Version 1.0.28

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Version 1.0.28 - Released July 24, 2020 - Known issues fixed, improvements and new features added as follows:

> **Note:** Some of these changes were implemented as Hot Fixes during the development cycle. They were fixed on separate dates, but weren't published until the official release.

#	Changes	Revision
1	ADDED	Item Transaction Tab - added the column for the Total Dollar Amount as a column available under the gear for the Transactions Tab
2	ADDED	New Payment Integrations - New e-payment libraries available for Payeezy, Stripe and Square
3	ADDED	Added a preference to enter emails that get notified when payments are made via the payment requests that are sent out - so orders can get released when they are paid
4	ADDED	Auto BCC on emails - Added the ability to set up Auto BCC on email templates
5	ADDED	Display currency symbol ($) on prices/costs/amounts on form templates - There is a preference that will do this on the templates
6	ADDED	Purchase Orders child list on customer details screen - Hidden by default, useful for companies doing job tracking
7	ADDED	Option to auto BCC specific emails on all outgoing emails
8	ADDED	**FreightPrint Integration** - New Shipping Integration for Truck Load Freight - More on that **here**
9	ADDED	Format all date/times in sync jobs to be in localized time
10	ADDED	Added the Quantity on the On Order Details tab of an item as the new column: Open Quantity.
11	ADDED	Ability to close Activies in bulk/batch from the list
12	ADDED	Allow capturing partial auth - Previously when capturing a previous auth the user does not have the option to specify how much to capture. This adds a prompt when capture is clicked for the amount.
13	ADDED	Added a Font & Rich Text Editor for emails in the system
14	ADDED	Reports - Item Sales by Month - Now includes Bill of Materials

15	ADDED	Added a new user preference to BCC yourself
16	ADDED	Added reporting for price levels
17	ADDED	Added totaling of the number of records on the lists
18	ADDED	Cart Visibility - Customer/Lead Detail - Allow for users to review current cart. Who has an active cart, Etc.
19	ADDED	Add to Open Work Order Checkbox in Reorder Analysis - Just like the Add to Open Purchase Order Checkbox but for Work Orders, using the Production side of Reorder Analysis
20	ADDED	Batch Actions on Customer Returns - Changing Status and Creating PDF
21	ADDED	DocuSign Integration **BETA** - When generating Sales Order, option to save and send via email to customer through DocuSign. Once customer signs via DocuSign, signed copy returned and stored in SO attachments.
22	IMPROVED	Ledger Report - Dates - Ledger REPORT with opening balances or running balances.
23	IMPROVED	Implemented a New Load Balancer for faster performance
24	IMPROVED	Memo For Adjustments - Put in Journal Entry - Per line
25	IMPROVED	New Preference under Receiving - 'Allocate Receiver Charges based on' and then there is a drop-down box
26	IMPROVED	Attachments have a new 'Done' button after dragging and dropping groups of files into the drop zone.
27	IMPROVED	Ecommerce Customization - Added an option in Ecom Settings to ADD On Order (PO's only) when updating inventory.
28	IMPROVED	Line Item Edit - Made it so that the Edit button doesn't hide and no double Edit and Save Button
29	IMPROVED	Charts e.g Sales Page - Fixed them not displaying
30	IMPROVED	Adjusting the Lot # - Resolved with a new pop up screen
31	IMPROVED	Item Transaction list needs to have the price/cost
32	IMPROVED	QBO New Type to Sync Customer Type
33	IMPROVED	Request for Quote - EComm Integration Proxy Setting - added an option to the integration configuration where any item being downloaded on an order that is not found in Order Time to instead be filed under a MISC item (or one they assign in the integration options) with all the typical sales desc and pricing and quantity data making it onto the order
34	IMPROVED	Parent Customer / Job - There is a confirm dialog box now when a new Customer is added as a Sub Of a parent customer or job
35	IMPROVED	You can now send Email from a List using the Batch Actions drop-down
36	IMPROVED	HTML Email Capable Now! Also a Rich Text Editor

