

Version 1.0.35a

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Version 1.0.35a - Released February 22, 2024

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!



Due to certain updates you may need to perform a hard refresh on certain pages like the Item Detail page. Check out these instructions on performing a hard refresh: [How to Perform a Hard Refresh and Clear Cache](#)

#	Changes	Revision
1	ADDED	Item Substitution Added to Sales Orders and Quotes. If your Item has Related Items that are set as Replacements a new icon will show up for that Line Item on your Sales Orders or Quotes. This icon allows you to perform a Substitution with the Related Items.
2	ADDED	On Ship Doc Line Items we have added the column: Available Make sure to turn on the preference under Shipping > Show available on ship doc line item.
3	ADDED	Color-coding has been added for Calendar Events. To Enable go to Company Preferences > Activities > select Use activity type as colors for calendar and Save. In your Profile Lists > Activity Types you can set colors for your Event-type Activities.
4	ADDED	New Company Preference under Sales > Advanced: Days to add to a Sales Order and Quote Promise Date
5	ADDED	New Company Preference under Inventory : Use Available instead of On Hand for bin moves. You should do this when you want to exclude Committed or Allocated when doing a bin move.
6	ADDED	New Company Preferences under Inventory : Section for Counts to exclude certain items

7	ADDED	On Sales Order Line Items we have added the column: Kit No
8	ADDED	Added the ability to select multiple Classes when creating a Reorder Analysis for Production
9	ADDED	New functionality has been added under Accounting Integration. There is a new link under Sync Queue and Sync Jobs to Batch Repost Journal Entries . When clicked it allows you to choose a From Date and a To Date. Clicking Save will start the batch.
10	ADDED	The hover-over Item Popup function has been added to Purchase Orders
11	ADDED	When Sending Email from a Transaction you can now Maximize the Send Email window. The button is located on the top-right near the X that closes it.
12	ADDED	New Alert Type added: Vendor Return
13	ADDED	Added the ability to add Attachments to Payments
14	ADDED	New Company Preference under Shipping: Default Return Bin. If this is populated it becomes the Default Bin for Customer Returns and by extension the location of the customer return
15	ADDED	"Send To Type" has been added to your Form Templates. When you select Billing, Shipping, or Contact those will be the default To Emails for automated and batch emails (Alerts, B2B, Batching)
16	ADDED	API Additions: IncludeLineItemDetails has been added which will include Bin and/or Lot/Serial Number entries.
1	IMPROVED	SPF Records have been added to Email Domain Verification . This help your company comply with the newest Gmail and Yahoo sender restrictions.
2	IMPROVED	The Location drop-down for Adjustments has been swapped to alphabetical order
3	IMPROVED	The name of your Reorder Analysis now appears on Printed Versions just like how it appears for Reports
4	IMPROVED	The Company Names have been Alphabetized on the Company dropdown in the Item Alias screen
5	IMPROVED	Added Role Exceptions for Report Schedules, Form Templates, Master Search Results
6	IMPROVED	Catalog Ordering has been updated and the functionality has been improved
7	IMPROVED	Improved functionality with how the Unit of Measures are handled for the Ship Doc Line Item via the API
8	IMPROVED	You can now set a Step on a Bill of Materials to a fraction of a minute or a fraction of an hour, etc. The quantity is no longer forced to be 1 or greater.
9	IMPROVED	Bill of Material Step UOM - Minutes can be used for Reporting purposes as well now, and fractions won't round incorrectly.

10	IMPROVED	When performing a Transfer, if you add an Item with a Lot / Serial Number, the Transfer Line Item screen now has a tab called Available. This tab will show you all the Lot / Serial numbers that are available for transfer as well as their Quantity and current Bin.
11	IMPROVED	Entity Ref Names can now be used to concatenate within Calculated Fields. Example: UOM + Another Entity.
12	IMPROVED	Ledger Reports can now be used with Promise Dates. There previously was an issue because certain transactions do not have a Promise Date, but in the case where it is left blank, we now use the Date field.
1	FIXED	Fixed an issue where the A/P Account in the Terms was not driving the AP account in QuickBooks Online and QuickBooks Desktop
2	FIXED	Fixed an issue where the Price calculation was off when a Price Level is by Price (not by cost)
3	FIXED	Fixed an issue where applying credit was not taking into account the exchange rate for foreign currency
4	FIXED	Line Instructions for an Item weren't being applied to Work Orders after editing the Bill of Materials and clicking Reload BOM on the Work Order
5	FIXED	When cloning a Quote, Sales Tax wasn't correctly being applied if you use the "Calculate tax rates based on zip codes instead of Item Sales Tax" Preference
6	FIXED	Fixed a display issue where Lotted Items with no quantity retained Inventory Value
7	FIXED	Fixed an issue where Drop Ship Purchase Orders were not always creating the corresponding Ship Doc when received
8	FIXED	Fixed a display issue where not all of the Linked POs on a Receiver would show on certain List Views
9	FIXED	B2B Portal: Fixed an issue where Style Items come in with 0 Available Inventory instead of the sum of available selections
10	FIXED	Corrected a behavior where after saving and reloading a label with a barcode you could no longer resize the barcode
11	FIXED	Addressed a bug causing quantities not to be registered when using the Sales Order Catalog
12	FIXED	Resolved an issue that made you unable to Drag and Drop sections on a Ship Doc Form Template
13	FIXED	Fixed an error that occurred when trying to edit a Receiver Line Item that had a Lot / Serial Number attached to it
14	FIXED	Fixed an error that occurred when trying to Export from the Sales Order Line Item Editor - Promise Dates tab

15	FIXED	Fixed a display issue that occurred when you changed the quantity on an Item you were adding to a Sales Order. It wouldn't update the Price Level List for Volume Based Discounts.
16	FIXED	Fixed a bug when editing a Parent Item or Parent Customer the change would not flow down to the Child Items or Customers
17	FIXED	Fixed a display issue where the progress widget on the Imports or Reorder Analysis wasn't visually incrementing
18	FIXED	Fixed an issue where the Posting Date was not being reset when creating a Customer Return from a Ship Doc
19	FIXED	Fixed a Ship Doc bug that could occur when the Customer has overpaid it wouldn't sync over to QuickBooks
20	FIXED	For newly created Kit Items the Standard Cost is now updating properly on the Item List
21	FIXED	Resolved an issue where Classes wouldn't show up in the drop-down on Purchase Order Line Items