Customer Portal (fka WebPortal) and Web API Release Notes

Cavallo Support - 2026-09-17 - Release Notes

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Release Date 7/13/2026

API 1.1.2.21

UPDATED: API: GET, PUT, and DELETE endpoints can now support business objects which have a \ or other special characters in their key. To use this functionality, replace all instances of the key in the URL's path with a Base 64 URL encoded version of the key prefixed with "Base64URL:". For example, when updating a sales document which is a quote and has a doc num of A\B, use the path /api/SalesDocument/QUOTE/Base64URL:QVxC but keep the Sales_Doc_Num in the body as A\B.

Customer Portal 1.1.2.21

FIXED: Application: This application now supports business objects which have a \ in their key.

Release Date 6/5/2026

API 1.1.2.20

ADDED: API: Purchase Receipts: There are now endpoints for creating, reading, updating, and deleting purchase receipts.

ADDED: API: Purchase Receipt Line Items: There are now endpoints for creating, reading, updating, and deleting purchase receipt line items.

ADDED: API: Purchase Receipt Details: There are now endpoints for creating, reading, updating, and deleting purchase receipt details.

Release Date 5/19/2026

API 1.1.2.19

FIXED: Workflow Forwarding: Smart printing will now trigger correctly when pushing documents through workflow. (Introduced: 1.1.2.17)

Release Date 4/15/2026

API 1.1.2.18

UPDATED: API: ItemPriceList and InventorySearch endpoints now have a Dex_Row_Timestamp datetime column which automatically updates whenever the row's data is updated. These columns can be used with the OData enabled endpoints to only return rows which have recently changed. NOTE: These columns will only work after running SalesPad version 5.7.3 or higher's database update, and then running Web API's database update.

Release Date 4/6/2026

API 1.1.2.17

BREAKING CHANGE: AvaTax: AvaTax tax calculations now use AvaTax's REST service and new SalesPad settings which were introduced in SalesPad version 5.6.3. Users who have AvaTax set as a SalesTax Query Handler in SalesPad may need to upgrade to SalesPad version 5.6.3 or higher.

UPDATED: Application: Web API is now a 64-bit application.

UPDATED: Application: SalesPad was updated to version 5.7.0.

UPDATED: Application: DevExpress was updated to version 25.1.7.

Release Date 7/24/2025

API 1.1.2.16

FIXED: Getting Started: The Basic Authentication hyperlink now works.

FIXED: Additional Help: The hyperlinks now work and have more appropriate labels.

Release Date 3/4/2025

API 1.1.2.15

UPDATED: Application: RestSharp was updated to version 106.15.0.

UPDATED: Application: DevExpress was updated to version 24.1.5.

UPDATED: Application: SalesPad was updated to version 5.5.1.

UPDATED: API: Sales Line Item: Update Fulfillment Endpoint: This endpoint is now faster and does not impact as many database tables.

FIXED: API: Sales Rep: GET endpoint for SalesRep will no longer result in a "Specified cast is not valid" error when attempting to retrieve a specific Sales Rep.

FIXED: API: Endpoints will not randomly give unauthorized errors in low memory situations.

Web 1.0.1.138

UPDATED: Login: Changed the default background to reflect the application’s current branding.

Release Date 10/31/2023

Web 1.0.1.128

FIXED: Sales Document Card: Users will no longer receive an error related to a missing user field endpoint when loading a Sales Document. (Introduced: 1.0.1.117)
FIXED: Grid Filters: The focus of a grid filter will no longer be lost after the grid is refreshed.

Release Date 7/19/2023

API 1.1.2.14

ADDED: API: Sales Line Item: Update Fulfillment Endpoint: Accepts a sales document line and a list of fulfillment details, and fulfills that sales line accordingly.
ADDED: API: GET CustomerItemClassPriceLevel endpoint added.
UPDATED: Sales Documents: Deleting sales line items with the DeleteLineItems endpoint will now audit which line items were deleted.
UPDATED: Sales Line Items: Deleting a sales line item with the delete endpoint will now audit which line item was deleted.
UPDATED: Sales Documents: Calling the DeleteLineItems endpoint without specifying a body or line items will now return a Bad Request status code instead of a Created status code.
FIXED: API: PUT /SalesDocument endpoints no longer duplicate named notes during updates.

