

Changelog

Streamline Win and Mac versions 5.33.1 (2022-12-08)

General Features

- Added the Channel category to the Tree View and Reports.
- Added the 'Order type' column to the Ordering plan report.
- Sum up the displayed qty while combining locations.
- UI/UX improvements.

Streamline Server version 2022.11.1 (2022-12-08)

- Added the ability to export the Changes tab into an Excel file

Streamline Win 5.32.1 and Mac 5.32.1.2 versions (2022-11-07)

General Features

- Added the ability to filter by ABC analysis in the Report tab.
- Added the 'Inventory value' column to the Inventory tab.
- Split To ship qty by channels in the Demand table.
- Moved the 'Inactive' model type to the 'Active (Yes/No)' setting.
- The Ordering availability has been extended to impact the transfer orders.
- Added the Material Consumption row to the Demand table.
- UI/UX improvements.
- Bug fixes.

Streamline Server version 2022.10.1 (2022-11-07)

Server/Client app

- UI/UX improvements.
- Bug fixes.

Streamline Mac & Win version 5.31.0 (2022-10-06)

General Features

- Added the ability to set amount of days when a user halts new orders that surpass orders in transition
- Added the Max cost parameter in the Containers and Groups dialog
- UI/UX improvements
- Bug fixes

Streamline Server version 2022.9.0 (2022-10-06)

Server/Client app

- Split the 'Hide financial data' permission into 'Hide sales data' and 'Hide purchasing data' permissions

Streamline Mac & Win version 5.29.0 (2022-08-02)

Integrations

- Pronto connector.

General Features

- Added the Manufacturing groups.
- To ship orders are always considered as a part of the forecast.
- Ability to hide/show rows in the table in the Demand tab.
- Removal/Substitution rules impact 'To receive' orders.
- Added the ability to save changes in Planned orders dialogue.
- Bug fixes.
- UI/UX improvements.

Streamline Server version 2022.7.0 (2022-08-02)

Server/Client app

- Catalog access setup process improvement.

Streamline Mac & Win version 5.28.0 (2022-07-06)

General features

- Group max lot constraint.
- An option to create Removal/substitution rules for channels.
- Ability to import new item codes via the Channel info tab.
- New product forecasting by using an existing seasonal pattern.
- Color-blind mode.
- Manufacturing max lot constraint.
- Option to consider quantity to ship as part of the forecast.
- Ability to accumulate lead time demand (no lost sales).
- Option to constrain manufacture orders by material availability.
- UI/UX improvements.
- Bug fixes.

Streamline Server version 2021.6.0 (2022-07-06)

Server/Client app

- Performance improvements.

Version 5.27.12 (2021-12-21)

General features

- Max Lot constraint for a group of items.
- Multiple data sources connection.
- Exact Online connection.
- Turkish & French translations.
- Time machine improvements.
- Bug fixes.
- Stability improvements.
- UI/UX improvements.

Server/Client app

- Major performance improvements.
- Removal/Substitution rules on server.

Version 5.26.6 (2021-08-19)

General features

- Ignoring sales periods manually in a hierarchical way to adjust the statistical forecast for the COVID-19 outbreak or other outlier events.
- Reducing the amount of sales history imported to a project file.
- UI/UX improvements.
- Bug fixes.

Integrations

- Oracle Netsuite connector.
- Exporting Approval status, Item category, Model type, Forecast overrides, and Notes to a database.
- Importing the Material Procurement status from a database.
- Importing the Order Cycle parameter in days from a database.

Server/Client app

- New Automation tab that allows scheduling of daily data import/export operations.
- Server connection improvements.

Version 5.25.2 (2021-06-07)

- Odoo connection.
- SAP Business One connection.
- An option to keep safety stock with materials as opposed to finished items.
- Ability to edit zero order quantities in the Planned Orders dialog.
- Removal/substitution rules in the database connection and transactional spreadsheet connection.
- Ability to set effective dates for substitutions.
- Overrides for the Top-down forecasting coefficients.
- Export forecast by channels from the Inventory Report tab.
- Portuguese translation.
- Ability to ignore the number of stockout days in the forecast properties.
- An option to constrain transfer orders by the availability of items in the distribution center.
- Ability to export forecasts and projected revenue to a database from the Reports tab.
- Importing future Max lots as a table.
- Price elasticity support in the forecasting settings.
- UI/UX improvements.
- Bug fixes.

