

## AssetOptics for Salesforce Lightning Version 3.0 Release Notes Release Date – Nov 2020

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### How to use these Release Notes

The release notes are organized by solution area. The UC identifier refers to a specific Use Case within the AssetOptics software development lifecycle (SDLC). An explanation of the Use Case and delivered functionality follow. If there are any configuration requirements, they will be listed in the Setup Requirements following the use case explanation. The setup requirements should be used by your system administrator to plan and execute the AssetOptics managed package upgrade.

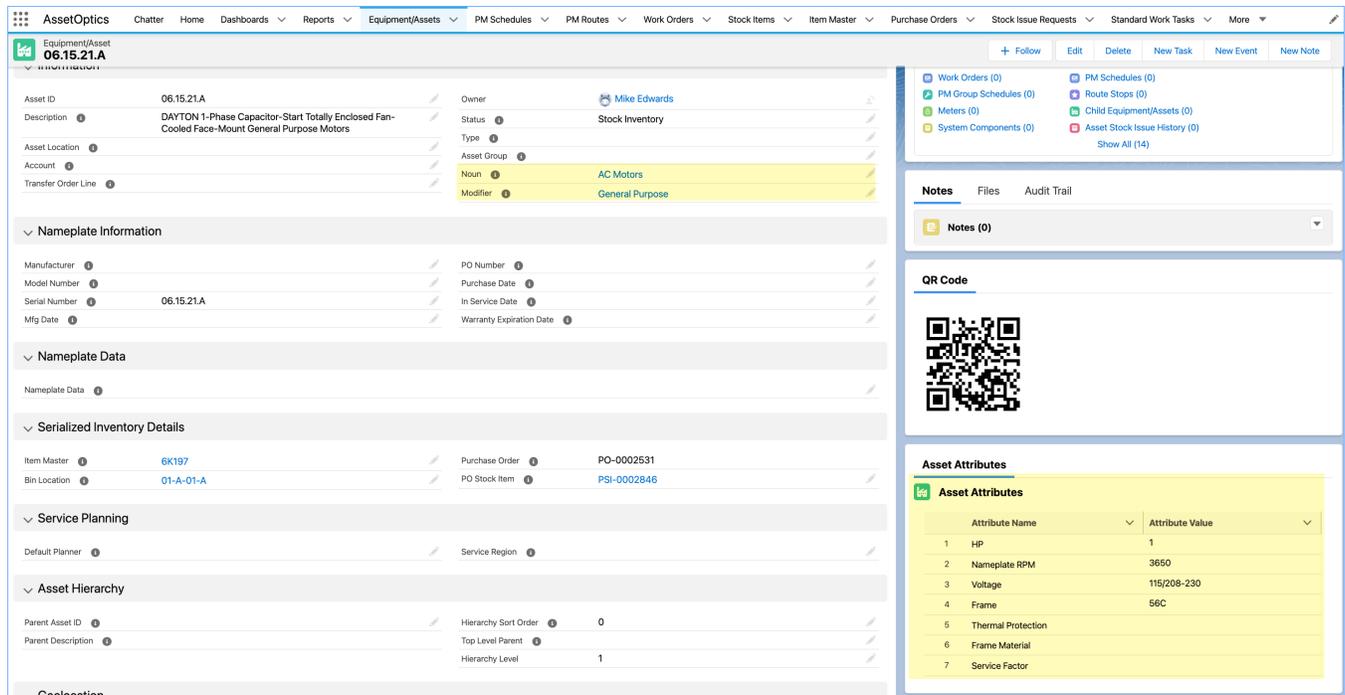
# Asset Management

## UC-0383 Noun, Modifier, & Attributes on Equipment/Assets

Nouns, Modifiers and Attributes provide you with the ability to define a list of data elements for an asset without creating custom fields. This functionality has been extended from MRO Inventory Management to Asset Management. Nouns, Modifiers and Attributes is a 3-tiered data structure. A single Noun can have many Modifiers, and within each Modifier, a set of Attributes can be defined.

Example:      Noun:            AC Motors  
                 Modifier:        General Purpose AC Motors  
                 Attributes:      HP  
                                 Nameplate RPM  
                                 Voltage  
                                 Frame  
                                 Thermal Protection  
                                 . . .