Release Date 10/25/2022

API 1.1.2.13

ADDED: API: Added Pre Transfer Script hook that executes when transferring quotes to orders.
FIXED: POST api/SalesLineItem - Non-inventory items will now write the Unit_Cost value correctly. The Extended_Cost is calculated by Unit_Cost multiplied by Quantity to match SalesPad Desktop functionality.

Release Date 9/23/2022

API 1.1.2.12

Desktop Compatibility Version: 5.2.33

UPDATED: Application: The app is now usable for customers using CRM licensing or Customer & Order Manager licensing.

Release Date 3/9/2022

API 1.1.2.11

BREAKING CHANGE: Sales Documents: Line Items: The stored procedure spweb.sppGetInventorySearch_Web now supports the custom stored procedure spweb.spcpGetInventorySearch_Web instead of dbo.spcpGetInventorySearch. This allows for different products to filter the sales inventory lookup differently. Implementations of spweb.spcpGetInventorySearch_Web may simply call dbo.spcpGetInventorySearch if desired.

FIXED: Filter Scripts: Nullable user field types, such as integer, decimal, and Boolean, are now handled correctly to prevent the 'The binary operator Equal is not defined for the types System.Nullable'1[System.Boolean] and System.Boolean.' error.
FIXED: Application: Fixed the 'Could not load file or assembly CefSharp.BrowserSubprocess.Core.DLL or one of its dependencies. The specified module could not be found.' error by removing CefSharp files from the installation directory.
FIXED: Sales Documents: Line Item: The item lookup will load and filter results properly, regardless of what the setting 'Inventory Search Use Proc Override' is set to.
FIXED: Opening void or historical documents in Web Portal will no longer result in an error message.

Release Date 6/11/2021

API 1.1.2.7

UPDATED: RestSharp dll updated to 106.2.2 to match Desktop and avoid "Could not load file or assembly" error.

FIXED: External Users: Fixed issues that would occur when an external user was assigned too many customer addresses.

Release Date 10/5/2020

API 1.1.2.4

Web 1.0.1.104

Desktop Compatibility Version: 5.0.5

ADDED: API: SalesDocuments\WithLines: A new header flag 'CopyAddressInfoFromAddressCode' which copies physical address information (street address, city, etc.) from the address code passed for 3rd party tax services.

FIXED: API: Sales Document: Sales Documents created without a billing address specified will now use the customer's primary billing address for the Email Billing field.

UPDATED: API: DevExpress upgraded to from 18.2 to 19.2
UPDATED: API: api/SalesDocument/WithLines will now update line numbers automatically if none are provided or duplicates are detected. This resolves some issues with dropped lines and mismatched UDFs.
UPDATED: API: GP Submodule updated to latest master commit. (Desktop 5.0)
UPDATED: Admin: Fields: Only fields of type "string" are allowed to be flagged as required.

FIXED: API: SalesDocuments\WithLines: Requests without Currency_Dec specified will no longer have rounding errors with AvaTax.
FIXED: SalesDocumentCard: UDF fields marked as Required in Admin -> Fields -> Sales Document are now highlighted in yellow. Checkout and Forward buttons are disabled and have a tooltip (Chrome only) displaying which fields are required to enable button.
FIXED: Sales Documents: Opening a historical or void sales document will not result in a 'SalesDocument not found' error.

Release Date 7/16/2020

API 1.1.2.3

Web 1.0.1.103

Desktop Compatibility Version: 5.0.0

ADDED: API: EnableDetailedLogging ApplicationSetting - will log request and response bodies to SalesPad's Graylog server for troubleshooting. Defaults to false; should only be enabled when requested by SalesPad, and should not be left on indefinitely.

UPDATED: POST api/SalesLineItem and PUT api/SalesLineItem/{Sales_Doc_Type}/{Sales_Doc_Num}/CreateOrUpdate both allow for custom pricing by passing Unit_Price in the request body. If not passed, normal SalesPad pricing rules will apply.
UPDATED: API: Plugins are only loaded for specific endpoints which require them.
UPDATED: Licensing: WebAPI now checks for an updated license when external user licenses are no longer valid due to expiration.

