SalesPad Desktop Release Notes (2017-2015)

Paul Manyen - 2024-11-22 - Release Notes

Version 4.6.1.5

Release Date 11/10/17

FIXED: Assembly: When creating a new assembly, the system will now check the historical records to check if that assembly number was already used.

FIXED: Avatax: Sales line-level tax amounts for returns will no longer be negative values.

FIXED: Inventory: Barcode Maintenance: This screen will no longer have issues in which it pauses to load data when the user is scrolling through barcodes.

FIXED: Returns: Fulfillment will no longer be miscalculated when changing various fields on the sales line.

FIXED: Sales Document Entry: When changing to an address that has already been validated once, the address will no longer be re-validated. (Requires an Address Validation query handler.)

FIXED: EDI: Sales Document Packages: Having many packages with labels will no longer cause Out of Memory exceptions. (Extended Module)

FIXED: Sales Entry: When the 'Shortage Option For Item No Backorders' setting is set to NotSet, users will no longer see an "Index (zero based)" exception when saving a sales document with an item that does not allow back orders. This exception would also cause SalesPad to crash. The workaround is to either update the ActiveSupport.xml file in the installation folder or change the setting. (Introduced: 4.6.1.1)

Version 4.6.1.4

Release Date 11/3/17

ADDED: Group Pricing Import / Export: UDF's at both Group pricing and Group Pricing Item Details now can be exported/imported to Microsoft Excel.

ADDED: Setting: Enable System Logging - When enabled, additional logging to the spSystemLog table for some specific scenarios will occur. (Default: False)

ADDED: Setting: SQL Invalid Object Ignore - This setting allows newer users of mobile/web to work with older versions of SalesPad Desktop by ignoring newer features that may not exist in Desktop. (Default: Mobile; Web)

ADDED: User Field Editor: Group Pricing Item Details now supports user field columns

FIXED: Import Manager: Importing item barcodes without an Enabled column will now result in an error stating 'Column '' does not belong to table.'

FIXED: Interactions: Creating certain UDFs will no longer cause a conversion error when navigating to the Interactions tabs. This can be fixed by running sppRefreshViews in SQL and does not require an upgrade.

FIXED: Inventory Lookup: Tabs will now properly load if the Alternate Items tab was the last tab used.

FIXED: Inventory Lookup: When an item number, rather than a barcode, is searched for and the 'Enable Inv Lookup Item Barcode Conversion' setting is enabled, the item number field will no longer be set as blank.

FIXED: Nodus: When using the 'Write to CCA' setting on the processor, the expiration date written to CCA will now be written in the proper format. (Extended Module)

FIXED: Purchase Line Item: When an item number, rather than a barcode, is inserted on a purchase order line and the 'Enable PurchasingLookup Item Barcode Conversion' setting is enabled, the item number field will no longer be set as blank.

FIXED: Quick Report: Export To Template: Speed improvements were made to the export process.

FIXED: Sales Document Entry: After accepting or changing the GP Promo Pricing (GP Extended Pricing), the document total will be properly recalculated.

FIXED: Sales Line Item: When an item number, rather than a barcode, is inserted on a sales line and the 'Enable Item Barcode Conversion' setting is enabled, the item number field will no longer be set as blank.

FIXED: Settings: Sales: 'Enable Item Barcode Conversion' and 'Default Items To Non Inventory' will now work together.

Version 4.6.1.3

Release Date 10/27/17

ADDED: Customer Default Items Plugin: The plugin now has window position save and restore functionality, which will save the plugin's size and location upon closing and will restore the plugin to the saved size and location upon opening.

ADDED: Security: Customer Default Items Plugin: Can Export Grid - This setting will determine whether the gridExtender will allow the user to export the gridview. (Default:

False)

ADDED: Security: Customer Default Items Plugin: Can Print Grid - This setting will determine whether the gridExtender will allow the user to print the gridview. (Default: False)

ADDED: Security: Customer Default Items Plugin: Can Update Grid - This setting will determine whether the gridView is editable. (Default: False)

UPDATED: Active Support: Error messages related to sales line items now give information about which item caused the error.

UPDATED: Password Editor: A toolstrip icon was added.

FIXED: Customer Contract Pricing: When using a grouped contract, if the sales line's quantity goes over the contract limit, a sales line will now prompt to split properly.

FIXED: Customer Default Items Plugin: Grid Layout changes will now be saved.

FIXED: Google ZipCode Query Handler: Users will no longer receive a "Zip Code validation failed. Exceeded Google API query limit." error if they change the zip code multiple times in quick succession.

FIXED: Item Maintenance: Valuation Method will no longer be editable when creating new items that are not Sales inventory type items.

FIXED: Kit Components: If there are entries for the item in IV00105 for the functional currency with the currency ID set to blank, users will no longer see duplicate kit components.

FIXED: Returns: Qty Fulfilled will now more accurately represent the total quantity in SOP10203. This value is a calculated field and is just for display purposes.

FIXED: Returns: When changing the UofM on a sales line and reducing the quantity, an extra record will no longer be created in SOP10103 for multibin environment users.

FIXED: Sales Entry: When changing the warehouse and quantity fulfilled at the same time in a multibin environment, the fulfillment will be properly switched to the new warehouse.

FIXED: Sales Line Items: The 'Can Change Kit Quantities' security no longer requires the 'Sales Line Item Package Smart Field' setting to be populated with a UDF.

FIXED: Sales Search: The Total column will now populate if the grid also has the SubTotal column. Previously, this was only an issue if the 'Only Load Visible Columns' security was enabled. (Introduced: 4.6.0.19)

Version 4.6.1.2

Release Date 10/20/17

ADDED: Item Price: Extended pricing users can now access the Price Sheet ID field in the Item Price business object.

UPDATED: Ship Center: The Ship From Address on Shipments generated from Sales Documents now defaults to the document's warehouse address unless the carrier requires a specific origin.

FIXED: Inventory Lookup: Previously, clicking on an item number hyperlink would not properly load the item in the Inventory lookup. This issue has been resolved. (Introduced: 4.6.1.1)

FIXED: Inventory: The QTY_Drop_Shipped value in IV00102 and IV00103 will now be updated properly as dropship purchase orders are released or invoiced.

FIXED: New Customer: The Note index will now be properly set when creating new customers, rather than being set to 0. This fixes a scenario where there may be a bad note index in SY03900, of 0, and new customers would always pull that note.

FIXED: PayFabric Customer Wallet: Users will no longer receive an "Endpoint Not Found" error when attempting to use the tab for a customer whose number contains special characters.

FIXED: Receipt Transaction Line Selector: Searching by serial or lot tracked values will now return the correct results.

FIXED: Receipt Transaction Line Selector: Users will no longer receive a "SQL statement is nested too deeply" error when doing a search that would potentially return a large number of purchase receipts.

FIXED: Sales Document Line Items: The Inventory Information grid will no longer hide the name of the right-most column if the user has added any sales line item plugin buttons.

FIXED: User Field Editor: The Map To field will now be properly set if the user updates the value for one user field, clicks on another user field, and then navigates back to the original user field.

Version 4.6.1.1

Release Date 10/13/17

BREAKING CHANGE: spcpGetEquipmentSearch: Any custom Equipment Search procedures will need to be updated because of some recent changes to the parameters. Please contact Support if you have any issues.

UPDATED: Backordered Items Report: Users can now select multiple warehouses on the Backorered Items report.

UPDATED: Settings: 'Search Other/3rd Party Items' has been renamed to 'Search Alternate Items'.

FIXED: BOM Entry: Performance when loading BOM items that contain components which are also BOM items was improved. SalesPad will now only show components of BOMs nested up to 10 deep.

FIXED: CRM Entry: CRM Notes and CRM Entry values will no longer save if there have not been any changes made on the form. This will help prevent overwriting changes when two users have the same event open and only one user is making changes.

FIXED: Customer Contact Addresses: The Create Letter will now properly replace the CustomerAddr merge fields. (Introduced: 4.6.0.19)

FIXED: Customer Contact Addresses: The grid will now properly show the Contact Type when set up. (Introduced: 4.6.0.19)

FIXED: Equipment Search: Show In Stock will now work properly with equipment items that have been returned.

FIXED: In-Transit Transfers: The debit distribution account for each line item will now be properly set to the Via Site's account, or, if that does not exist, then set to the To Site's account.

FIXED: Inventory Lookup: Some minor speed improvements around layouts and some extra database hits while loading the screen were added.

FIXED: Inventory Lookup: The Alternate Items tab will be properly visible if Search Alternate Items is checked or unchecked when loading the screen.

FIXED: Inventory Lookup: The Vendor Items tab will be properly visible if Search Vendor Items is checked or unchecked when loading the screen.

FIXED: Inventory Lookup: The grids will now properly have the correct item selected when no results are shown in for different grids.

FIXED: Prospects: The Convert Prospect To Customer and the Create Opportunity plugins are no longer allowed to load if the open prospect has no contacts.

FIXED: Sales Inventory Lookup: The 'Can Access Alternate Item Catalog' security will now properly disable the Search Alternate Items check box.

FIXED: Sales Inventory Lookup: There will no longer be an extra scroll bar for the Search Fields section.

Version 4.6.1.0

Release Date 10/6/17

BREAKING CHANGE: Quick Reports: Editing a quick report now requires the 'Quick Report Editor' security to be enabled.

BREAKING CHANGE: Quick Reports: The Create Call List button will now be visible when the 'Enable Create Call List' security for quick reports is enabled, and the quick report contains any columns with the following names: "custnmbr", "Customer", "Customer_Num", "Customer_Number".

BREAKING CHANGE: Quick Reports: The ability to export to Excel on database quick reports now depends on the 'Can Export Grid' security for quick reports.

ADDED: Dispatch Appointment: Users are now able to combine appointments by dragging and dropping one onto another.

ADDED: Dispatch Appointment: Users are now able to view the sales documents associated with the appointment.

ADDED: Dispatch Map: Double-clicking on the map will display the address at that given location, and the user can choose to add that stop to a route.

ADDED: Dispatch Route Card: A Schedule tab was added.

ADDED: Dispatch Route: Users are now able to link a sales document to a route from the Route card.

ADDED: Dispatch Schedule Route: A sales document plugin that attempts to link the document to a route based on the required ship date and customer was added.

ADDED: Dispatch Search: A new tab which displays routes on a map was added.

ADDED: FedEx Validation: This is a new extended module that supports FedEx address validation. Users must have proper FedEx credentials to use this service.

ADDED: Inventory Analysis: A Primary Vendor column and search field has been added.

ADDED: Inventory Analysis: Tooltips have been added to many columns and other fields to help usability.

ADDED: Item Barcodes: A new Barcode Maintenance screen was added.

ADDED: Item Barcodes: SalesPad barcodes were added.

ADDED: Quick Report Columns: A tab was added to the Quick Report Editor which allows users to specify how individual columns appear and are summarized, grouped, and sorted.

ADDED: Quick Report Comparisons: A tab was added to the Quick Report Editor which allows users to compare a column's value to another column and change the color based on the difference.

ADDED: Quick Report Editor: A new form was added that allows users to easily edit, create, and view quick reports.

ADDED: Quick Report Properties: A tab was added to the Quick Report Editor which allows users to choose the overall properties of how the quick report is displayed.

ADDED: Quick Report Query: A tab was added to the Quick Report Editor which allows users to write the SQL query, which is the core of a quick report, manually, or develop the query using a tool.

ADDED: Quick Report Scripting: A tab was added to the Quick Report Editor which allows users to write scripts to run when the quick report loads, or write Context Menu Item scripts, which can be run at will.

ADDED: Quick Report Searches: A tab was added to the Quick Report Editor which allows users to further filter the data returned by the quick report's query.

ADDED: Quick Report Updates: A tab was added to the Quick Report Editor which allows columns in the quick report to be updated, writing back to the underlying database table.

ADDED: Remote Library: A new endpoint was created in Remote Library to better process recurring sales with Automation Agent. (Requires Automation Agent 1.0.0.14)

ADDED: Request For Quote: A module that allows users to create RFQs for multiple vendors at once, email them to the vendors, and convert them to purchase orders was added. Documentation can be obtained through support or from our website. (Extended Module)

ADDED: Security: Inventory Analysis: Calculate Suggested Values Script - This security will process all currently shown lines attempting to calculate preview values for Reorder Point Qty, Order Up To Level, Min Order Qty, and Max Order Qty.

ADDED: Security: Inventory Analysis: Can Save Items Changes - This security allows the user to calculate and save new values for Generic Description, Reorder Point Qty, Order Up To Level, Min Order Qty, and Max Order Qty. (Default: False)

ADDED: Security: Quick Report Properties: Can Disable Database Quick Reports - If set to True, users will be able to enable or disable quick reports that are stored in the database. (Default: True)

ADDED: Security: Quick Report Properties: Enable Connection String Field - If set to True, users will be able to set the quick report's connection string, which can be used to run its query on a different connection. (Default: False)

ADDED: Security: Quick Report Query: Enable DevExpress Query Builder - If set to True, users can use a DevExpress query building tool to generate the SQL query. (Default: True)

ADDED: Security: Quick Report Query: Restricted Keywords List - This is a semicolon-delimited list of keywords to exclude from SQL queries. (Default: "UPDATE; DELETE; DROP;

ALTER")

ADDED: Security: Quick Report Scripting: Enable Quick Report Scripting - WARNING: Updating the database directly with scripting should be done with extreme caution. (Default: False)

ADDED: Security: Quick Report Updates: Enable Quick Report Updates - WARNING: Updating the database directly with quick reports should be done with extreme caution. (Default: False)

ADDED: Security: Quick Reports: Can Copy - This security enables copying. (Default: False)

ADDED: Security: Quick Reports: Can Rename - This security enables renaming. (Default: False)

ADDED: Security: Quick Reports: Can View Disabled Reports - This security allows the user to check a box to display reports that have been disabled. (Default: False)

ADDED: Security: Sales Batch Processing: Show Capture CC Auths Button - Setting this value to False will hide the Capture CC Auths button. (Default: True)

ADDED: Security: Sales Document Payment: Auto Reduce Cash Payment - When saving a cash payment for a value greater than that on the document total, the amount saved will be automatically reduced to match the sales document on the account. Cash back is also displayed. (Default: False)

ADDED: Security: TeleSales Monitor: Can Reset Completed Rows - This security allows the user to reset completed rows so that they are not completed. (Default: False) (Extended Module)

ADDED: Session Endpoint: An Endpoint to mimic the WebApi Authorization implementation was added.

ADDED: Settings: Dispatch: Default Dwell Time - This setting displays the time in minutes for how long it takes to get from one stop to the next. (Default: 10)

UPDATED: Inventory Analysis: The layout has been updated and standardized to conform to other SalesPad screens.

UPDATED: Inventory Lookup: Discontinued items no longer show up in a vendor search, to be consistent with the Inventory Items grid.

UPDATED: Inventory Lookup: Inactive items no longer show up in a vendor search if Show Inactive is left unchecked.

UPDATED: Quick Reports: ContextMenuItem element scripts for database quick reports now support the ShortCutKey attribute.

UPDATED: Quick Reports: Database quick reports can now utilize the ShowAutoFilterRow attribute to show the auto filter row by default.

UPDATED: Quick Reports: Filing quick reports using the Pivot Grid viewer will now support the OnRunScript element.

UPDATED: TeleSales Monitor: The Clear Completed button has been renamed to Reset Completed. (Extended Module)

FIXED: Application: Crash logs will now give proper information if a user is in a Windows environment that does not use an American date/time format.

FIXED: Email: When emailing and using the 'Print PDFs Attached to Sales Document and Items' setting, attachments will no longer be deleted once the email is sent. (Introduced in 4.5.1.9)

FIXED: Inventory Analysis: Grid grouping is now properly applied before searching.

FIXED: Inventory Analysis: The On Order Mths Avail column will no longer always be empty.

FIXED: Inventory Analysis: The On Order column will no longer be different than the group summary's Currently Ordered value.

FIXED: Matrix Sales Entry: Clicking a cell now always highlights all of the text within the cell.

FIXED: Purchase Advisor: When creating a purchase order from a reorder point that has no warehouse data, users will now be able to edit the Location column on the purchase order line.

FIXED: SOP to POP: The RQSTFFDATE field will now be populated with the sales line item's Requested Ship Date.

FIXED: Sales Document Entry: Sales Doc ID default holds will now be properly applied to new sales documents.

FIXED: Sales Document Entry: Split Sales Document: Splitting a document on multiple criteria, where one of the criteria is Backorder Quantities, will be more consistent. Backordered lines will now all be grouped on one sales document.

FIXED: Sales Document Notes: When a document is read only (but not historical or voided), users will be able to update the sales document notes/comments if they have the 'Override Queue Access for Notes and Comments' security enabled. (Introduced: 4.6 0.20)

FIXED: Sales Document Resources: Loading speed was improved in some scenarios regarding this tab. This was a view change in spvSalesDocumentResources, changing a UNION to a UNION ALL.

FIXED: ShipTo Funnel: Integration will no longer fail when there is an extra backslash in the import file path.

FIXED: TeleSales Monitor: Sales documents created through TeleSales Monitor will now properly run any pre-save script in place. (Extended Module)

FIXED: Telesales Monitor: Telesales will no longer load the sales document columns related to the last order. These fields can be turned back on by going into sppSelectTelesalesInteractions and un-commenting the required fields. This was done to increase performance for users with a large number of customers. (Extended Module)

REMOVED: Quick Report Manager: The Quick Report Manager form was combined into the Quick Report Browser form.

Version 4.6.0.24

Release Date 9/22/17

ADDED: SalesPad Today: Copy / Paste Events - The user can now right click to copy and paste events from the context menu.

ADDED: SalesPad Today: Recurring Events - The user can now set up recurring events that will repeat on a specified schedule.

FIXED: Create Return: Service, Misc Charge, and Fee items will no longer have their cost zeroed out when created from an invoice.

FIXED: Manufacturing Order Sales Links: The Pre Cancel MO Link Delete script will now run properly, if the 'Handle Breaking Final Link' security is set to Always Cancel MO.

FIXED: Manufacturing Order Sales Links: When the 'Handle Breaking Final Link' security is set to Always Cancel MO and the MO's status is Closed or Completed, the MO's status will no longer be set to Cancelled.

FIXED: Non Multi Currency: Some non-multi-currency user’s environments were being treated as multi-currency environments in certain scenarios. This has been fixed.

FIXED: PayFabric Sales Batch Processing: Any Preauth Hold code applied to a document will now be removed upon successful capture of a PayFabric authorization transaction.

FIXED: Sales Document Entry: Loading a sales document which contains a large number of sales promotions is now much quicker. Loading is also quicker when the document total changes.

FIXED: Sales Document: Changing UofM on existing sales line items on a non-functional currency document will now properly update the EXTDCOST/OREXTCST fields in SOP10200.

FIXED: Sales Document: Changing cost on existing non-inventory line items on a non-functional currency document will now properly update the EXTDCOST/OREXTCST fields in SOP10200.

Version 4.6.0.23

Release Date 9/15/17

ADDED: Application: The ARTransactionEntry, ReturnsManagement, SalesEntryQuickPick, and SignaturePad modules are now included in the core installation.

ADDED: Bulk Pick Ticket Printing: The sppGetBulkPicketTicketInfo stored procedure now has spcpGetBulkPickTicketInfo functionality.

ADDED: Opportunities: A sequence column was added to the Opportunity Status business object to allow for ordering of Opportunity Statuses.

ADDED: Warehouse Maintenance: This form is no longer Beta.

FIXED: Counter Sales: Document Total will now be recalculated upon Price Level changing.

FIXED: Sales Line Selector: Warehouse Code will now be displayed.

FIXED: Sales Monitor: There will no longer be an "Item has already been added. Key in dictionary:" error when a document in the system has no batch set. (Re-Introduced: 4.6.0.21)

FIXED: Security Script Manager: When an autofilter row is applied, there will no longer be a "The given key was not present in the dictionary." error. (Introduced: 4.6.0.15)

Version 4.6.0.22

Release Date 9/8/17

ADDED: FedEx Validation: This is a new extended module that supports FedEx address validation. Users must have proper FedEx credentials to use this service.

ADDED: Settings: Enable Customer Locks - This setting enables the SalesPad customer activity locks. (Default - False)

ADDED: Activity Locks: Customer locks are now displayed in the Activity Locks screen.

ADDED: Customer Card: Banners display when a customer is locked.

FIXED: Binary Stream MEM: The database update will no longer fail on the spvMEMSetup due to missing columns when using GP2010.

FIXED: Customer Overview: Customers with no Customer Class set will now properly save/load layouts. (Introduced: 4.5.1.23)

FIXED: Purchase Order Generation: Users will no longer receive a "Customer Number is required for Drop Ships" econnect error when attempting to generate a dropship purchase order from a dropship sales line item.

FIXED: Purchase Order Generation: Users will no longer receive the error " '' is not a column of SalesLineItem error" when attempting to create a purchase order when the 'PO Cost Selection' setting is set to PO_Cost_Selection_User_Field and the 'PO Cost Selection User Field' setting is empty. The 'PO Cost Selection Fallback' setting will now be used in this situation.

FIXED: Purchase Order: Users will no longer receive an object reference error if the vendor does not have a purchase address.

FIXED: Returns: Users will no longer receive an "Cannot insert the value NULL into column EXTDCOST" error when attempting to create a return with only service items on it.

FIXED: Sales Document Comments: Deleting GP comments will now properly keep the comment as deleted when transferring to an invoice.

Version 4.6.0.21

Release Date 9/1/17

BREAKING CHANGE: Customer Audit: Audit logs are displayed in one entry for each save.

ADDED: Layout Maintenance: The tabs selection for a form's tabs will now include tabs added by extended modules.

ADDED: Opportunity Audit: Audit Log was added to Opportunities.

ADDED: Opportunity Contact Links: These provide a method to link an existing contact to an opportunity. Previously, a new contact had to be created for each opportunity.

ADDED: Opportunity Line Items: User field functionality has been added.

ADDED: Sales Document: Avalara Tax Commit Plugin: This plugin sends the Post request with the current sales document tax, along with the Commit flag (controlled by security), to Avalara. If Commit is True, tax will not be recalculated upon posting the document in GP. This applies to invoices and returns only.

ADDED: Sales Monitor: Custom stored procedure support was added to sppSalesMonitor.

ADDED: Sales Monitor: Users can now hide auto forwarding queues on the Sales Monitor.

ADDED: Settings: Customer Columns To Include In Audit - This setting specifies the Customer columns that will be audited. If left blank, no auditing will be done when a Customer column is updated.

ADDED: Settings: Opportunity Columns to Include In Audit - The setting specifies the opportunity columns that will be audited. If left blank, no extra auditing will be done.

ADDED: Settings: Opportunity Line Columns to Include In Audit - This setting specifies the opportunity line columns that will be audited. If left blank, no extra auditing will be done.

FIXED: Customer Card: Interactions: When an interaction is created through an email to a customer, the From field is now filled out with the email address of the user who originally created the email.

FIXED: Kwik Tag: The database update will no longer fail with a "TWO" database error.

FIXED: User Field Editor: Copying a UDF from one business object to another will no longer cause an error upon updating the database tables.

Version 4.6.0.20

Release Date 8/28/17

FIXED: Customer Contact Addresses: Having the Only Load Visible Columns disabled will now properly load the grid. (Introduced: 4.6.0.19)

FIXED: Customer Contact Addresses: When deleting addresses, users will no longer receive an Object Reference error. (Introduced: 4.6.0.19)

FIXED: Customer Contact Addresses: When using the Mark As, users will no longer receive an Object Reference error. (Introduced: 4.6.0.19)

FIXED: Customer Contact Card: Users will no longer receive an infinite prompt to save when they are using the 'Load Only Visible Columns' security on the Customer Contact Addresses card. (Introduced: 4.6.0.19)

FIXED: Customer Discount: If the customer has a Customer Discount selected that does not exist anymore, users will no longer receive an Object Reference error when opening a sales document.

FIXED: Dispatch Route Entry: Spelling on the form tool tip was corrected.