37	IMPROVED	Charts - Data field overlap - display issues resolved
38	IMPROVED	Certificate for Sync Tool - Updated
39	IMPROVED	Job Scheduler - Unable to recover when server becomes unavailable - Created additional failovers so that this doesn't happen
40	IMPROVED	Now create a Role Exception for SubTotalAmount if you don't want your Warehouse users to be able to see the charts on the Sales Tab
41	IMPROVED	Discount on receiver - Negative # on Add Cost to put in a discount
42	IMPROVED	Added dependency tables to Sales Order and Work Order Reporting
43	IMPROVED	Sales Order and Quote Cloning Button under Customer
44	IMPROVED	Matrix Report with Comparative
45	IMPROVED	Valuation for Disassembly when finished
46	IMPROVED	Updated the AntiMalware Scan Interface so that it runs faster for attachments
47	IMPROVED	Value amounts on disassembly sped up and calculated when the document is finished
48	IMPROVED	Counts don't accidentally duplicate
49	IMPROVED	Ecommerce - Class and Customer Notes from BigCommerce populating in Order Time
50	IMPROVED	New preference in Purchasing: When creating a linked PO from a Sales Order, copy the Items description.
51	IMPROVED	Distributed cache sped up for a faster experience
52	IMPROVED	Batch Email - No Template Errors
53	IMPROVED	Email Enhancement Request - The ability to batch email from the Customer list, so that you can sort by the types of Customers you want and shoot them a targeted Email
54	IMPROVED	Hover over an item on a ShipDoc, fixed to work just like hovering over one on a Sales Order
55	IMPROVED	Total Cost, Margin Markup up on Sales Order
56	IMPROVED	New Items copy Sales Description to Purchase Description
57	IMPROVED	New Preference to Prevent Changing Status After Requesting Payment
58	IMPROVED	Item Quantity Total and Total Line Items line on Purchase Orders and Sales Orders
59	IMPROVED	Tab for value adjustments on the receiver
60	IMPROVED	Customer Purchase Order as a column on the full payment screen

61	IMPROVED	Sort Tax Item Drop down on Sales Order
62	IMPROVED	Unable to search for item in a Quote (Multiple items with similar name) - Seperated out the fullname search and then scored the results based on if its an exact match, begining match or not. Then ordered by that criteria.
63	IMPROVED	Add Available column to Sales Order Report - We added the Inventory Status by Location table.
64	FIXED	Charts Not Displaying
65	FIXED	Price Level - Rate inconsistencies
66	FIXED	Links within the email templates broken
67	FIXED	New Customer Conversion - Handle bad connection failure
68	FIXED	Closing Date not displaying
69	FIXED	Customer Return/RMA Form Ship Address Uses the customers Ship Address
70	FIXED	Mobile Errors
71	FIXED	Reorder Analysis should use Owned
72	FIXED	Calculated Fields not updating on their own.
73	FIXED	Custom Fields not displaying
74	FIXED	Purchase Order Status- Approved and Closed
75	FIXED	Mobile Errors Set 5
76	FIXED	Prevent Assign Currency - QBO and QBD
77	FIXED	If a count is finalized and the button clicked more than once duplicate adjustment will get generated.
78	FIXED	ItemLotRef1 not updating when step on a work order is changed
79	FIXED	Sync default class assigned to items with QBO
80	FIXED	Users vs license error
81	FIXED	Creating a drop ship PO with no sales order creates an empty ship doc
82	FIXED	Accounting Integration Custom Fields not displaying
83	FIXED	QBD Sync Not Showing Errors For Item Add In Sync Queue Error Log
84	FIXED	Lot/Serial # add button not working when Chrome language is Romanian
85	FIXED	Clone was not working with Calculated Custom Fields
86	FIXED	Manually created bin moves erroring out intermittently

87	FIXED	QB Sync Tool Logic To Avoid Dupes
88	FIXED	Label Template Errors and display issues
89	FIXED	Label Template Concurrency issue
90	FIXED	Database Cache needed to be sped up!
91	FIXED	Roles needed to be developed out for new features
92	FIXED	Cache Issues Resolved
93	FIXED	Expiration Date - 1 day early when creating a new Lot/Ser # Entry
94	FIXED	In Doc Payment
95	FIXED	FormEditTemplate - Lookup list saved in json
96	FIXED	When searching on the Leads list for fields that IsTextProperty is not true customers will show up
97	FIXED	Cannot edit inline description on Sales Order
98	FIXED	Payment screen default payment method on gateway
99	FIXED	Open Quantity columns on Sales Order Items in reporting shows quanttity even if manually closed
100	FIXED	Report Edit button fixed
101	FIXED	Delete Audit trail error
102	FIXED	On Template - Payment (Negative). Shows with 2 minus signs.
103	FIXED	Filter error for mixture of serialized and non serialized items.
104	FIXED	Batch Email Testing errors resolved
105	FIXED	Indented BOM display issues resolved
106	FIXED	Sync Queue Payment issues resolved
107	FIXED	Cannot Add Category to General Section error
108	FIXED	QB Desktop Tool - email with a comma still passes Test Connection
109	FIXED	Fixed ability to Delete from Sync Queue
110	FIXED	Issue with Charts not displaying
111	FIXED	QBOTRP. Delete Txn Sync Q - If the val adj is neg, need to delete vendor credit instead of bill.
112	FIXED	Label Printing - Disassembly - Fixed so that we get the same Line Item and Details options as Work Orders.