FIXED: API: Smart Printing and Run Script consistently run via API Workflow Forward.
FIXED: Sales Document Entry: Changing the Ship To Address will no longer clear the fields on the User Fields tab.
FIXED: Sales Document Entry: Changing the Bill To Address will no longer revert changes made to the Sales

Document.

Release Date 12/31/2019

API 1.1.2.2

Web 1.0.1.62

Desktop Compatibility Version: 4.6.4.21

Web Portal

ADDED: App Wide: UDF Inputs now support more characters.

FIXED: Customer Card: UPS Validation module is once again available.
FIXED: Item Quantities: Item quantities now properly render on grids and column pickers.
FIXED: New Customer Address: 'Warehouse_Code' will always populate based on the primary address for a customer.
FIXED: Sales Order: Address dropdowns now open without issue.
FIXED: Search Screens: Typing an apostrophe into any of the grid column filters now filters as expected.

Release Date 8/5/2019

SERVER 1.1.1.4

FIXED: API: CustomerAddr requests now support special characters in Address_Code.

Release Date 7/3/2019

SERVER 1.1.1.2

FE 1.0.1.22

CHANGED: Configurator: The Configurator now allows dropdown blank selections on dropdowns.

FIXED: API: Sales Document: Posts no longer fail if a kit item was added and the Tracking_Option field wasn't passed in when attempting to create a sales document using the WithLines end point.
FIXED: Configurator: The Configurator cache will now be cleared when the Configurator screen is closed without saving.
FIXED: Sales Document: Partially shipped sales documents no longer cause log outs.

Version 1.1.0.5

Release Date 3/15/19

Web Portal

UPDATED: Logo: Updated logo to latest SalesPad logo.

FIXED: Configurator: The Close Configurator button will now be visible if the configuration version is marked as historical. (Extended Module)
FIXED: Sales Document Notes: In some scenarios, notes would only save a portion of what was entered. This has been corrected.
FIXED: Sales Line Items: When adding the same item number twice in a row will, the UofM field will no longer be blank.

Version 1.1.0.4

Release Date 3/5/19

Web Portal

ADDED: Application: There is now a configurable setting in both API and Frontend to dictate automatic logout time. (Default: 15 minutes)
ADDED: Sales Document Search: Added 'Begin Date' and 'End Date' search parameters.

UPDATED: Configurator: Configured items will now be cached when in the configuration screen. This will reduce wait time when selecting options before adding the item to a sales line.

FIXED: Login: Reset Password On Next Login will now work properly for non-admin security groups.
FIXED: Sales Line Items: Changing quantity now respects the 'Reprice When Qty Changes' setting.
FIXED: Sales Line Items: Changing unit of measure now respects the 'Reprice When UofM Changes' setting.

FIXED: Sales Line Items: Decimal values will no longer be converted to integers when editing numerical quantity.
FIXED: Sales Line Items: Editing the unit price field will no longer revert back to the previous price.

Version 1.1.0.3

Release Date 1/28/19

Web Portal

UPDATED: Security: Sales Document: The Address Code securities have been renamed to Bill To Address Code and Ship To Address Code. An Edit property has also been added as a selectable option.

FIXED: Customer Card: API Requests for Customer Address are now properly filtered by both Customer Number and Address Code to avoid timeout issues due to retrieving too many addresses.
FIXED: New Customer: When creating a new customer, the Primary Ship/Bill To Address Code will now be set instead of the Primary Statement Address Code.
FIXED: Sales Document: Changing the Ship To or Bill To Address would sometimes not update these fields. This has been corrected.
FIXED: Sales Document: Changing the Shipping Address Code will now update the sales document's Email field.
FIXED: Sales Document: External users will no longer be able to mistakenly update sales document addresses on Sales Document Types that are restricted to them. This was caused by the user making changes to the customer's Contact Address and then opening a sales document using that address.
FIXED: Sales Document: Sales document comments/notes will no longer be cleared out when updating user fields or vise versa.
FIXED: Sales Document: The Bill To Address field will no longer display information if the user does not have security access to the Bill To Address Code field.
FIXED: Sales Document: The Bill To and Ship To address code fields will now properly respect their security settings.

Version 1.0.1.5

Release Date 7/16/2018

Web Portal

ADDED: Customer Address: Security: Addresses.
ADDED: Customer Address: Security: Address Type.
ADDED: Customer Address: Security: Phones.

