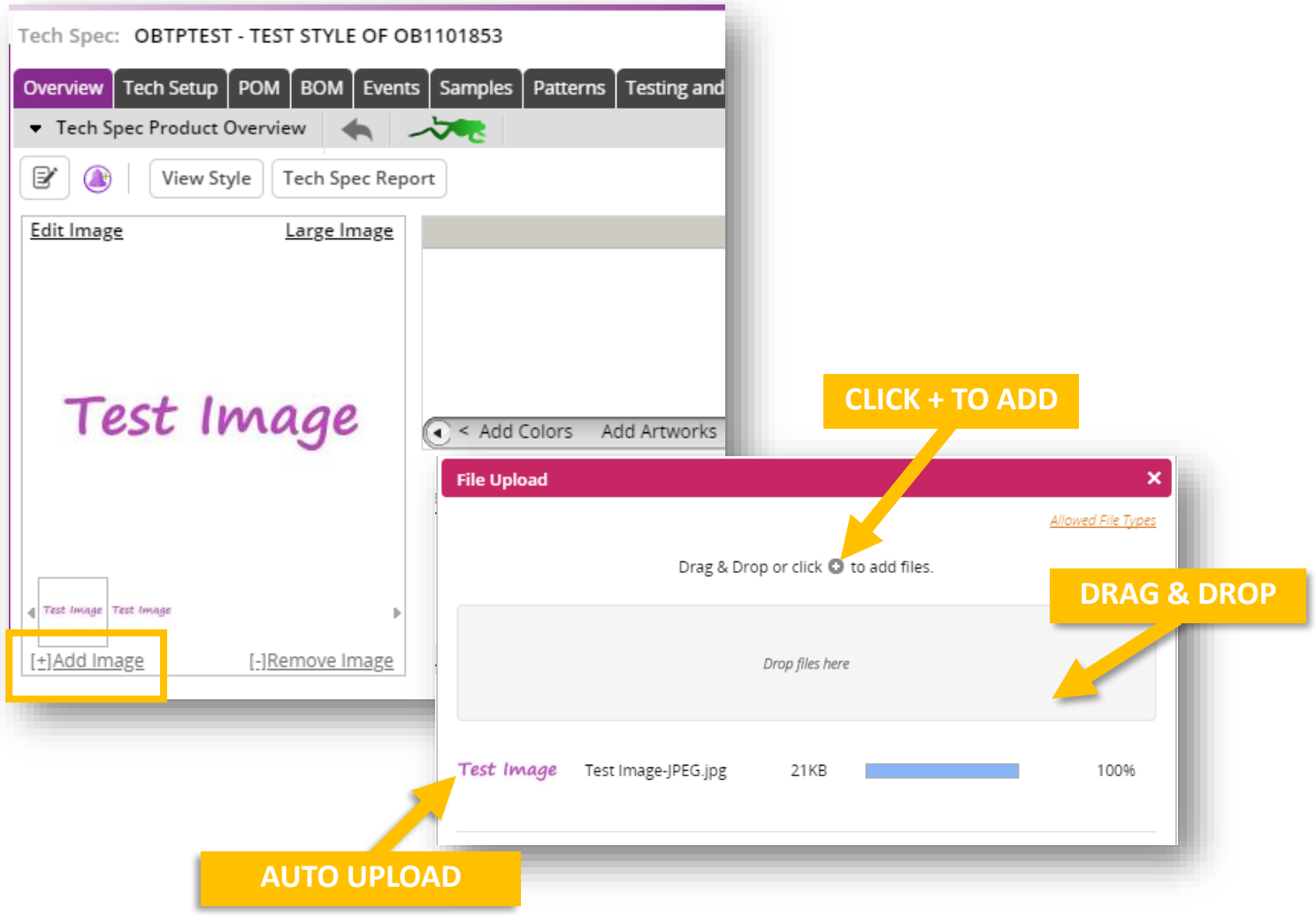
Or click the + button to attach images

The file will now auto upload into Tradestone without having to click Save. Once the % reaches 100%, your attachment has been added

REMINDER:

Acceptable file types: ai, cxf, doc, docx, dsf, dwg, dxf, gif, htm, iba, jpeg, jpg, mdl, mov, pdf, ppt, qtx, tif, tiff, txt, vet, wmf, xls, xlsx, xml, xsd, xsl.

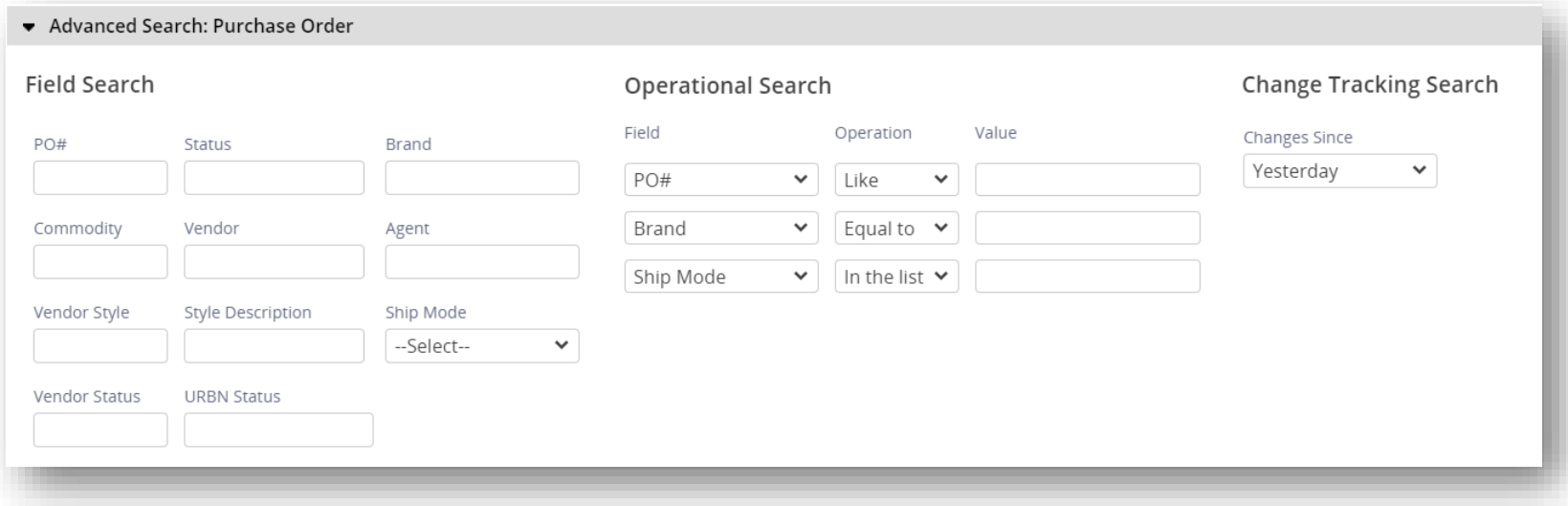
Make sure you do not have any special characters in the file name to avoid issues viewing and generating onto Tech Spec Reports