FIXED: Equipment Search: Show In-Stock Only checkbox will now work properly.

FIXED: Localization: Sales Entry: Creating new sales documents will now work as intended when using SalesPad in Spanish.

FIXED: Sales Entry: Users would occasionally receive a prompt when closing a Read Only sales document, allowing them to save a document when they should not have been able to. This has been corrected.

FIXED: User Fields: User Fields with quick reports will now be usable on Read Only grids.

FIXED: User Fields: User fields with quick reports that insert values containing apostrophes into the "where" clause of the query will no longer cause Invalid Syntax errors.

Version 4.6.0.19

Release Date 8/18/17

BREAKING CHANGE: Advanced Search: The Advanced Customer and Advanced Sales Document search screens were removed. They were marked as BETA. The normal searches have been improved using the Only Load Visible Columns functionality.

BREAKING CHANGE: Quick Load Grids: The Quick Load Grids on the Customer Address tab, Customer overview, and Fulfillment plugin were removed or replaced with Only Load Visible columns functionality. This was done to help improve performance.

ADDED: Settings: PayFabric Theme: This setting specifies the name of the PayFabric theme to use. If the theme does not exist in PayFabric's settings, then PayFabric's default theme will be used. If left blank, SalesPad will use its own theme.

ADDED: UPS Address Validation: A screen was added for choosing between two addresses when a validation returns successfully but changes the original address.

UPDATED: Customer Card: UI loading was slightly improved.

UPDATED: Customer Contact Addresses: The Enable Customer Address Quick Load Grid was renamed and repurposed to Only Load Visible Columns. Adding columns requires a screen refresh. The Address and Phone columns are not populated with this functionality, due to the composite nature in which they were populated. (Default: True)

UPDATED: Customer Overview: The Enable Customer Address Quick Load Grid was renamed and re-purposed to Only Load Visible Columns. (Default: True)

UPDATED: Settings: Calculate AR Transaction Taxes - This setting now defaults to False.

FIXED: CardControl: More checks for "Hexadecimal value is an invalid value" errors were added.

FIXED: Customer Card: A blank value for the 'Visible Return IDs', 'Visible Quote IDs', 'Visible Order IDs', or 'Visible Invoice IDs' securities will no longer prevent sales document copying.

FIXED: Customer Card: Changing the hold status of a customer that has a credit limit type of Unlimited or No Credit will no longer result in eConnect errors.

FIXED: In-Transit Transfer Fulfillment Plugin: The plugin will now load faster for serial tracked items with a large number of serials.

FIXED: Inventory: Blocked Item Report: Blocked lines on orders that aren't manually fulfilled can now be partially allocated.

FIXED: Inventory: Blocked Item Report: Setting the unblocked quantity of a line and then selecting the line and clicking the Unblock Line & Allocate button will no longer fail to recognize the line as selected.

FIXED: PayFabric: A customer's billing information will now be populated if there is no default wallet set for them.

FIXED: Sales Document Fulfillment Plugin: The plugin will now load faster for serial tracked items with a large number of serials.

FIXED: Sales Document Search: Several unused columns that were causing errors when the 'Only Load Visible Columns' security was enabled were removed.

REMOVED: Sales Document Fulfillment Plugin: Security - This security enables Serial Tracked Quick Load Grid.

Version 4.6.0.18

Release Date 8/11/17

ADDED: Security: Customer Search - When set to True, whatever search values that have been entered in the customer search form will be pulled into the New Customer form. (Default: False)

ADDED: Security: Customer Search: Allow Multiple Customer Search Forms - This security turns on the ability to have multiple customer search forms open. (Default: False)

ADDED: Settings: AvaTax Pre Submit Tax Request Script - This is a C# Script that executes before a tax request is made to AvaTax for the document. It allows the user to make final changes to the GetTaxRequest object before it is submitted to AvaTax.

FIXED: Funnel: A dictionary key error will no longer happen when Shipping Methods are not mapped.

FIXED: Funnel: The UPS import mapping file will now only be created if it doesn't already exist.

FIXED: PayFabric: Having multiple Shipping emails selected no longer causes an error when trying to make a payment.

FIXED: Purchase Order Audit: Auditing a newly copied purchase order no longer causes an error.

FIXED: Recurring Sales Document: The Enabled checkbox is now visible in PayFabric Build. Introduced 4.6.0.15

FIXED: Returns: Previously, return documents with line items which have unit costs with more than two decimal places could have rounding issues, if the currency of the document had fewer currency decimal places. This would result in the extended cost being incorrect for the document. This has been corrected.

FIXED: Sales Document Mass Update: User fields will again be visible in sales document properties.

FIXED: Sales Documents: In certain scenarios, sales lines on historical documents in non-multi-currency environments would be rounded down to one decimal place, rather than two. This has been corrected.

FIXED: Sales Documents: When using a non-functional currency, users will no longer receive a prompt to save the document when closing. This was caused by the sales lines' extended costs being recalculated when the document was opened.

FIXED: Sales Promotion Coupons: Users will no longer receive a SQL error if all Sales Promotion date ranges are before the document's Doc Date.

FIXED: Sales Promotion: When attempting to generate coupons using a Value Based Prefix field for a promo that uses a Customer Assign type of CustomerAddress, users will no longer receive an "Invalid column name Address Code" error.

FIXED: SalesPad Distributions: If the Dropship field is edited after the dropship sales line has been saved, the distribution account will now be set properly.

Version 4.6.0.17

Release Date 8/4/17

ADDED: Sales Inventory Lookup: Security: Allow Screen Layout Customization - This security allows screen layout customization. (Default: False)

ADDED: Security: Customer Extended Pricing: Auto Refresh - This security automatically refreshes the Extended Pricing tab when opened. (Default: False)

ADDED: Settings: PayFabric: Send Shipping Address Info - When enabled, SalesPad will send the Shipping Address information to PayFabric. This should be enabled if the 'Shipping Address Required' setting in PayFabric is enabled. (Default: False)

UPDATED: Cash Receipt: Messaging for when a cash receipt fails to save after using CardControl has been improved.

UPDATED: Customer Extended Pricing: The tool strip was replaced with a bar manager to conform to similar screens in SalesPad.

UPDATED: Sales Inventory Lookup: Layout customization is now properly saved.

FIXED: Application: Unused files were removed from the Install directory.

FIXED: Customer Extended Pricing: The Item Description field will now function properly when searching.

FIXED: Sales Document Entry: Saving or transferring to invoice will not fulfill and backorder the document if the quantity available has gone below zero. This was most likely to happen in a multi-bin environment, or with lot-tracked items.

FIXED: Sales Document Manual Split: Documents can no longer be split if they are read-only.

FIXED: Sales Line Distribution Entry: A typo was fixed. "Markdown" is now "Markdown:”.

Version 4.6.0.16

Release Date 7/31/17

ADDED: Customer Overview: An X button was added to the Sales Territory field, which is used to clear out the selected territory.

ADDED: Layout Maintenance: PayFabric tabs are now visible in the Layout Maintenance screen for the Customer card.

ADDED: Workflow Rules: Added spcp functionality to the sppCheckCustomerCredit proc. This proc is used when forwarding a document through a batch when the Credit Limit workflow rule is evaluated.

UPDATED: Split Sales Document: The Ok button is now disabled when there is nothing to split.

FIXED: Customer Overview: Attempting to assign a blank Sales Territory to a customer will no longer throw an error.

FIXED: Inventory Bin Transfer: Transferring into a bin that has a negative quantity is now allowed.

FIXED: Opportunity: Opportunity Status is no longer cleared when adding a line item on a new opportunity.

FIXED: PayFabric Batch Charge: The summary screen that appears after capturing is finished will no longer close immediately after it appears.

FIXED: PayFabric: An error message regarding failed payments made in SalesPad was clarified.

FIXED: Purchase Order Line Items: Changing a non-inventory line item to an inventory item will now update the line's Is Non Inventory value.

FIXED: Purchase Order Line Items: Typing the beginning of an item number and clicking the button to search for the item with the 'Default Items to Non Inventory' setting enabled will no longer set the line to non-inventory when the item exists in inventory.

FIXED: Sales Document User Fields: Previously, mapped user fields could be overwritten or cleared out in certain situations when saving a sales document. This has been corrected.

Version 4.6.0.15

Release Date 7/21/17

ADDED: Base Email Audit: Any Email Audit tab now has a begin and end date control that allows the user to filter the audits.

ADDED: Cash Receipts: The ability to see both National Account and Children transactions and cash receipts with one search was added. A Child Customer dropdown for selection was added, plus an X button to reset to the National Account within the dropdown. A document dropdown to select the main customer has also be added.

ADDED: Cash Applications: National Account cash receipts can now be applied to child receivables, and children can apply to themselves without being searched for directly.

ADDED: Dispatch Driver: A banner which tells the user whether or not the current driver's license has expired was added.

ADDED: Dispatch Route: A check which prevents assigning a driver with an expired license to a route was added.

ADDED: Security Script Manager: Script highlighting to show which scripts have text within them was added.

ADDED: Security: Dispatch Driver: License Expiration Date Warning - This security determines the number of days in advance to receive warning about the driver's license expiring. (Default: 30)

ADDED: Security: Opportunity: Allow Screen Layout Customization - This setting turns on the ability to customize the document header. (Default: False)

UPDATED: Purchase Order Receipts: Optimizations were made to purchase order receipt loading.

FIXED: Counter Sales: When triggering a save by using a Sales Entry Plugin (e.g. Fulfillment) and then moving directly to the Checkout tab, SalesPad will no longer throw an "Input variable contains an empty value" error.

FIXED: Custom SQL Procedures: Clearing the Data Warehouse no longer prompts a database update.

FIXED: Import Manager: The Import Manager now interprets text representations dates.

FIXED: Interactions: The Duration now updates correctly when changing the End Time.

FIXED: Inventory Bin Transfer: Transferring a decimal quantity that when rounded up would be greater than the quantity available will now work as expected.

FIXED: PayFabric Customer Wallet: An object reference error that resulted when double-clicking on a Customer card was resolved.

FIXED: PayFabric: Batch Capture: This now works properly with EMV transactions.

FIXED: PayFabric: Cash Receipts: Better messaging has been added if a PayFabric transaction fails.

FIXED: PayFabric: EMV Authorize transactions can now be captured.

FIXED: PayFabric: EMV transactions can now be voided and credited.

FIXED: Purchase Order Receipts: Crashes caused by trying to load too many purchase order receipts at once no longer occurs.

FIXED: Purchasing Receipt Document: Reference errors that occurred when accessing receipt documents which contain updated user defined field(s) were fixed.

FIXED: Recurring Sales Document: The Payment Method dropdown menu is no longer visible when running non- CardControl builds.

FIXED: Registry Maintenance: Inconsistent layouts have been fixed.

FIXED: Remote Library: The Remote Library will no longer create a second active user if one already exists.

FIXED: Sales Document: Some required fields were being skipped on new documents if, before clicking the Save button, the user opened a Sales Document Plugin that triggered a save. This has been corrected.

FIXED: Sales Line Item Excel Import: Setting a line as non-inventory in the Excel document will now create the line as non-inventory.

FIXED: Sales Line Item Excel Import: The 'Default Items to Non Inventory' setting will now be respected when importing non-inventory items.

FIXED: Store Setup: Inconsistent layouts on different grids have been fixed.

FIXED: Tasks: The Duration and End Time now update when either is changed.

REMOVED: SalesPad Today: The Interaction Lists grid has been removed.

Version 4.6.0.14

Release Date 7/14/17

BREAKING CHANGE: Sales Document Search: By default, the 'Only Visible Columns' security is enabled, and adding new columns to the grid will not populate data until the screen is refreshed. This change was made to help improve the speed of this screen and to allow for a larger search base.

ADDED: Customer Opportunities: The Opportunity Status column will now be available in the column chooser.

ADDED: Prospect Opportunities: The Opportunity Status column will now be available in the column chooser.

ADDED: Security: Sales Document Search: Disable Search Prompt - This disables the search warning prompt. (Default: False)

ADDED: Security: Sales Document Search: Only Load Visible Columns - When enabled, the sales document search will be faster and only load the visible columns' data. (Default: True)

UPDATED: Attach Sales Line To PO: Tab layout was removed, the Break Link button icon was changed, other small changes were made.

UPDATED: Attach PO To Sales Line: Tab layout was removed, the Break Link button icon was changed, other small changes were made.

FIXED: Assemblies: Assemblies will no longer save multiple times if there are multiple line UDFs.

FIXED: Assemblies: Assemblies will now allocate from bins properly based on the item's valuation method.

FIXED: Attach Sales Line To PO: A bug regarding the view failing to load unless the user resized the pop-up was fixed.

FIXED: Avatax Address Validation: Address validation will no longer throw an eConnect error when using Avatax Address Validation.

FIXED: Binary Streams: MEM Sales Document Plugin: The facilities dropdown will no longer allow the user to select improper facilities. It will now filter out facilities based on user, customer, and Sales Doc ID, rather than just user.

FIXED: Binary Streams: Purchase Order: Previously, when a purchase order was being created, SalesPad would assume the document is a Standard type purchase order. This would cause the Binary Streams PO Type to be populated incorrectly, if the purchase order was a Dropship type purchase order. This has been corrected.

FIXED: CardControl: Better checks for "Hexadecimal value is an invalid value" errors were added.

FIXED: Case Tracker Detail Entry: Case Tracker Details will now properly load item numbers on historical documents.

FIXED: Case Tracker Printed Report: Printed form will now correctly pull data from spcpCaseTrackerReport

FIXED: Contact Search: The grid no longer combines rows with the same name.

FIXED: Counter Sales: Changing the customer will no longer result in the sales document's first line item having the previous customer's data.

FIXED: Counter Sales: Hitting Enter within a Counter Sales item entry no longer results in overly dark highlighting.

FIXED: Customer PayFabric Transactions: Columns are no longer editable.

FIXED: Equipment Maintenance: When using the Binary Streams MEM module, the Field Service Sales Document ID dropdown will now be filtered properly based on the currently selected facility.

FIXED: Item Matrix: Item quantity is no longer carried over to the next focused field.

FIXED: PayFabric: PayFabric error messages regarding the customer wallet were improved for clarity.

FIXED: Purchase Order: When creating a purchase order from the Vendor card, the vendor address will now be set to the vendor's purchasing address.

FIXED: Quick Reports: Duplicating rows repeatedly now works without users having to re-select the focused row.

FIXED: Sales Document: Audits longer than 1024 characters will no longer be truncated.

FIXED: Sales Document: Extra attempts have been added if a SQL error occurs while forwarding a document through Workflow. Each attempt is logged as part of the sales document's audit log, and a message is given to the user about the error, then again if the forward was ultimately successful.

FIXED: Sales Fulfillment: The On Close Script will now run when canceling the Sales Fulfillment pop-up.

FIXED: Sales Territory Card: The Sales Territory field will now allow for single character entries.

FIXED: Sales Territory: Sales Territory Name can no longer be edited after the Territory is saved.

FIXED: Sales Territory: Users can no longer save over existing Sales Territories.

FIXED: SalesPad Today: Tasks now consistently show up on calendars.

FIXED: Security Script Editor: Script compilation errors will now give the correct line numbers.

FIXED: User Field Editor: Field names containing but not beginning with an underscore will no longer have an underscore added to the beginning.

FIXED: Vendor Item: User defined fields may now be added to the Vendor Item tab on the Inventory Lookup screen.

Version 4.6.0.13

Release Date 7/7/17

FIXED: Configurator Search: Opening an active configuration will now always open the most recent version of that configuration.

FIXED: Configurator: Configurations with default or GP pricing will now respect contract pricing.

FIXED: Dispatch: Route Entry: Deleting stops from the route will no longer cause the sequence of stops to become incorrect.

FIXED: Email: Previously, when using the 'Save Resources as GP Attachments' setting and attaching one of these resources to an email, in certain scenarios the wrong resource would be attached to the email. This has been corrected.

FIXED: MO Entry: When clicking the Print button and choosing to save a new manufacturing order, the MO Number field was not being properly filled in. This could result in extra manufacturing orders being unknowingly created on subsequent saves. This has been corrected.

FIXED: PayFabric: When sending L2/L3 data, the ShipFromZip is now properly set to the Warehouse Zip Code field of the sales document.

FIXED: Sales Line Item Restrictions: Item restrictions based on the State field will now be properly evaluated. If using a case-sensitive version of SQL, it may be necessary to drop table: spSalesLineItemRestrictionValidation, and proc: sppUpdateSalesLineItemRestrictionValidation and let the SalesPad database update recreate them.

FIXED: User Field Editor: User fields can no longer be given names that match C# keywords.

Version 4.6.0.12

Release Date 6/30/17

ADDED: Dispatch: A pop-up was added that tells users if the assigned vehicle on a route is over its maximum capacity.

ADDED: Inventory: Inventory By Location will now have columns for Purchase Receipt Default Bin, Purchase Returns Default Bin, Assembly Receipts Default Bin, Material Issues Default Bin, Manufacturing Receipts Default Bin, and Repair Issues Default Bin.

ADDED: Security: Inventory Transfers: Populate Destination Bin List - When disabled, the Destination Bin field will only allow free typing and not populate existing bins.

UPDATED: PayFabric Transactions: PayFabric's transaction ID will now also be stored in spSalesDocumentCreditCardPayment's Auth_Code2. This will make linking the table with the spPayFabricTransction table much easier.

UPDATED: Sales Document Properties: Equipment Description will now update to the Equipment Item Number field's item description. This field is still editable if the description needs to be changed.

UPDATED: Sales Document Properties: The Equipment Serial Number field is now a dropdown with selectable serial numbers populated based on the Equipment Item Number field.

FIXED: Convert Opportunity to Quote: Opportunity resources will now transfer to the quote properly if the 'Save Resources as GP Attachments' setting is enabled.

FIXED: Convert Prospect to Customer: Prospect resources will now transfer to the new customer properly if the 'Save Resources as GP Attachments' setting is enabled.

FIXED: Quick Reports: The duplicating of rows now works repeatedly without users having to re-select the focused row.

FIXED: Sales Document Properties: The Equipment Serial Number hyperlink will now function as intended.

FIXED: Scripting: Scripts that use //#REFERENCE will properly compile now. (Introduced: 4.6.0.11)

FIXED: Setup/Utilities: Import Manager: When using the InventoryByLoc table, mappings to the Sales_Fulfillment_Default_Bin and Sales_Returns_Default_Bin fields will now be imported correctly.

FIXED: Workflow: There is now better disposing put in place to help prevent potential Out Of Memory errors during some Workflow processes.

Version 4.6.0.11

Release Date 6/23/17

ADDED: Purchase Receipt: An icon was added to the Update Vendor Items button.

ADDED: Security: Counter Sales: Auto-Increment Quantity - An existing line item's quantity will increment when the same item is scanned or entered on the sales document. (Default: False)

ADDED: Security: Sales Document Resources: Copy New Resource To Customer - Automatically add any resource attached to a sales document to its respective customer as long as no resource by its name already exists on that customer. (Default: False)

ADDED: Setting: Configurator: Force Append A Random Number - If set to True, when creating new items, the Configurator will always append a random number to the end of the item number.

UPDATED: Inventory Transfer: Better warning messages were created if the quantity entered is greater than the quantity available.

UPDATED: Inventory Transfer: The Destination Site field can now be cleared out.

UPDATED: Security: The Layout Path is no longer visible unless you have the 'Can Change Layout Path' setting enabled. This functionality is outdated, since we now store layouts in the database.

FIXED: Application: Prompts and messages with large amounts of text will no longer have the text cut off.

FIXED: Application: The "ctrl + f" find panel for grids is no longer restored as part of the grid's layout.

FIXED: CRM: Prospect Entry: Prospect numbers auto-assigned to prospects will now increment by 1 instead of 2.

FIXED: Counter Sales: When a package/kit's quantity is increased, the quantity will properly roll down to the package/kit components.

FIXED: Interaction Event Entry: Adding an interaction with a reminder of "2 Hours Before" or more will no longer create an error.

FIXED: Interactions Entry: Pre-Save e.Cancel now prevents an interaction from saving.

FIXED: Inventory Transfer: Row values will no longer blank out in certain scenarios, and they will update properly.

FIXED: Inventory Transfer: The Create New Transfer button will now properly copy values to the row.

FIXED: Item Maintenance: Item User Field quick reports will now be synchronized with any changes made to the item.

FIXED: Item Maintenance: New items will no longer have their Price Method overwritten by their Item Class's Price Method upon creation.

FIXED: Login: The window requiring a password reset upon login can no longer be closed to bypass the password reset.

FIXED: Manufacturing BOM Entry: String Config Code is now revisioned.

FIXED: Opportunity Card: When an opportunity line item is deleted, the Opportunity Card form will no longer create unnecessary save prompts upon printing or closing the opportunity.

FIXED: Opportunity Customers: Opportunity customer and prospect links will no longer throw null reference exceptions when attempting to add a new customer/prospect link to the formlet after saving the opportunity.

FIXED: Opportunity Customers: When more than one customer link exists on an opportunity, the link(s) can now successfully be deleted.

FIXED: Opportunity: Opportunity Properties fields will no longer revert to previous values when adding new line items.

FIXED: PayFabric: A number of issues with L2 and L3 data when using a First Data gateway were fixed.

FIXED: Receipt Transaction Entry: Users will no longer receive the "Insert statement conflicted with CHECK constraint" error when attempting to save an Inventory Return type transaction.

FIXED: Receipt Transaction Line Selector: Base UofM will now be used, instead of the item's Purchasing UofM, when inventory adjustment receipt lines are transferred to the Return Lines section.

FIXED: Sales Batch Processing: Transferring an order from Sales Batch Processing with the AvaTax Customer Usage Type field set up, without first going to a Customer card or a sales document, will no longer result in the Customer Address UDFs failing to load.

FIXED: Sales Document Audit: The Audit tab will now show the correct quantities for new line items whose quantities are greater than 1, regardless of what the 'Can Change Kit Quantities' security is set to.

FIXED: Sales Document Entry: Copying a sales document will now add an audit to the new document, specifying the original document.

FIXED: Sales Monitor: Cost will now be properly calculated for sales documents that have been partially invoiced in GP.

FIXED: SalesPad Today: Interaction Key fields are now populated.

FIXED: Security Script Manager: The Inventory Transfers plugin will now show fields for Inventory Transfer in the Help window.

FIXED: Settings: Sales: The setting 'Include Item Details In Sales Document Audit' will now work for copied sales documents.

FIXED: Smart Printing: Email audits from smart printing now include the body of the email.

REMOVED: Settings: Show Auto Calc Freight Option - These two settings, with the same name, were never used. They have been removed.

Version 4.6.0.10

Release Date 6/16/17

BREAKING CHANGE: In order for Item Restrictions to work, users will need to go into Item Restrictions and re-save the restrictions.

BREAKING CHANGE: Layouts: Layouts that used to be saved locally will no longer load. Before upgrading, users should re-save layouts and/or verify that they are saved into the spLayout table. Most likely this will only be a problem if upgrading from a 4.0 or newer build, or layouts have not been re-saved after other upgrades.

BREAKING CHANGE: Sales Document Properties: Some saved layouts may need minor adjustments if they relied on the grey area between the splitter and the fields.

BREAKING CHANGE: The Sales Line Item lookup will now show restricted items, but the items will not be allowed to be added to the sales document.

ADDED: Customer Cash Receipts: An integration with Credit Card Advantage, when making cash receipts with PayFabric, was added.

ADDED: Dispatch: A pop-up that tells users if the assigned vehicle on a route is over its maximum capacity was added.

ADDED: Item Restrictions: Users are able to restrict based on Purchase Line fields.

ADDED: Item Restrictions: Users are able to restrict based on Sales Line fields.

ADDED: PO Line Item Restrictions Override: A Purchase Line plugin which allows a user to select an override reason to allow a restricted item onto a document was added.

ADDED: PayFabric: Transactions will now generate processor log entries.

ADDED: Sales Entry Quick Pick: Quick Pick Maintenance: Quick Pick categories can now be reordered using drag and drop.