FIXED: Customer Address: Customer Address grid should show results after modifying security.

Version 1.0.1.4

Release Date 7/10/2018

Web Portal

FIXED: General: Item lookup once again searches.
FIXED: Customers: The primary address website link will work regardless of whether the link explicitly specifies a protocol (i.e. http or https).
FIXED: Sales Document Transfer: Post transfer scripting will now compile and execute as expected.
FIXED: The subtotal column of a Sales Document Search grid is now formatted correctly as currency.

Version 1.0.1.3

Release Date 4/24/2018

Web API

ADDED: GL Transactions: Endpoints for loading and creating GL Transactions.
ADDED: GL Distributions: Endpoints for loading and creating GL Distributions.
ADDED: Authentication: Bearer token authentication is now supported.

Version 1.0.1.1

Release Date 3/21/2018

Web API

ADDED: AR Transactions: Endpoints for loading and creating AR Transactions have been added.
ADDED: AR Transactions: Endpoints for loading Historical and Open AR Transactions have been added.

UPDATED: Sales Document Entry: Created sales documents on the rest API will now have warehouse set based on the warehouse code of the given customer address if not populated.

FIXED: Reports: Having certain custom reports will not cause reports to fail to load.

Version 1.0.0.6

Release Date 11/21/2017

Web Portal

ADDED: External Users: An Order Stepper for quotes, which allows for a more user-friendly and guided order creation and payment process, was added.
ADDED: Customer: Pay Now Tab: The ability to create cash receipts for customers using the Pay Now tab was added.
ADDED: Customer: Pay Now Tab: The ability to apply cash receipts to posted invoices was added.
ADDED: Customer: Wallet Tab: This tab, which allows the management of PayFabric wallets, was added.
ADDED: Sales Document: PayFabric Tab: This tab, which shows existing PayFabric transactions and allows the creation of new transactions, was added.
ADDED: Admin: Groups Tab: Other Tab: Customer: PayNow and Wallet permissions were added.
ADDED: Admin: Groups Tab: Other Tab: Sales Document: A PayFabric permission was added.
ADDED: Admin: Groups Tab: Fields Tab: PayFabric Transaction permissions were added.

Web API

ADDED: *api/Batch* endpoints were added.
ADDED: *api/CashApplication* endpoints were added.
ADDED: *api/CashReceipt* endpoints were added.
ADDED: *api/CashReceiptCreditCardPayment* endpoints were added.
ADDED: The *api/PayFabricTransaction* endpoints were extended.
ADDED: A *POST api/PayLinkPaymentComplete* endpoint was added.

Version 1.0.0.5

Release Date 9/11/2017

Web Portal

FIXED: SalesDocument Card: Sales document changes are saved correctly after the first change.
FIXED: Active Users Panel: License statistics are refreshed after toggling the external user Active/Inactive status.

Web API

UPDATED: Sales Document Workflow: Forwarding a document through workflow will now run the Smart Printing and Run Script workflow plugins where applicable.

Version 1.0.0.4

Release Date 8/4/2017

Web Portal

ADDED: The page title updates to the description of the current page.

FIXED: SalesDocument Card: Sales Line Items Grid: Edit Columns: Fields for SalesLineItemHistory no longer show for open SalesLineItems, and vice versa.
FIXED: Customer Search: Advanced Search: Advanced search fields now use a "Starts With" search filter, instead of "Like".
FIXED: Admin: Groups Tab: Fields Tab: Customer Permissions: Sales Person ID and Sales Territory permissions are now linked between Customer and CustomerAddr.

Web API

UPDATED: SalesPad Active Support: Error Messages: SalesPad error messages now provide more detail on certain errors, and additional information to assist in resolution if available. For example, error "SP001" will now resolve to "There is no Backorder Document ID set up for this document ID."

FIXED: A Desktop update which fixes the "Unable to cast object of type 'Apollo.Data.BusinessObjectCollection' to type 'SalesPad.Bus.SalesPromotions'." error when saving Customer or CustomerAddr was incorporated. This was thought to have been fixed in 1.0.0.2, and the secondary issue is now fixed.

Version 1.0.0.3

Release Date 6/30/2017

Web Portal

ADDED: Admin page: Upon making changes, an alert will be displayed with a reminder that logging out is required for new permissions to take effect.