New Feature: Advanced Search Options

New Screens in 2019R2 offer more advanced ways to search

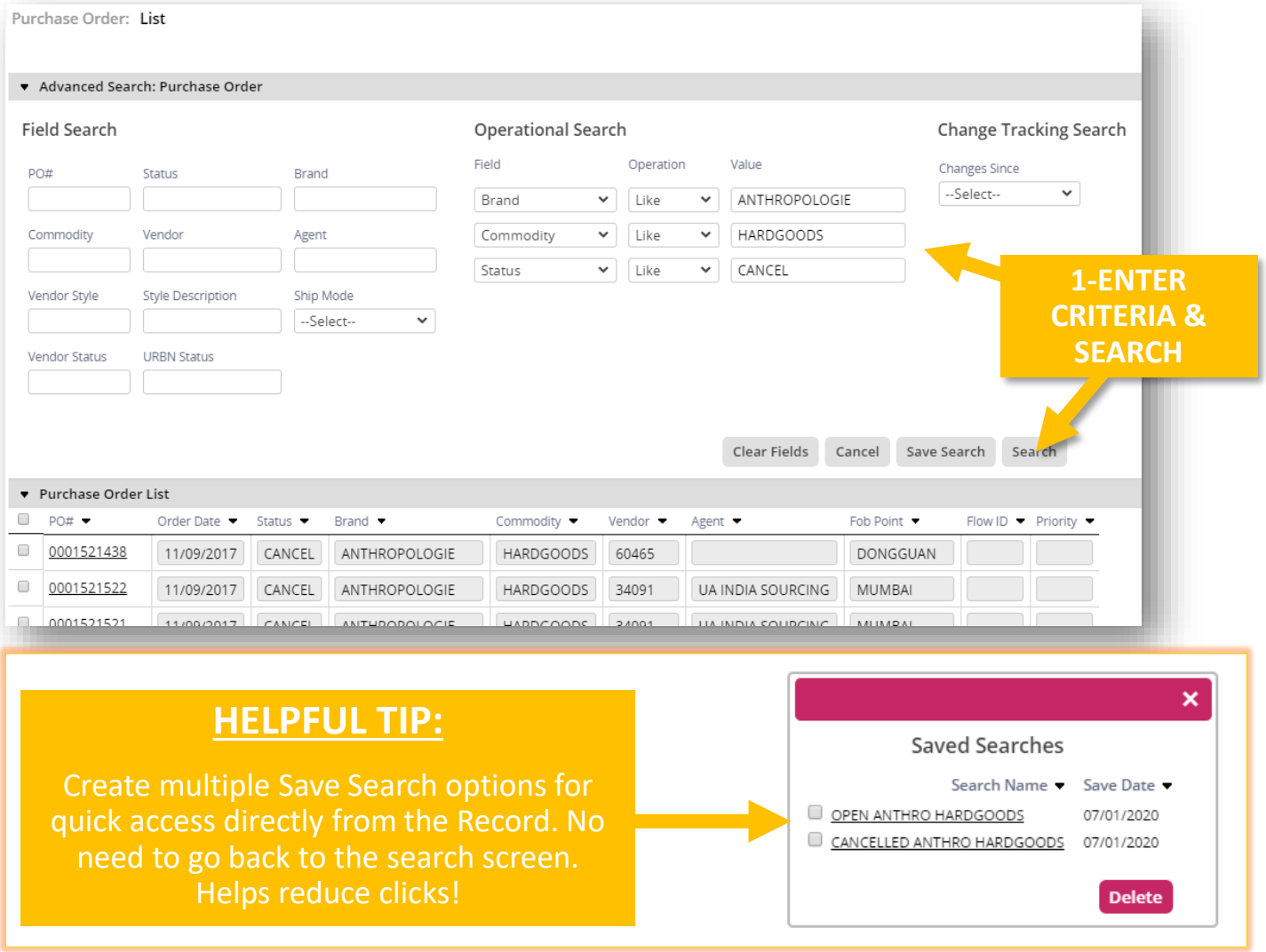
- Field Search
  - Search using select key fields to search
- Operational Search
  - Search using select fields to search, with the added feature of the Operation (like, not like, equal to, not equal to, etc)
  - Operational search is similar to search filters within queries today
- Change Tracking Search
  - Search based on change tracking
  - Search records that have changed within the last day, two days, week, or month
- All Advanced Search options can be used combined or individually



HELPFUL TIP:

Use Saved Search to create specific search criteria using the new advanced search tools

New Feature: Saved Search



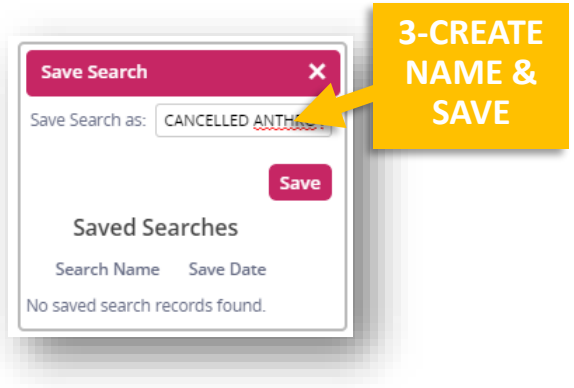
HELPFUL TIP:

Create multiple Save Search options for quick access directly from the Record. No need to go back to the search screen. Helps reduce clicks!

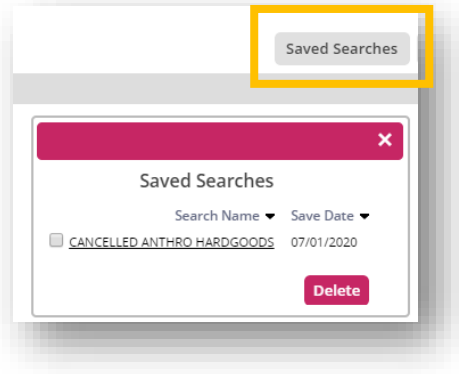
Saved Search is a quick an easy way to jump back to a previous or frequently used search criteria

To create a saved search:

1. Enter Search criteria & Search
2. Click **Save Search**
3. Name your 'Saved Search'
4. Click Save



You can now access Saved Search options where you see SAVED SEARCH in the document