ADDED: Sales Line Item Restrictions Override: A Sales Line plugin which allows a user to select an override reason to allow a restricted item onto a document was added.

ADDED: Security: Equipment Search: Show Cost - This setting enables the Unit Cost column, which shows cost of the item. (Default: False)

ADDED: Security: Sales Monitor: Default Sales Rep From System User - This setting filters results via the user's assigned sales rep by default. It will default to (blank) if user has no assigned sales rep. (Default: (blank))

ADDED: Settings: Drop Ship PO Evaluate Item Restrictions - Item restrictions will be evaluated before a line is added to the purchase order and/or before the purchase order is saved.

ADDED: Settings: PayFabric Allow Create GP Payment - This setting allows a user to create a GP payment on a sales document for an existing PayFabric transaction that was not written to GP. (Default: (NONE))

ADDED: Settings: Restricted Item Line Color - This setting changes the background color of line items that are restricted.

ADDED: Settings: Sales Document Evaluate Item Restrictions - Item restrictions will be evaluated before a line is added to the sales document and/or before the sales document is saved.

UPDATED: Layouts: Layouts will be cached, and any changes will require other users to log out and back in to see the changes. This was done to help eliminate excess database hits and improve screen loading times.

UPDATED: Sales Document Properties: The unusable gray area when moving the splitter down was removed, the default layout was updated to look better. When moving the splitter, the properties section will now adjust accordingly.

UPDATED: UDF Tabs: When customizing layouts, users now have access to the properties of the controls.

FIXED: CRM: Prospect Entry: Prospect Numbers auto-assigned to Prospects will now increment by 1 instead of 2.

FIXED: Customer Cash Receipts: Clicking the "..." button when there is already text in the Customer field will no longer show the Customer lookup twice.

FIXED: Customer PayFabric Transactions: Transactions will now load the first time without having to click the Refresh button.

FIXED: Customer: Contact Addresses: Create Letter will now replace all instances of a merge field, instead of just the first instance.

FIXED: Customer: Contact Addresses: Create Letter will now work with all versions of Microsoft Word.

FIXED: Equipment Card: Rental Item number and Rental Order number will now be populated when a Rental Order is created.

FIXED: Import Manager: Item Master notes can now be imported properly.

FIXED: Purchased Line Editor: Users will no longer receive a "Specified case is not valid" error when clearing out the Quantity column and tabbing off.

FIXED: Remote Library: Exceptions will now be audited and logged properly.

FIXED: Sales Document Entry: Changing a sales line item with a blocked item to dropship will no longer result in backordered items becoming fulfilled.

FIXED: Sales Document Entry: Copying a Sales Document will now add an audit to the new document specifying the original document.

FIXED: Sales Document Entry: Customer discounts will now populate properly when a sales document is created.

FIXED: Sales Document Entry: Dropship sales line items with blocked items will no longer change in quantity when saved.

FIXED: Sales Document Entry: The Payments field value now properly updates after voiding PayFabric authorizations.

FIXED: Sales Document Holds: Creating a sales document hold with a preauth hold code that is more than 15 characters in length will no longer result in an error.

FIXED: Sales Document: When using the 'Quick Transfer' setting, invoices will no longer skip a number.

FIXED: Sales Line Mass Update: Entering a Begin Date or an End Date will no longer prompt for search criteria.

FIXED: SalesPad Today: Handling was improved for emailing CRM events when email settings are not properly set up.

FIXED: Security Script Manager: The Inventory Transfers Plugin will now show fields for Inventory Transfer in the Help window.

FIXED: Settings: Sales: The setting 'Include Item Details In Sales Document Audit' will now work for copied Sales Documents.

FIXED: SignaturePad: When an order with a signature is transferred, the signature will now be viewable on the invoice.

FIXED: System Info: Extended Modules will no longer appear in the list of Custom Modules.

FIXED: Sales Document: Sending an email to a customer without a billing or shipping address and the 'Default Email Address' setting set to billing or shipping, will no longer produce an error.

Version 4.6.0.9

Release Date 6/9/17

ADDED: Setting: Send Email/Bulk Email: Setting Display Name: Can Customize Send Email Layout - This setting determines which user groups can customize the Send Email or Bulk Email screen layouts. (Default: (NONE))

UPDATED: Recurring Sales: Recurring Sales will now use a light version of the Sales Line Item Search view, improving performance.

UPDATED: PayFabric/CCA: Support for integration with newer versions of Credit Card Advantage have been improved.

FIXED: Assembly: After setting the status to Released, users will no longer receive the "Cannot insert the value NULL into column BIN" error when attempting to save and over-allocate an assembly. (Introduced in 4.6.0.8)

FIXED: Customer Contact Address: Directly clicking the Address Code link while Fast Ship is enabled will now properly set the Fast Ship To Address.

FIXED: Inventory Lookup: Custom sppGetInventorySearch (spcpGetInventorySearch) will now be properly called with all the current parameters. This will fix the issue with the Show Inactive check box not working properly when using an spcp. This is a SQL stored procedure change and does not require an upgrade.

FIXED: Purchase Line Item: Changing the item number on a new line while using the Inventory lookup will now update all of the item fields without having to tab out of the field or click off of the line.

FIXED: Purchase Line Item: Field changes will no longer be reverted if the user opens the Inventory lookup and then cancels.

FIXED: Purchase Line Item: When users did not have security for the Matrix Purchase Order Entry plugin, it was possible for item numbers to clear out after opening the Inventory Lookup screen. This has been corrected.

FIXED: Returns: Returning non-inventory items with a cost will no longer cause a "Cost of Goods Sold distribution amount is incorrect" error in GP. This can be fixed with a proc update and does not require a full upgrade. (Introduced in 4.5.1.26)

FIXED: Sales Batch Processing: Grouping by a column will no longer cause issues with Selected Documents Only being enabled.

FIXED: Sales Document Search: Sales Document UDF columns will now appear in the results grid as intended. (Introduced: 4.6.0.4)

FIXED: Sales Line Item Mass Update: Line Item UDF columns will now appear in the results grid.

FIXED: Sales Line Item: When users did not have security for the Matrix Sales Entry plugin, it was possible for item numbers to clear out after opening the Inventory Lookup screen. This has been corrected.

FIXED: Sales Monitor: Users will no longer receive an "Item has already been added" error when there is a sales document with a blank batch.

FIXED: Settings: Settings that assign accessibility to Users/Groups will now properly evaluate the full name instead of what the name starts with. For example, giving permission to "CSR" will no longer also give permission to the "CSRAdmin" group.

Version 4.6.0.8

Release Date 6/2/17

ADDED: Settings: Send Email/Bulk Email: Can Customize Send Email Layout - Determines which user groups can customize the Send Email or Bulk Email screen layouts. (Default: (NONE))

UPDATED: Application: The Recurring Sales feature will now use a light version of the Sales Line Item Search view, improving performance.

UPDATED: Sales Entry: The Sales Promotions checks, which make the tool tip and buttons visible, will now only happen when the data in the SubTotal field on the document changes, cutting back on database hits during document entry. This only effects users with Sales Promotions set up.

FIXED: Assembly Entry: Changing the assembly warehouse will now roll down to the line items, if the user clicks into the line items rather than tabbing off.

FIXED: Assembly Entry: Negative assemble quantity values are no longer allowed. This functionality may be added at a later time.

FIXED: Assembly: When there is not enough inventory to fulfill a non-tracked item, SalesPad will no longer freeze when attempting to save a released assembly.

FIXED: Dashboards: When adding a new data source, users will no longer receive an error about missing DevExpress dlls. These dlls can be obtained via the Support department and do not require an upgrade.

FIXED: Report Manager: Users will no longer receive an object reference error if the sales document being used as a dataset does not exist.

FIXED: Sales Entry: Dropship service items could not be purchased without being backordered, but this issue has been resolved. This was a SQL stored procedure change to sppRecalcFulfilled and does not require a build upgrade.

FIXED: Sales Line Distributions: It is no longer required for scripting to save the document first before setting the Sales Line GL Distribution Account fields.

FIXED: Sales Line Distributions: Scripting that was setting the Sales Line GL Account fields would not save properly. This will no longer require setting the IsChanged flag as a workaround. (Introduced: 4.5.1.5)

FIXED: Sales Line Distributions: Splitting documents that have the Sales Line GL Account fields set differently will now properly keep the respective values.

Version 4.6.0.7

Release Date 5/26/17

ADDED: Avatax: The Customer PO Number is now passed to Avatax.

ADDED: Support for TLS 1.1 and 1.2 added.

UPDATED: In Transit Transfer Audit: The Save Audit Log message has been updated to better reflect if the document is newly created or being updated.

UPDATED: Funnel: Error handling when registry permissions are limited was updated. (Introduced: 4.6.0.1)

UPDATED: Security: Sales Document Properties/Customer Overview/Counter Sales Document Properties: The "Can Change Payment Terms" description has been updated for clarity.

FIXED: Activity Locks: Users will no longer receive an error when attempting to clear a manufacturing order or RMA document lock.

FIXED: Create MO Plugin: SOP to MOP links will no longer clear out, if the user triggers the Item Number validation event.

FIXED: Create MO Plugin: There will now be an audit log of the MO's creation on the sales document, if the 'Autosave' security is set to False.

FIXED: Equipment Troubleshooting: Users will no longer receive an Object Reference error when opening this tab, if the manufacturing module is installed.

FIXED: Funnel: Users will no longer receive a KeyNotFound exception when the shipping mappings are not set up. (Introduced: 4.6.0.1)

FIXED: In Transit Transfer Audit: The ellipses button on the Audit Description column will no longer be disabled.

FIXED: In Transit Transfer Entry: In certain scenarios, it was possible to create two In Transit Transfer documents with the same order document ID. This has been fixed.

FIXED: Inventory Lookup: The Item Attribute tab will no longer appear, unless at least one Item Attribute Class has been set up and the spcvAttributeItem view has been created in SQL.

FIXED: Inventory Lookup: The item tabs along the bottom of the Inventory lookup will now be properly refreshed when searching from the Vendor Items tab and selecting a row.

FIXED: PayFabric: Sales document payments generated by PayFabric Batch Charge are now removed when voiding the transaction.

FIXED: Purchase Advisor Detail: The sppPurchaseAdviceDetail call to the spcpPurchaseAdviceDetail was missing a few paramaters. Making an spcp out of the _Modified version would throw a casting error. This issue has been resolved. This is a SQL stored procedure change and does not require upgrading. (Introduced: 4.6.0.2)

FIXED: Sales Document Entry: When the 'Use Shipping Suffix' setting is disabled and the number of sales lines are greater than the 'Sales Line Grouping Save' setting, transferring to invoice will no longer error out with a nondescript error message.

FIXED: ShipCenter Shipping Calculator: Closing the Funnel no longer causes a crash when there is no document loaded.

Version 4.6.0.6

Release Date 5/19/17

ADDED: PayFabric: The sales document's Shipping Address is now automatically passed in when creating transactions.

ADDED: Setting: Reprice When Warehouse Changes - Set this to True if you use Group Pricing and would like the price to update when changing a line item's warehouse. (Default: False)

UPDATED: Inventory Transfer: Users can now type in the Destination Bin field.

UPDATED: Purchase Order Entry: The number of hits to the database when loading a purchase order was reduced.

UPDATED: Security: Sales Document Entry: The Pre-Transfer script description was modified for clarity.

FIXED: Application: Certain shortcuts were not working properly, Alt+S for saving on various forms being the main one. This issue has been resolved. (Introduced: 4.5.1.29 DevExpress Upgrade)

FIXED: Attach PO To Sales Line: When looking for viable sales line items for dropship purchase orders, we now compare the purchase line item's Company field and the sales line item's Ship To Name field.

FIXED: Attach Sales Line to PO: When looking for viable purchase line items for a dropship sales line item, we now compare the sales line item's Ship To Name field and the purchase line item's Company field.

FIXED: Customer: The Customer Language setting is now saved and loaded properly.

FIXED: Item Inventory: When using the 'Can Reorder Bins' security users will no longer receive a "@Qty_Available is not a parameter" error. This is a SQL stored procedure change.

FIXED: Purchase Line Item: The Location column is no longer editable when creating a purchase order from a purchase plan.

FIXED: Purchase Order Addr: Changing the Ship To address will now update all line item address information for dropship purchase orders.

FIXED: Purchase Order Entry: On dropship purchase orders, the Ship To Name will now be set the Alt Company Name of the customer's Ship To address, rather than the customer's name.

FIXED: Purchase Order Entry: When creating a dropship purchase order from the Vendor card, the Shipping Method will now be set to the customer's Ship To address's Shipping Method, rather than the vendor's.

FIXED: Purchase Order Taxes: Taxes were not being calculated if the GP Company Default Purchase Tax option was not populated and the Use Shipping Method When Selected Default Tax Schedule setting was not enabled. This has been corrected.

FIXED: Sales Batch Processing: The PayFabric Batch Charge was not completing properly in some scenarios. This has been corrected.

FIXED: Sales Promotion Coupon Plugin: The Available Promotions grid will now only be populated with promotions that are valid to the sales document's customer.

Version 4.6.0.5

Release Date 5/12/17

ADDED: Inventory Adjustment Allocation: Serial/Lot user fields were added.

ADDED: Item Maintenance: Price Level Maintenance: A Delete All button to remove all Price Levels from the selected item was added.

ADDED: Sales Line Configurator: Notifications for invalid configurations of dynamic item numbers and UofM were added.

ADDED: Security: Allow Screen Layout Customization: Purchase Order Addresses, Customer Card A/R Overview, Sales Line Mass Update, Sales Document Mass Update, Sales Batch Processing, Purchase Order Search, Vendor Search, Customer Search, Inventory Lookup, Inventory Transfers, Sales Transfers, Receipt Transfers, Sales Analysis and Sales Document Addrs fields were added. (Default: False)

ADDED: Security: Item Maintenance: Price Level Maintenance: Can Delete All Price Levels - This setting enables a button in Price Level Maintenance to remove all the Price Levels. (Default: False)

ADDED: Security: Sales Documents: Allow Screen Layout Customization - When enabled, the layout of the screen can be customized. (Default: False)

ADDED: Vendor Address Card: Users can now change and save layouts on this screen.

UPDATED: Attach PO to Sales Line: It is no longer required for Unit of Measure fields to match in order to link a sales line and a purchase order.

UPDATED: Attach Sales Line To PO: It is no longer required for Unit of Measure fields to match in order to link a sales line and a purchase order.

UPDATED: Backordered Items Report: Log messages are now shown if when attempting to allocate the document cannot be locked or an exception is thrown.

UPDATED: Contact Search: The Contact Type search field has been converted into a dropdown list.

UPDATED: PayFabric: Handling for missing/invalid settings was improved.

UPDATED: Workflow Setup: Recently added queues can now be selected when editing a Workflow rule.

FIXED: Assembly Entry: Assemblies will now be properly saved when users choose to save the document after clicking the Print button.

FIXED: Audits: Changes to dates will now be recorded in audits, regardless of the length of the date.

FIXED: Backordered Items Report: If an exception is thrown while allocating a document, the document will be properly unlocked.

FIXED: Backordered Items Report: Non Inventory items will no longer throw an "Object cannot be cast from dbnull" error when expanding the grid.

FIXED: Backordered Items Report: The Qty Available column is no longer editable and will not throw an "Invalid cast" exception.

FIXED: Backordered Items Report: When manually changing the quantity allocated, there is now better error handling and checks to see if the document is locked.

FIXED: Binary Stream MEM: Customer Search: This will now respect MEM Customer Security.

FIXED: Binary Stream MEM: Vendor Search: This will now respect MEM Vendor Security.

FIXED: Cash Receipts: Changing the transaction amount on a PayFabric transaction will now properly update the cash receipt.

FIXED: Cash Receipts: Users will no longer be asked to save a cash receipt when using the Clear button. This change only affects non-CardControl builds of SalesPad.

FIXED: Customer Card Notes, Sales Document FedEx Quote, Customer AR Notes, Attribute Search: Users can no longer customize the layout.

FIXED: Customer Notes/FedEx Quote: Layout customization has been disabled.

FIXED: Customer Search: Filter scripts will now work with the 'Only Load Visible Columns Security' enabled. (Introduced: 4.5.1.29)

FIXED: Customer Search: UDFs were not displaying values with the 'Only Load Visible Columns' security enabled. This issue has been resolved. (Introduced: 4.5.1.29)

FIXED: Distribution BOM: Assembly Entry: Saving an assembly will now refresh any calculated UDFs.

FIXED: Group Pricing: Qty Start and Qty End can now be equal to each other. Previously, the Qty End had to always be greater than the Qty Start.

FIXED: Inventory Adjustment Lines: The Transfer to Location column is now spelled correctly.

FIXED: Opportunity Card: Users will no longer need to have the 'Can Delete' sub-setting enabled in order to be able to make Opportunities historical.

FIXED: Opportunity Search: The Sales Person and Sales Territory columns are now properly linked to their respective cards.

FIXED: PayFabric: The 'Credit Card Type Mappings' default value now matches PayFabric return values.

FIXED: Price Level Maintenance: From Qty and To Qty values can now be equal to each other. Previously, the To Qty had to always be greater than the From Qty.

FIXED: Prospect Card: Auto-assigned prospect numbers will now work correctly in Spanish and French.

FIXED: Prospect Interactions: When creating a new Prospect, there will no longer be existing Interactions displayed on the Interactions tab on the Prospect card.

FIXED: Purchase Adviser Notes: The item selected in the Demand Detail window will now automatically be populated in the Item Number column when creating a new note, as intended.

FIXED: Purchase Advisor: Purchase Qty will now always match Qty Needed, unless the line is part of a purchase plan. This value is still editable.

FIXED: Purchase Advisor: UofM will no longer be incorrect if the item's purchasing Unit of Measure is not the base Unit of Measure.

FIXED: Purchase Advisor: Users will no longer receive a "Divide By Zero" error when an item's Unit of Measure schedule contained an equivalent that was not in the base Unit of Measure.

FIXED: Purchase Line Editor: Non-Inventory items will no longer have their back-order quantity adjusted if the line has no back-order quantity. If the line has any back-ordered quantity, this value will be adjusted to the new quantity value.

FIXED: Purchase Order Entry: Unsaved changes are no longer lost after editing the address.

FIXED: Purchased Line Editor: Users will no longer receive a "Subtotal does not match the line items total" error when attempting to adjust the quantity. (Introduced in 4.5.1.21)

FIXED: Remote Library: Remote Library no longer opens multiple instances of the same customer.

FIXED: Reporting: SalesPad Dashboard Viewer: Dashboard parameters will no longer reset when the dashboard refreshes.

FIXED: Resource/Interactions/Opportunities: The tool bars are no longer customizable.

FIXED: Resources: Non-GP resources set to transfer will now move from order to invoices as expected.

FIXED: Resources: The Upload New Version plugin will no longer throw an "sppUpdateHistoricalResource expects parameter @Attachment_ID" exception. This is a SQL stored procedure update and does not require an upgrade.

FIXED: Resources: When transferring quotes to orders, the resulting historical quote will now have any resources that were on the original quote.

FIXED: Sales Document Entry: Copying a Sales Document is now limited to the Document

IDs specified in the relevant Customer Card securities (Visible Quote IDs, Visible Order IDs, Visible Invoice IDs, and Visible Return IDs).

FIXED: Sales Document Entry: Smart Printing: A prompt was added to save before printing, if there are changes to be saved.

FIXED: Sales Document Line Items: Extra group tabs will no longer be added when the Sales Document Entry form is untabbed or re-tabbed.

FIXED: Sales Document Line Items: When using the Custom Group feature, if a custom group is removed from a line and no other line item is associated with that same custom group, the sales line tab associated with that group will now be removed automatically.

FIXED: Sales Document Properties: The 'Validate Customer PO' security now validates against open documents, as well as historical documents.

FIXED: Sales Document Properties: The Misc Charge field was being improperly calculated when the sales document was a non-functional currency document. This issue has been resolved.

Version 4.6.0.4

Release Date 5/5/17

BREAKING CHANGE: Card Knox: The 'Card Knox Credit Card Type Mappings' setting may need to be set up again, if changed from the default values.

ADDED: Setting: Sales: Save Sales Line Layout Using Sales Doc Type - This setting determines whether or not the sales line item grid loads and saves layouts based on the Sales Document Type. Warning: Any existing layouts will be reset to their default layout until they are changed. (Default: False)

ADDED: User Field Editor: The Show On Document Type options have been enabled for the sales line item business object.

UPDATED: Interactions: Reminders can now be set for scheduled Interactions.

UPDATED: Customer Opportunities: Added a Total column to the grid.

UPDATED: Install: The RemoteHelp.exe file is no longer installed along with SalesPad.

UPDATED: Opportunity Search: Added a Total column to the grid.

UPDATED: Prospect Opportunities: Added a Total column to the grid.

UPDATED: Quick Reports: The Refresh button is now disabled and changes to "Loading" after being clicked. There is a half-second delay before it can be clicked again; this is to help prevent accidental double-clicks and click mashing.

FIXED: Customer Search: The search grid will no longer display a "Loading . . ." message when a search returns no results and the 'Only Load Visible Columns' security is enabled.

FIXED: PayFabric: The 'Credit Card Type Mappings' setting was not properly saving when changed from the default values. This issue has been resolved.

FIXED: Sales Document Audit: Clicking the ellipsis button in the Description column will now open a window showing the full description.

FIXED: Sales Fulfillment: Selecting multiple lots will now work properly.

FIXED: Sales Line Excel Import: Non-inventory items will now be imported properly.

Version 4.6.0.3

Release Date 4/28/17

ADDED: Configurator - Dynamic Root Item: Users can now use a formula from the options selected to generate the new item number, rather than using the string code.

ADDED: Configurator: For the Assembly BOM configuration type, scrap percentages can be set at the option level and through a formula, when using dynamic configured items.

ADDED: Configurator: The Configuration Type dropdown can now be set to Assembly BOM to create distribution bills of material.

ADDED: Setting: PayFabric: API URL - This is the URL that is used to connect to the PayFabric API.

ADDED: Setting: PayFabric: Hosted Page URL - This is the URL that is used to connect to PayFabric hosted pages.

UPDATED: Resource Printing: Memory recovery was improved for circumstances when an OutOfMemory exception is thrown while printing large resources.

FIXED: Configurator: Text attributes with a value increment will now increment from the value minimum, instead of always from zero.

FIXED: Customer PayFabric Wallet: The scrollbar will now work when wallet editing is disabled by security.

FIXED: Database Update: Users will no longer receive the Log messenger when running the database update when the spvSalesLineItem_Light view has not been created yet.

(Introduced: 4.6.0.2)

FIXED: Email: Users will no longer receive an "Access to the path is denied" error in certain situations when sending emails with read-only file attachments.

FIXED: New Customer: The Address Audit log no longer loads unrelated logs.

FIXED: Purchase Line Item: Unit cost based on the item's current cost or standard cost will now be properly calculated based on exchange rates for the currency of the document when a line is added.

FIXED: Purchase Order Entry: Purchase orders with non-functional currency will now have the exchange rate and rate calculation method populated before the document is saved for the first time.

FIXED: Receiving: Users will no longer receive an "Arithmetic overflow" error when receiving non-functional currency purchase order lines that have a rate calculation method of 1.

FIXED: Sales Line Distribution Entry: When attempting to save a document before the plugin opens, users will no longer receive a "Parameter count mismatch" error, if they have a Sales Document Pre-Save script enabled.

FIXED: Sales Order Entry: When copying a document, the Sales Rep field for the new document will no longer be cleared out when the associated customer address does not have a Sales Rep specified.

FIXED: Vendor Notes: The Notes and Comments fields will no longer be blanked out when using certain themes.

Version 4.6.0.2

Release Date 4/21/17

BREAKING CHANGE: Purchasing Advisor: The results will, by default, now only show the warehouse for the system user's default warehouse.

BREAKING CHANGE: Purchasing Advisor: The setup for Buyer ID's or Last Vendor Used fields now require spcp's. This functionality was causing slow-downs during searching and is not enabled by default.