Web API

ADDED: *api/PayFabricTransaction* - GET/POST/PUT/DELETE endpoints were added for PayFabricTransaction objects.

Version 1.0.0.2

Release Date 6/16/2017

Web Portal

UPDATED: Currency and number formatting were updated in Inventory Search, Item Master, Sales Line Items, and Sales Line Item Search grids.
UPDATED: Plugins.txt was updated with proper format for plugins in config.js.

FIXED: Admin: Groups Tab: The group name creation check is no longer case sensitive.
FIXED: Admin: Users Tab: After deleting a user, the user information is removed from the screen.
FIXED: Grid Column Selection: Column selections are reset when changes are cancelled.

Web API

UPDATED: Business Object Models: These were updated to match the current Desktop version (~v4.6.0.4).

FIXED: Sales Document: The Master Number is whitelisted for Document Copy.
FIXED: A Desktop update which fixes the "Unable to cast object of type 'Apollo.Data.BusinessObjectCollection' to type 'SalesPad.Bus.SalesPromotions'." error was incorporated. (*Update: There is a secondary issue still causing this error, fixed in 1.0.0.4*.)

REMOVED: Database Update - SQL Credentials requirement removed from Database Update page. Current API connection credentials (from web.config) are used instead.

Version 1.0.0.1

Release Date 5/10/2017

Web Portal

ADDED: Admin: Users: A toggle was added for marking external users as inactive oractive (does not count against licenses).
ADDED: Customer Card: Customer AR Details (a new permission added in Admin: Groups) were added to the Customer card.

UPDATED: Admin: Groups: The system does not allow deletion of yourself or the "sa" user.
UPDATED: Login Screen: Error message improved when API is not accessible.

FIXED: Customer Search: Permissions around the New Customer button for internal users were fixed.
FIXED: Customer Card: Preceding spaces in Customer Numbers are no longer trimmed.
FIXED: Customer Card: Item History: The SalesLineItemSearch formatting was updated.

Web API

BREAKING CHANGE: The Web API requires a minimum SalesPad Desktop version of 4.5.1.29, due to Sales Promotions added in SalesPad Desktop.

UPDATED: *GET api/Session?isPermanentSession={True/False}* - An optional URL parameter for permanent API sessions was added. If set to True, this session will NOT expire after 15 minutes of inactivity.
UPDATED: DevExpress was upgraded to v16.2.5 (this matches Desktop v4.5.1.29+).

Version 1.0.0.0

Release Date 1/20/2017

This is the official 1.0 release.

Version 0.6.10.25

Release Date 1/13/2017

Web Portal

FIXED: Sales Document Notes: Notes and comments now obey permissions setup and save correctly for external users.

Web API

UPDATED: The SalesDocument(&History) *Notes* and *Comments* properties were removed from External Blacklist.

Version 0.6.10.24

Release Date 12/30/2016

Web Portal

UPDATED: The Web Portal background image and favicon were updated to use the new SalesPad Logo.

Version 0.6.10.23

Release Date 12/09/2016

Web Portal

UPDATED: Currency formatting was updated to avoid excessive sales document saves.

FIXED: The query string for SalesLineItem requests was updated to include Doc_Type, so that duplicate sales document numbers across different document types do not result in lines from other documents being shown.
FIXED: The bindings for the Sales Document Billing and Shipping Address Code dropdowns were fixed.

Web API

UPDATED: Bulk API Permission Endpoints: Upon receiving an error, the system will continue to loop through and attempt the rest of the updates, rather than breaking in the middle.

Version 0.6.10.22

Release Date 12/02/2016 (WEB API RElease Date 11/28/2016)

Web Portal

This build was triggered for Custom changes. There are no changes.

Web API

FIXED: Desktop Framework Controller credentials are now thread safe for API, and they no longer cause cross-thread incorrect document locking.

Version 0.6.10.21

Release Date 11/18/2016

Web Portal

UPDATED: SalesDocument Card: The Copy button now copies current document to a new document. It always uses the Quote type. The same customer is used, Doc ID is determined by loading the quote with the same Master Number and using the Doc ID. If no original quote is found, an error is displayed.

