

Version 1.0.39

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Version 1.0.39 - Released July 10, 2025

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	Order Time Pay Canada is live
2	ADDED	New Preference in Payments > OrderTime Pay "Limit number of payment methods on file per customer"
3	ADDED	Order Time Pay customers can now add new payment methods for Customers from the Customer Details page (click Add OT Payment Method)
4	ADDED	Order Time Pay customers can now edit payment methods (delete cards, update expiration date, etc.) for Customers from the Customer Details page (click Edit Payment Methods)
5	ADDED	New Preference in Payments > General "Generate payment link instead of emailing a payment request" Instead of emailing the Send Payment Request link you can choose to receive it as a copy-able link to send separately
6	ADDED	New Preference General > Advanced "Allow editing custom fields from a full list in batch action"
7	ADDED	New Preference Production > Advanced > "Enable updating Work Order Component Std. Costs to the item's purchase cost" It adds a button above the Work Order to update the costs
8	ADDED	New Preference General > Advanced "Mark Memo & Instructions tab when they have values" which also highlights the memo & instructions tab for Customers

9	ADDED	New Preference in Sales > Advanced "Convert partial Quotes to Sales Orders" allows for breaking out Quote Line Items to their own SO
10	ADDED	New Preference in Shipping "Update the Sales Order Shipped Dated when the Ship Doc is re-shipped" The preference "Use the posting date (date shipped) instead of the Ship Doc's date when updating the Sales Order's Date Shipped field." must be checked for this to work
11	ADDED	New Preference in Purchasing > Reorder Analysis "When using a single location filter, always show reorder point, reorder amount and max quantity for that location. "
12	ADDED	New Preference in Sales > Advanced "Copy attachments from sales order to ship doc"
13	ADDED	<p>New Preference General > Advanced "Enable Reports from Details Page" On New or Existing Reports you can check the box that says "Show in Details". Then when you go to details page for any of the following entities you will have a Reports drop-down.</p> <p>Available on:</p> <ul style="list-style-type: none"> • Adjustment • Customer • Customer Return • Item • Location • Lot Or Serial No • Purchase Order • Quote • Rental Contract • Repair Order • Receiver • Sales Order • Ship Doc • Value Adjustment • Vendor • Vendor Return • Work Order
14	ADDED	The Item Pop-up when you hover over an Item on Sales Orders, Purchase Orders, and Ship Docs, now works on Bill of Materials and Work Orders (It can still be disabled in Company Preference > Items)
15	ADDED	There is a new Role permission for the Merchant Track dashboard for Order Time Pay. Under the Roles you click on the Sales tab and the Role is called Merchant Track. Users who have a role with that permission checked can access the payments dashboard.
16	ADDED	New QBO Only Preference for "Show the ACH link on Invoices and Show the Credit link Card on Invoices". This allows the user to take ACH and CCs from the invoices generated through Order Time.
17	ADDED	The Kit configuration chooser off of a Sales Order has been added to the API
18	ADDED	Added the ability to create Bins via the API

19	ADDED	Added a highlight in green on the Memo & Instructions tab when there is data in the memo, shipping instructions, or internal notes field for a Ship Doc
20	ADDED	On the Transactions tab on an Item you can now add the Memo Column
21	ADDED	When sending email from the system and clicking on the Additional To section, you can now choose Employees (these can be edited in your profile lists)
22	ADDED	Date Converted field has been added to Customers. You can create Customer Report using this field to show all the Leads that have converted to Customers
1	IMPROVED	Added the locations chosen for the Reorder Analysis to the General box in the header. If multiple locations are chosen, they will be separated with a comma.
2	IMPROVED	Allocation by bin checks other bins before putting a bin into the negative when negative inventory is allowed. (Please do not allow negative inventory, it is not a best-use scenario)
3	IMPROVED	When using the configurable Bill of Materials for an assembly item that is being added to a Sales Order, you can now correctly apply a price level to it once it has been added to the Sales Order
4	IMPROVED	When doing a configurable Kit, the custom fields from the item used flow down to the Kit Selections (Keep in mind they are not copied to the Kit Item itself)
5	IMPROVED	The API for the Quote now includes LineItems in the List API
6	IMPROVED	The Memo and Instructions now flow down from the parent Work Order when doing a drill down
7	IMPROVED	When a payment is modified, or the applied to or from is changed there is an audit trail entry for the modification
8	IMPROVED	Last Modified and Modified columns have been improved on the Reorder Point by Location tab on an Item
9	IMPROVED	When replacing a component using the BOM Component replacement feature on the BOM Full List, we've added a warning before saving to prevent mishaps
10	IMPROVED	We improved the experience when using the Select Items to Receive function, instead of Back Order, the Column is called Open Quantity
11	IMPROVED	The phone number field for customers and leads now supports international formatting. If there is a plus sign at the beginning it allows you to do the International formatting
12	IMPROVED	When you put a Parent Customer on Credit Hold it puts all Child Customers in Credit Hold as well. Removing the Parent from Hold does the same for all Child Customers as well

13	IMPROVED	New Price is now displaying in the Price tab and the Item Markup price level
14	IMPROVED	When printing labels, the Repeat Labels Based On drop-down correctly includes custom fields and the drop-down no longer gets squished
15	IMPROVED	We added a spinner when adding an Item on a document so that you can't accidentally double and triple add it
16	IMPROVED	Improvements to the Ecommerce Config when switching to Ship Doc it should load the proper selections
17	IMPROVED	Search functionality has been added to the Catalog Ordering screen
18	IMPROVED	Calculated report fields that are doing math between two tables can be used in a Summary function
19	IMPROVED	The Currency Symbol used in the profile lists now overrides the default currency symbol for print-outs if you have utilized custom symbols
20	IMPROVED	Variable Groups in a Config BOM can now be rearranged easily with new up/down arrows
21	IMPROVED	Report filters for True and False no longer require you to put in 0 or 1, they let you choose True or False
1	FIXED	The Default Start Time for Rental Contracts has been updated to fix an issue with new contracts
2	FIXED	Fixed an issue where deleting a bin would not update the item line so Sales Orders that had allocated that inventory would not update
3	FIXED	Fixed an issue where percentage custom fields with many decimal places would error out
4	FIXED	Fixed an issue where the change vendor list would not expand past the window size
5	FIXED	Fixed an issue where the Change vendor link should not appear if the document is read-only/closed for Quote, Sales Order, Ship Doc, Purchase Order
6	FIXED	Changing the status on a Work Order should now properly update the last modified date
7	FIXED	Changing the status of a Step on a Work Order should now update the last modified date
8	FIXED	Fixed an issue that occur when enabling UOM Sets for the first time
9	FIXED	Fixed an issue where the Description field for the lot number is now copied to the Lot Serial section in the Sales Order and Ship Doc
10	FIXED	Fixed an issue where changing the quantity on a cloned Work Order would not adjust the quantity per

11	FIXED	Fixed an error that could occur on the price levels tab on an Item, no error should appear unless you leave the rate field blank
12	FIXED	Fixed an issue with a form allowing dashes, periods, or spaces for credit cards
13	FIXED	Fixed an issue when creating a Role Exception for the Total Amount on a Receiver>Returns, it would still show within the Vendor Receiver tab
14	FIXED	Fixed a bug that made it so that using the custom date filter in a view on a list would not save the filter
15	FIXED	Fixed an issue where the Config BOM Price was not getting deducted correctly when changing the quantity, saving, and coming back into the Config BOM