Version 1.0.34

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Version 1.0.34 - Released September 15, 2023

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. Our development team is constantly releasing new changes to better serve great customers like you!

#	Changes	Revision
1	ADDED	**Item Merge**
2	ADDED	Create a **Report Schedule** to send Reports via Email automatically at intervals that you configure
3	ADDED	**Receiver Allocation** - Allocate Items from a Receiver to Sales Orders and Work Orders
4	ADDED	Ability to select a **'From' Email** when sending Emails
5	ADDED	Ability to create a Partial Invoice for a Rental Contract
6	ADDED	Ability to search by phrase on the **Rental Dashboard** to find Items quickly
7	ADDED	You can now see the Location for Rental Equipment directly on the **Rental Dashboard**
8	ADDED	**Customer Return** - Select Items from a Ship Doc (Partial Customer Return)
9	ADDED	**Vendor Return** - Select Items from a Receiver (Partial Vendor Return)
10	ADDED	**New Preference** under Sales > Advanced: Enable **splitting a Sales Order** Sales Orders where you have Selected to Ship certain line items can be Split to move the Open Quantities to another Sales Order.
11	ADDED	**New Preference** under General > Advanced: Hear a beep sound after successfully scanning a line item
12	ADDED	**New Preference** under Sales > Advanced: Can change the Status of the Sales Order or Quote after an Email is Sent.

13	ADDED	**New Preference** under General > Advanced: Allow editing custom fields from a transaction's details page, even when the transaction is closed. Allows you to edit Custom Fields on Closed Documents. Make sure to check the box on each Custom Field you want this to work on, you must edit the Custom Field.
14	ADDED	**New Preference** under Sales > Advanced: Default status for Sales Orders coming off hold
15	ADDED	**New Preference** under Items: Disable Item Popup on Sales Orders and Ship Docs. This disables the pop-up you see when you hover over the Item Name in a Sales Order or Ship Doc
16	ADDED	**New Preference** under Mobile > Order Time Mobile: Sort the Sales Orders by Promise Date or Doc No.
17	ADDED	**New Preference** under Sales > General: When you have "Customer PO number must be unique" checked, another option appears called "Allow blank Customer PO number". The default setting for this is unchecked.
18	ADDED	**New Preference** Under General > Advanced: Show location address on a form template instead of the company address
19	ADDED	**New Preference** under Shipping: Status Change After Batch Fulfillment - This gives you a drop-down to choose the Status you would like it to change to.
20	ADDED	**New Preference** under Sales > Rounding: Tax Rounding/Rounding Direction. You can choose Round Down, Round, Round Up
21	ADDED	**New Preference** for Non-US QB users under Sales > Advanced: Customer Sales Tax Code overrides Item Sales Tax Code
22	ADDED	**New Preference** under Sales > Advanced: Update customer ship to address when cloning a Sales Order or Quote
23	ADDED	**French Language Localization** - Change the Primary Language in your browser to French or French (Quebec) and refresh Order Time Inventory
24	ADDED	Ability added to Import a new BoM Version via the BoM Easy Import
25	ADDED	Added the ability for an Admin to view the Orders which are "Checked Out" on the Mobile App and Release them.
26	ADDED	Create a Rental Contract directly from a Customer. In the Page Layouts add the Rental Contracts tab to Customer Details.
27	ADDED	Added the ability to change the Customer Return No. when Returning an Item from a Ship Doc (If you leave it as is it will create a new Customer Return)
28	ADDED	The Easy BoM Report button now also appears on the Item details page for Assembly Items
29	ADDED	Added the ability to Allocate Work Order Steps from the Work Order List