ADDED: Purchasing Advisor: There is now a Custom Search field, hidden by default, which can be used in an spcp to search by a specified field.

ADDED: Purchasing Advisor: There is now an information icon that will display whether or not the system is using an spcp.

ADDED: Purchasing Advisor: There is now an sppPurchaseAdvice_Modified, and the sppPurchaseAdvice supports an spcp. This is needed in order to re-enable the Buyer ID functionality (this may slow the system down significantly).

ADDED: Purchasing Advisor: Users can now search by Warehouse(s), Item Number, and Item Class. Item Number and Item Class search fields have a "Starts with" or "Equals" operator for further search refinements. NOTE: Existing spcp's will need to be updated to support the new searching functionality, however, nothing will be broken when using outdated spcp's.

ADDED: Security: Purchasing Advisor: Allow Screen Layout Customization - When enabled, users can customize the layout. (Default: False)

ADDED: Security: Purchasing Advisor: Search On Load - When disabled, the screen will not do a search when initially loading. (Default: True)

ADDED: Security: Purchasing Advisor: Use Default Warehouse From User - While enabled, the Warehouse search field will be populated with the user's default warehouse. (Default: True)

UPDATED: PayFabric: Crediting a transaction made on another document from a return will now only create a separate payment on the return.

UPDATED: Purchase Order Entry: Changes to user fields on purchase orders that include prepayments can now be saved.

UPDATED: Purchasing Advisor: The Buyer ID field will no longer be visible if no purchasing buyer IDs are set up.

UPDATED: Purchasing Advisor: The sppPurchaseAdviceDetail_Modified can be used to re-enable the Buyer ID functionality, if required (this may slow the system down significantly).

UPDATED: Receiving: Prepayments on purchase orders will no longer prevent users from making Shipment type receipts. Invoice and Shipment/Invoice types are still not allowed.

FIXED: Assembly Entry: After saving an assembly, changing the assemble quantity will now allocate serial/lot tracked items properly.

FIXED: Assembly Entry: The Material Issues bin will now be the first bin used for allocation in a multibin environment.

FIXED: Inventory Adjustment Lines: The Qty Available column now displays up to five decimal places.

FIXED: Inventory Analysis: Users will no longer receive an Object Reference error when opening the Inventory Analysis module.

FIXED: Opportunities: Emailing opportunities will no longer result in an "Incorrect syntax near 'in'" error.

FIXED: PayFabric: Partial credit transactions will now properly adjust sales document payments.

FIXED: Sales Fulfillment: Certain columns would reappear after being removed from the Available To Pick grid when reloading the plugin. These columns will now be properly saved to the user's layout.

Version 4.6.0.1

Release Date 4/14/17

ADDED: Funnel: Support for FedEx Ship Manager has been added to the Funnel.

ADDED: Funnel: Support for UPS's Saturday Delivery Service has been added to the Funnel.

ADDED: Sales Document Promotion: Sales Document Promotion information has been added to Report Designer.

ADDED: Sales Line Item Promotion: Sales Line Item Promotion information has been added to Report Designer.

ADDED: Sales Promotion Coupon: Sales Promotion Coupon information has been added to Report Designer.

FIXED: Inventory Lookup: Inventory Tab: Back-ordered quantity will now be properly updated for kit items on orders. Users will need to run an inventory reconcile to fix this issue for sales document made prior to this change.

FIXED: Sales Document Promotion: The Sales Promotion availability indicator will now work properly if a coupon is applied to a sales document that has a zero-dollar subtotal.

FIXED: Sales Monitor: Gross Margin data will no longer be incorrect if the document was partially invoiced using GP.

FIXED: Sales: Localized versions of SalesPad can open void and historical documents.

Version 4.6.0.0

Release Date 4/7/17

BREAKING CHANGE: Sales Document Resources: Resources from all related documents will no longer be visible on a sales document. Going forward, we will be creating new links to any transferable resource as sales documents are split or transferred.

ADDED: In-Transit Transfer Link: When an ITT link is deleted, the action is recorded on both the Sales Document audit and the In-Transit Transfer audit.

ADDED: Inventory Transaction Entry: An Audit tab for auditing changes to the inventory transactions was added.

ADDED: PayFabric: Support for EMV processing was added.

ADDED: Sales Document Addrs: Customize Layout: New DevExpress layout properties were added.

ADDED: Settings: Copy Document Header To Line Items - This setting copies the warehouse from the document header onto the line items. Otherwise, the warehouse associated with the customer address will be used.

ADDED: Settings: Inventory Transactions: Item Transaction Columns to Include In Audit - Indicates columns that will be audited for inventory transactions. If left blank, no extra auditing will be done. (Default: Doc_Date; Batch_Num)

ADDED: Settings: Inventory Transactions: Item Transaction Line Columns to Include In Audit - Indicates columns that will be audited for inventory transaction lines. If left blank, no extra auditing will be done. (Default: Quantity; UOfM; Reason_Code)

FIXED: Avatax Address Validation: Sales line Ship To address information will be updated if the validation's recommended address information is chosen.

FIXED: Choose Purchase Plan: Previously, the 'Adjust for Purchasing UofM' security would only function if there were vendor items set up for the item. Now, it will first look at the Purchasing UofM on the item and then look at the vendor items.

FIXED: Choose Purchase Plan: When using the 'Adjust for Purchasing UofM' security, the calculated adjusted quantity will no longer be incorrect if the sales line quantity is the same as the quantity base UofM for the purchasing UofM.

FIXED: DevExpress Layout: If a user right-clicks then selects Reset Layout, layouts will now reset immediately. Duplicate layout loading is also fixed.

FIXED: GP Resources: In some situations, SalesPad would create a new attachment rather than link to an existing attachment. This has been corrected.

FIXED: In-Transit Transfer Entry: Kit items are no longer allowed as line items.

FIXED: In-Transit Transfer Entry: When saving, users will no longer receive an over-allocation pop-up for lines that have no item number.

FIXED: In-Transit Transfers: Distribution records will now be created properly.

FIXED: Manufacturing BOM Entry: Users will no longer receive an "Object reference not set to an instance of an object" error when adding components.

FIXED: Opportunity/Prospect Contacts: Users will no longer receive an "index out of range" exception. (Introduced: 4.5.1.29)

FIXED: PayFabric Migrator: PayFabric requires billing address information for credit cards in certain situations, but these fields were not required for credit cards in CardControl. We now use the customer's primary billing address information if the information is missing from the credit card.

FIXED: Purchase Advisor: Users can now adjust the quantity of a purchase order line created from a reorder point.

FIXED: Sales Document GP Resource: If a document was created in GP and an attachment was transferred from a customer, duplicate resources will no longer be created when saving.

FIXED: Sales Document GP Resource: Previously, deleting some GP resources would result in the attachment file and all links to that file being deleted. Now, only the link will be deleted, unless it is the last link deleted.

FIXED: Sales Line Item: When using the 'Sales Document Quick Save' setting, users will now be able to clear out the line comments after they have been populated.

Version 4.5.1.29

Release Date 3/31/17

BREAKING CHANGE: Customer Search: By default, the Only Visible Columns security is enabled, and adding new columns to the grid will not populate data until the screen is refreshed. This change was made to help improve the speed of this screen, and to allow for a larger search base.

ADDED: Licensing: The TeleSales, CaseTracker, WorkWave, and Dispatch modules now require licenses.

ADDED: Sales Line Promotion: A module that allows users to create sales line level promotions was added under Sales Document Promotion.

ADDED: Sales Promotions: A module that allows users to create sales document header level promotions and generate coupons for those promotions was added under Sales Document Promotion.

ADDED: Security: Customer Search: Only Load Visible Columns - When enabled, the customer search will be faster and only load the visible columns data. (Default: True)

UPDATED: Dashboard Maintenance: Chart Series control was updated due to a DevExpress upgrade.

UPDATED: DevExpress: DevExpress was upgraded to 16.2.4.

UPDATED: Opportunity Contact Entry: Bing Maps service was updated due to a DevExpress upgrade.

UPDATED: Prospect Contact Entry: Bing Maps service was updated due to a DevExpress upgrade.

FIXED: Customer Overview: The Customer Class, Payment Terms, and Price Level fields can now be cleared out.

FIXED: Customer PayFabric Wallet: Wallets are properly retrieved for customers with spaces in the Cust # field.

FIXED: Email: When using the Report Controlled print attachment option, the system file that is being attached will no longer be deleted after the email has been sent.

FIXED: PayFabric: Voiding transactions will now properly remove sales document payments.

FIXED: Payments: When using the non-CardControl Authorize.Net payment processor and conducting a charge deposit, users will no longer have multiple GP financial batch entries.

FIXED: Printing: Printer name validation for network printers was improved. Users are now less likely to receive the "Printer Not Valid" error message.

FIXED: Purchase Order Entry: Freight and misc charges will now be taxed properly.

FIXED: Purchase Order: The FRTTXAMT and MSCTXAMT fields in POP10100 will no longer add to themselves each time a purchase order is saved with freight or a misc charge.

FIXED: RedTail EDI: There will no longer be extra blank comment lines when the EDI document does not include line comments.

Version 4.5.1.28

Release Date 3/24/17

ADDED: New Customer: A Price Level field has been added to the New Customer form.

ADDED: ShipCenter Shipping Calculator: Users can now specify package details from the plugin.

UPDATED: Activity Locks: When clearing locks, there will be a system log entry.

FIXED: Application: When the Payfabric or Cardknox tabs are disabled, there will no longer be a database query against those tables.

FIXED: Counter Sales: The securities to enable/disable the Payfabric and Cardknox tabs are now respected.

FIXED: Counter Sales: When using a CardControl build, there will no longer be a double-save when navigating to the Check Out tab along with further saves when switching tabs again.

FIXED: Funnel: Better exception handling when processing documents was added.

FIXED: Funnel: Various null references were fixed.

FIXED: PayFabric: Batch Capture: Authorizations can now be captured on invoices without receiving a payment type error.

FIXED: PayFabric: "MSO IsBatched" is properly set when writing to CCA.

FIXED: Report Manager: There will no longer be an "Out Of Memory" exception due to loading too many transactions at one time.

FIXED: Sales Document Entry: Users in a non-multi currency environment will no longer receive an "Object Reference" error when attempting to save a document. (Introduced: 4.5.1.26)

FIXED: Sales Document Payment: Payments generated from CardControl transactions will now set the Doc Date field to local time.

FIXED: Sales Document Resources: Users will no longer receive a "Conversion failed when converting the varchar value '\' to data type int" error when transferring an order to invoice in certain scenarios.

FIXED: Sales Line Item: Adding multiple packages/kits through the Inventory Lookup pop-up will now correctly set the unit price/price level on the lines.

Version 4.5.1.27

Release Date 3/17/17

ADDED: Security: Purchase Order Addr: Can Create Customer Address - Allows a user to create a new customer address. This only works on dropship purchase orders. (Default: True)

ADDED: Security: Purchase Order Addr: Can Update Customer Address - Allows a user to update the customer's address. This only works on dropship purchase orders. (Default: True)

UPDATED: In-Transit Transfers: Kits are no longer allowed on in-transit transfers when using the ITT Generation sales document plugin. This follows the established GP rules.

UPDATED: Security: Purchase Order Addr: Update Button Enabled is now called Can Update

Vendor Address; its description has been updated to reflect this change.

FIXED: Configurator: Sub configured items will no longer use Great Plains pricing, if the root configured item is using a pricing type of Configurator.

FIXED: Database Update: Certain calculated user fields containing single quotes will no longer fail.

FIXED: Inventory Lookup: Inventory: Next Expected Receipt column will no longer use purchase order lines that have a status of New.

FIXED: Inventory Lookup: Users will no longer receive an Object Reference error when selecting the Sales tab.

FIXED: Inventory Lot User Fields: When setting lot user fields on a receipt line, the resulting lot's user fields will now be properly updated when the receipt is posted, if the receipt line's Receive To Site was changed from its original value.

FIXED: RemoteLibrary: Communication with RemoteLibrary no longer fails due to a contract mismatch. (Introduced in 4.5.1.22)

FIXED: Sales Document Resource: Users will now be able to delete sales document resources as intended.

Version 4.5.1.26

Release Date 3/10/17

ADDED: Settings: Include Authorizations When Calculating Default Amount - SalesPad will include existing authorizations when calculating the default amount for new PayFabric transactions. (Default: True)

UPDATED: PayFabric: Existing authorizations are included when calculating the default amount for new PayFabric transactions.

UPDATED: Receipt Transaction Line Selector: This module is no longer in Beta.

FIXED: Customer PayFabric Wallet: New wallets are properly created for customers with special characters in the Cust # field.

FIXED: Matrix: The Update Line Comment function will now work in all scenarios.

FIXED: Matrix: When not using the Replacement Text setting, users will no longer receive duplicated text in the item number. (Introduced: 4.5.1.23)

FIXED: New Customer: The ShipToName field in RM00102 will default to the Customer Name if an Alt Company Name is not provided.

FIXED: Returns: When posting a return using non-functional currency and created in SalesPad, users will no longer receive COG distribution errors.

Version 4.5.1.25

Release Date 3/3/17

ADDED: New Extended Module: Case Tracker: A new extended module used to track specific customer issues and their resolutions was added.

ADDED: Settings: Include Authorizations When Calculating Default Amount - SalesPad will include existing authorizations when calculating the default amount for new PayFabric transactions. (Default: True)

UPDATED: PayFabric Migrator: Log message will now include errors received from PayFabric.

UPDATED: PayFabric Transaction: Existing authorizations are included when calculating the default amount for new PayFabric transactions.

UPDATED: Sales Document Audit: Audit entries from related documents can now be viewed.

FIXED: Binary Stream: Sales Monitor will now properly show zero quantity batches. This was a SQL change to sppSalesMonitorSummary.

FIXED: Inventory Lookup: The Item Audit table now allows long item descriptions.

FIXED: PayFabric Migrator: An issue where AMEX cards were being decrypted with extra characters, causing issues when migrating, was fixed.

FIXED: Sales Entry: The Total Paid and Amount Due banner that appears for historical invoices will now show correct values if a cash receipt was applied to the document and the document had a Payment Terms discount available.

FIXED: Sales: Users will no longer receive the "Sales document no longer exists" message when opening voided documents. (Introduced: 4.5.1.22)

Version 4.5.1.24

Release Date 2/24/17

FIXED: Equipment Lookup: The Sales Document column hyperlink will now work properly for serial items that have been invoiced or returned.

FIXED: Inventory Allocations: In-Transit Transfers Tab: When using the Filter By Location security, this grid will now look at the From site and the Via site when loading rows.

FIXED: Manufacturing Links: There was potential for deadlocks issues around spIS010001 due to missing table keys and missing nolocks in sppMOCommitments_Disconnect. These can both be fixed via SQL updates.

FIXED: Purchase Order Addresses: The Ship To Address tab will be the sub-tab selected. (Introduced: 4.5.1.17)

FIXED: Remote Library: The Remote Library User is now logged out of SalesPad when Remote Library is running as a service and Windows is shut down.

FIXED: Returns: Users will no longer receive the "The Cost of Goods distribution amount is incorrect" error when attempting to post a return with a kit line item.

FIXED: Sales Document: User Defined Field settings for showing user fields only on specific document types will now be respected.

FIXED: Sales Entry: Users will no longer receive the "Cannot insert the value NULL into column GLPOSTDT" error when saving or generating payments. This was a change to a SQL procedure: spptaSopHdrRecalc_SalesPad. (Introduced: 4.5.1.21)

FIXED: Sales Transaction Entry: Manufacturing links created when splitting or invoicing a sales document were improved.

Version 4.5.1.23

Release Date 2/17/17

ADDED: Purchase Order Line Item Configurator : Identical functionality as the Sales Line Item Configurator but for Purchase Orders. Both Configurators will pull from the same Item Configurator Maintenance Screen

ADDED: Security: Sales Document Line Items: Can Edit Quantities on MO linked Lines - If set to true, users will be able to edit Quantity and Quantity Backordered while a manufacturing order is linked. (Default: False)

UPDATED: DevExpress Layout: Right-click, select Customize Layout form, then Layout Tree View to access added properties which enable more customization options with layouts.

FIXED: Application: The tabs selected as Auto Start tabs will no longer be reset when updating or reinstalling SalesPad.

FIXED: Cash Receipts: When a PayFabric transaction is denied, users will no longer be able to save the cash receipt by clicking the Clear button.

FIXED: Child Accounts: When adding a child account to a customer, a record for the parent account will now be created in RM00105, allowing users to update Nation Account options in GP.

FIXED: Matrix: When using the Replacement Text Indicator, users will no longer get duplicated text in the item number or description.

FIXED: Sales Document Line Items: Sales lines that are linked to an MO now only lock quantity backordered when the MO status is Released.

FIXED: Sales Line: The Equipment Serial Number field will no longer be cleared out after saving when it was populated using the Equipment Lookup to find a serial number.

Version 4.5.1.22

Release Date 2/10/17

ADDED: Inventory Lookup: An Item Audit tab for auditing changes to the item was added.

ADDED: PayFabric Migrator: Better audit messages when a migration fails were added.

ADDED: Remote Library: REST Endpoint was added to Remote Library.

ADDED: Workflow: Run Scripts will now stop Workflow from forwarding a document when the script sets the CancelEventArgs.Cancel property to True.

ADDED: Setting: Inventory Lookup: Item Columns to Include In Audit - Indicates item columns that will be audited. If left blank, no extra auditing will be done. (Default: Item_Description; Item_Short_Name; Item_Generic_Description; Replaced_By; Item_Class_Code; Item_Type; Standard_Cost; List_Price; Current_Cost; Price_Level; Item_Shipping_Weight; Selling_U_of_M; Sales_Tax_Option; Item_Tax_Schedule_ID; Purchase_Item_Tax_Schedu; Purchase_Tax_Options; Price_Method)

ADDED: Settings: Enable REST Endpoint: Remote Library can now be accessed with a REST endpoint.

ADDED: Settings: REST Endpoint Name: An extension to the web address resource name for a REST endpoint was added.

FIXED: Application: A "Collection was modified" error when trying to set the system user icon has been resolved.

FIXED: In-Transit Transfer Fulfillment Plugin: Various issues with partially shipped lines and fulfillment were fixed.

FIXED: In-Transit Transfer: Partially fulfilling line items will no longer cause the status to remain as Open on the line and the document.

FIXED: In-Transit Transfer: Users will no longer be able to delete or edit most columns on partially received, received, partially shipped, or shipped lines.

FIXED: Inventory: In-Transit Transfer: Audit: Descriptions can no longer be edited by the user.

FIXED: Inventory: Inventory Lookup: Allocated quantity for kit items will now show how many kits are allocated.

FIXED: PayFabric: Enabling the Auto Start First Payment setting no longer causes transactions on new sales documents to have a default amount of $0.

FIXED: Purchasing: Purchase Order: Audit: Descriptions can no longer be edited by the user.

FIXED: Sales Analysis Report: When a user loads a saved layout, duplicate fields will no longer be added to that layout.

FIXED: Sales Entry: Copying a document with a package item and having the Reprice on Copy setting enabled will no longer combine the cost of the components with the top-level package item.

FIXED: Sales Entry: In a non-multibin environment, users can now properly fulfill non-inventory items that are linked to a PO and use separate fulfillment.

FIXED: Sales Line Item: After entering in a correct item number, creating a new line will no longer require the user to press Enter twice.

FIXED: Sales Line Item: Clicking the Delete button will now focus the next line.

FIXED: Sales Line Item: When using the Named Notes for Quote setting, pressing Enter will no longer create a new sales line.

FIXED: Sales: Sales Document Entry: When attempting to save a sales document missing required fields, the missing fields will be shown in one message.

FIXED: Sales: Sales Document: Audit: Descriptions can no longer be edited by the user.

FIXED: Security Editor: When setting up a new user, the New User dialog box is now correctly labeled "User ID" instead of "User Name".

FIXED: TeleSales Monitor: There will no longer be an invalid column name "Auto_Calc_Freight" error. This was a SQL stored procedure change.

Version 4.5.1.21

Release Date 2/3/17

ADDED: Customer Equipment: The Assigned to Customer column was added.

ADDED: Import Manager: A KitComponent table that supports importing kits and their components was added.

ADDED: Import Manager: The ItemMaster table now supports importing the Kit COGS Account Source field.

ADDED: Print: Added a System Default Printer selectable option in the printer dropdown.

ADDED: Security: CRM Contact Card - Can Edit (Default: False)

ADDED: Vendor Address Card: Users can now change and save layouts on this screen.

UPDATED: Opportunity Contacts: Users can now edit a Contact on an Opportunity card by clicking either the Contact ID or First Name cell values for a particular row.

UPDATED: PayFabric Settings: Transaction URL can now be selected from a dropdown.

UPDATED: Sales Document Payments: Payments tabs are read only if the document is read only.

UPDATED: Security: Sales document securities that only require queues no longer show the document type and document IDs in the dropdowns.

UPDATED: Setting: Backorder Document ID - This setting now has a description.

FIXED: Assembly Entry: Assembly line items' GL Account Index will now properly substitute warehouse account segments.

FIXED: Assembly Entry: Renaming the "Inventory - Retail/Parts" GL account will no longer prevent users from creating assemblies.

FIXED: CRM Contact Card: Users will now be prompted to save when attempting to close out of a newly edited Contact.

FIXED: Copy Sale Document: The Choose Sales Doc ID and Customer popup now has the updated SalesPad logo for its icon.

FIXED: Counter Sales: The user no longer needs to hit Enter twice to activate the customer search.

FIXED: Customer AR Statement: There is now better messaging if this report is blank.

FIXED: Customer Card: Interaction: Anonymous login will be attempted if the Email Server Username and Password have not been set.

FIXED: Customer Sales Graph: When using the plot selection Margin, data will now be displayed properly.

FIXED: Export To Excel: There is now better exception handling when trying to export to

Excel and access permissions are denied.

FIXED: In-Transit Transfer Fulfillment: Fulfilling will now work properly if the In-Transit Transfer line item's quantity was changed after a fulfillment was previously added to the line. This change only affects non-multibin environments.

FIXED: Inventory Lookup: The Item Class field no longer has two dropdowns.

FIXED: Item Class Report: When printing, the Item Class label in the report header will now be set properly.

FIXED: Item Properties: The List Price dropdown will correctly clear out when there are no Price Levels to load.

FIXED: Login: The information message panel will now display a message if the SQL credentials are incorrect.

FIXED: New Customer: When a user creates a new customer in SalesPad, there will no longer be a blank note on the Customer Card in GP.

FIXED: New Email Template: The Cancel and OK buttons are now re-positioned to remain in the lower right-hand corner when the window is resized.

FIXED: Purchase Order Entry: Closed and Received lines will no longer have their extended cost recalculated when closing a document. This will prevent some instances of a save prompt appearing when no changes have been made to a purchase order.

FIXED: Purchase Order Entry: Extended Cost will now only be recalculated if the Unit Code, Quantity, or Cancelled Quantity columns are changed on the line.

FIXED: Purchasing Advisor: The comment field in the Demand Detail grid can now be copied via the right-click menu.

FIXED: Report Manager: The Design button icon has been replaced with an icon that is more fitting.

FIXED: Sales Document Item Restrictions: The Enabled flag is respected for a customer when adding items to a sales document.

FIXED: Sales Document Payments: The Credit Card Name field now populates when PayFabric is enabled.

FIXED: Sales Document Payments: Transaction Time columns do not display the date.

FIXED: Sales Entry: Copying a sales document and setting a different customer will now copy the warehouse codes of the line items correctly.

FIXED: Sales Entry: The SetupBasicSalesLineItemCollection method will no longer generate an Object Reference error when processing a CardControl transaction.

FIXED: Sales Entry: When transferring to invoice, the GL Posting will now properly respect the Posting setting in GP for transaction date. This was a change to a SQL procedure:

spptaSopHdrRecalc_SalesPad.

FIXED: Sales Line Distribution: The sales document is now saved when this plugin is opened to prevent changes from being lost on new documents.