Version 0.6.10.20

Release Date 11/14/2016 (Web API Release Date 11/11/2016)

Web Portal

UPDATED: Admin: Users: UserCustomer and ShipTo dropdowns use new API endpoints so that they are not limited to current external user's customer. (Requires API v.0.6.10.20+)

FIXED: Currency formatting on historical SalesLineItem grids was fixed.

Web API

ADDED: *GET Customer and Customer Address Admin endpoints for use in Admin* - The Users page where Customer and Address dropdown is not limited to the current external user's customer. (Not shown in API Help pages.)

FIXED: The "Object reference not set to an instance of an object" is resolved after an API database update is performed.

Version 0.6.10.19

Release Date 11/07/2016

Web Portal

ADDED: Tooltips were added to the Add Line Item and Delete Line Item buttons.

Web API

UPDATED: *GET api/Download* - Set ContentType with MimeMapping and changed ContentDisposition to "inline" in order to have the browser attempt to display files instead of automatically downloading them.
UPDATED: APIRecentItems table max lengths were increased to avoid an error that occurred when the title was too long when creating a Recent Item. This requires the following manual SQL to run before performing API database update:
DROP TABLE spweb.APIRecentItem
DELETE FROM spweb.VersionInfo

Version 0.6.10.18

Release Date 10/31/2016 (Web API Release Date 10/28/2016)

Web Portal

This build was triggered to stay in sync with the API build version. There are no changes.

Web API

UPDATED: *POST api/ConfiguredItem/Validate* - The body of the request to accept document and customer properties was changed so that the document does not need to exist in order to validate and retrieve item price (with group pricing, if relevant).

Version 0.6.10.17

Release Date 10/24/2016

Web Portal

UPDATED: Configurator: UofMs are restricted to those returned in the Configurator Object returned by the API (Requires Desktop v4.5.1.7+, API v0.6.10.17+).
UPDATED: Unformat currency fields logic were improved in the modal saver. Previously, the were causing "Input string not in correct format" errors.

FIXED: Sales Document Card: Comments and Notes now display properly upon document load.
FIXED: Sales Document Card: The Delete Line Item button now enables properly when lines are selected.
FIXED: Sales Document Card: Printing: Print Control now prints the selected report instead of the first on the list.

Web API

UPDATED: *PUT api/ConfiguredItem/Configuration* - This passes document Price Level and Currency to Configurator Pricing (Requires Desktop v4.5.1.7+). With the 'Limit UofM Dropdown To Pricing Only' setting (found in Desktop Settings) set to True, it will only return UofMs that have Price Levels set up for Document Price Level and Currency.
UPDATED: *POST api/SalesDocument/{Sales_Doc_Type}/{Sales_Doc_Num}/Copy/{New_Sales_Doc_Type?}/{New_Sales_Doc_ID?}/{New_Customer_Num?}* - This now queries first for Doc Source before loading the document to copy, and allows copying of historical documents.
UPDATED: *GET api/Session* - When set to True, this queries and returns APIVisualPermissions for the user's SystemGroup.

FIXED: Querying Framework (AFW) is now case insensitive. Property names cased differently in the database

versus the application are no longer disconnected.

Version 0.6.10.16

Release Date 10/17/2016

Web Portal

ADDED: A notification modal for displaying notifications returned by the API was added.

UPDATED: The CSS for Save Snackbar was improved and moved to bottom center to avoid overlaying controls and images.

FIXED: Configurator: Subconfigurations now populate properly again.
FIXED: The issue where some checkboxes were saving the opposite of what was checked has been fixed (this was occuring mostly in permissions pages).

Web API

UPDATED: *PUT and POST api/SalesLineItem* endpoints - SalesDocument SaveMessage is now being passed out in the Notifications array.

FIXED: *POST api/SystemGroup/Permission* - Group Permissions now being set correctly.

Version 0.6.10.15

Release Date 10/07/2016

Web Portal

ADDED: Config.js: A Custom_Logo property was added for adding a company logo to Web Portal.

UPDATED: The Quick Pick / Item Catalog Go Back icon was changed.

Version 0.6.10.14

Release Date 10/03/2016

Web Portal

ADDED: Admin: Groups: Fields: Customer Address: Create Checkbox: Permissions around the New Customer Address button were added.
ADDED: Admin: Groups: Fields: A/R Note: Create Checkbox: Permissions around the New Customer A/R Note b