30	ADDED	Ability to see the BoM Revision No on the Bill of Materials itself
31	ADDED	New Import Type for Customer Item Group Prices
32	ADDED	New Item Property: Margin, automatically updates the Price field based on changes to the Std Cost
33	ADDED	The Promise Date and Location fields have been added to the Work Order Import
34	ADDED	Added the ability to Partially Invoice a Rental Contract
35	ADDED	Ability to set Alerts for Contacts on Create, Modify, and Delete
36	ADDED	Under the Customer > Items Sold tab you can now add the UPC column
37	ADDED	New property for Vendors - Default Lead Time. If the Lead Time is updated it will update Item Vendors where the Lead Time is Blank or less than the new value.
38	ADDED	Added the ability to Inactivate and Delete the Primary Contact on a Customer
39	ADDED	You can now view all your Custom Messages in a Report. Create a New Report, choose Customers & Leads, and add the Custom Messages Table.
40	ADDED	Added the ability to add Lot or Serial Numbers to Sales Order Labels
41	ADDED	New Role Restrictions for Kit Items, including Kit Pricing
42	ADDED	New Tab on Items for Item Price Levels. Go to your Item Details Page Layout and activate the Tab called Prices.
43	ADDED	Last Purchase Date field added to Items. Add it to your Item Detail Page Layout.
44	ADDED	In an Item Group you can set the Max Discount %. This takes precedence over Price Levels when adding the Items to a Sales Order.
45	ADDED	The Memo Column can now be added to an Item's On Order Detail tab. This will show the Memo information from the Purchase Order or Work Order associated to the Item.
46	ADDED	Now via Import you can associate a Customer Address with a Contact
47	ADDED	Item Vendor Quantity Field added - Item > Vendors Tab > Edit a Specific Vendor. You can also change your Ecommerce Configuration, check Update Inventory, and choose Include Item Vendor Quantity. Great for Drop Ship Ecommerce companies.
48	ADDED	If you have a Payment Gateway set up for ACH/Echeck as well as Credit Card Payments, you can now send out two types of Payment Request Links. Using {!link} as the token will send a Credit Card Payment Link like normal. Using {!linkach} as the token will send an ACH Payment Link.
49	ADDED	BrainTree has been added to the list of Payment Gateways
50	ADDED	Zapier Integration
51	ADDED	Wix Ecommerce Integration

52	ADDED	API Endpoint Added for **Refunds**
53	ADDED	Ability to Convert a Lead to a Customer via the API
1	IMPROVED	Using the Sales Order Easy Import you can now import Sales Order Header and Line Item Custom Fields
2	IMPROVED	The Sales Order Easy Import now supports editing the Shipping Amount field, Shipping Method, and Ship Sales Tax Code
3	IMPROVED	Editing a Custom Field does not remove it from the Page Layout
4	IMPROVED	Added a confirmation pop-up to all docs that comes up when changing the status to Voided
5	IMPROVED	When Creating a New Receiver, you can now sort the Open Purchase Order Screen by clicking the headers.
6	IMPROVED	The Margin on the Bill of Materials updates when the Cost changes
7	IMPROVED	Total Kit Cost is now displayed in the Summary on a Kit Item
8	IMPROVED	Payment Request feature allows for payments in the Customer's Currency
9	IMPROVED	If you add info to a Custom Field like a Pick List it will not be removed from the Page Layout. Changing the Custom Field Type will still require you to add it back to the Layouts.
10	IMPROVED	If Locations have been picked for Reorder Analysis, Reorder Point / Max Quantity / Lead Time are updated for those Locations only.
11	IMPROVED	Reports have been sorted by Name alphabetically
12	IMPROVED	The Filter Lists are now sorted alphabetically on the drop-down. When you hit the cog on a List > Other Tab > Check Creator Only: It shows you only the Filter Lists which you created.
13	IMPROVED	Sales Order Descriptions should now follow over to Linked Work Orders or Linked Purchase Orders.
14	IMPROVED	QuickBooks Authorization Emails have been updated to include the Company Name - This helps Admins who manage multiple Company Files
15	IMPROVED	**Important Improvements for Sales Tax on Purchase Orders and Receivers in the VAT System** Applicable to Non-US Tax
16	IMPROVED	Added a pop-up warning when you click Revert to Default on a Page Layout
17	IMPROVED	You can edit the Quantity when you use the Select to Ship function or the Select to Receive function
18	IMPROVED	Updated the Machine Hours field type to allow for decimal points