Version 5.23.5 (2020-12-04)

- Connection to Streamline Server.
- Min lot constraint for manufactured items.
- SKUbana connector.
- Order number column in the 'To ship' table.
- Export of color coding to Excel files.
- Bug fixes
- UI/UX improvements

Version 5.22.1 (2020-10-22)

- Implemented price elasticity test, improved precision of elasticity calculations.
- Added tags in the Video Tutorials tab, now you can filter tutorials by tag.
- Fixed bug - negative 'on hand' values were adding days of stockout to the period.
- Time Machine - a simulation tool that executes purchasing recommendations in a simulated ERP system. Time passes as fast as your CPU allows showing you the future of your supply chain in all reports and tabs. This feature can be used for supply chain stress-testing as it adds white noise to your demand plan.
- Other bug fixes.
- UI and UX improvements.

Version 5.21.3 (2020-09-19)

- Most replenishment constraints are now editable right in the Inventory and DC reports.
- Added a new constraint 'Max containers' that limits the max number of containers per order.
- Added the container rounding constraint for transfer orders.
- Material and product tree dialogs are now showing quantities of materials available for

manufacturing and open order quantities.

- Added one-click filtering of items related to the selected BOM.
- Added 'Quarter start month' and 'Year start month' to Settings for the 'Sum by' function in Reports.
- Added 2 new reports "Expected to receive" and "Expected to ship" displayed by period.
- Fixed: Projected on hand report is too rough within the lead time when the lead time exceeds one period.
- Other bug fixes.
- UI and UX improvements.

Version 5.20.0 (2020-08-10)

- Design changes: Added a side-bar on the left that replaces top-level tabs.
- Improved 'Quick update' function, now updated period can include just one day of sales history.
- Added an option to constrain sales forecast reports with projected inventory availability (that depends on Stockout and Max lot).
- Dropped a DC selection control in the Settings. Now DCs are only configured using the DC column.
- Most of the Inventory view parameters are now editable right in the UI table.
- Added the 'Annual sales' tile to the dashboard.
- Removed the 'Use ignored data for seasonality' option - it's now always turned on.
- Made 'Projected stock-outs' report dependent on the Max lot parameter.
- UI and UX improvements.
- Bug fixes.

Version 5.19.1 (2020-07-20)

- Manufacturing lead time.
- Export BOM tree to an Excel file.
- Inactive items are automatically treated as pre-ordered items unless the inactive model is selected manually.
- Bug fixes.
- UI/UX improvements.

Version 5.19.0 (2020-07-09)

- Now auto-detecting and matching columns in our template spreadsheets using column headers.
- Added two calculated columns: Available on-hand quantity; and Max build quantity for Finished products.
- Ability to Hide/Show columns in Planned orders dialog.
- Added material procurement status column to Inventory Planning tab
- Renamed 'Batches' tab in connectors to 'Batch expiration'.
- Added the 'Edit connection' command in the menu File.
- Added the 'Lead time variance' column to Inventory Report and Inventory panel in the Demand Forecasting window.
- Dynamics NAV connector now exports purchase orders using API, supports product variants and reads BOMs.
- Spire connector now supports BOMs and directly exports transfer orders.

- QuickBooks connector now imports Open Builds.
- Replaced Suppliers min lots with Group min lots. Groups are not limited to suppliers.
- Added "Expand/Collapse" buttons to the BOM tree.
- Added Annual Sales quantity and Next Year Sales quantity to the KPI panel in the Demand Forecasting window.
- The Free Edition of Streamline now allows up to 1000 planning items, \$1M annual revenues, or 10k annual sales quantity.
- UI/UX improvements.
- Bug fixes.

Version 5.18.0 (2020-05-13)

- Rounding up to container size is now possible with custom container configurations. Use custom break downs of planning items by container groups.
- Improved Dynamics NAV integration. Added support for item variants and BOMs. Added direct upload of planned orders to NAV via the Web API.
- Save files (.gsl) are now compressed and can't be opened by older versions of Streamline.
- Improved calculation of model coefficients for events and holidays in the case of insufficient data.
- Minor bug fixes and UI/UX improvements.

Version 5.17.0 (2020-05-01)

- A new package of Streamline that runs on MacOS. (Download using a Mac.)
- Added projected stockout/overstock information in the Demand Forecasting tree, next to every node.
- Added import of 'weight/unit' and 'volume/unit' parameters to aggregated spreadsheet connector
- Some improvements on speed and performance.
- Fixed a bug with processing lead time variance.
- Minor bug fixes and UI/UX improvements.

Version 5.16.1 (2020-04-09)

UI/UX

- Redesigned Start page and 'New project' dialog.
- Removed Item Info columns from the Transactions table of the Transactional data connection.
- Added 'on hand' information to the chart on all levels of the tree.
- Added a warning dialog for filter deletion.
- Included 'item description' into the 'Demand forecasting' table export.
- Improved Days of Supply calculations when To Ship information and the Bill of Materials are loaded.
- An ability to preserve approval status across project updates when a new period of data is imported.
- An ability to set the time range for the 'Actual sales' report

Integrations

- Added the 'Aggregate by' (day, week month) control for the DEAR connector.
- Added container load information to the Aggregated data spreadsheet connector.