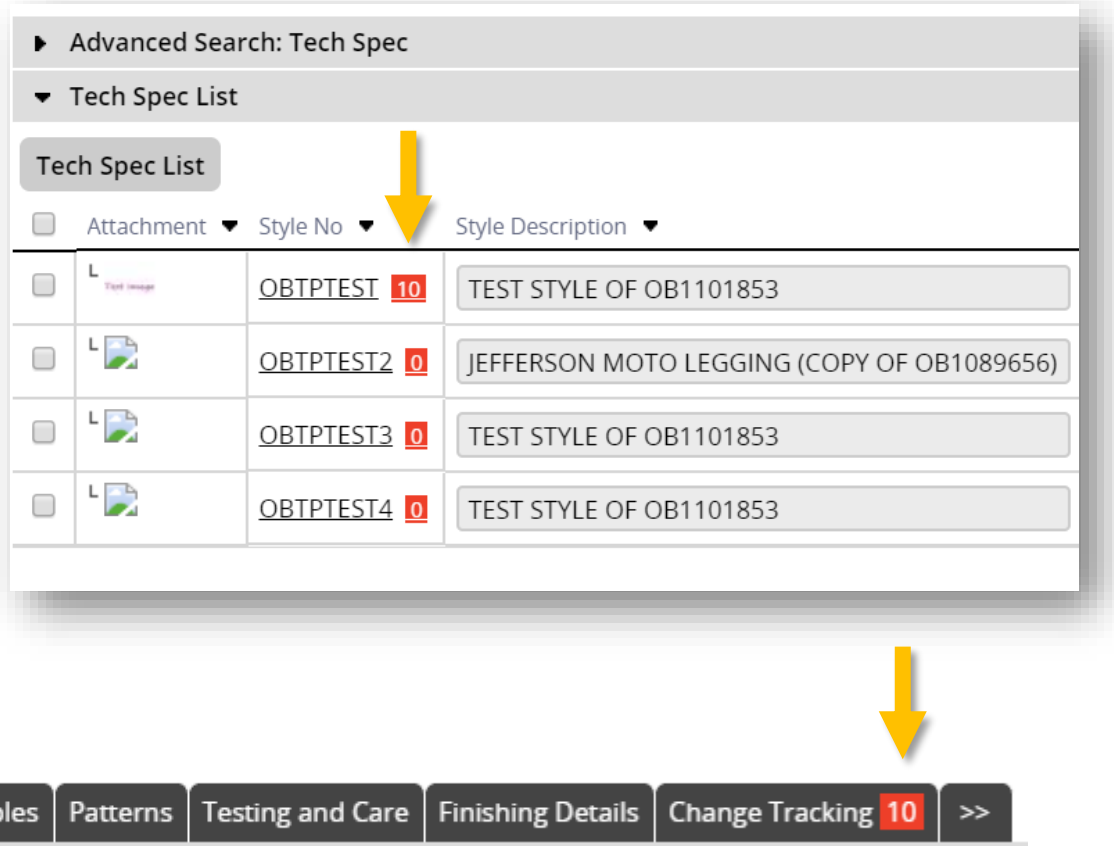


New Feature: Change Tracking Count

Change Tracking feature of displaying # of changes has been available on the Tech Spec, but is now available to all tabbed screens

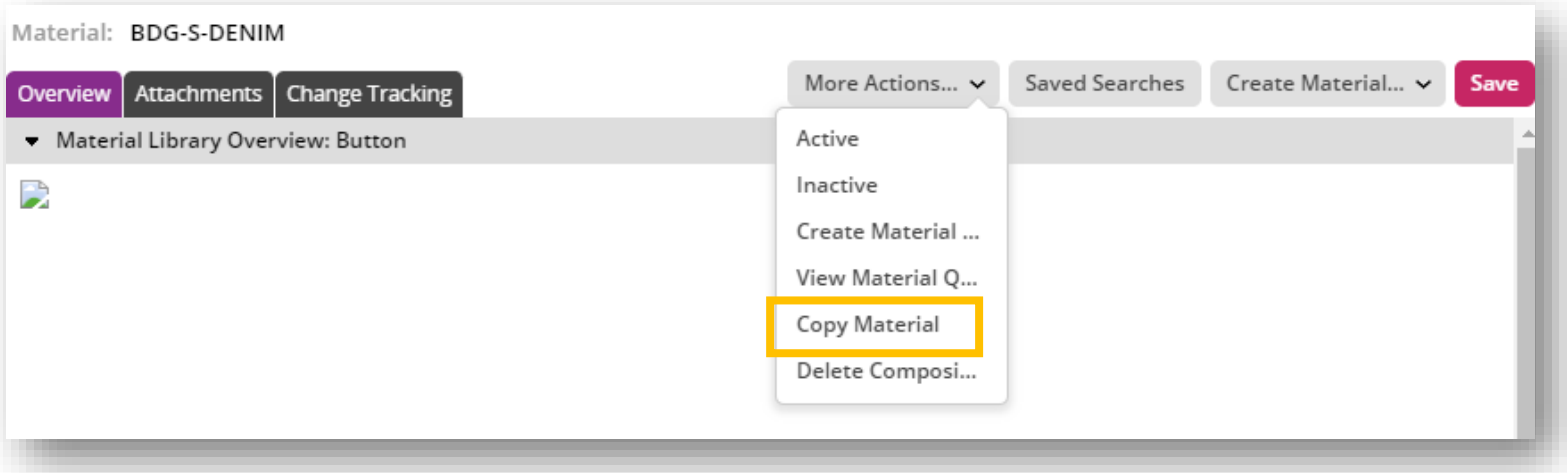
You will see a red # next to the style # on search screens or on the Change Tracking Tab as an indication of changes since last viewed

This is just information. No need to clear the count



New Features: Copy Material Record

- In Material Library, you can now copy an existing material to a new record
- Go to MORE ACTIONS and select Copy Material
- You can copy all information from the record
  - Overview
  - Attachments



New Features: Code + Description- Screens

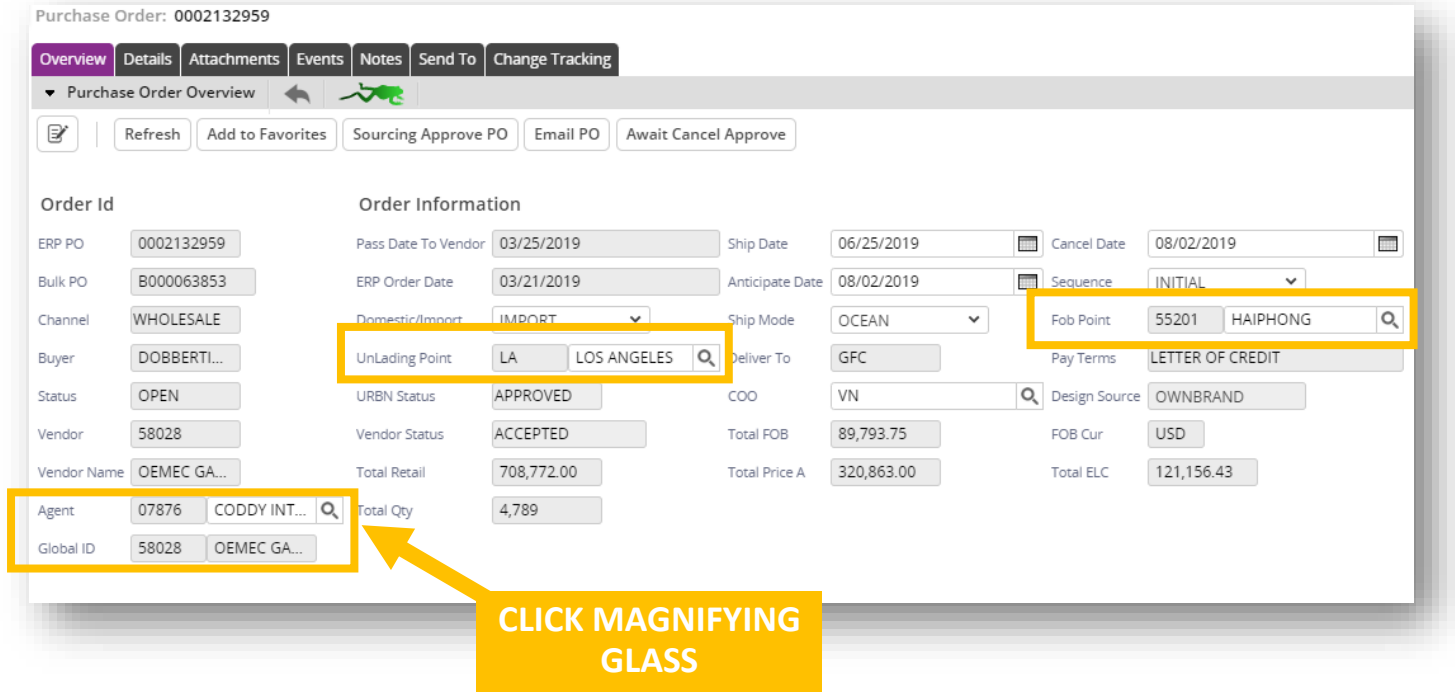
Fields that come from Support tables in Tradestone with Code and Description will now show both in a single row