113	FIXED	Add Cost - Costing can be negative now
114	FIXED	Closed Date - Not getting synced due to Sync Job.
115	FIXED	Date type Filters/Sorts in reports in different formats cause issues
116	FIXED	Flatten Error
117	FIXED	Attributes are showing on Item Variations when not active - Should Not Show.
118	FIXED	Company Logo Align Right issue
119	FIXED	Customer Alias - Custom fields would not import.
120	FIXED	Sales orders generated from quotes - Fixing a report where you can see which Sales Orders were created from Quotes
121	FIXED	Billing - Error during resubscribe fixed
122	FIXED	FreightPrint Beta Issues Resolved
123	FIXED	HTML EMAIL Changing Templates - display errors resolved
124	FIXED	Item Vendor - Custom Fields were not working
125	FIXED	ROA Vendors - Need List Of Item Vendors – put preferred on top, change color - Change Event For Vendor to get the new cost / quantity query.
126	FIXED	Missing Value Amounts in Disassembly - value amount calculation was missing in the 'summary'
127	FIXED	Item Page - Summary not filtered for location
128	FIXED	Contact email character limit - extended on certain screens
129	FIXED	Cannot Add Lot # to a Split Work Order
130	FIXED	BoM - Minor issues - When cloning a BoM, phantom status will be copied over - When changing the line item position within a BoM fixed display issues with other line items.
131	FIXED	Lot / Ser Duplicate - Cleaned Up
132	FIXED	Setting group on import - Does not seem to pick up the unit of measure
133	FIXED	Fill Status on PO List - Broken, issue resolved
134	FIXED	If a Custom Field is Added/Removed - Should also update the Report Fields.
135	FIXED	Take a look at the google charts CSS - display, etc.
136	FIXED	Shipping Integration - FreightPrint - Added a popup when the username or password is blank
137	FIXED	Adjustment Sync QBD - If there is no values, do not sync.
138	FIXED	Correcting the Customer File / Primary Ship Address / Phone - Display issues solved.

139	FIXED	Sales Tax calculation for Shipping which is taxable in certain States
140	FIXED	Tax issues - display bug
141	FIXED	Order Time / Shopify integration - Taxes - Fixed an issue where tax-exempt items were being calculated with tax
142	FIXED	Labels Disappear - Fixed an issue with disappearing labels under certain circumstances
143	FIXED	Prevent Work order from BoM with inactive steps
144	FIXED	Customer Create Role - Fixed a Role issue where customers could still be created
145	FIXED	Issue adding another user over 10 users after initial sub
146	FIXED	Total Amount Adjustments - fixing how Filters are applied
147	FIXED	Customer Is Taxable in QBO
148	FIXED	Work Order issue - User Location Errors
149	FIXED	Error Message Work Order - No jumping across, have to go status to status
150	FIXED	Changing the promise date after ship doc was created
151	FIXED	3dcart some items aren't updating inventory
152	FIXED	QB Desktop tool - Failed to Load settings
153	FIXED	Ecommerce Sales Order Billing/Shipping company name incorrectly displaying
154	FIXED	Logins with No TenantLogin - Fixed an Error when you change the User's Email Address
155	FIXED	Referential integrity - Fixed an error in logging the User ID to the Source
156	FIXED	Mobile Fixes: Preferences, Bins, Unused Properties, Ship Doc Statuses, UOMs, UOM Sets, Settings, Initial Load Time
157	FIXED	Shopify API Changes - Migrated to the new API Version
158	FIXED	Amazon S3 and Amazon CloudFront migrating default certificates to Amazon Trust Services in March 2021
159	FIXED	Ecom Proxy customer option adds customer in OrderTime, add config option - Added a checkbox directly under or above the dropdowns that will enable Order Time to also not create customers but instead use the customer selected
160	FIXED	Fixed an error where Onboarding would charge twice when resuming a subscription
161	FIXED	We now test to see if there is Javascript in any template text, for extra security
162	FIXED	Security Recommendations Implemented - further restricting and protecting the integrity of all data

163	FIXED	DocuSign Fixes - Multiple users, how the oauth is handled, include the user name in Additional Recipients and CC
164	FIXED	Daily Sync Skipped if a manual sync is run - Instead it should always run at the scheduled time unless a job is already in progress.
165	FIXED	Swapped the URL that the ShipStation Image goes to under Shipping Integrations
166	FIXED	Set the URL that the FreightPrint Image goes to under Shipping Integrations