When a Noun-Modifier pair is set on an Asset record, the Attributes are copied to the Asset Attributes where you may enter Attribute Values (either from the related list or directly on the Lightning component). If you edit Attributes master on the Noun-Modifier, these changes will be reflected in the Asset Attributes for all related Asset/Equipment records.



**Setup:** If you are using the standard AssetOptics profiles (and mapped security profile configurations correctly during the upgrade install) or standard AssetOptics permission sets (which upgrade automatically), then no security update is required. Otherwise, enable access to the Asset Attribute object, the *AttributeTriggerHandler* and *AssetAttributeLWC* APEX classes. The Asset Attribute object is

on the detail side of a Master-Detail relationship with the Asset Tag object (Asset/Equipment object) and thus you should set access rights consistent with the Asset Tag object.

## Inventory Management

### UC-0386 Noun, Modifier Attribute Updates Automatically Propagate to Item Master Attributes

The APEX trigger handler on the Attributes object has been updated so that if you add a new or edit an existing Attribute, these edits will be reflected in the Item Attributes object for all existing Item Master records.

**Setup:** If you are using the standard AssetOptics profiles (and mapped security profile configurations correctly during the upgrade install) or standard AssetOptics permission sets (which upgrade automatically), then no security update is required. Otherwise, enable access to a newly created APEX class, *AttributeTriggerHandler*.

### UC-0385 Item Master Attributes Lightning Web Component

A Lightning Web Component (LWC) to display & edit Item Master Attributes & Attribute Values has been created. This component can be displayed on the Item Master record page. Item Attributes can be edited on the Related List or directly in the LWC.

The screenshot displays the Salesforce interface for an Item Master record. The record ID is 6K197. The description is "DAYTON 1-Phase Capacitor-Start Totally Enclosed Fan-Cooled Face-Mount General Purpose Motors". The noun is "AC Motors" and the modifier is "General Purpose". The item status is "Active" and the number is "002504". The owner is Mike Edwards. The item specifications include "AC Motors" as the noun and "General Purpose" as the modifier. The system information shows it was created by Mike Edwards on 11/2/2020 at 9:56 AM and last modified by Mike Edwards on 11/2/2020 at 10:03 AM. The item attributes section shows a list of attributes with values: 1 HP, 2 Nameplate RPM 3650, 3 Voltage 115/208-230, 4 Frame 56C, 5 Thermal Protection, 6 Frame Material, and 7 Service Factor 1.25. The Service Factor attribute is currently being edited.

**Setup:** If you are using the standard AssetOptics profiles (and mapped security profile configurations correctly during the upgrade install) or standard AssetOptics permission sets (which upgrade automatically), then no security update is required. Otherwise, enable access to the *ItemAttributeLWC* APEX class. If you are using AssetOptics standard Lightning record pages, no page layout updates are required. Otherwise, add the *itemAttribute* LWC to your Item Master record pages.

### UC-0401 Item Master Attributes Lightning Web Component for Stock Item

A Lightning Web Component to display Item Attributes on the Stock Item record is provided.

The screenshot displays the 'Stock Item' record for item 6K197. The main header shows the item name and key metrics: On Hand Qty (4), Available Qty (4), Storeroom (Main Storeroom), and Primary Bin Location (01-A-01-A). The 'Details' section is expanded to show 'Information', 'Serialized Component Setup', and 'Stocking Information'. The 'Information' section includes fields for Stock ID, Description, Manufacturer, and Status (Active). The 'Serialized Component Setup' section shows 'Serialized' as 'Yes' and 'Condition' as 'New'. The 'Stocking Information' section shows 'On Hand Qty' as 4, 'Committed Qty' as 0, and 'Available Qty' as 4. The right-hand sidebar contains 'Quick Links' with categories like Bin Locations, Planned Stock, Asset Stock Issue History, Files, Inventory Transactions, PO Stock Items, Notes, and Vendor Case Packs. Below that is the 'Item Attributes' section, which lists various attributes such as HP, Nameplate RPM, Voltage, Frame, Thermal Protection, Frame Material, and Service Factor.