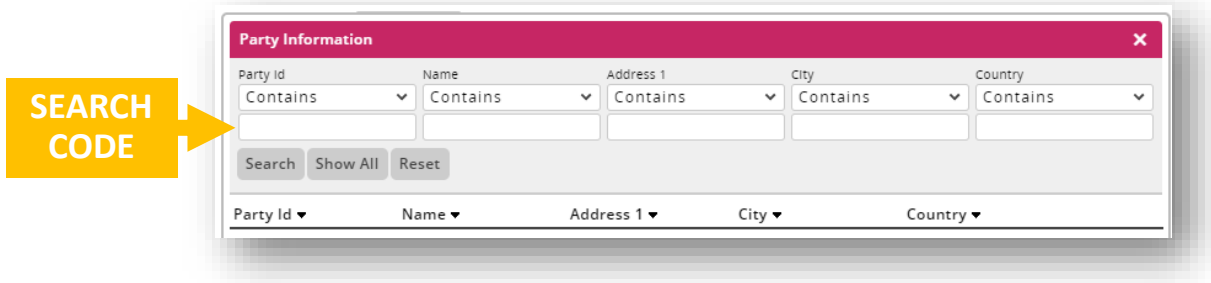
Screens:

- Screens will now show both. Description will be searchable and once selected, both code & description will display
- Description will be used for the type ahead
- If you want to search by Code, click on the magnifying glass and search the Code

Fields include:

Class	Agent (PO)	Agent ID (Party)
Subclass	Global ID (PO)	
Dept	Manufacturer (PO)	
Div	FOB Point (PO)	
Reported	Lading Point (PO)	
Product Standards	Unlading Point (PO)	



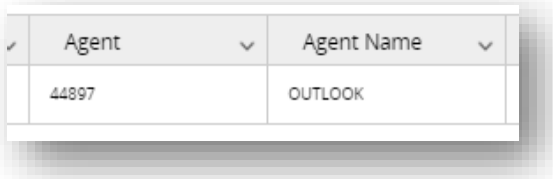


New Features: Code + Description- Queries

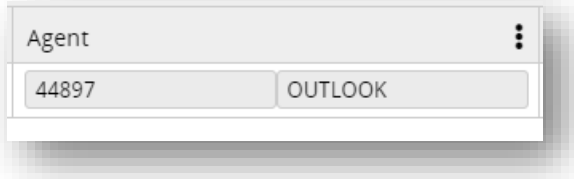
Search:

- Field are now searchable by both code & description
  - This adds flexibility in searching within one field

Before

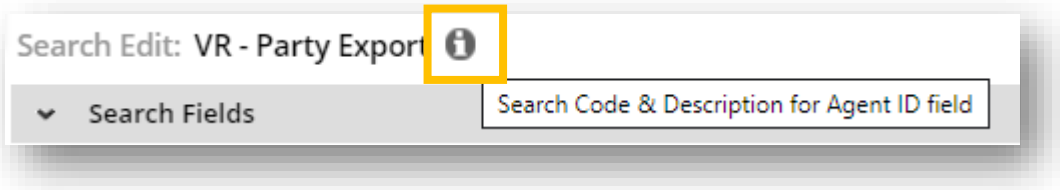


After



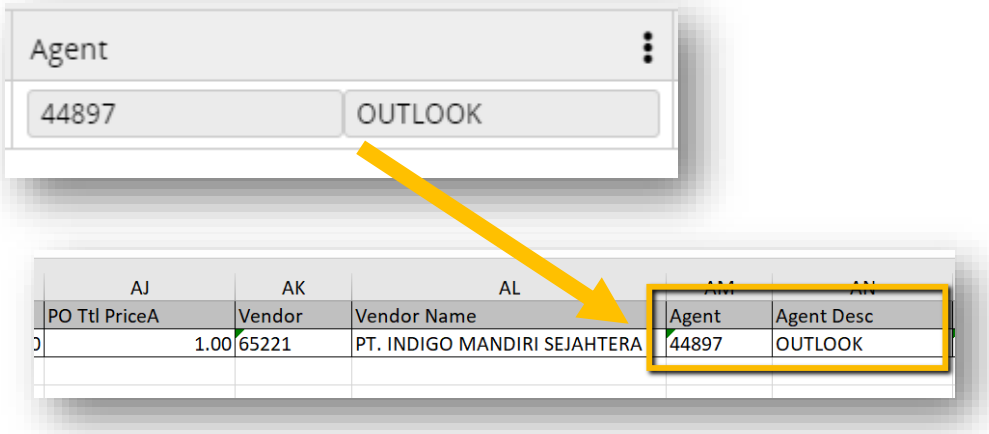
On Screen:

- Queries will now show both code & description in a single field
- These fields will be listed in the Query Description (the ℹ icon next to the Query Name)



Exporting to Excel:

- When you export, the code and description will be displayed in 2 separate columns
  - This adds the flexibility to delete if no longer needed after export