FIXED: Vendor Overview: When using the 'Show Vendor Hint' security, the hover hint will now display data properly.

Version 4.5.1.20

Release Date 1/27/17

ADDED: CRM Contact Search: Contact user fields were added to the search grid.

ADDED: Opportunity Line Items: On Row Changed Script: A C# script that executes when an opportunity line has been changed.

ADDED: Opportunity Line Items: User field functionality has been added.

ADDED: User Field Editor: Group Edit Permissions: Allows the user to make user fields for a specific user group Read Only.

FIXED: CRM Contact Card: The Delete button is now visible on this form as intended.

FIXED: Customer AR Statement: Users are now able to open returns from the AR Statement selection window.

FIXED: In-Transit Transfer Entry: Printing transfers now requires changes to be saved.

FIXED: In-Transit Transfer Fulfillment: When fulfilling an In-Transit Transfer with a Via Site, the fulfillment screen will now let the user select bins from the Via Site, rather than the To Site. This only affects multi-bin environment users.

FIXED: In-Transit Transfer: The bin transfer site will now properly use the Via Site and its bin, rather than the To Site. This only affects multi-bin environment users.

FIXED: Inventory Adjustment: The GL Posting Date will be properly set when posting in GP is set to use the Transaction Date.

FIXED: PayFabric Sales Batch Processing: Errors with creating payments will now be properly displayed.

FIXED: PayFabric: The auth code will now be written to generated payments instead of the key value.

FIXED: Purchase Order Lines: Historical comments are now properly populated. This was a SQL change to spvPurchaseLineItem_base.

FIXED: Sales Document Payments: CardKnox is now properly disabled for Read Only documents.

FIXED: Sales Document Payments: PayFabric is now properly disabled for Read Only documents.

FIXED: Sales Document Search: Historical documents will no longer show functional currency values in the Subtotal, Freight, Tax, Misc Charge and Discount columns when the document is using a non-functional currency.

Version 4.5.1.19

Release Date 1/20/17

ADDED: Attach Sales Line to MO: Added auditing to sales document when MO links are broken.

ADDED: Sales Document MOs: Added auditing to sales documents when MO links are broken.

FIXED: Opportunity: Convert to Quote: Opportunities without line items will no longer prompt to choose lines when converting to a quote.

FIXED: Sales Analysis: When choosing to hide/show Sales or Profit columns users will no longer receive a "The given key was not in the dictionary" error.

FIXED: Sales Document Entry: Sales Fulfillment: Returns can now be fulfilled in localized versions of SalesPad.

FIXED: Sales Document Line Items: MO-linked sales lines are now editable without the Manufacturing extended module.

FIXED: Sales Document Resources: When transferring a split order, the sales document resources on the resulting invoice will no longer be 0 kb files.

Version 4.5.1.18

Release Date 1/13/17

BREAKING CHANGE: REMOVED: Security: Interactions: Can Delete Interactions. This security is now split into two different securities.

ADDED: PayFabric: The 'Authorization Up Charge Percent' setting now works with PayFabric.

ADDED: Returns: The Qty Fulfilled field will now display the total quantity that has been picked for the return. This is a display feature only, the value is not saved on the Sales Line field.

ADDED: Security: Interactions: Can Delete Others Interactions - Allows a user to delete another user's interactions (Default: True)

ADDED: Security: Interactions: Can Delete Own Interactions - Allows a user to delete their own interactions (Default: True)

ADDED: Security: Sales Document Payments: Available Processors - Allow for customization of which processors security groups can select for transactions. (Default: "*")

ADDED: System User Card: Modified the User Card selector to display a pop-up containing a list of available users to select. Old security values are still supported, so this will not cause any issues for legacy users.

UPDATED: Application: Instead of getting a "ScreenSync binding is invalid" exception message, users will now get a Log message that informs them that they should log out and back into SalesPad.

UPDATED: Copy Sales Document: When copying a contract priced line where the contract has expired or been deleted, SalesPad will now find a viable contract or find the next usable price for the new line item.

UPDATED: Item Maintenance: The Customer Items tab no longer requires Beta access.

UPDATED: PayFabric Migrator: There is now a pop-up telling the user that the CardControl.API.dll is required to run PayFabric Migrator. This file can be retrieved from a previous CardControl version of SalesPad, or the user can contact support.

FIXED: Application: There were some "Object reference not set to an instance of an object" errors when logging out while prompts to save were being handled simultaneously. This would happen if clicking Yes on the prompt would trigger some other form to launch. This issue has been resolved.

FIXED: Blanket Order Release Plugin: Users will no longer receive a "Cannot access a disposed object" error when a Rich Text Memo UDF is in the header layout.

FIXED: Contract Pricing: Contract pricing with Kit items now updates purchase quantity properly when changing the kit's quantity. Users must have the 'Can Change Kit Quantities' security set to True.

FIXED: Copy Sales Document: Contract lines could double fulfillment on the new document line items in certain situations. This has been corrected.

FIXED: Login: Users will no longer receive a "Sequence contains no matching element" error if the Store/Drawer they are assigned to does not have a credit card device set up, while other Store/Drawers do.

FIXED: PayFabric Migrator: A partially entered customer number will no longer throw an error.

FIXED: Quick Reports: When using multiple quick reports and un-tabbing/re-tabbing the formlet, the caption will remain consistent.

FIXED: Resources: Resources attached to Purchase Requisitions in GP will no longer cause a "Conversion failed when converting the varchar value \" error when opening a Resource tab in SalesPad.

FIXED: Returns: Increasing or decreasing the quantity for multi-bin items will properly increase or decrease the picked quantities when using the auto-fulfillment option.

FIXED: Returns: Serial tracked items will no longer have the quantity reduced if the picked quantity is less than the original quantity upon saving. NOTE: Serial tracked items must still be fully picked before posting.

FIXED: SOP to POP: When purchasing Non-Inventory items through Sales Entry, the quantity will not be zeroed when the Choose Purchase Plan security 'Adjust For Purchasing UofM' is enabled.

Version 4.5.1.17

Release Date 1/6/17

UPDATED: Tax Schedules: Tax schedules are now loaded when a user logs into SalesPad. This allows for form loading improvements in numerous areas when there are a lot of tax schedules. It's still possible that the first time loading a form with a tax schedule may be slower, but subsequent form loading will be faster.

FIXED: Assembly Entry: Changes made to any field in the assembly header will now successfully trigger a save prompt when closing out of a newly edited assembly.

FIXED: CardKnox Integration: Creating a credit on a return from an existing payment will now properly create the payment record on the return document.

FIXED: Item Maintenance: When adding new vendor Information, the Vendor Item Number and Vendor Item Description will now be properly pulled from the Item Number and Item Description fields.

FIXED: Printed Reports: There will no longer be an "Attempted to divide by zero" error if the UofM schedule Equiv Qty is zero in the IV40202 table. This was a SQL view change: spvUOfMScheduleDetail.

FIXED: Profitability: When using the Show Recent Receipts security, changes made to the unit price will now be carried over to the sales line.

FIXED: Purchase Order Entry: Opening a PO from the Activity Lock screen for the active user will no longer be read-only.

FIXED: Purchase Order Entry: The read-only status is now more accurate for multiple scenarios.

FIXED: Sales Document Payment: Creating a new credit card payment and typing in the credit card number will no longer result in an index and length error.

FIXED: Sales Entry: The user no longer needs to tab off of the newly edited field before clicking Transfer in order for the save prompt to display.

FIXED: Sales Entry: When updating a UDF that is mapped to USRDAT01 or USRDAT02 and the Windows region date format is DD/MM/YYYY, users will no longer receive a "String was not recognized as a valid DateTime" error.

REMOVED: Database Update: The Refresh Procs option had the potential to revert stored procedures to older versions on certain systems. This issue has been resolved.

Version 4.5.1.16

Release Date 12/30/16

BREAKING CHANGE: Sales Document Line Item: Pre-Delete scripts now use a List type for the dataRowsToDelete parameter. Any pre-existing scripts will need to be updated to reflect this change.

ADDED: Opportunity Line Items: On Row Changed Script - C# Script that executes when an Opportunity line has been changed.

ADDED: Opportunity Line Items: User field functionality has been added.

ADDED: Pricing Type: Standard Plus Configurator was added as a Pricing Type.

ADDED: Setting: Use Historic Configurations To Reprice Sales Line - When manually entering a configured item on a sales line, or re-pricing a configured item on a sales line, the price will return from the historic version of the configuration, if the active version doesn't match the configuration that initially created the item. Requires Configurator Module.

ADDED: Settings: Use Configurator Pricing When Manually Entering Configured Item - When adding an item that was created by Configurator to a sales line, the system will attempt to price the sales line via the Configurator Pricing Type. Requires Configurator Module. (Default: False)

FIXED: PayFabric Payments: Credit amounts will now properly be exported to Nodus CCA.

Version 4.5.1.15

Release Date 12/22/16

ADDED: New Customer: The ability to set the Trade Discount value when creating a new customer was added.

ADDED: Security: A System Security report was added.

ADDED: Security: A User Group Difference report was added.

ADDED: Security: New Customer: Can Assign Trade Discount - Allows a user to assign a trade discount. (Default: True)

UPDATED: Customer Overview: When changing a customer's class, the Trade Discount will now be updated to the

customer class's default Trade Discount.

FIXED: Group Pricing Maintenance: When deleting then exporting group pricing, users will no longer receive a "Deleted row information cannot be accessed through the row" error.

FIXED: PayFabric Transaction: Voided PayFabric transactions will now properly set the void status when exported to Nodus CCA tables.

FIXED: Sales Document Properties: Line items will no longer have their prices updated if a user clicks on the Price Level dropdown and does not modify its value.

FIXED: Sales Entry: Instead of receiving a "Cannot insert the value NULL into column Print_Phone_NumberGB" error, on GP2013 or newer, users will now receive the active support message about a missing Ship To address.

FIXED: Sales Entry: When using a separate Fulfillment Doc ID type, non-inventory items can now be backordered.

FIXED: Sales Line Item: Sales line user fields on historical documents will no longer be read-only when security is enabled.

FIXED: User Fields: Clearing out Rich Text Memo fields will no longer crash SalesPad. (Introduced: 4.5.1.3)

Version 4.5.1.14

Release Date 12/15/16

ADDED: Opportunity Monitor: Opportunity User Fields columns have been added to the Opportunity Monitor.

UPDATED: Database Update: Speed improvements were made around spx user field tables and user field views.

UPDATED: Refresh Procs: The sppRefreshProcs is now case sensitive and will only refresh stored procedures that start with "spp."

UPDATED: Sales Line Excel Import: The Excel Type and Show Results options are now saved in the registry.

FIXED: Attach Sales Line to MO: The Break Link button is disabled when SalesPad Manufacturing is not loaded.

FIXED: Create Manufacturing Order: The Create Manufacturing Order plugin now respects Made Items and does not create an MO when the "BOM should be treated as" field in Item Engineering Data is set to Buy.

FIXED: Database Update: There will no longer be an indexing error on the spxFutureInventoryLotNum table if you also have DataCollection installed.

FIXED: Group Pricing: When using an All Customers group pricing option in tandem with another group pricing option for a particular customer, the sequence number will now properly be used to determine pricing priority. Previously, it would ignore the All Customer group pricing and use the next lowest sequence number group pricing for that customer.

FIXED: MO Entry Properties: MO Entry Properties now properly sets fields as read-only for certain MO statuses.

FIXED: Manufacturing Scheduling Preferences Startup Script: This script no longer throws a null exception when there are no scheduling preferences.

FIXED: PayFabric: The 'Preauth Hold Code' setting now works properly with PayFabric.

FIXED: Purchasing Advisor: Reorder Points will no longer consider quantity on a purchase order which is linked to a sales order as quantity on order. This quantity will be allocated to the sales order when received, and therefore shouldn't be used when determining how much stock should be ordered.

FIXED: Purchasing Advisor: There will no longer be "Error converting data type datetime to smalldatetime" error when creating purchase plans for documents that have an invalid required ship date. There is now a log messenger that is displayed.

FIXED: SOP to MOP: When an MO is partially received and the sales order is split or partially invoiced, the Qty_Match field will now be properly set to 0 on the back-ordered portion of the split.

FIXED: SOP to POP Links: When removing a purchase order link from a sales order, the purchase order will no longer remain locked once the link has been removed. This has also been fixed for the sales order when the link is removed on the purchase order side. (Introduced: 4.5.1.13)

FIXED: Sales Document MOs: The Break Link button is disabled when SalesPad Manufacturing is not loaded.

FIXED: Sales Line Excel Import: Importing kits that are packages will no longer cause "Cross Threading" errors.

FIXED: Sales Monitor: The EnteredBatch column will now be properly updated when a document is forwarded through Workflow.

FIXED: Settings: There will no longer be a "0.00 is not a valid value for Decimal" error when running SalesPad in French.

Version 4.5.1.13

Release Date 12/9/16

ADDED: Configurator: A Costing Type dropdown allows for selecting a costing type to use on the configuration level.

ADDED: Customer Card: When deleting an interaction on the customer card, there will now be a prompt to verify that the user would like to delete the selected interaction.

ADDED: Settings: Use Sales Line List Price When Converting - When converting a non-inventory Item into an inventory item, use the line's unit price as the item master's list price. (Default: True)

ADDED: User Field Editor: Added a new user field option, Is Multi Select, which allows dropdown list user fields to be multi-selected. This option is only available when the Value option has been filled in.

UPDATED: Purchase Line Items: The Release By Date will no longer be set when a document has been released. This field must now be manually populated.

UPDATED: Sales Document Addresses: The Ship To and Bill To addresses now validate after choosing a new address from the dropdown, rather than when tabbing/clicking out away from the field.

FIXED: CRM Event Entry: When opening a CRM Event and making no changes, clicking OK will no longer send an email to the assigned user if the Email User Task Info security is enabled.

FIXED: Database Update: Database updates will no longer fail for users of Nodus CCA.

FIXED: Dispatch Route Report: The Sales Doc Num field will no longer be the same across all stops.

FIXED: Excel Data Import: The import no longer crashes when importing numeric values into text fields.

FIXED: In Transit Transfer Line Items: User fields will no longer be cleared whenever the line's status is changed.

FIXED: Interaction Email: Users will no longer receive the error "The method or operation is not implemented" when clicking Send.

FIXED: Inventory Adjustment: Users will no longer receive the "This Inventory Transaction Number is already in use." error on the document number field if they have a blank document number in the database.

FIXED: Lot Number Search: Expiration and manufactured dates now filter the search correctly.

FIXED: Manufacturing Order: The override standard costs setup in standard cost maintenance will no longer affect the cost calculations when printing a manufacturing order.

FIXED: PayFabric Payments: Exported transaction information to Nodus CCA tables will now use the credit card name used in the Dynamics GP setup.

FIXED: Purchase Advisor: If the PO Cost Selection setting is set to PO Cost Selection User Field, Reorder Points will properly use the PO Cost Selection Fallback setting option to determine unit cost.

FIXED: Purchase Line Items: The Released Date will now be set to today's date when a PO is released.

FIXED: Purchase Order: Purchase Order Status will no longer update to Change Order if the only value changed on any line was Promise Date or Promise Ship Date.

FIXED: SOP to POP links: Removing links from one document will now require the user to close or unlock the linked document. This fixes an issue where links could be recreated if a sales order was saved after the link was removed on the linked PO, and vice versa.

FIXED: Sales Document Resource: When deleting a split document, any related document's resources will no longer be deleted.

FIXED: Sales Document Resources: The "Some part of your SQL statement is nested too deeply." error will no longer occur when documents have been split numerous times.

Version 4.5.1.12

Release Date 12/2/16

ADDED: Application: Added support for creating and viewing tasks and interactions assigned to a mobile user.

ADDED: Customer Extended Pricing: There is now an sppGetExtendedPricing_Modified stored procedure available, which can be modified to be used as an spcp. This is an older version that may be faster for some people and/or resolve

some SQL errors, however, it may not show list price properly when using the percentage of list price option. This screen is for visual purposes. Using this procedure does not affect pricing on sales documents.

ADDED: Inventory Allocation: In-Transit Transfers: The ETA Date column was added.

ADDED: PayFabric Transaction: Sales Document Number and Sales Document Type columns have been added. Sales Document Type will only be populated for cash receipts.

ADDED: Security: Sales Batch Processing: Show Total Column: Setting this value to False will hide the \"Total\" column. (Default: True)

ADDED: Security: Sales Document CardControl Payments: Allow Remove Cash/Check Payments - Allows a user to remove Cash/Check Payments. (Default:True)

ADDED: Security: Sales Document CardControl Payments: Allow Remove Manual Payments - Allows a user to remove Manual Payments. (Default:True)

ADDED: Security: Sales Document Payments: Allow Remove Cash/Check Payments - Allows a user to remove Cash/Check Payments. (Default:True)

ADDED: Security: Sales Document Payments: Allow Remove Manual Payments - Allows a user to remove Manual Payments. (Default:True)

UPDATED: Customer Search: The Contact Sales Rep column now contains a clickable link that will bring the user to the Sales Person card.

UPDATED: Database Update: There is now better exception messaging during the database update if updating any user fields fail, which can happen for some calculated user fields.

UPDATED: Returns: Non-tracked components of kits will no longer be automatically fulfilled if the document ID has "Return AutoFulfill" disabled.

FIXED: Application: Certain "sp" extension methods will no longer receive null reference errors.

FIXED: Customer Card: The Customer Discount dropdown will no longer be populated multiple times with the same value if a customer discount has more than one discount detail.

FIXED: Customer Search: Sales Person ID and Contact Sales Rep columns will no longer contain the same information.

FIXED: Customer Search: Sales Person ID and Sales Person Name columns will only populate a single value for each customer rather than once for each Address Code.

FIXED: Database Update: The database update will no longer fail for GP10 users who do not have a QTYREPLACED field in POP10500. (Introduced in 4.5.1.11)

FIXED: E-mailing: CC and BCC email addresses now have better error checking to avoid throwing an exception.

FIXED: In Transit Transfer Line Items: User fields will now save properly.

FIXED: In Transit Transfer Properties: Customized layouts will now save properly.

FIXED: Inventory Adjustment: Users will now be able to type date information into the Doc Date field. Previously, users would have to select a date from the calendar.

FIXED: Item Restrictions: Items will now be checked to determine if they are restricted when the item is selected from the Item Number Lookup screen accessed from a sales line.

FIXED: Localization: There will no longer be a "Requested value was not found" error when using the auto filter row on certain grids or forms.

FIXED: PayFabric Payment: Creating a deposit authorization on an order and then capturing after being transferred to invoice will no longer result in an "Invalid Payment Type" error.

FIXED: PayFabric Payment: Payments on documents containing items using special characters in the item description will no longer result in a "Bad Request" error message.

FIXED: Print: Users will no longer receive an object reference error when attempting to close the print screen while the reports are loading.

FIXED: Purchase Line Item: Users will now be able to edit the Site Tax Schedule column if the item's Purchase Tax Option is set to "Base on vendor".

FIXED: Sales Document Properties: When using the 'Show Gross Margin' security, discounts on the document will now be taken into account when the gross margin and the gross profit are calculated.

FIXED: Sales Line Items: Users will no longer be able to add and save inactive items to existing sales documents.

FIXED: Sales Monitor: Speed improvements were made to the sales monitor. This was accomplished through a change to the sppSalesMonitor stored procedure, changing the spvSalesRep to use the table RM00301. Any spcp's should be looked at and adjusted accordingly.

FIXED: Sales Search: There are no longer duplicate dropdown buttons. (Introduced: 4.5.1.10)

FIXED: User Defined Fields: Error will no longer occur when using a User Defined Field editor and then loading the card on which those User Defined Fields are used.

FIXED: User Field Editor: The spvCustomerSearch view will no longer be deleted if a user creates a Customer Addr user field and then runs Update All Tables.

FIXED: User Field Editor: The spvVendorSearch view will no longer be deleted if a user creates a Vendor Addr user field and then runs Update All Tables.

Version 4.5.1.11

Release Date 11/18/16

BREAKING CHANGE: Opportunity Card: The Opportunity Amount field was replace with the Misc Charge field. This will break scripts using the Opportunity amount and also remove it from the layout. (Introduced: 4.5.1.9)

FIXED: Cash Receipts: Cash receipts will no longer be created if PayFabric fails to charge the credit card.

FIXED: Configurator Pricing: An issue where the configurator would not price based on a Custom BOM.

FIXED: Opportunity Pre Save scripting using userfields will now save changes.

FIXED: PayFabric: Credit card expiration dates will now be saved properly to the Sales Document Payments table.

FIXED: Purchase Order: If a return receipt has been posted for that purchase order with Replace Returned Goods selected, purchase orders will no longer be assigned a "Received" status when re-saved in SalesPad.

FIXED: Sales Batch Processing: When using the Batch Email functionality, resource attachments will no longer be missing the file extension in the file name.

Version 4.5.1.10

Release Date 11/11/16

ADDED: Recurring Documents: There is now an audit trail of what document and/or recurring definition events originated from.

ADDED: Sales Document Search: Sales Doc ID, Source (open, void, history), and Sales Person ID search fields were added.

ADDED: Settings: Use Quantity Fulfilled for Extended Pricing on Invoices – If set to true, the extended price for Invoices will be calculated using the quantity fulfilled instead of the total quantity. (Default: False)

UPDATED: Inventory Adjustment Properties: The Location field is now called Default Location. A tooltip has also been added, to clarify its purpose.

FIXED: Application: Plugins will now properly dispose when closed, rather than when the form they were used on is closed.

FIXED: CRM Event Entry: Layouts will now save properly.

FIXED: Default Doc Items: Changing a line item number will no longer result in a new line being added to the grid.

FIXED: Interaction Entry: Layouts will now save properly.

FIXED: Inventory Adjustment Properties: If the Default Location security is blank, it will now be set to the last item's Site value when reopening the document.

FIXED: Inventory Adjustments Allocation: If a user opens the Allocation plugin then tries to delete the inventory adjustment, there will no longer be an "Object reference" error.

FIXED: Inventory Adjustments Allocation: Users can no longer free type bin names.

FIXED: Item Maintenance: The pre-save script will no longer trigger before the user has been prompted to save changes.

FIXED: Log Messages: This is no longer available on the main ribbon. (Introduced: 4.5.1.9)

FIXED: Manufacturing Links: When rolling down the sales document's requested ship date, any MO link attached to a sales line will have its due date also updated.

FIXED: PayFabric Customer Wallet: Clicking No on the delete wallet confirmation prompt will no longer still delete the wallet.

FIXED: PayFabric Customer Wallet: Double clicking on a wallet will no longer result in an "Object Reference" error.

FIXED: Printing A/R Statements: Return documents can now be selected in the Preview window.

FIXED: Recurring Documents: When generating a document based on a historical document, sales rep, emails, and UDFs are now transferred to the generated document.

FIXED: Sales Document Search: The E-mail and Fax icons are visible again. (Introduced: 4.5.1.8)

FIXED: Sales Entry: The "Value cannot be null" exception on the val_Address field of a sales document will no longer occur.

FIXED: Sales Entry: When a user trys to close a sales document, there will no longer be an "Object reference" error on the CanClose method.

FIXED: Sales Line Items: Notes from an existing sales document will no longer be copied to new sales lines' comment fields.

FIXED: Sales Monitor: There will no longer be a "Object reference" error when right-clicking the auto-filter row and trying to send documents to batch or forward documents in Workflow.

FIXED: Sales Person Card: Users will no longer receive an error if they attempt to make a new note on a new sales person.

FIXED: SalesPad Today: Customer and CRMEvent user fields will now be properly populated in the Tasks grid.

Version 4.5.1.9

Release Date 11/4/16

ADDED: Bulk Printing: The Send To Resources option will now send the report to resources for sales and purchase orders. (Requires security access.)

ADDED: CRM Setup: A Historical column is now available. Opportunities will now be set to Historical when converted to a quote, with a status set flagged for Historical.

ADDED: E-mailing: The Send To Resources option will now send the report to resources for sales and purchase orders. (Requires security access.)