**Setup:** If you are using the standard AssetOptics profiles (and mapped security profile configurations correctly during the upgrade install) or standard AssetOptics permission sets (which upgrade automatically), then no security update is required. Otherwise, enable access to the ItemAttributeLWC APEX class. If you are using AssetOptics standard Lightning record pages, no page layout updates are required. Otherwise, add the stockItemAttribute LWC to your Stock Item record pages.

## Preventive Maintenance

### UC-0399 Revised Projected Meter Due Date Calculation on PM Schedule

Revised the formula that derives the Projected Meter Due Date to use the Last Meter Reading Date instead of the Last Work Order Completion Date as the anchor from which the Average Daily Use is projected. In practice, this makes the calculation of more sensitive to variability. This is, however, offset by the ability to specify the number of meter readings used to calculate the Average Daily Use.

**Setup:** None

### UC-0398 PM Schedule Floating Interval Default Value Changed to False

Updated Floating Interval default value = False

Updated PM Status default value = Active

**Setup:** None

## Purchasing

### UC-0397 Updated SOQL on Stock Item Open POs Lightning Web Component

Updated the SOQL that populates the *Open POs* LWC on the Stock Item record page. The LWC previously displayed records from Purchase Requisitions AND Purchase Orders. Removed Purchase Requisitions from the display results.

**Setup:** None

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### UC-0403 Updated Purchase Order Select Stock Items Lightning Web Component

On the Purchase Requisition and Purchase Order record page, an LWC can be invoked thru the Add PO Stock Item action. This LWC presents a list of Stock Items that can be added to the PR/PO. This list is filtered by the Purchase Order Storeroom and the excludes existing PO Stock Items.

The Recommended Qty to Reorder column has been updated to reflect the recommended quantity in the Purchase Unit of Measure. *Was previously recommending in the Stock UOM.*

**Setup:** None

### Mobile

#### UC-0394 Added Scan Barcode Lightning Web Component

A Lightning Web Component enabling a user to scan a barcode or QR Code using their mobile device camera has been added. The LWC is displayed in mobile via the tab labeled, Scan Barcode. The barcode or QR Code must contain ONLY the Salesforce Id (18-character Salesforce record Id). When scanned, the user will be navigated to the record in Salesforce Mobile. This feature works across all objects.

**Setup:** If you are using the standard AssetOptics profiles (and mapped security profile configurations correctly during the upgrade install) or standard AssetOptics permission sets (which upgrade automatically), then no security update is required. Otherwise, enable access to the Scan Barcode tab and expose to your mobile apps as needed.

### Setup & Configuration

#### UC-0395 Configured Dynamic Forms for all Desktop Lightning Record Pages

In Salesforce Winter '21 release, dynamic forms were made generally available. Dynamic forms enable you to create the record detail page layout directly in a Lightning record page (desktop view only). *See Salesforce Help for further details.* Leveraging this new feature, all AssetOptics Lightning record pages for the full browser experience have been updated to dynamic forms. Whereas the classic detail page layout (even when viewed within a Lightning record page) could previously only be assigned by Profile and Record Type, the dynamic forms detail section is specific to a Lightning record page and thus can be assigned as: Org default, by App, by App-Profile-Recordtype.

**Setup:** For all AssetOptics objects where only the master record type or a single record type exist, the Lightning record pages will be set as the org default and no further setup is required. For all AssetOptics objects where that are more than one record types, a Lightning record page in the named scheme of ObjectName\_RecordTypeName is newly created and must be assigned accordingly. *Even if you are using the standard AssetOptics profiles.*

The Lightning record pages to be assigned are as follows:

1. Asset Tag Component
2. Asset Tag Equipment
3. Asset Tag Vehicle

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4. Meter Continuous
  5. Meter Counter
  6. Purchase Order
  7. Purchase Requisition
  8. Transfer Order In
  9. Transfer Order Out
  10. Work Order Corrective
  11. Work Order Model
  12. Work Order Preventive
  13. Work Order Request
  14. Work Order Route
  15. Work Order Route Stop

### **Installation URL**

Please submit a case via the AssetOptics customer community or submit an email to [help@assetoptics.com](mailto:help@assetoptics.com) to request the managed package installation URL.