New Feature: Tech Spec- Itemized Smart Copy

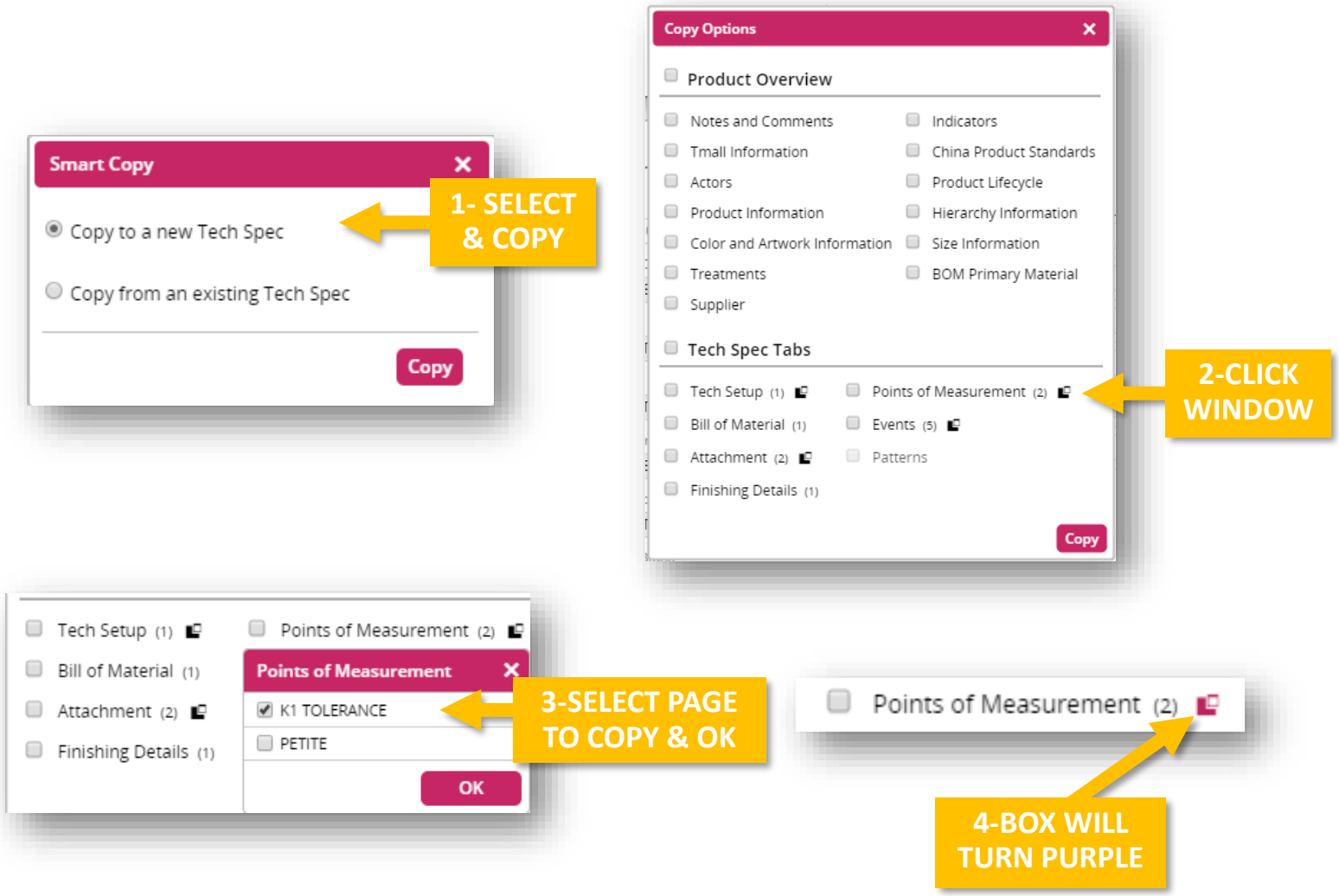
COPY TO A NEW TECH SPEC

User can now select from specific items within each tab to copy when using Smart Copy feature

To use the new feature:

1. Select **Copy to a new Tech Spec**
2. You will see new windows next to Tech Spec Tabs where multiple Pages exist. Click the Window
3. Select the page you want to copy in the new window & click **OK**
4. Window will appear purple if a specific page is selected
5. Users can still check the box to select all pages
6. Click **Copy**

This will now copy only the pages selected



New Feature: Tech Spec- Itemized Smart Copy

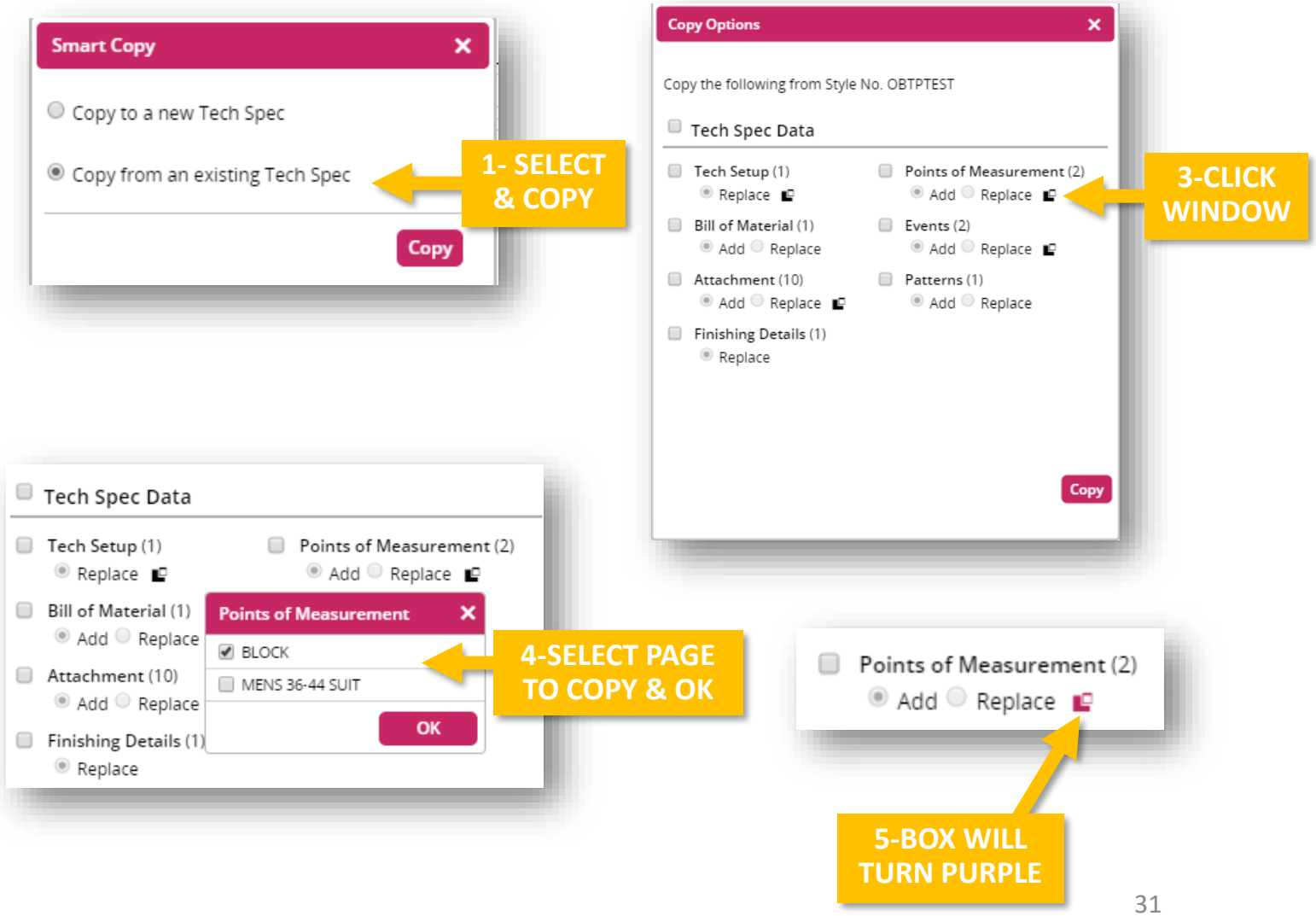
COPY FROM AN EXISTING TECH SPEC

User can now select from specific items within each tab to copy when using Smart Copy feature

To use the new feature:

1. Select **Copy from an existing Tech Spec**
2. Search the style to copy from
3. You will see new windows next to Tech Spec Tabs where multiple Pages exist. Click the Window
4. Select the page you want to copy in the new window & click **OK**
5. Window will appear purple if a specific page is selected
6. Users can still check the box to select all pages
7. Click **Copy**

This will now copy only the pages selected



New Feature: My Views (Queries)

In the current version we have the 'My Views' functionality for a few queries, but 2019R2 offers improvements and all queries have been converted to function as 'My Views'

Benefits of 'My Views'

- With 'My Views', users can personalize existing queries to see just what they want to see.
- It is an individual, non-administrative way to customize a Query.
- Users can Save their customized view for future use as well

Users can:

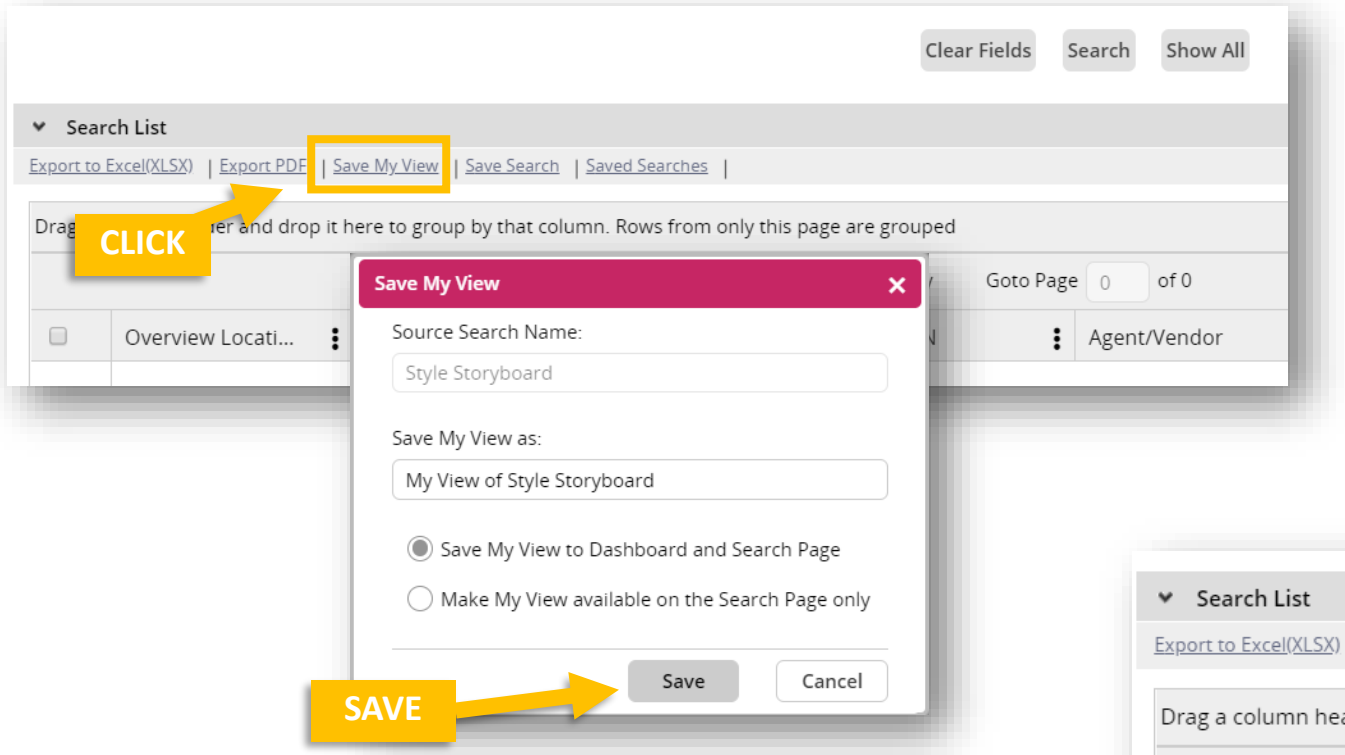
- Drag to change the order of columns presented
- Freeze columns to make them un-scrollable
- Hide or show specific columns
- Make columns wider or narrower
- Exported re-formatted My Views to excel
- Save a configuration to refer back to later
- Manage/Delete previously configured My Views as needed
- Use Saved Search to quickly search frequently used options

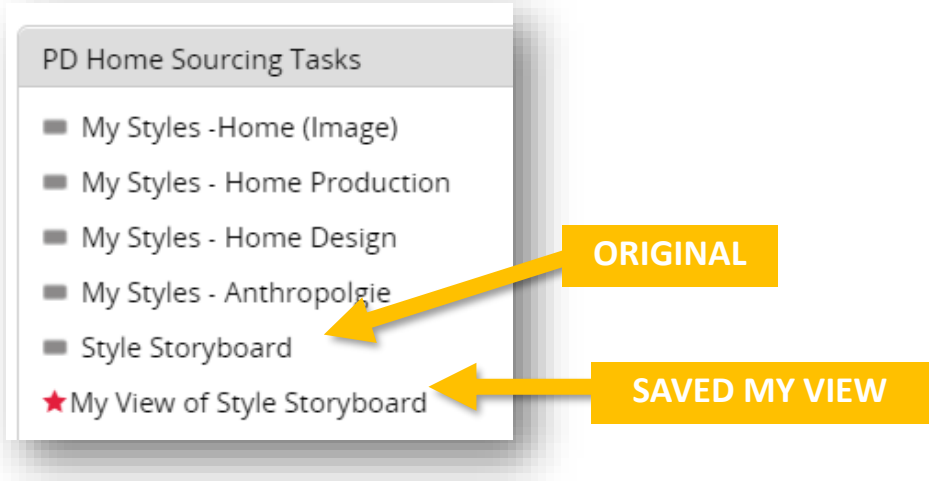
HELPFUL TIP:

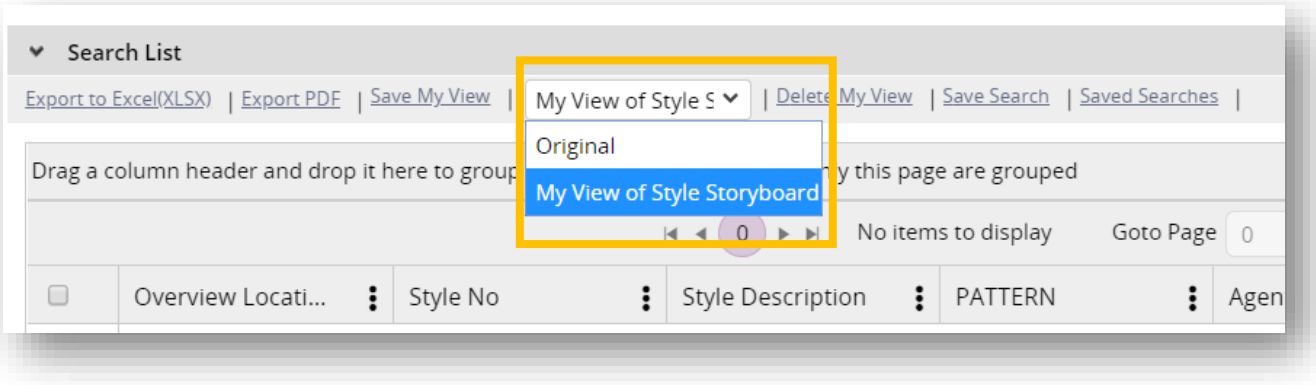
There's some faster ways to access frequently used queries

- You can use the Back Button to navigate back to a query you were recently in
- The query will also be listed in the Recently Viewed Documents

New Feature: My Views (Queries)