ADDED: Import Manager: A Kit Component table that supports importing kits and their components was added.

ADDED: Log Messenger: This messenger will launch and dock whenever messages are sent to it. Currently, there are some printing, emailing, and resource errors that use this messenger. Messages can also be sent through scripting. Messages are not saved. However, they can be exported to Excel.

ADDED: Opportunity Card: Opportunity line items have been added.

ADDED: Opportunity Card: Printing has been added to Opportunities.

ADDED: Print Preview: When printing from the print preview screen, for sales and purchasing, reports will be sent to the document resources, if properly checked.

ADDED: Return Fulfillment: The fulfillment plugin for returns now allows for entering quantities for specific bins or lots.

ADDED: Security: Convert To Quote: Reprice On Conversion - If true, this option will reprice each line brought over to the new quote, instead of using the pricing set up on the Opportunity.

ADDED: Settings: Large Ribbon Icons - This is a semicolon-delimited list of forms that will use a larger icon on the ribbon, instead of the default small icon. This setting does not affect the Application tab.

UPDATED: Recent Customers: There is now an icon for the docked plugin.

UPDATED: Recent Sales Documents: There is now an icon for the docked plugin.

FIXED: Application: Temp files that are created for printing and e-mailing will now be deleted.

FIXED: Bulk E-mailing: The Combine Reports checkbox no longer says Print As A Single Job.

FIXED: Configurator Pricing: An issue where the configurator would not price based on a Standard BOM was fixed.

FIXED: Inventory Lookup: Inventory Tab: Changing the UOfM dropdown now updates both the Location and the Bin grids.

FIXED: Print Preview: The Times Printed field will only be updated if you print from the Preview form.

FIXED: Printing: The reports that are sent to the document resources no longer have an extra '.pdf' in the file name.

FIXED: Purchase Order: BCKTXAMT and OBTAXAMT will now be calculated properly when using a purchase tax detail that calculates tax based on line item cost.

FIXED: Purchase Order: BackoutTradeDiscTax and OrigBackoutTradeDiscTax will no longer be improperly populated when saving a purchase order.

FIXED: Receiving: The Items tab will no longer be visible when there is only one tab.

FIXED: Sales Monitor: Previously, checking a sales document ID that had an extremely large number of batches would crash SalesPad. There is now a prompt when there are potentially too many batches selected, and we will not be able to show all the documents in those batches.

Version 4.5.1.8

Release Date 10/28/16

ADDED: Customer Interaction: Copy functionality has been added.

ADDED: Purchasing Advisor: A Customer column was added to Demand Summary.

ADDED: Sales Document Search: Sales Doc ID, Source (open, void, history), and Sales

Person ID Search fields were added.

ADDED: Settings: Use Primary Address For Purchase Order Vendor Address - When disabled, a purchase order's vendor address will be the one highlighted on the vendor card when a new PO is created, regardless of what address is the primary address. (Default: False)

UPDATED: Sales Fulfillment Plugin: The audit trail now includes the "Fulfillment Plugin" source.

UPDATED: User Fields: The calculated UDF form now has a warning about performance impact and a recommendation to use tables with NOLOCKS.

FIXED: Application: There will no longer be prompts to save because of calculated User Fields.

FIXED: Manufacturing/Receiving: PO line items will no longer appear multiple times after searching.

FIXED: Purchase Order Vendor Address: The vendor address on a purchase order can once again be changed.

FIXED: Sales Fulfillment Plugin: The Sales Document Actual Ship Date is now properly set when fulfilling the document. An audit trail is also written.

FIXED: Sales Line Mass Update: The Update Price button is now enabled properly, based on the 'Can Update Prices' security.

FIXED: Sales Person Card: The contact log notes are now properly loaded.

FIXED: Settings: Prompt To Change Price When Converting: This setting's description was corrected to say that the prompt appears when converting a non-inventory sales line item to an inventory item, rather than when converting a quote to an order.

Version 4.5.1.7

Release Date 10/21/16

ADDED: Group Pricing: A Resequence button was added.

ADDED: Remote Library (Windows Service): Event logs for documents that fail to forward now include the document number.

ADDED: Security: Customer Holds - Deleting a Customer hold will require the GP password for the respective hold type. (Default: False)

ADDED: Security: Sales Document Holds - Deleting a hold on a Sales Document will require the GP password for the respective hold type. (Default: False)

UPDATED: Remote Library: When forwarding a collection of documents, if one fails, the remaining documents will now be processed.

FIXED: Database Update: The database update should no longer fail on spvOpportunityCustomer_base.

FIXED: Manufacturing Links: Editing a line item's Requested Ship Date will now update any MO links attached to that line.

FIXED: PayFabric: An issue that preventing creating credits on return documents was resolved.

FIXED: Sales Line Item: When deleting a kit line item from a sales document, kit components that are lot tracked will now properly be added back to the inventory's availability.

Version 4.5.1.6

Release Date 10/14/16

ADDED: CardKnox Integration: An integration with CardKnox to support chip and pin credit card transactions was added.

ADDED: RemoteLibrary: Users can now specify windows logon credentials when installing RemoteLibrary as a Windows service.

ADDED: Settings: Lot Userfield Roll Down Override - Selected Lot User Fields will not be saved when rolling down changes. This setting requires the 'Apply User Field Changes To All Lots With Same Name' setting to be enabled.

UPDATED: New Customer: Closing or cancelling this screen will no longer prompt the user to save; it will now inform them that cancelling will cause all changes to be lost.

FIXED: Customer Equipment: Equipment will no longer appear twice in the Equipment tab if it has been saved and assigned to that customer.

FIXED: EDI Packages: Users will no longer receive an error when attempting to add a new sales document package.

FIXED: Item Maintenance: Item valuation method will now properly roll down when setting the item class on a new item.

FIXED: Item Maintenance: When in a non-multi currency environment, a new item's currency decimal places will now be updated correctly when an item class is selected.

FIXED: Manufacturing: Kit Component SOP to MOP links will no longer be deleted if the sales document is saved after being closed and reopened.

FIXED: Sales Document Address: Updating the customer address will now refresh the document to use the updated changes.

FIXED: Sales Document Properties: Historical sales documents will now properly display equipment information in the Document Properties header.

Version 4.5.1.5

Release Date 10/7/16

BREAKING CHANGE: Outlook Add-in: New required procedure added in Desktop 4.5.1.5 affects GPOA version 1.2.0.5 will need sppEmailAudit from support.

ADDED: Sales Document Email Audit: An Attachments column was added.

ADDED: Customer Card Email Audit: An Attachments column was added.

ADDED: Settings: Lot Userfield Roll Down Override - Selected Lot User Fields will not be saved when rolling down changes. This setting requires the 'Apply User Field Changes To All Lots With Same Name' setting to be enabled.

ADDED: Manufacturing: Pre-Cancel MO Links Delete Script: This script runs when cancelling an MO after deleting the last SoptoMop link.

ADDED: Security: Sales Document Mass Update - Pre Update Script: This script runs before 'Update Documents' runs.

ADDED: Setting: AvaTax Use Order Date For Invoice Tax Date - When this setting is disabled, the tax date will be the invoice's document date. When this setting is enabled, the tax date will always be the original order's document date. (Default: True)

FIXED: Avatax: Re-saving an invoice that was transferred to invoice had the potential to have the taxes recalculated using the invoice document date instead of the original order document date. This issue has been resolved.

FIXED: Avatax: When transferring an order to invoice, the Avalara document date will now use the invoice's document date. Taxes will still be calculated using the order date, unless the 'AvaTax Use Order Date For Invoice Tax Date' setting is disabled.

FIXED: Funnel: The SalesPad Funnel will now correctly add Saturday pickup charges and other additional shipping charges to the freight.

FIXED: Funnel: When attempting to import to UPS from the funnel, freight costs and batch forwarding will now be saved properly.

FIXED: In-Transit Transfer Line Items: This grid will no longer allow sorting on its columns, other than the default ascending sorting applied to the line item sequence column which cannot be changed to descending order. This matches the other line item entry grids' sorting behavior.

FIXED: In-Transit Transfer: When an "open" and fully fulfilled document is saved, the status will now be set to "picked." Alternately, if the user un-fulfills some line items and the status is "picked," the status will be set to "open."

FIXED: Sales Document Entry: Sales document discounts of one percent or less now save correctly.

FIXED: Sales Document Line Items: When an MO is linked, users can now open the Inventory Lookup from the Item Number column.

FIXED: Sales Line Distributions: Making changes to sales line distributions in GP and then transferring the document in SalesPad will no longer lose the changes on the new document. Users must have the setting 'Enable SalesPad Desktop Distributions' set to True to use this functionality.

Version 4.5.1.4

Release Date 9/30/16

FIXED: Cash Receipts: New receipt numbers will no longer be generated until the cash receipt has been saved. Before, in certain scenarios it was possible for GP to grab the same receipt number that was currently being worked on in SalesPad, causing a conflict when saving.

FIXED: Email Template Editor: Merge fields will now be properly filled in with the corresponding sales document field in ADDDlocalized versions of SalesPad.

FIXED: Item Maintenance: Table IV00105 will now be updated properly when an item's currency is changed.

FIXED: Purchasing Advisor: Filters on the Demand Detail grid will no longer be removed when applying a purchase plan to a row using the Purchase Advisor Details tab.

FIXED: Purchasing Advisor: Purchase Plans will now be refreshed on the row when they are applied or removed using the Purchase Advisor Detail tab.

FIXED: Quick Report: Users will no longer receive the error message "Cannot perform 'Like' operation" when attempting to print a report while filtering the grid on a column using a numeric type.

FIXED: Sales Document Address: When changing the Address Code, the Shipping Notification Email will now be updated to the Address Email.

FIXED: Sales Entry: If they do not have group permissions to a sales line item user field, users will no longer receive an Object Reference error when opening a historical document.

FIXED: User Field Editor: Users will no longer be able to create user fields without entering in the field name first.

Version 4.5.1.3

Release Date 9/23/16

ADDED: Backordered Items Form: Added a dropdown that allows the user to filter backordered items based on the user who created the document.

ADDED: Sales Line Item: An item's generic description can now be accessed through the sales line in scripting without accessing the item master.

UPDATED: Application: If Master Number Tracking is turned off in GP, there will now be a prompt when logging into SalesPad that this is required.

UPDATED: Sales Document Entry: If the master number is 0, the document will be marked as read-only. This implies that Master Number Tracking is turned off and/or existing documents have not been updated properly.

UPDATED: Security Editor: Sales Document Entry: The description for the 'Ship Queue Access List' security has been modified to mention the Security Setting 'Allowed To Ship' and the effects it may have on this security setting's functionality.

UPDATED: Smart Printing: When the error "'column' argument cannot be null. Parameter name: column" is found, Smart Printing will reattempt to process the document up to three times. If this fails all three times, an audit log giving a better description of where the failure occurred will be written to the document’s audit.

FIXED: Cash Receipt Entry: Pressing the Clear button will no longer leave the Receipt Number field read-only.

FIXED: Customer Overview: "Successfully" is now spelled correctly in the Deleting Sales Document log table message box.

FIXED: Price Level Maintenance: Column captions will now be displayed correctly, and users will no longer see duplicates.

FIXED: Purchase Order Entry: Users attempting to cancel a PO that was partially received will no longer receive an error stating 'T must be an Enum'.

FIXED: Purchase Order Entry: When a kit is added to a PO, the component lines will no longer be missing values that would otherwise be populated if the item was added alone.

FIXED: Sales Document Mass Updates: Focusing on a field and not making any changes will no longer cause a blank value to be written to the documents.

FIXED: Sales Document Payments: A speed improvement was made when using Sales Document Payment UDFs; there was potentially extra data being loaded.

FIXED: Sales Document: The User Fields tab will now say User Fields instead of SalesDocument User Fields.

FIXED: Sales Line Components: Kits with a quantity of zero will now display their components correctly.

FIXED: Vendor Return: Users will no longer receive a "Subquery returned more than 1 value" error when attempting to generate a return from a receipt which contained an item number more than once.

Version 4.5.1.2

Release Date 9/16/16

BREAKING CHANGE: Sales Line Items: Changes to an item's Unit Cost on non-functional currency documents are now reflected in the originating currency. Previously, changing the cost was reflected in functional currency and the originating value was calculated upon saving.

UPDATED: Application: Added Security Script Manager as an option in the application context menu.

UPDATED: Application: The interval for active user checking was increased from 60 seconds to 270 seconds.

UPDATED: Script Manager: The caption "Script Manager" was changed to "Filter Script Manager."

UPDATED: Security: Receiving: Default Batch ID has been updated to inform the user that Batch IDs over 15 characters will be truncated.

FIXED: AR Transaction Search: The columns CheckBook ID and Check Number will now be populated correctly.

FIXED: AR Transaction Search: This window is now re-sizable.

FIXED: AR Transaction Search: Transactions can now only be found for the currently selected customer.

FIXED: Application: There was potential for deadlocks when the application checked the

Active User table. This has been corrected.

FIXED: Avatax: Certain scenarios of Shipping or Pickup Types for Canadian customers would throw an "is not a valid province or state" error. We are now passing the proper country code.

FIXED: Customer Card: Customer Properties: The appearance of text boxes and dropdown editors is now uniform.

FIXED: Customer Contact Address: Marking a new Primary address will now update the Tax Schedule and Shipping Method fields in RM00101.

FIXED: Customer: Customer Contact Addresses: Address Types can now be marked as an Address Type in localized versions.

FIXED: Inventory Adjustment Lines: The Reason Code dropdown edit control will now allow clearing of its edit value through the use of the newly added Delete button.

FIXED: Item Maintenance: Vendor Information: Adding a new record with the same vendor ID as an existing one will no longer force the user to close the Item Maintenance screen.

FIXED: Item User Field: When using a pre-save script, a complete refresh of the user field data will no longer occur. This should speed up this screen significantly when using a pre-save script.

FIXED: Receiving: Using the Received Selected button without manually selecting a line would update the first line's To Receive column value, but upon saving would revert the column to blank and a receipt would not be created. This has been corrected.

FIXED: Sales Document Addresses: The Undo button is no longer floating. (Introduced: 4.5.0.17)

FIXED: Sales Document Addresses: There is now a Clear button for Tax Schedules. However, there are some scenarios where Econnect will not allow for a blank Tax Schedule. (Introduced: 4.5.0.12)

FIXED: Sales Document Addresses: When changing the Tax Schedule, there will be a prompt to roll the Tax Schedule to the sales lines if the "Prompt User When Changing Tax Schedule" setting is enabled, else it will roll to the sales line items properly. (Introduced: 4.5.0.12)

FIXED: Sales Document Entry: When choosing a comment, the Sales Line Comment ID will properly set and no longer reset to blank.

FIXED: Sales Document Line Items: The Delete button is disabled on read-only documents.

FIXED: Sales Document Search: Date UDFs will always show the date instead of the time.

Version 4.5.1.1

Release Date 9/9/16

ADDED: Security: Counter Sales: Can Delete - Allows users to delete counter sales transactions after they have been saved. (Default: True)

ADDED: Security: Inventory Lookup: Vendor Item Results Limit - This is the maximum number of results allowed when searching for vendor items. This limit is to help with some memory issues when doing a blank or vague search. (Default: 10,000)

UPDATED: Counter Sales: Documents with open CardControl or PayFabric credit card payments can no longer be deleted until the transaction has been voided.

FIXED: Application: When closing SalesPad, users will no longer receive an error if they have insufficient access rights to the Toolbar layout file.

FIXED: Customer Card: Closing and opening customer cards will now properly remember the last selected tab.

FIXED: Item Maintenance: When creating new items in a non multi-currency environment, the CURNCYID and CURRNIDX fields in IV00105 were being set to the functional currency. They will now be set to be empty and 0, respectively.

FIXED: Layouts: Some screens may have been saving layouts whenever the screen was closed. They now only save the layout when the layout is customized.

FIXED: Receiving: Users will no longer receive an Object Reference error when closing the screen after having clicked on the PO Number or Barcode Scan fields.

FIXED: Sales Document Entry: If the user has security to delete documents, but the document they are viewing is not in a queue that they have security access to, the Delete button will no longer be enabled.

FIXED: Sales Person: When creating a new sales person, an error will appear if the Sales Person ID entered matches an existing sales person.

Version 4.5.1.0

Release Date 9/2/16

ADDED: Dispatch: Appointment created added to Driver Board, Vehicle Board, Sales Document Dispatch Driver, Sales Document Dispatch Vehicle, Driver Schedule, and Vehicle Schedule.

ADDED: Dispatch: Appointment deletion added to Driver Board, Vehicle Board, Sales Document Dispatch Driver, Sales Document Dispatch Vehicle, Driver Schedule, and Vehicle Schedule.

ADDED: Dispatch: Read only appointment types created added to Driver Board, Vehicle

Board, Sales Document Dispatch Driver, Sales Document Dispatch Vehicle, Driver Schedule, and Vehicle Schedule.

ADDED: Group Pricing: Group Pricing User Defined Fields.

ADDED: Item Restrictions: Allows a restriction on specified items being added to sales documents based off of set criteria.

ADDED: Security: Sales Document Line Items: Prompt on Sales Line Deletion.

ADDED: Settings: Avalara: AvaTax Capitalize Suggested Addresses - "Capitalize suggested address returned by Avalara address validation." (Default: False)

ADDED: Settings: Configurator Pricing Option: Configurator Pricing Option to use when Pricing Configurations. (Default: ConfigPricingLookup)

ADDED: Settings: Universal Script: Added a Setting Script that can hold one or more C# classes. These classes and their properties and methods can be accessed from any other SalesPad script.

ADDED: Settings: WorkWave Post Import Script - C# Script that executes after importing each WorkWave Route Step. This script can be used to write back values from WorkWave.

ADDED: WorkWave Import Approved Routes: Default Appointment Status: Default Appointment Status to apply to Route Stops that are imported from WorkWave.

ADDED: WorkWave Import Approved Routes: Default Appointment Type: Default Appointment Type to apply to Route Stops that are imported from WorkWave.

FIXED: Sales Document Entry: Quantity fulfilled can now be increased for dropship line items that are not linked to a PO.

FIXED: Sales Document Entry: There will no longer be a " '' is not a column of 'SalesLineItem' " error if the setting Address Pricing By is blank.

FIXED: Sales Document: Line Items: When deleting a line from a return, the line will now be removed from SOP10203.

FIXED: Sales Document: Users will no longer be asked to save a historical or void document unless changes have been made to a UDF, Comment, or Note.

FIXED: Sales Entry: Econnect errors will no longer be silently handled when transferring or when splitting Sales Documents.

FIXED: Sales Entry: When transferring an order to an invoice when the invoice doc ID is set to use Allocate By Batch, line allocation quantities will be transferred to the invoice rather than being reduced to zero.

FIXED: Sales Entry: When using an Allocate By Batch sales doc ID, the allocation quantity will no longer be reduced to zero when manually fulfilling.

FIXED: Sales Line Item: Changing the quantity of a package item that uses contract pricing to greater than the quantity remaining on the contract will now allow the user to put the overage quantity on a newly generated line.

FIXED: Sales Line Item: Changing the quantity of a package item that uses contract pricing to greater than the quantity remaining on the contract will now allow the user to roll back the component quantities if they choose not to move the overage quantity to a new line.

FIXED: Vendor: New vendors will no longer have a 0.01% trade discount when first created in SalesPad.

FIXED: WorkWave: Load capacity has been fixed when dealing with non-base unit of measures.

Version 4.5.0.18

Release Date 8/26/16

UPDATED: Group Pricing: Making changes and saving should now be quicker.

UPDATED: Group Pricing: There is now a busy cursor and busy object message when saving, deleting, or changing group rows.

UPDATED: Group Pricing: When deleting groups, the delete will be saved immediately. This is to help with performance while attempting to delete a large number of groups.

UPDATED: Group Pricing: When importing, each group will be saved during the import process. This allows for larger imports to happen without 'Out of Memory' exceptions occurring.

FIXED: Application: Attempting to login with an expired SalesPad Desktop license will now provide a message stating 'License has expired.'

FIXED: Customer Overview: The customer summary hint when hovering over the customer number will now show the proper margin percentage.

FIXED: Group Pricing: There should no longer be 'Out of Memory' exceptions when importing or exporting large amounts of data.

FIXED: Group Pricing: There should no longer be 'Out of Memory' exceptions when moving group pricing sequences up or down.

FIXED: Group Pricing: Users will no longer get a 'Deleted row information cannot be accessed through the row' error if they delete a few groups and then try to export without saving first.

FIXED: Item Maintenance: Adding a currency on an item will now properly save the currency ID.

FIXED: Purchase Line Distribution Plugin: The format was not always correct when using less than 3 GL account segments. This would not allow the distributions to update properly. This issue has been resolved.

FIXED: Sales Document Address: When changing the Address Code, the Shipping Notification Email will be updated to the address email.

FIXED: Sales Document Addresses: The Country Code dropdown edit control will now allow clearing of its edit value through the use of a newly added Delete button.

FIXED: Sales Document Notes: The comment ID will now be set when choosing a GP comment. It will always use the last chosen comment ID.

FIXED: User Field Editor: Updating the tables and views for Purchase Line Item user fields will now update the view for Line To Receive.

Version 4.5.0.17

Release Date 8/19/16

ADDED: Backordered Items Form: Added a dropdown that allows the user to filter backordered items based on the user who created the document.

ADDED: CRM Event: Added user fields to CRM Events.

ADDED: Customer Holds: New tab created under the Customer Card that displays and sorts all holds on open sales documents for that Customer. Used to apply holds to all of the open sales documents.

ADDED: Customer Overview: A user can now apply holds to open sales documents by right clicking the document in the open sales document grid and selecting Apply Holds. The holds that are applied are based on the holds selected in the Customer Holds tab.

ADDED: In-Transit Transfers: Taken out of Beta.

ADDED: Sales Document Addresses: Undo button will revert any changes to the address code defaults.

ADDED: Security: CRM Event Entry - Allow Layout Customization. Enables or disables access to layout customization on the CRM Event Entry form. (Default: True)

ADDED: Security: Customer Holds: Can Add Customer Holds - Allows a user to add customer holds. (Default: False)

ADDED: Security: Customer Holds: Can Remove Customer Holds - Allows a user to remove assigned customer holds. (Default: False)

ADDED: Security: Customer Holds: Sales Holds to Exclude - Holds that will be excluded when applying holds to all Sales Documents.

ADDED: Settings: Configurator: New Manufacturing BOM Script - A C# Script which runs on new manufacturing BOMs created through configurator, before the new item is first saved.

ADDED: Settings: Configurator: New Distribution BOM Script - A C# Script which runs on new distribution BOMs created through configurator, before the new item is first saved.

ADDED: Import Manager: Security: Can Run Imports - When true, users can run imports in Import Manager. (Default: True)

ADDED: Import Manager: Security: Can Edit Import Definitions - When true, users can edit import definitions in Import Manager. (Default: True)

ADDED: Import Manager: Security: Can Delete Import Definitions - When true, users can delete import definitions in Import Manager. (Default: True)

UPDATED: Improved localizations on Customer Card, Sales Document Entry, and Sales Document Search.

UPDATED: Improved localizations on Vendor Card, Vendor Search, Purchase Order Entry, and Purchase Order Search.

UPDATED: Inventory Adjustments: The layout is more consistent with other screens and the Add button is now called New.

UPDATED: PayFabric Payments: Capturing an authorization or crediting an existing transaction will now prompt the user to input the desired amount.

FIXED: Customer Contact Addresses: The layout for the Quick Load Grid was not properly restoring saved layouts. This issue has been resolved.

FIXED: Grid Filters: There will no longer be a "Length cannot be less than zero" error when clicking on a grid's orange triangle, due to saved grid filters.

FIXED: Grid Filters: There will no longer be a "Sequence contains no elements" error when saving a filter with no filter name.

FIXED: In-Transit Transfers: The GP setting 'Allow Transfer Overrides' is now respected when trying to over-allocate.

FIXED: Price Level Maintenance: The Unit of Measure price will no longer use incorrect decimal places if there is a blank item number entry in IV00105.