19	IMPROVED	Improved the functionality when scanning Items in a Kit to a Ship Doc
20	IMPROVED	Updated the Fill Line Item API to support Transfers
21	IMPROVED	Improved the Can Make calculation for Kit Items
22	IMPROVED	The Image Column can be added to the Inventory Status by Location List
23	IMPROVED	Added the ability to Overbook in the Rental Module. Clicking Add during these situations will bring up a pop-up warning.
24	IMPROVED	Failed Payments are now recorded in the Audit Trail Report - Search for Error Processing Payment
25	IMPROVED	New Preference for the DocuSign integration: Set Status After Signed, works for Sales Orders and Quotes. Modify Status after Emailed in Sales > Advanced and that will count for the DocuSign Integration as well.
26	IMPROVED	You can add the Max Sales Quantity field to your Items to set the max for B2B Portal Sales
1	FIXED	Fixed an issue where Purchase Orders with over 100 line items would show an incorrect Total
2	FIXED	Miscellaneous grammar and spelling errors have been fixed within the Company Preferences
3	FIXED	Fixed an issue where the Rentals tab on a Customer was on by default even if Rentals weren't enabled
4	FIXED	Fixed an issue where Purchase Order Line Items wouldn't fill on the Status - Sent
5	FIXED	Fixed an Issue where reordering lines on orders with multiple Kits would break the Line Numbers
6	FIXED	Fixed an error that occurred when creating a Reorder Analysis
7	FIXED	Corrected an issue that wouldn't allow you to Import the Ship To Address Names when Importing Sales Orders The order of the columns is important. Make sure the Customer column goes before Ship To.
8	FIXED	Corrected an issue on iOS Tablet or Phone multi-page Form Templates preview would not let you scroll to additional pages after the first.
9	FIXED	Corrected a display issue on Work Orders where going to Page 2 of Components for a Step and switching to the next Step would cause those Components to not show up.
10	FIXED	Fixed an issue where performing a Sales Order Import to update a Sales Order was changing the Date and Promise Date
11	FIXED	Fixed a Costing issue with UOM Sets. If the Vendor was not listed as an Item Vendor the Std Cost would not change to the Purchase As UOM.

12	FIXED	Fixed an issue where you couldn't Import negative quantities for an Adjustment on an Item that has a Lot / Serial Number
13	FIXED	Fixed an issue where the Description and Custom Fields were note updating when an edit was made to a Lot or Serial No. entry.
14	FIXED	Fixed errors that would occur when trying to Create a PDF while using Order Time on a Mobile Browser
15	FIXED	Fixed an issue that occurred when you have the Preference to Auto set the quantity from the Sales Order to the Ship Doc. If you manually added a line to the Ship Doc the Quantity would stay at 0.
16	FIXED	Fixed an issue that made it impossible to Add Items to an existing Vendor RFQ
17	FIXED	Fixed an issue with Problem Codes in Repair Order Reports
18	FIXED	Fixed an issue that occurred when applying multiple Payments to a Rental Contract
19	FIXED	Fixed an issue where changing the Step Location on a Work Order wouldn't update the Work Order Location
20	FIXED	Fixed a Xero issue where the Purchase Tax Code wasn't populating
21	FIXED	Fixed an issue with different currencies that would occur when adding line items to a Receiver. It will look at the exchange rate on the doc now.
22	FIXED	Fixed a bug that occurred when you Deallocate Repair Order Components
23	FIXED	Fixed an issue where you uncheck the top check box on the Reorder Analysis screen and it wouldn't uncheck all
24	FIXED	Allow Shipping Partial wasn't working correctly for Kits
25	FIXED	Fixed an issue where Custom Notes were duplicating in the Memo field
26	FIXED	Fixed the functionality for adding a Service Item to a Work Order. It would auto-allocate even with the preference to auto-allocate Components turned off.
27	FIXED	Fixed an issue when adding a line item to a Sales Order with an Exchange Rate
28	FIXED	Fixed an issue with the Minimum Order Quantity not affecting Purchase Order Line Items properly
29	FIXED	Fixed a display issue where Lot and Serial Number Reference wouldn't appear in the Transaction Tab of the Lot/Serial No Details page if the LSN was added through a Count
30	FIXED	Fixed Xero Sync Issues & Xero Terms Calculations
31	FIXED	Fixed an issue where Ecommerce Configuration Settings were slow to load
32	FIXED	Fixed the implementation of Tracking Categories mapped to Class for Xero

33	FIXED	Fixed an issue where deleting line items on a Bin Move would remove the wrong line.
34	FIXED	Fixed an issue that messed up filtering the Ship Doc List using the Balance column
35	FIXED	Fixed an issue where Receivers had missing Bins