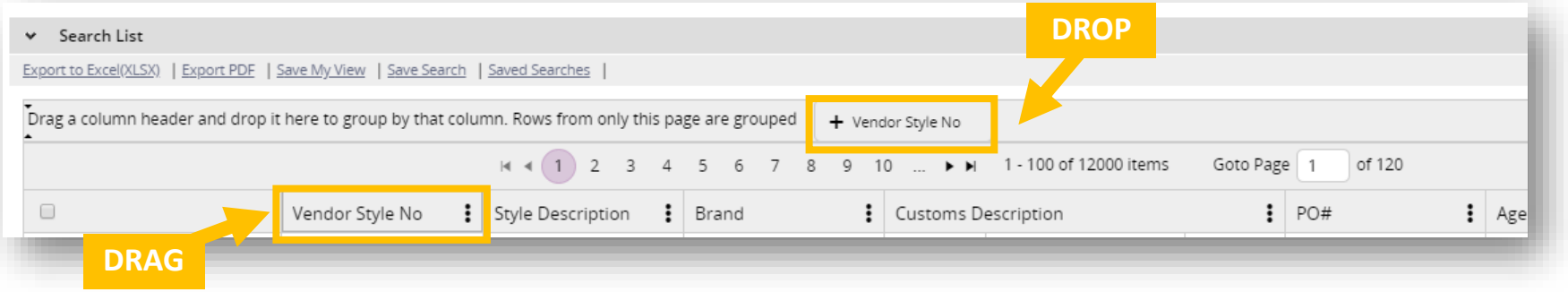


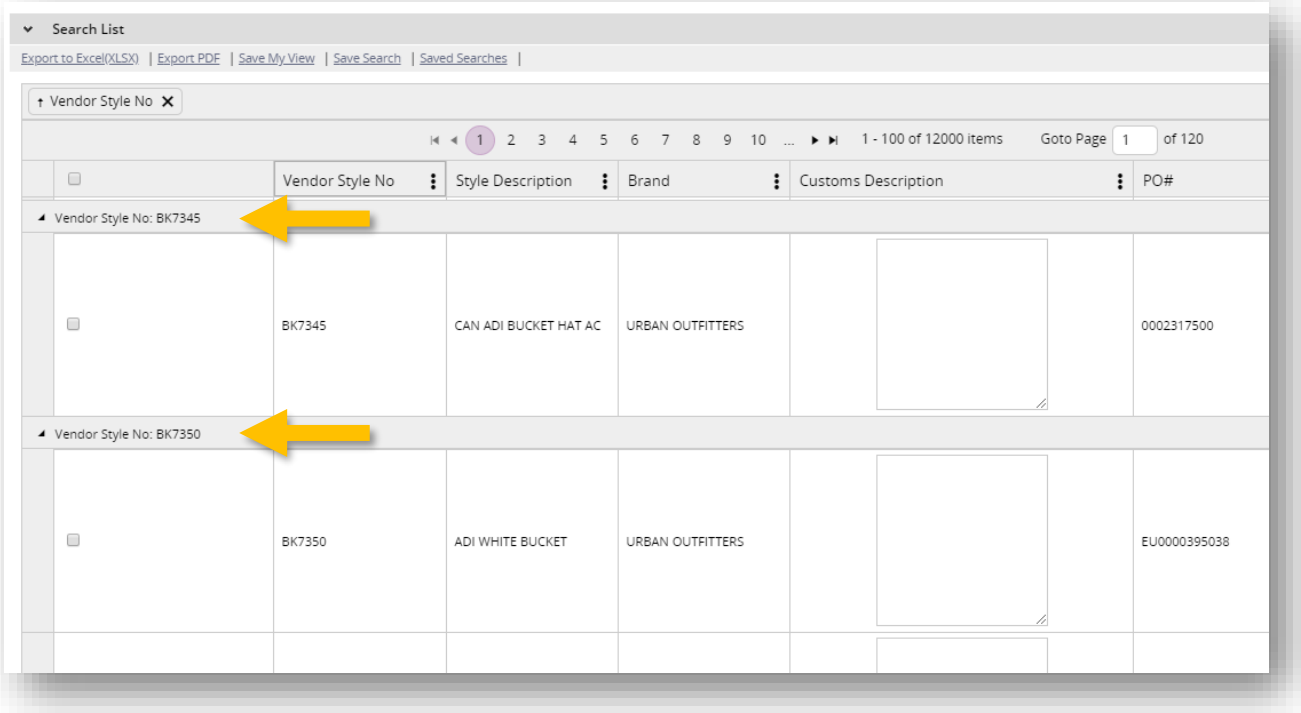


Make the saved View available in the future. In 2 ways

- Save My View to Dashboard and Search Page (this will create a STAR on your dashboard under the original query)
- Make My View available on the Search Page only

New Feature: My Views (Queries) - On Screen Grouping





Group your data directly in a query

Follow the instructions on the screen to Drag a column header and drop it into the section above

This will group your data based on your selection

You can sort other fields within the grouping to help organize your data in the screen

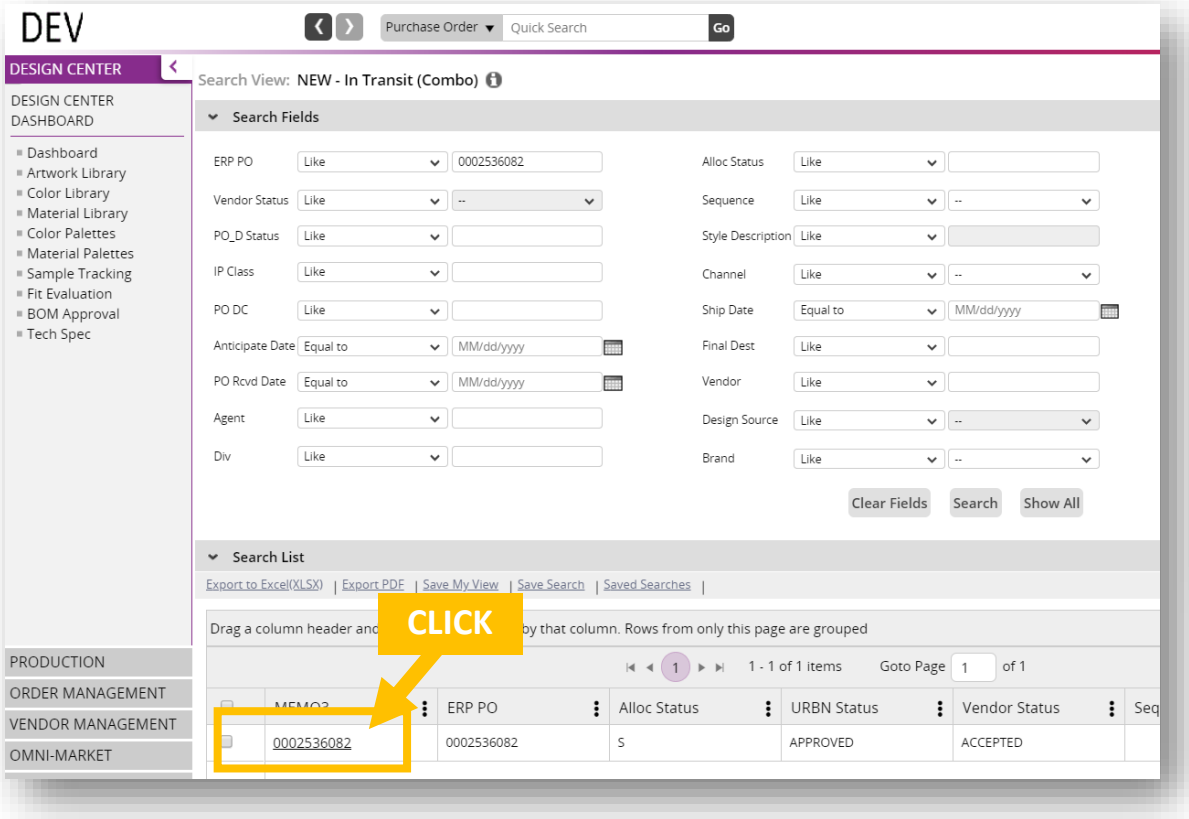
Note: Grouping is just an on-screen tool

