

Version 1.0.29

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Version 1.0.29 - Released November 12, 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 about until the official release.

#	Changes	Revision
1	ADDED	Freeze headers on lists/reports - So when you scroll on long reports you can still see what each column means.
2	ADDED	New List - Inventory Status By Location
3	ADDED	Every Full List has Auto-Fill for Filtering on Customers, Vendors, and More
4	ADDED	New Report Types For Warehouse Reports: Quantity Adjustments & Value Adjustments
5	ADDED	New Report Types For Inventory Reports: Item Transactions and Open Orders (All Orders Customers will remember this as the Deficiency Detail Report)
6	ADDED	Ability to Export Orders to CSV straight from the Orders themselves.
7	ADDED	Ability to GET / ADD / UPDATE a Kit Item via the API
8	ADDED	Remove 0 quantity lines from Ship Docs - applied when you change the status to shipped.
9	ADDED	Percent as an option for a custom field data type - If a calculated field is a percentage it should resolve to it's decimal value.
10	ADDED	Events or tasks to SMS - Company Preferences, Under Activities - Make sure to add a Cellphone Carrier and Mobile Number to each User you want to receive SMS.
11	ADDED	Ability to Add custom fields to Production Order
12	ADDED	Added 'On Orders' and 'ETA' to the Inventory Status By Location List.
13	ADDED	Option to set up an alert for Payment Received
14	ADDED	Ability to change the Purchase Order Vendor after the document is saved
15	ADDED	Ability to import a Purchase Order from a CSV
16	ADDED	Option for auto fill to be turned on when creating ship docs for all items besides the ones with serial number tracking

17	ADDED	Auto complete search box on lists should take into account filters on list - So if you are on the sales order list and it is filtered to only show open orders, the auto complete when searching should only suggest open orders.
18	ADDED	Ability to create a Production Order from a Sales Order
1	IMPROVED	Configurable Bill of Materials POP - Rules - when you add a new Component/Config it clears out the Selections and Rules
2	IMPROVED	Set a rule to search for sync jobs that are active and set to auto sync but haven't synced for a day or more to refresh them.
3	IMPROVED	Fix for possible cause for Stuck Sync Jobs
4	IMPROVED	API List Controller - Added support for the correct Path for Attachments
5	IMPROVED	Improved the rounding for Calculated Fields
6	IMPROVED	Improvements to Page Load Times
7	IMPROVED	Newest outside Security Audit shows no flaws, Passed our third security review
8	IMPROVED	QuickBooks API Annual Security Review - Passed
9	IMPROVED	Updated Spanish Language Sections
10	IMPROVED	Made it so that Order Time Trial Accounts can NOT send Emails. Customers can request access if necessary for testing purposes.
11	IMPROVED	New Launcher for the guides in the Admin section
12	IMPROVED	Edit button for Leads in the right place
13	IMPROVED	Added Shipping Regions to Locations
14	IMPROVED	Improved the functionality of the Bin Move operation
15	IMPROVED	Better backups with reduced load time
1	FIXED	Fixed an error that occurred when hitting the back button after selecting a Company File
2	FIXED	Fixed an error when filtering names not IDs
3	FIXED	Fixed Login Page Errors for New Users
4	FIXED	Fixed an error where trying to enter customer item numbers would give an error message
5	FIXED	Price Level Groups cannot refer to themselves
6	FIXED	Bug where Conversions don't Convert default Item Images correctly

7	FIXED	Bug with switching other charge to service or a non part item
8	FIXED	Bug where Unit of Measure Sets were duplicating alternates
9	FIXED	Cannot select properties when creating Calculated Field for order line date
10	FIXED	On a Purchase Order that is approved/closed if you add a column to the line items the action column disappears
11	FIXED	Kit Rules on a Bill of Materials weren't saving when reloading
12	FIXED	Optional Kit Component Not Rechecked after you edit the first time - Improved the Kit Rule UI
13	FIXED	Adjustment list not showing amounts - All 0's even though the adjustments have amounts. Confirmed to be an issue.
14	FIXED	When a Calculated Field uses another field (e.g. iteminventory) check to copy that field first.
15	FIXED	Re-record with Date Fails on Value Adjustment Check
16	FIXED	Subtotal Changing after Status Change - As you add items the ship doc is re-calculated. When you change status there is another re-calculation
17	FIXED	When deleting line items check for value adjustments - We check to make sure it does not cause negative inventory. Now we also check if the units have been revalued and error out if so.
18	FIXED	Date type Filters/Sorts in List - Needed to save international format - If two users have different formats for their dates and one puts a sort/filter for a date on a report, it will not work properly for the other.
19	FIXED	Fixed an error where Verified Email override doesn't change Reply To list
20	FIXED	Fixed an error where Total Records on a Profile List wouldn't update until your refresh the page
21	FIXED	Fixed the Inventory Ledger by Location Report to correct the Running Total
22	FIXED	Fixed an error where the Ledger Report was repeating some headers
23	FIXED	Closing Activity is not Going to History
24	FIXED	Filter names weren't using custom captions
25	FIXED	Reorder point by location not working - When you try to save it gives you an object reference error
26	FIXED	Enter Inline Quantity on Ship Doc when inventory is not in default bin
27	FIXED	Auto complete search terms weren't working with an ampersand
28	FIXED	Notes on Customer - Not available on Sales Order / Ship Doc
29	FIXED	Memo Fields were broken when you add a code character especially when saving a Vendor or a PO

30	FIXED	Fixed an error changing the location on a Vendor Return
31	FIXED	DocuSign Activities / Alerts
32	FIXED	Made it so that the drop-downs close when you print a PDF or labels. It shouldn't get stuck open!
33	FIXED	Deleting a custom field could corrupt a Saved Layout - Now it will throw to a default instead of an error
34	FIXED	Shopify line item discounts not being applied
35	FIXED	If you set a location filter and then open it back up to edit, it does not stick on the Reorder Analysis
36	FIXED	Deleting a Customer or Lead was not deleting the B2B login
37	FIXED	Dates for Activity on Home - Some filters not working
38	FIXED	Resolved errors when saving templates
39	FIXED	Batch Emailing wasn't emailing the contact assigned to the document
40	FIXED	Fixed an error in the b2b config where if it wasn't saved during creation, it wouldn't load back up
41	FIXED	The Domain Name for your B2B Portal cannot have a space!
42	FIXED	Fixed a Label Template loading error
43	FIXED	Fixed a Batch Action Value Adjustment error
44	FIXED	Fixed an error when saving label templates
45	FIXED	Custom Captions now considered on Summary Doc
46	FIXED	Ship Doc Item Quantity Ordered not showing on Report
47	FIXED	B2B Config - Featured Products - If the item list is long it took forever to load the config
48	FIXED	Fixed a Ship Doc Sub Total Issue where it was being calculated wrong
49	FIXED	Ledger Report set to All Data filter wasn't starting at the beginning
50	FIXED	New Look up for filters on lists and reports - made sure custom fields work
51	FIXED	Audit Trail for Delete Count
52	FIXED	Error with drill down on Inventory Valuation
53	FIXED	Fixed problems that would cause duplicated adjustments
54	FIXED	Fixed an error where reports were missing fields
55	FIXED	Image and Attachment Links forced to be https:// for security reasons

56	FIXED	Kit Price rounding issue that was changing the totals from Sales Order to Ship Docs
57	FIXED	Fixed the Tax Setting from being cleared on Customer Addresses
58	FIXED	Import of item vendor data which then updates standard cost, does not trigger the function to re-calculate item custom fields.