FIXED: Purchase Order Entry: Users will no longer receive Econnect Error Code 370 after cancelling a line item and attempting to save. (Introduced in 4.5.0.11)

FIXED: Purchase Order Entry: When the Setting 'Use Service Item Cost on a Linked PO' is set to True, the cost for each Purchase Line Item will no longer reset to the item's default current cost when changing the vendor in the PO properties.

FIXED: Quick Reports: Customer, Vendor, Sales Document and Purchase Order single quick reports will now show the report name properly without clicking on the tab. (Introduced: 4.5.0.1)

FIXED: Sales Document Address: A historical document's Ship To address can no longer be modified when clicked.

FIXED: Sales Document Address: Any new addresses created through this tab will now appear in the Bill To Address dropdown list.

FIXED: Sales Document Entry: Closing a plugin will no longer prevent the sales document from closing.

FIXED: Sales Shipment: Resources will no longer be deleted when invoicing Split Orders.

FIXED: Smart Printing: Deleted rules will no longer be exported or imported.

FIXED: Upon loading the Print form, the Available Reports grid will now pull in all reports enabled in Securities without throwing object reference errors.

REMOVED: Security: Smart Printing: Admin Mode: Admin mode has been removed. It is no longer necessary since Smart Printing Maintenance was added.

Version 4.5.0.16

Release Date 8/12/16

ADDED: Backordered Items Form: Dropdown that allows the user to filter backordered items based on the user who created the document.

FIXED: Receiving: Previously, if the batch name used in the security Default Batch ID was less than 15 characters you would get an ArgumentOutOfRangeException error. This issue has been resolved. (Introduced: 4.5.0.14)

FIXED: Sales Document Payments: User defined fields on sales document payments can now be properly edited.

FIXED: Sales Line Item: The distribution account for non-inventory items that are set to drop ship will now be set to the Drop Ship Items account rather than the Non-Inventoried Items account. This change was made to reflect GP functionality.

Version 4.5.0.15

Release Date 8/5/16

ADDED: Application: There is now a SQL stored procedure, sppCreateIndexes, that can be manually run to create indexes that will help speed improvements. If indexes have already been added to some tables, then these new indexes should be reviewed so that duplicates are not created. This procedure will check for indexes with the same name and not create duplicates. It is also very important to have all users out of the system before adding these indexes.

FIXED: Sales Document Payments: Changing the document date when creating a manual credit card payment will no longer revert back to the current date.

FIXED: Sales Line Distribution Entry: Addressed an issue with the masking for account segments being incorrect.

FIXED: Purchase Line Distribution Entry: Addressed an issue with the masking for account segments being incorrect.

FIXED: Purchase Line Items: The Update Missing Vendor Items button will no longer update lines with a purchase status of Closed.

FIXED: Sales Document Address: Changing the ShipTo address will now properly update matching Sales Line's ShipTo address when using the Purchase button.

FIXED: Purchase Order: Editing the Required Date, Promised Date, Promised Ship, or Shipping Method fields will no longer roll down to Closed lines causing an error when attempting to save.

Version 4.5.0.14

Release Date 8/1/16

UPDATED: Driver Dispatch Board: Icon updated to no longer be the same as the Vehicle Dispatch Board.

UPDATED: Receiving: Batch names now have a 15-character limit.

UPDATED: Sales Document Entry: Improved speed and performance when saving sales documents.

FIXED: Cash Receipts: The Check/Card Number field now has a maximum character length of 19 (the maximum number of characters possible for a credit card number).

FIXED: Cash Receipts: The Date field entry's default date format upon load will now be consistent with its date format after editing this value (MM/DD/YYYY).

FIXED: Configurator: Now supports Components as Phantom BOMs and sets category to Manufacturing when component is a BOM.

FIXED: Customer Card: There will no longer be an infinite prompt to save when the Customer Contact Address card has the 'Enable Customer Address Quick Load Grid' security enabled and the user is updating different customer addresses.

FIXED: Customer Overview: The Sales Territory field will no longer act as a dropdown/window popup, only as a window popup by clicking on the ellipses. The field color has also changed from white to light gray to show that its value can only be changed by selecting the ellipses, not the text field.

FIXED: Dispatch: Modules will no longer duplicate in the Dispatch ribbon page.

FIXED: Inventory Bin Transfer: "@Vendor_ID is not a parameter" error will no longer occur. (Stored Procedure Change: sppTransferLotBin)

FIXED: Price Maintenance: Save New Price List: Using the Save New List Prices correctly applies a new Price List and no longer causes an error.

FIXED: Price Maintenance: Will not receive "undefined function StartsWith()" error when applying multipliers.

FIXED: Purchase Plan: Checking or unchecking the Use Drop Ship Line Cost check box will now update the cost. This was only set if the setting 'Use Drop Ship Sales Line Item Cost' was enabled.

FIXED: Purchasing Advisor: Purchase Order Vendor Address is now being set upon creating a new Purchase Plan and selecting a Vendor.

FIXED: Receiving: When trying to receive a multi-line dropship purchase order with a Batch name greater than 15 characters, an error about the Vendor Document number needing to be unique resulted. This issue has been resolved.

FIXED: Sales Document Line Items: A dropship line item with a modified cost will no longer revert the cost change back when making changes to the line item.

FIXED: Sales Document Transfer: Transferring a document that has a dropship line item with a cost changed by the user will now maintain the item cost change.

FIXED: Sales Line Components: The Sales Line Components plugin will now display correct values for unsaved line items. (Introduced: 4.5.0.11)

FIXED: Sales Line Item: Group pricing should now be properly pulled in if the group price was set up in one of SalesPad's localized languages.

FIXED: Sales Line Items: blue triangle indicator now only appears when the line has a link with an MO Number.

Version 4.5.0.13

Release Date 7/22/16

BREAKING CHANGE: Sales Document: The Auto Calc Freight field is no longer on the SalesDocument business object. Any scripts that rely on this field should be converted over to use a UDF.

ADDED: Cash Receipts: Cash Receipts can now be charged using PayFabric.

ADDED: Customer Item History: Capability to add custom plugin buttons to this screen.

ADDED: Dashboard Viewer: Enter full screen by opening the Dashboard Viewer in a separate, single-tab browser window and pressing F11.

ADDED: Dashboard Viewer: Auto Refresh options.

ADDED: Email: Added a message stating "Sales/Word and Excel Sales Document Reports cannot be attached to emails". No email attachment functionality has changed.

ADDED: Group Pricing: User Defined Fields have been added to Group Pricing.

ADDED: Security: Sales Document Line Items: Prompt on Sales Line deletion. (Default: True)

ADDED: Setting: Configurator Pricing Option - Configurator Pricing Option to use when Pricing Configurations. (Default: ConfigPricingLookup)

UPDATED: Sales Document Entry: We no longer save the value for the Auto Calc Freight field in the SY90000 table, which will help with some performance issues by removing an extra SQL join in the views.

FIXED: Assembly Entry: User Defined Fields are no longer cleared upon first save.

FIXED: Database Update: There was an issue where some Service Pack numbers for GP2010 would prevent the spptaCreateSopPaymentInsertRecord_Salespad from properly being created resulting in an infinite database prompt. This issue has been resolved.

FIXED: PayFabric: Resolved an issue that resulted when trying to create a PayFabric sales document payment with line items containing quotations in the item description.

FIXED: Sales Document Entry: On the first save of an existing document, there were extra calls being done to load Item Prices when using Pricing Trace. This change will help sales document saving performance. (Introduced: 4.4.1.23)

FIXED: Sales Document Entry: When partially entering an item number and pressing Enter, a new line would be created and focused after coming out of the inventory lookup. The current line will now stay focused.

FIXED: Sales Document Line Items: Package components whose quantities are set to 0 in GP Kit Item Maintenance will no longer be defaulted to a quantity of 1 upon entering the package in a sales document.

FIXED: Splitting: When splitting Sales Documents that use Allocate By Document Batch, fulfillments will now properly carry over to the split document.

REMOVED: Setting - Auto Calc Freight Option Default.

Version 4.5.0.12

Release Date 7/15/16

ADDED: Setting: 'Configurator Pricing Option' - Configurator Pricing Option to use when Pricing Configurations. (Default: ConfigPricingLookup)

ADDED: Settings: 'Use GP Process Hold Transfer Setting' - Respect the GP Process Hold setting for ability to transfer documents on hold. (Default: True)

ADDED: Settings: Users can now specify the credentials to use when connecting to the DataCollection Service during allocation.

UPDATED: Counter Sales: Price level field is now a dropdown.

UPDATED: Group Pricing: Sequence numbers will no longer automatically sort when a line is added or deleted, or when new lines are imported.

UPDATED: Related Sales Documents: Historical document will now have a ‘History’ red text indicator.

FIXED: Choose Purchase Plan: When using the 'Adjust For Purchasing of UofM' security, the newly generated PO line will now have the purchasing unit of measure rather than the unit of measure from the sales line.

FIXED: Customer Contact: Sales Rep name is now shown in a column within the dropdown when creating a new Customer Contact.

FIXED: Exchange Document: When creating an exchange from a posted invoice, markdown amount or percent will no longer be set to zero upon saving.

FIXED: Inventory Adjustments: Qty Base U Of M will now be properly set when changing a row's item number. Previously, this issue would cause the extended unit cost to be incorrect.

FIXED: Inventory Adjustments: Users will no longer receive an object reference error when trying to delete a row that has not been saved.

FIXED: Report Manager: Loading the AR Transaction report will no longer result in an error while using Binary Stream MEM.

FIXED: Sales Batch Processing: Forward Results: The message column now only displays the message which specifies where the document went or why it wasn't forwarded.

FIXED: Sales Batch Processing: Users can no longer transfer documents that have a GP hold which prevents transfers. This hold can be ignored by disabling the 'Use GP Process Hold Transfer Setting' setting.

FIXED: Sales Document Addresses: The Tax Schedule label is now aligned with its dropdown field.

FIXED: Sales Document Entry: There are now fewer calls to update/insert into the SY90000 table when saving a sales document. There will also be fewer entries entered into the table.

FIXED: Sales Document Payments: Grid layout, column width, and position of the form are now saved properly.

FIXED: Sales Document Entry: Resolved an issue with dropship item originating cost not being calculated properly using the exchange rate.

FIXED: Sales Entry: Setting: 'Void Original Split Order' - When fully invoicing a split order, the original will no longer be voided. (Introduced: 4.5.0.8)

FIXED: SalesPad Today: In rare cases, users would receive an error stating “States Value Cannot Be Null” when closing the module. This has been corrected.

FIXED: Settings: 'Use Drop Ship Sales Line Item Cost' - This setting will now work properly when creating a purchase order from a sales document.

FIXED: Settings: 'Use Service Item Cost on a Linked PO' - This setting will now work properly when creating a purchase order from a sales document.

FIXED: Split Sales Document Post Split Script: Splitting an already split document will now run the script on the original document rather than just the newly created documents.

DELETED: Purchasing Advisor: The Use Planning Lead Time was never implemented. (Introduced: 4.5.0.0)

Version 4.5.0.11

Release Date 7/8/16

ADDED: Customer A/R Transaction Entry: Batch Numbers is now a dropdown.

ADDED: Customer A/R Transaction Entry: If the user hovers the mouse over the Tax text box or the Info icon next to the Tax Schedule selector, a tip will appear with the Tax Details for that Tax Schedule.

ADDED: Security: Customer A/R Transaction Entry: ‘Include Historical Transaction Batch Numbers’ - If True, the dropdown menu for Batch Number selection will include batch numbers of historical transactions that match the current transaction type. (Default: False)

ADDED: Security: Customer A/R Transaction Entry: ‘Include Applied Transaction Batch Numbers’ - If True, the dropdown menu for Batch Number selection will include batch numbers of applied transactions that match the current transaction type. (Default: False)

ADDED: Security: Inventory Transfers: ‘Pre Save Script’ - A C# Script that runs before each Inventory Transfer is saved.

UPDATED: Customer A/R Transaction Entry: A/R Transaction Lookup: Search Options: Users may now select multiple transaction statuses.

UPDATED: Customer A/R Transaction Entry: A/R Transaction Lookup: Values in the Transaction Status column will now read Work, Open, or History instead of 1, 2, or 3, respectively.

UPDATED: Localization: Customer Card: Open Sales Documents Quick Load Grid: Column headers are now localized.

UPDATED: Menu Ribbon: Links are now divided into groups to help with low-resolution screens.

UPDATED: Purchasing: Receipt Transaction Line Selector: Receipt Lines: The Receipt Type column will now display text representations of the receipt type instead of numbers.

FIXED: Application: Corrected an issue with several prompts where clicking the Close button (X) would perform the same actions as clicking Yes.

FIXED: Application: Decreased the number of database queries performed upon login.

FIXED: Cash Receipts: On Load script will no longer run twice every time the form loads. The script will run once for every cash receipt, as intended.

FIXED: Customer A/R Transaction Entry: The Payment Terms will now load after selecting a transaction in the transaction lookup.

FIXED: Customer A/R Transaction Entry: A/R Transaction Lookup: Corrected spelling errors in column headers.

FIXED: Customer Card: Open Sales Documents Quick Load Grid: Customization changes made to the grid will no longer be undone when the user clicks Save or Refresh.

FIXED: PO Entry: Changing the vendor on the PO no longer causes the original vendor name to be populated into the Purchasing Company field.

FIXED: PO Entry: Changing the vendor on the PO no longer causes the original vendor's country to be populated into the Purchasing Company field.

FIXED: Purchase Order Entry: Users will no longer receive an “Attempted to divide by zero” error when using the Attach PO to Sales Line plugin after adding a new line.

FIXED: Receipt Editor: Double-clicking the column headers in the search grid will no longer result in an error.

FIXED: Receipt Editor: Clicking Add when there are no lines to add will no longer result in an error.

FIXED: Receipt Editor: Applying changes to a Receipt Line will no longer give an error and cause the Receipt Line to be removed.

FIXED: Recurring Sales Generator Documents: When the reprice checkbox is checked in a recurring sales definition, the new unit price will no longer be rounded to the nearest whole number upon generating the document(s) when using special pricing.

FIXED: Sales Batch Processing: When using the 'Transfer To Invoice Batches Allowed' security, specifying multiple batches will now work correctly.

FIXED: Sales Document Addresses: Tax schedule is now spaced correctly.

FIXED: Sales Document Payments: Column layouts and screen size and position are now saved properly.

FIXED: Receivables Scheduled Payments: Calculating payments with annual or semiannual frequency will no longer create errors.

FIXED: SalesPad Today: In rare cases, users would receive an error stating “States Value Cannot Be Null” when closing the module. This has been corrected.

FIXED: Sales Line Components: Components modified by “GP Sales Line Kit Options” plugin will now display properly when using the Sales Line Components plugin.

FIXED: Setting: ‘Allow Multiple Discounts’ - All customer discounts are no longer added to a sales document when this setting is set to False.

FIXED: Setting: ‘Prompt To Change Price When Converting’ - The description was incorrect and has been updated to reflect the proper functionality of this setting. It now states that the prompt will appear when converting a non-inventory item to an inventory item.

FIXED: Workflow Setup: When the user enters a duplicate queue name, the warning message can no longer be ignored.

FIXED: Workflow Setup: The editor for setting a queue's name no longer autocompletes to previous queue names.

FIXED: Workflow Setup: The workflow no longer saves whenever a new queue is added.

FIXED: Workflow Setup: Deleting a newly created or imported queue will now remove the queue properly.

FIXED: Workflow Setup: Importing a workflow will no longer allow duplicate queue names to exist. If an imported workflow has duplicate queue names, the user will be given the option to overwrite the existing queues.

FIXED: Workflow Setup: The Move To Queue dropdown in Workflow Rules will no longer contain copies of queues.

FIXED: Workflow Setup: Deleting queues and exporting the workflow without saving in between will no longer result in the deleted queues being exported.

FIXED: Workflow Setup: Importing a workflow with multiple workflow rules having the same sequence number will no longer result in an error.

FIXED: User Field Editor: In Customer Items, attempting to map a UDF to GP user fields 3, 4, or 5 will no longer cause an "Invalid Column Name" error.

FIXED: User Field Editor: User fields will no longer be set to disabled when they are initially created.

REMOVED: Sales Line Components: The Extended Cost column has been removed.

REMOVED: Security: Sales Line Components: The ‘Show Extended Cost’ security has been removed.

Version 4.5.0.10

Release Date 7/1/16

FIXED: Assembly Line Items: Image User Defined Field: This is no longer treated as a plain text UDF but rather as a file path link to the image.

FIXED: Counter Sales: The Price Level field is now a dropdown.

FIXED: Customer Contact: Sales Rep name is now shown in a column within the dropdown when creating a new Customer Contact.

FIXED: Customer Search: Sales Person ID link now works correctly and brings a user to that Sales Person's card.

FIXED: Purchase Order Entry: Users will no longer receive an “Attempted to divide by zero” error when using the “Attach PO to Sales Line” plugin after adding a new line.

FIXED: Sales Batch Processing: Forward Results: The Message column now only displays what queue the document was moved into or why it was not forwarded. The document number was removed from this column.

FIXED: Sales Entry: Transferring an order to invoice with a payment and using a third party tax handler would throw Econnect errors. This is a SQL stored procedure fix to spptaSopVoidDocument_SalesPad and spptaSopHdrRecalc_SalesPad.

FIXED: Sales Monitor: For any selected data row in the tree layout, there is no longer a discrepancy between that data row's document count and the number of documents displayed in the grid layout.

FIXED: Sales Document Entry: When using the ‘Use Shipping Email From Customer’ and the ‘Fast Ship to Ordering Enabled’ setting and copying a sales document, the shipping email will now correctly be updated from the primary shipping address set on the customer card.

FIXED: Vendor Address Resources: Users will now be able to access Vendor Address Resources without receiving a localization error.

Version 4.5.0.9

Release Date 6/24/16

FIXED: Item Maintenance: Deleting multiple rows from the Price Level Maintenance tab no longer causes errors.

FIXED: Purchase Order Entry: When editing a PO with a purchase status of "Change Order", users will no longer receive an econnect error stating that the "PO_Line_Status was incorrect" when attempting to save. (Introduced in 4.5.0.5)

FIXED: Purchase Order Entry: When printing a PO, the Qty Committed will no longer double. This is a SQL change to sppCreateSopToPopLink. (Introduced in 4.4.1.27)

FIXED: Purchasing Advisor: The focused row will be remembered when searching or using the apply button.

FIXED: Sales Document Entry: Quote Transfers: Canceling a transfer after clicking the transfer button will no longer save changes made by the pre-transfer script.

FIXED: Setting: ‘Program Test Skin’: The selected color schema will now be respected.

FIXED: User Field Editor: The ‘Show on Sales Document Types’ setting is now being properly enforced.

Version 4.5.0.8

Release Date 6/16/16

ADDED: Sales Entry: Setting: ‘Void Original Split Order’ - When enabled, the original split order will be voided instead of moved to history. (Default: False)

UPDATED: Localization: Localized all Resources tabs, Interactions tabs, and Equipment Card tabs.

UPDATED: Purchasing Advisor: The Purchase Price can no longer be changed in the Details section, this can be changed on the grid by changing the Unit Cost.

UPDATED: Purchasing Advisor: The Show Inactive option is now available for GP versions prior to 2013.

FIXED: Search Screens: Clicking 'X' on the prompt that appears when searching with no search criteria will no longer run the search.

FIXED: Application: Fixed various spelling errors throughout Security Editor.

FIXED: Application: Fixed various spelling errors throughout Settings.

FIXED: Counter Sales Line Items: When using the Sales Inventory Lookup by tabbing off the item number field after entering a value on the first line in a new document, On Row Changed scripts will now be triggered.

FIXED: Customer Search: Column Headers will no longer have underscores in their captions when loaded for the first time.

FIXED: Email Validation: Email addresses with domains that do not end in '.com' will no longer cause an 'Is Not A Valid Email' error.

FIXED: Group Pricing: Import/Export: Exporting and Importing a group pricing will now include the Item Description.

FIXED: Interaction Event Entry: Users are now able to resize the Interaction Entry window.

FIXED: Localization: Tab names will no longer change to English names when clicked on.

FIXED: Prospect Properties: Prospect Number is now kept as Read Only when using the 'Auto Assign ID' security.

FIXED: Purchasing Advisor: Cost will now be pulled onto the Purchase Order if there is no Purchase Plan associated and will not be zeroed out when using the Detail section to apply a purchase plan.

FIXED: Purchasing Advisor: The Detail view will now show the proper item when first loaded if there was a filter on the Summary view.

FIXED: Purchasing Advisor: The UofM was not always correct for Sales Demand and Reorder Point demands. Now the base UofM will be pulled if there is no Purchasing UofM set up.

FIXED: Purchasing Advisor: The initial load is now faster.

FIXED: Purchasing Advisor: The screen will now refresh after using the Remove All Plans button.

FIXED: Purchasing Advisor: Numerous design and layout issues with buttons and check boxes have been corrected.

FIXED: Sales Batch Processing: Forward Results: The Message column now only displays the message which specifies where the document went or why it was not forwarded. The Sales Doc Number has been removed from this column.

FIXED: Sales Batch Processing: The Report Processing Window now displays the batches that the sales documents have been forwarded to.

FIXED: Sales Entry: In GP2013 or newer, eConnect would set the ALLOCABY flag in SOP10100 to 2 after re-saving a document. This has been corrected with a SQL stored procedure change: spptaSopHdrRecalc_SalesPad.

Version 4.5.0.7

Release Date 6/10/16

ADDED: Counter Sales: Sales Entry: There is now a dropdown in the Shipping Method column for selecting shipping methods.

ADDED: Item Maintenance: When changing Item Class ID for an item, the class default values for the Sales Tax Schedule, Purchase Tax Schedule, and Allow Back Orders fields will be pulled from the Item Class.

ADDED: SMTP Setup: The Edit button now has a button icon.

ADDED: Security: ‘Can Change Quote Expiration Date’ - Allows the user to change the quote expiration date. (Default: False)

ADDED: Settings: ‘Enforce Quote Expiration Date’ - Prevents a quote from being transferred if it is past its expiration date. If the current date is passed the quote's expiration date, then the user will also be informed when trying to do transfer. (Default: False)

ADDED: Setting: ‘Load AR Statement using Document Date’ - If True, Customer A/R Statement details will be loaded using the document date instead of the posting date. (Default: False)

UPDATED: Application: Support for GP 2016.

UPDATED: Application: When logging into SalesPad and the GP Setup Information did not load properly, users would receive a "No Row at Position 0" error, now they will receive a better suggestion on SQL tables to check (INTERID and CMPANYID in SY00100 and DYNAMICS..SY01500).

UPDATED: Application: Updated localization in various modules and forms: Customer Card, Item Properties, Sales Document Payments, Counter Sales, and Store Setup.

UPDATED: Avatax: If the GP sales setup for non-inventory items is set to Non-Taxable, we will now send the Avatax Non-Taxable Tax Code for Non-Inventory Items.

UPDATED: Localization: Shortened names of tabs in following cards: Opportunity, Prospect, Sales Person, Sales Territory, Assembly, BOM, Purchase Order, Receipt Transaction, Vendor, Customer, and Sales Document.

FIXED: Assembly Entry: Assembly Line UDFs are now able to be edited when the Assembly has not been released.

FIXED: CRM: Opportunity: When creating a new opportunity, the text on the tab will say 'Opportunity: (NEW)' rather than being blank.

FIXED: Localization: Counter Sales: Buttons and labels will now resize to fit localized text.

FIXED: Localization: Customer Card: Sales Graph Tab: Data will now appear on the graph in each localized version.

FIXED: Localization: Inventory Lookup: The text on tabs will no longer reset to English when they are selected.

FIXED: Localization: Smart Printing: On Load Email Script will no longer cause errors in localized versions.

FIXED: Report Manager: The Preview window now only displays the first page of the sample report. This was done to prevent memory spikes.

FIXED: SMTP Setup: The Add, Edit, and Remove buttons have been moved closer to the Close and Refresh buttons.