Version 5.15.1 (2020-03-10)

Engine

- Implemented Container rounding by weight, volume and quantities, separating containers based on supplier code.
- Changed the logic of the Preorder/Inactive model, splitting it into two different models - Preorder and Inactive.
- Changed the logic of the category-level overrides, they are now saved at the item-channel level as constants as opposed to coefficients.
- Added a "Panned vs Actual" report into Reports

Integrations

- Improved connection with Fishbowl.
- A Fishbowl connection option to export only finished product orders.
- A Cin7 connection option: Consider items with missing Qty Dispatch as shipped for dispatched orders.
- Added import of outlier marks as a binary column in the Transactions table.

Version 5.14 (2020-01-17)

Engine

- Added ability to change the DC code for replenished items in the Inventory planning report using the Export/Import Parameters function.
- A change in the manufacturing orders logic, now we export manufacturing orders for finished items and do not export intermediates anymore.
- Added ability to manually import outliers. Specific transactions can be marked as outliers in a separate field during the import of data. The whole period becomes an outlier.

Integrations

- New integration with DEAR Inventory.
- Added a multi-database connection for Spire.

Bug fixes

- Auto/pre-order intermittent model still making order suggestions.
- Inconsistency between affected periods in stockout report and in the Inventory Planning table.

- Crashes as a result of incompatibility with some Windows versions.
- Project resetting after adding the channel level into the import.
- Outliers are not saving in the project on some conditions.
- Overrides not showing on the Demand Forecasting tab on some conditions.
- Safety stock zeroing out after item approval.
- Pending sales orders are not importing from TradeGecko.

Version 5.13 (2019-12-05)

Engine

- Made improvements to top-down modeling.

UI

- Now displaying Supplier's Min Lot parameters in the Inventory Planning tab.
- Highlighting outliers on the chart now
- Added Item Type column (for the bill of materials) to the Reports section
- Added success message for order export for Min/Max strategy
- Now we show 3 digits in the Safety stock Settings equation.
- Fixed some localization issues in the Register window.
- Greatly sped up tree Expand in several cases.

Integrations/Fishbowl

- Introducing new integration!

Integrations/TradeGecko

- Implemented balance price.
- Now we use transaction update date instead of creation date.

Version 5.12 (2019-11-12)

- Added ability to show/hide any columns in Inventory planning and Reports tables:
 1. Common menu in the toolbar (moved it out of Settings).
 2. Each column can be hidden by right-clicking.
 3. Exported reports are now customized.
- Improved localized interface (column width in Spanish etc).
- Added color-coding to outlier points on the chart (black dots).
- Quick filters functionality:
 - Set any cell value as a filter condition on right-click.
 - Auto-naming for filters from the column header.
 - Add any value to existing filter as another condition.
- Created Fishbowl integration and connector interface.
- Added ability to auto-adjust model level after applying another item's model (Use model from).

- Removed seasonal price forecasting functionality.
- ABC analysis returned to the Inventory report section.
- Improved performance - Item tree navigation happens more quickly now.
- Total order weight and volume figures are shown the Inventory reports and the Planned orders dialogue
- Fixed several bugs.

Version 5.10 (2019-09-26)

- Improved ODBC and MySQL integration.
- Fixed several bugs.

Version 5.9 (2019-09-18)

Engine

- New 'Projected Stockouts' report breaking down stockouts by period.
- Fixed not passing 'Display quantity' into 'Planned orders' in case of a safety stock debt.
- Slightly speed up BOM inventory calculations.
- Added filters to the Reports tab.

Reports

- New columns in the Reports tab: Model Quality, Model Type.

Explain inventory

- Added Shelf Life explanation into Explain Calculation.
- Exclamation mark replaced with \pm and tool-tip in the 'On hand+In Transition' row in Explain Calculations.

Intersite optimization

- Added default Lead Time control for intersite transfers in Settings > Project.
- Added the 'Available for transfer' column into Inventory Planning tab.
- Now reducing stockouts has priority over reducing the number of purchases.

Misc.

- Changed the wording on a number of functions and localizations.
- Fixed several bugs.

Version 5.8 (2019-08-30)

Engine/UX

- Faster recalculation of purchasing recommendations after changes in the Inventory Report settings, or upon project reload.
- Added an import of Sales Price per SKU in the Item Info section of the database connector.

- Fixed: Changing manufactured goods status between Purchased and Manufactured didn't change the Order Type status.
- Fixed a search issue with selected and hidden nodes.
- Fixed: Explain Inventory dialog started calculations from a period in the past.
- Fixed: Safety Stock calculation that uses 'demand of future periods' didn't skip the demand of the Lead Time + Order Cycle.
- Enabled linking to the source location from the Intersite Optimization tab, 'Source From' column.
- Unified sales price aggregation across Reports and Demand Forecasting tabs.
- Approve function now disables forecast settings.