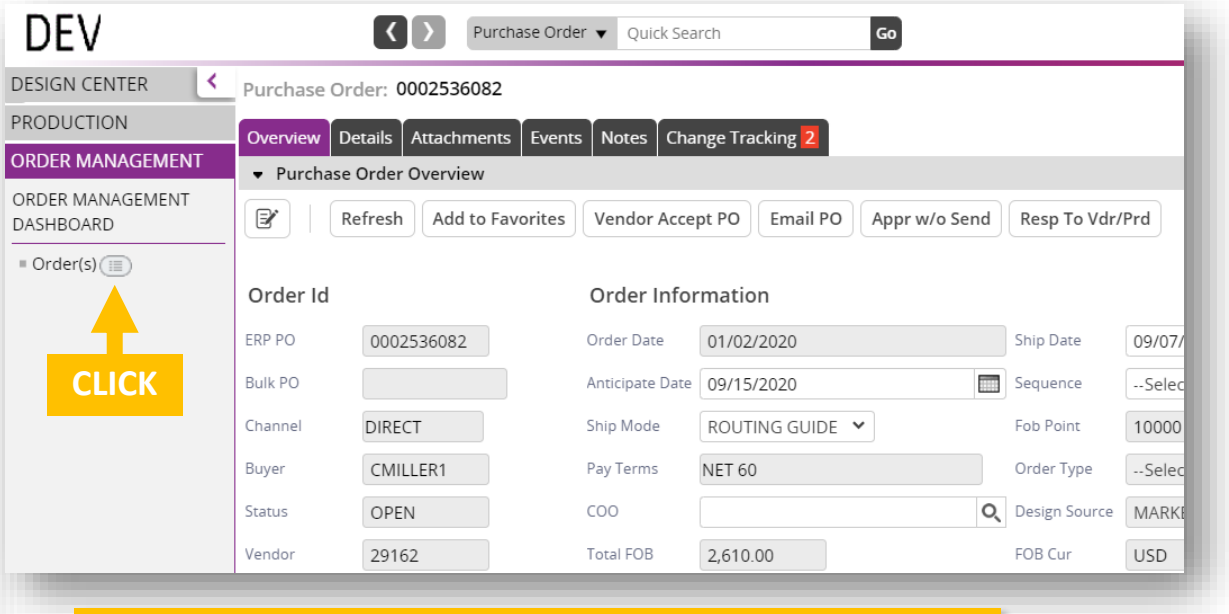
Exporting the data will not display grouped

New Feature: My Views (Queries) – Hyperlink

When you use a query that has a hyperlink to access a record (ie: PO or Style) you can get back to the query by clicking the icon in the Left Navigation

This will bring you back to the query with the same search results





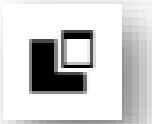
Note: You can return to the query for non-tabbed screens by clicking the 'Search List' button

(Non-Tabbed Screens: Packing List & Invoice)

Updated User Interface

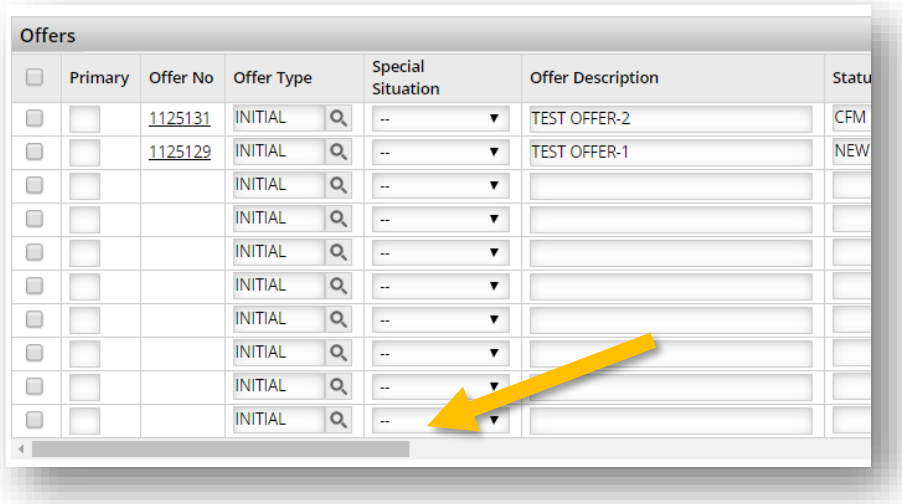
Glossary: Icons/Buttons

Updated User Interface: New Icons

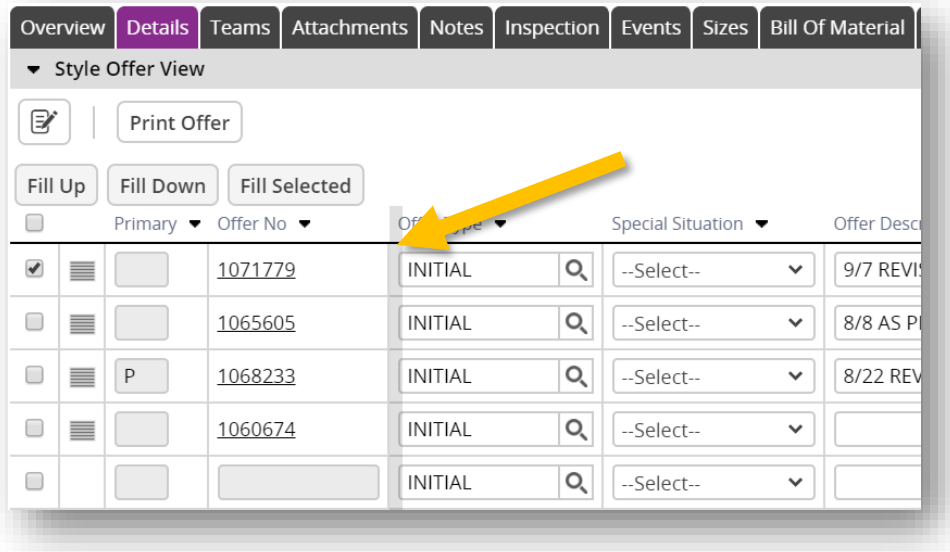
Before	After	
Libraries		**Libraries** can now be accessed through the stacked books icon
My Stuff		**My Stuff** can be accessed through the folder icon
N/A		**Favorites** can be accessed through the star icon at the top instead of via the dashboard
		Save has been update to a more modern look
		**Smart Tag** for ELC breakdown on Offer & PO changed from a chevron drop down to a new temporary window pop up. You can now move the window around, as needed

Updated User Interface: Scroll Bar

Before



After



Scroll Bar is now a Grey vertical line on new screens.

Bar Starts at the frozen column and allows you to scroll to the right without scrolling down to the bottom to find the horizontal scroll bar.

Old screens will still display the horizontal scroll bar