Integrations

- Service level parameter is added into the Database connector and Transactional spreadsheet connection.
- Dynamics NAV connector now has a Company name field.

Version 5.7 (2019-08-16)

New features

- Added Approval Status column in the reports.
- **Intersite optimization module**
- Added a new tab into the workspace called 'Intersite optimization'.
- Streamline automatically suggests intersite transfers in the 'Intersite optimization' tab.
- New columns in the data import dialog: Transfer Regions (in Item Info section), Source From, Order Type

Engine

- Fixed: Unable to override Sales Price in the current period in Demand Forecasting tab
- Faster processing of the inventory planning report and faster project loading, smoother functioning on large projects.
- Fixed: Dashboard doesn't reflect all project changes before the project is reopened.
- Fixed: QuickBooks integration bugs.
- Fixed: Automatic forecast recalculation is not triggered by some changes in the settings when necessary.

UI

- Fixed an issue with column width
- Added Arrival Date column in the Planned orders dialogue window

UX

- Added Mass Clear at the lowest level in the tree
- Fixed: An issue in the Import Parameters function of the Inventory Report. Service Level overrides load as x0.1 of the actual Service Level in the Excel file.

Version 5.6 (2019-08-02)

- Added an option to include Manufacturing Orders into planned orders
- Settings button added to the Demand Forecasting tab
- Fixed a couple of dashboard issues, providing a more graphically clear and coherent comparison.
- Fixed several automation bugs, auto-recalculation is now smoother.
- Improved naming of multiple sections in the interface, including tips in the database connector.
- Fixed approval function

- Numerous speed enhancements, a lot less delays in recalculations and the overall increase in productivity.
- A number of other UX/UI improvements
- A number of other UX and functional bugs fixed

Version 5.5 (2019-07-19)

- Support for transit warehouses that do not store inventory.
- A new dashboard that shows the expected savings due to optimal inventory planning.
- Minor UI improvements.
- Bug fixes.

Version 5.4 (2019-06-20)

Engine

- Overrides are extrapolated onto newly imported periods if more than 1 was added.
- Next order date column is now corrected for the current date, keeping all the ordering schedules updated.
- Applying existing items' models to new items is now available with database connection

UI

- New hotkeys
- Fixed a few crashes
- Implemented filtering by note
- New Projected write-offs Report
- Approval button now protects items from model overrides
- Fixed bug with chart not updating with model coefficients
- Fixed bug with Inventory Levels and Purchase Plan not calculating if you incrementally increased the horizon
- Ordering availability edits indicator added to the tree
- Several dashboard improvements, refreshed interface
- Safety stock on the chart is shifted to the right, now indicating 'safety stock to order', as opposed to 'safety stock at the time of arrival'
- Changed Promotions appearance on the chart
- Demand Forecasting now shows the forecast section by default

QuickBooks integration

- A custom field for PO arrival date
- Backorder date displays in In transition details
- Import inactive items from QuickBooks

Misc.

- A couple of minor command-line bugs fixed.
- Command line improvements - added ability to save the project under another name.

Version 5.3 (2019-06-07)

- Spanish translation.
- Polish translation.
- UI and planning engine improvements.
- Bug fixes.

Version 5.2 (2019-05-24)

- Inventory batch expiration. Projected write-off report and improved inventory level projections.
- Shopify connection.
- Improved Dynamics NAV and GP connections.
- UI improvements.
- Bug fixes.

Version 5.1 (2019-05-02)

- Promotions planning.
- Bug fixes.

Version 5.0 (2019-04-05)

- A 3-D data model that allows forecasting by channel-item-location as opposed to item-location.
- Automatic re-forecast when necessary (no Forecast button).
- Filtered reports are opened in separate tabs.
- A dashboard for inventory KPIs.
- Incomplete period control is handled automatically and is removed from the UI.
- UI improvements.

Version 4.9.4 (2019-02-22)

- Fixed: Spire connector error.
- Reworked QB connector.
- Embedded customer survey. It shows up after one month of application use.
- If there are no sales of an item during the last 12 months, we detect the item as Inactive.

Version 4.9.3 (2019-01-25)

- Fixed: Issues in the export of purchase orders.

Version 4.9.2 (2019-01-23)

- Fixed: Orders exported to ERP do not immediately show up in 'In transition'.

Version 4.9.1 (2019-01-17)

- The ability to execute Streamline via the command line.
- Unique filenames of reports exported to Excel files. The date and time of the export is added.
- We now output an incomplete period of sales in the actual sales history in the inventory report.
- Full re-import option in the drop-down menu of the Update Data button.
- The ability to export source DC in the database connection in the Export periodic order tab.
- Minor GUI improvements.
- Bug-fixes.

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