FIXED: Sales Document: The Quote Expiration Date header field on quotes is now editable in SalesPad.

FIXED: Setting: Sales Entry: ‘Quantity Decrease Will Decrease Fulfillment’: Corrected spelling of 'separate'.

FIXED: User Field Editor: Spanish and French users will no longer receive a "Sequence contains no matching element" error when attempting to make a new user field.

REMOVED: Security: Assembly Search: ‘Close Finished Window’ - The security had no functionality and has been removed.

Version 4.5.0.6

Release Date 6/3/16

ADDED: Assembly Entry: UDFs can now be added to the Properties section.

UPDATED: Customer Card: The Payment Terms dropdown is now sorted alphabetically.

UPDATED: Inventory Lookup: Item class filter is now pre-populated with existing item classes.

UPDATED: Localization: All Tabs: Right-Click Tab Options

UPDATED: Localization: Counter Sales: Store Setup

UPDATED: Localization: CRM: Task Entry, Interactions, Item Numbers, and Resources

UPDATED: Localization: Customer Card: A/R, Email Audit, and Audit

UPDATED: Localization: Vendor Search

UPDATED: Sales Inventory Lookup: Item class filter is now pre-populated with existing item classes.

UPDATED: Sales Document: The Payment Terms dropdown is now sorted alphabetically.

FIXED: CardControl Transaction: When using MSMQ there will no longer be a "hexadecimal value 0x01" type error.

FIXED: Counter Sales: Check Out: Payments: Corrected capitalization of PayFabric (previously Payfabric).

FIXED: Counter Sales: The Historical checkbox will now function properly when first searching for a customer.

FIXED: Counter Sales: Users will no longer receive a “CUSTNMBR does not exist” error when attempting to make a sales document after cancelling out of the New Return screen.

FIXED: Database Update: The sppRefreshProcs will no longer run if the database failed to create the procedure, and if it does fail there will be a better message explanation.

FIXED: Dispatch: The Dispatch modules will now appear in both the ribbon and the modules dropdown menu. (Extended Module)

FIXED: Item Maintenance: Vendor information was not saving unless the user added a new vendor or changed an item property. This has been corrected.

FIXED: Localization: Sales Person Card: Header will now load in non-English versions.

FIXED: Package Editor: When creating a package from a Sales Inventory type item, the package smart field will now be updated properly, and the package indicator will be added to the item number.

FIXED: Purchase Order Entry: PO Status and PO Line Status will now be localized correctly when loading an existing document.

FIXED: Report Manager: Sample Document dropdown now works correctly. The correct document types will be within the dropdown list, and the preview is updated based on the selected sales document.

FIXED: Sales Document Properties: The payment link will now properly show the "P: A:" in the payment link when transferring an order to invoice. (GP10 Only)

FIXED: Sales Entry: Purchasing Status will now be localized correctly when loading an existing document.

FIXED: Spanish Version: Customer: Print: Customer AR Statement Preview: The dates that are selected will now appear in the date edit boxes.

Version 4.5.0.5

Release Date 5/27/16

ADDED: Customer: A/R Transaction Entry: A/R Transaction Search: Transaction Numbers now have clickable links.

ADDED: Security: Customer A/R Transaction Entry: Can Edit - Allows the user to edit transactions. If set to false, transactions are Read Only. (Default: True)

ADDED: Security: Customer A/R Transaction Entry: Can Edit Transaction Number - Allows the user to manually type in a transaction number. (Default: True)

ADDED: Security: Customer A/R Transaction Entry: Can Print - Allows the user to print the transaction information. (Default: True)

UPDATED: Customer: A/R Transaction Entry: Users no longer have the option to customize layouts.

UPDATED: Customer: A/R Transaction Entry: A/R Transaction Search: Search form now matches other search forms.

FIXED: Application: In rare instances, there could be an "An item with the same key has already been added" error while logging into SalesPad. This should no longer happen.

FIXED: Customer: A/R Transaction Entry: "New" button image now matches other forms.

FIXED: Email Templates: Merge fields for user fields that are less than 6 characters long will now be properly translated to a value.

FIXED: Equipment Maintenance: Item History: Column names no longer have out-of-place punctuation.

FIXED: Equipment Maintenance: Equipment History: Column chooser now pops up in the normal spot.

FIXED: Interaction Emailing: Users will now be able to tell whether or not an email has failed to send by checking the status column in the Interactions grid. Status will be marked as "Failed" if the message failed and "Sent" if the message was successfully sent.

FIXED: MO Note is now set to null when a new MO is created without a note.

FIXED: Purchase Order Line Items: Non-inventory column is now set to Read Only.

FIXED: Purchase Order Line Items: Users are no longer able to freely edit the UofM text edit value for inventory lines.

FIXED: Reminders: When multiple reminders are shown at the same time, users can now handle each individually without an exception popping up.

FIXED: Sales Line Items: Can now edit MO linked lines when MO is in the Hold status.

FIXED: Sales Person Dashboard: Changes to the dashboard will automatically appear on the Sales Person card as soon as the dashboard is saved.

FIXED: Security: Customer A/R Transaction Entry: ‘Allowed Transaction Types’ – This security’s default is now ‘All’ instead of ‘None’.

FIXED: Settings: ‘Limit UofM Dropdown To Pricing Only’ – Enabling this setting will now work correctly. The user will no longer have to re-open the document in order for the UofM list to refresh, and items with the same UofM schedule will no longer show the same UofM list.

(BETA) ADDED: Activity Locks: Locks on In-Transit Transfer documents are now displayed in the Activity Locks screen.

(BETA) FIXED: In-Transit Transfers: The Auto-fulfillment option will no longer double allocate multibin non-tracked items.

(BETA) FIXED: In-Transit Transfers: Deleting lines or documents will properly unallocate inventory and remove fulfillment records.

(BETA) FIXED: In-Transit Transfers: Non-tracked items no longer double allocates, and removing fulfillment now properly unallocates.

(BETA) FIXED: In-Transit Transfers: There will no longer be an object reference error if the VAT10001 (VAT Country Code MSTR) table is empty.

Version 4.5.0.4

Release Date 5/20/16

UPDATED: CRM Entry: Reminder time now supports custom times.

UPDATED: Sales Document Entry: Reducing the quantity below the quantity fulfilled for Service/Misc/Flat Fee items will also reduce the quantity fulfilled.

FIXED: Item Maintenance: The U of M Price column in Price Level Maintenance is now formatted correctly.

FIXED: Payments: The Checkbook ID field will now only be disabled for order documents with Payment selected.

FIXED: Receiving: Receipt Batch dropdown list now updates upon saving.

FIXED: Report Properties: User will be prompted with a 'Discard Report Changes?' message box upon clicking Cancel or when closing the form.

FIXED: Sales Document: Warehouse changes will now be updated if the user clicks inside the line items grid after updating the warehouse.

FIXED: Sales Document Entry: Invoice: If a Pre-Invoice Script makes changes to the document, the changes will now be saved.

FIXED: Sales Document Entry: Transfer: If a Pre-Transfer Script makes changes to the document, the changes will now be saved.

FIXED: Setting: 'Sequence Document Numbers When Partial Invoicing' - Splitting multiple invoices from the same order will now correctly number invoices with .1, .2, .3, etc.

FIXED: Smart Printing Maintenance: Users with GP versions older than 2013 will no longer receive an "Invalid column 'Inactive'" error when attempting to open the module.

FIXED: User Field Editor: Layout Designer will now open and save layouts correctly for all layouts.

FIXED: User Field Editor: Resolved an issue that prevented users from saving user fields on the 'Contact' business object.

(BETA) FIXED: Report Manager: In-Transit Transfer Reports: Reports will now preview properly. (Introduced: 4.5.0.3)

(BETA) FIXED: Printing: In-Transit Transfer Reports: Reports can now pull custom data into the report.

Version 4.5.0.3

Release Date 5/16/16

ADDED: Bin Transfers: Lot user fields are now transferred during bin transfer operations.

ADDED: Database Update: Added a check box for enabling/disabling the Refresh SQL Stored Procedures at the end of the database update.

ADDED: Item Maintenance: User will receive a warning if the replacement item is not in inventory.

ADDED: Lot Number Entry: Added Item Description and Vendor Name fields to the Lot

Number Entry screen.

ADDED: Lot Number Entry: Added ability to copy lot attributes and/or user fields from one lot to other lot(s). Users can copy lot attributes from or to another lot by selecting the desired command from the Lot Attributes menu.

ADDED: Purchasing Advisor: Custom procedures can now be created for this procedure.

ADDED: SQL Custom Procedures: There are now buttons to run Refresh Views and Refresh SQL Stored Procedures.

ADDED: Sales Document Related Documents: Security - Show Voided Documents: When enabled, voided documents will be visible with a label of void.

ADDED: sppPurchaseAdviceDetail_Modified: User can utilize this procedure to retrieve and display UDF values. The user will need to change the name of this procedure to spcpPurchaseAdviceDetail in order to see the expected changes.

ADDED: System User Card: Sales Documents: Column for Customer Name.

ADDED: System User Card: Sales Documents: Column for Customer Num.

UPDATED: Database Update: There are now better messages when the sppRefreshViews and sppRefreshProcs are run at the end of the database update process.

UPDATED: Sales Document Entry: When an Invoice or a Return are split, the historical document will now be voided.

UPDATED: Sales Person Card: Documents: The documents form now matches other Sales Documents forms.

FIXED: A/R Statement Settings: Return documents now respect the date filters.

FIXED: Application: There should no longer be an Invalid Operation Exception: "Invoke or BeginInvoke cannot be called on a control until the window handle has been created." This error could happen throughout the application.

FIXED: Counter Sales: Doing an Exchange for an invoice that had a Discount % will no longer throw an "Input variable contains a negative value" error.

FIXED: Counter Sales: The Sales Document will no longer be saved twice when going to the Check Out tab in some scenarios.

FIXED: Customer Card: Invalid discount codes will now be filtered out of the discounts dropdown so that the user will no longer be able to select them for customers.

FIXED: Customer Contact Addresses: The Contact Addresses tab on the Customer Card will now correctly display the specified screen label for UDFs instead of the UDF name in the database.

FIXED: Database Update: The database update will no longer fail on spvGPResourceSetup. This issue only affected GP2013 RTM users. (Introduced: 4.5.0.2)

FIXED: Equipment Resources: Users will no longer receive a "Procedure or function sppUpdateEquipmentResource has too many arguments specified" error when attempting to add a resource to an equipment.

FIXED: Item Maintenance: Replacement items will no longer replace other replacement items causing a loop of items replacing each other.

FIXED: Lot Number Entry: Splitter position and fields layout is now being saved when Lot Number Entry screen is closed.

FIXED: Purchasing Advisor: Sales line item user fields will now correctly populate on the Demand Detail grid.

FIXED: Purchase Line Excel Import: Now updates rows that match line sequence and item number.

FIXED: Receiving: PO Line Status and PO Line Status Orig are now translated from GP values.

FIXED: Recurring Sales Definition: When creating a recurring sales definition from a document, the next document type will be correctly pulled in with the next document ID.

FIXED: Report Manager - Inventory Adjustment Report: No longer throws an error upon selection.

FIXED: Resource Migrator: Migrator now checks to see if a user field is disabled when loading the user field list. Previously this would result in an error if it had been disabled.

FIXED: Sales Document Payments: CardControl: Column widths will now automatically resize themselves based on the size of the Payments form.

FIXED: Sales Document Promotions: The Save button will now save promotions properly.

FIXED: Sales Entry: GP Taxes will now calculate properly if a sales line has a cancelled quantity and a mark-down percentage.

FIXED: Sales Entry: An item's cost will now be set based on the item's valuation method when a document is copied.

FIXED: Sales Person Card: Documents: Refresh button now works for filtering results.

FIXED: SalesPad DashBoard: The Vendor Data default data set will now properly pull in data.

FIXED: SalesPad Workflow Setup: The PreOrder workflow rule will now correctly evaluate to True or False depending on the parameter specified by the user.

FIXED: Security: An exception will no longer be thrown if a script had

"SalesPad.GP.Localization" in the body of the script.

FIXED: Smart Printing: On Load Email Script now works properly with Smart Printing.

FIXED: User Field Editor: When importing user fields, Group Permissions now properly default to * (all).

Version 4.5.0.2

Release Date 5/6/16

ADDED: A/R Transactions: Functionality to View and Print Applied A/R Transactions. (Extended Module)

ADDED: Application: Users can now choose 'Windows Region' for language. This allows SalesPad to be localized in the language associated with the region set on the Windows operating system. Only English, Spanish and French are currently supported.

ADDED: Inventory Transit Transfers: UDF functionality to In Transit Transfers. (Extended Module)

ADDED: Security: Sales Analysis: 'Excel Export Mode' - Defines what type of layout will be used when exporting Sales Analysis to an Excel document.

UPDATED: Create Assembly: When the assembly order is saved, the GP batch total and quantity will now be properly calculated.

UPDATED: Sales Inventory Lookup: When the 'Display Summary Warehouse Quantities' setting is enabled, the warehouse field will be disabled and show '(ALL)'.

FIXED: Bill Of Materials Entry: Horizontal splitter no longer overlaps the tabs beneath it.

FIXED: CardControl Payments: Payments will now attempt to write back to GP if an exception was thrown while processing.

FIXED: Contract Pricing: Purchase quantity of contract items that were used in packages will now be properly updated if the package item is deleted from a sales document.

FIXED: Customer Card: Item Sales: Corrected names of columns for price and margin.

FIXED: Customer Item Numbers: Customer Item Number UDFs can now be properly mapped to GP user fields.

FIXED: Customer Item Numbers: GP UDFs will no longer show up in the grid when they are not mapped to SalesPad Desktop UDFs.

FIXED: Customer Item Numbers: Notes can now be edited.

FIXED: Grids: Grids that do not allow sorting or grouping will no longer show the sorting and grouping options.

FIXED: Inventory: New Item - No longer limits Item Number to 15 characters, the new limit is 30 characters.

FIXED: Inventory Transactions: Locks have been added to inventory transactions to keep users from editing the same transaction simultaneously.

FIXED: Item Configurator: Overridden prices will not change when changing Price Levels on a sales document. (Extended Module)

FIXED: Lot Number Entry: Changed horizontal splitter to match other forms.

FIXED: Prospect Card: The Prospect Properties will now properly load when using SalesPad Desktop in Spanish or French.

FIXED: Purchase Order Entry: The Active Support message for Line Item Sequence will now be properly displayed instead of a tax schedule error.

FIXED: Purchase Plan: Create Purchase Order - When transferring a drop ship order to a purchase order the Country Code is now correctly transferred.

FIXED: Purchasing Advisor: Item Master UDF columns will now correctly display the screen label.

FIXED: Resources: When creating resources on a sales document and the setting ‘Save Resources as GP Attachments’ was enabled, the GP Attachment Flow settings were not being respected, causing a scripting error in GP when transferring an order to invoice. This has been corrected, and SalesPad will now respect all of GP's Attachment Flow settings.

FIXED: Sales Document Entry: The enter key will now properly add a new line while using a dockable plugin.

FIXED: Sales Document Entry: Resolved distribution conflicts when creating a return from a posted invoice using multi-currency.

FIXED: Sales Document Payments: Voiding transactions without a 'Document Group' will no longer result in an error.

FIXED: Sales Entry: Corrected spelling for Unallocate button.

FIXED: Sales Entry: With the 'Auto Prompt For Notification Email' setting enabled, there will no longer be infinite prompts to save the Customer Card.

FIXED: Sales Line Mass Update: Corrected spelling for Unallocate button.

FIXED: Security Script Manager: The Refresh button no longer returns the highlighted script to the top of the grid. The current script will remain selected and the script information screen will be refreshed.

FIXED: Transfer Quote: When transferring a quote to an order, if the order fails to save, the quote will no longer stay in history.

FIXED: Settings: Dispatch: ‘Route End Time’ - Corrected spelling in the description.

FIXED: Settings: Dispatch: ‘Route Start Time’ - Corrected spelling in the description.

Version 4.5.0.1

Release Date 4/29/16

ADDED: Back Ordered Items Report: Added a button to Back Ordered Items Report that forwards documents through workflow after allocating line items.

ADDED: Back Ordered Items Report: Added functionality to Back Ordered Items Report to automatically forward documents through workflow after allocating line items based upon a security.

ADDED: Purchase Order Links: Added Item Number column to the Links grid.

ADDED: SalesPad Today: The task list drop-down will now populate previously made tasks lists.

ADDED: Sales Line Mass Update: Document date column added to the Sales Batch Lines grid.

ADDED: Sales Line Mass Update: Added a button to Sales Line Mass Update that forwards documents through workflow after allocating line items.

ADDED: Security: Back Ordered Items Report: 'Enable Allocate and Release' - Enables the allocate and release button. (Default: False)

ADDED: Security: Back Ordered Items Report: 'Report Auto Forward After Allocation' - Automatically forward documents through workflow after allocating line items. (Default: False)

ADDED: Security: Custom Pricing: 'Automatically Use Default Update Method' - Automatically apply the default update method when changing the price of a line item. (Default: False)

ADDED: Security: Sales Batch Processing: 'Transfer To Invoice Batches Allowed' - List of queues that are enabled for transferring sales documents to invoice. (Default: True)

ADDED: Security: Sales Line Mass Update: 'Automatically Refresh After Allocation' - If enabled, Sales Line Mass Update will automatically refresh after allocating or unallocating. (Default: *)

ADDED: Security: Sales Line Mass Update: 'Enable Allocate and Forward' - Enables the allocate and forward button. (Default: False)

ADDED: Update MO Plugin: New Update MO plugin on Sales Document allows users to update linked sales line items.

UPDATED: Application Date: SalesPad Desktop's application date will now rollover to the next day if left running past midnight. It is still recommended users log out at the end of each work day.

UPDATED: Package Editor: Saving Definition is now based on the values in the plugin rather than the values on the original sales line.

UPDATED: Sales Batch Processing: After capturing CC authorizations, the log report will now show any documents that did not get sent to CardControl if the process is interrupted or an exception is thrown.

UPDATED: Sales Batch Processing: Updated message that is displayed to users when trying to transfer sales documents to invoices that are in a restricted queue.

UPDATED: User Field Layouts: All User Field forms now cache the layouts, any changes will require other users to log out and back into SalesPad. Older layouts will now be saved to the database after an initial load.

FIXED: Action Configurations: There will no longer be an exception if the Action Configurations fail to load from the AppData folder due to permissions issues. Exceptions are written to the System Log table and the forms will otherwise load properly unless there any custom configurations.

FIXED: Create Return: Saving a return in French or Spanish will no longer throw an error stating “Enum type was not found”.

FIXED: Customer Card: The Customer Card will no longer load slow if the Customer Quick Reports path is a network drive or some folder with slow response times.

FIXED: Drop-downs: Selecting the empty row of a drop-down now correctly saves the empty value for that field.

FIXED: Email Validation: Emails containing a period after the @ will now be validated correctly. This change is throughout SalesPad.

FIXED: Gift Certificates: Amount Remaining will now be properly calculated when the Gift Certificate Item Number is longer than 15 characters.

FIXED: Package Editor: Deleted kit components will now be properly deleted when performing a Save Definition.

FIXED: Package Editor: Inserting a new kit component will no longer create a sales line that has the correct item number but incorrect description, price and quantity.

FIXED: Purchase Order Copy: Copy of Purchase Order no longer comes in as read only when

On Hold is checked on the original document.

FIXED: Purchase Order Entry: Purchase Orders will no longer be slow to load if the Purchase Order Quick Reports path is a network drive or some other folder with slow response times.

FIXED: Purchase Order Entry: There will no longer be a “PO already exists” error after saving a PO a second time when the first save had an eConnect error.

FIXED: Quick Reports: Tabs would not load if certain exceptions were thrown while loading. This has been corrected.

FIXED: Sales Batch Processing: If the Capture CC Authorizations throws an exception while processing, we will now attempt to write back the payments to GP that were successful in CardControl.

FIXED: Sales Document Entry: Sales Documents will no longer be slow to load if the Sales Document Quick Reports path is a network drive or some other folder with slow response times.

FIXED: Sales Document Entry: When changing the warehouse, the prompt to roll down the change to line items will no longer appear twice when users select "No".

FIXED: Sales Document Promotions: The Save button will now saving promotions properly.

FIXED: Sales Line Components Plugin: Extended Cost field will no longer always show a cost of zero.

FIXED: Sales Line Resources: Resources will no longer disappear after refreshing the grid in the Sales Line Resources pop-up.

FIXED: Security: When a user right clicks on any tab and chooses Security, the Security form that opens will now automatically open to the tab’s security.

FIXED: System Info: When the window resolution is low, the Sales Document ID grid will no longer collapse until no rows are showing.

FIXED: Vendor Card: The Vendor Card will no longer be slow to load if the Vendor Quick Reports path is a network drive or some other folder with slow response times.

Version 4.5.0.0

Release Date 4/22/16

ADDED: Application Skins: SalesPad Desktop Green.

ADDED: Dispatch Sales: Extended module that allows creating and maintaining delivery schedules for drivers and vehicles. (Extended Module)

ADDED: PayFabric: SalesPad Desktop now has built in integration for PayFabric.

ADDED: Purchase Line Distributions: Allows users to view and edit purchase line distribution accounts.

ADDED: Sales Line Distributions: Allows users to view and edit sales line distribution accounts.

UPDATED: Application: Renamed to SalesPad Desktop. Previously was SalesPad.GP.

UPDATED: Application: New application logo.

UPDATED: Application Ribbon: UI Changes. Users can now click on the SalesPad Desktop logo in the upper left to access the application menu.

UPDATED: Login: UI changes.

FIXED: Historical Documents: Image user fields will no longer be editable on historical documents without proper security.

FIXED: Sales Document Line Items: When changing the item number for a package component, the price level for the line will be properly updated.

FIXED: Sales Document Transfer: Transferred resources will no longer have an additional extension appended to the file causing the file to no longer open and become corrupt.

FIXED: Sales Shipment: When using the "Override Invoice Number" or the "Use Order Number as Invoice Number" security, users will no longer receive a message stating "Invalid object name 'spv3SalesDocument_Light'" when transferring an order to an invoice.

FIXED: Security: System User's User Fields - Maintenance is no longer spelled incorrectly in the security description.

FIXED: Setting: 'Suppress Country Code' - This setting will now properly suppress the country code on print reports.

Version 4.4.1.30

Release Date 4/15/16

BREAKING CHANGE: Settings: 'Can Create Customer Address' - This setting has been removed and moved to security.

BREAKING CHANGE: Settings: 'Can Create Vendor Address' - This setting has been removed and moved to security.

ADDED: Customer Contact Address: Tax Schedule, Sales Territory, Don't Email, Don't Mail, Don't Fax, and Don't Text

ADDED: PayFabric Migrator: Credit cards saved with CardControl can now be migrated to PayFabric.

ADDED: Setting: MSMQ Timeout: This setting drives the timeout period when SalesPad reads from the MSMQ to retrieve CardControl transactions. (Default: 10 seconds)

ADDED: Security: Customer Contact Addresses: ‘Can Create Customer Address’ - Allows a user to create a new address or the customer. (Default: True)

ADDED: Security: Purchase Order Addresses: ‘Can Create Vendor Address’ - Allows a user to create a new address for the vendor. (Default: True)

ADDED: Security: Sales Document Addrs: ‘Can Create Customer Address’ – Allows a user to create a new address for the customer. (Default: True)

ADDED: Security: Vendor Contact Addresses: ‘Can Create Vendor Address’ - Allows a user to create a new address for the vendor. (Default: True)

FIXED: CardControl Transactions: Payments should never write to the wrong sales document. There is now a popup message and an audit trail when this would happen.

FIXED: Customer Discounts: Disabled discounts will no longer be applied. NOTE: This can be fixed with a change to spvCustomerDiscountSearch.

FIXED: Database Update: The database update could fail if there were stored procedures that could not be refreshed or altered. (Introduced: 4.4.1.29)

FIXED: Inventory Transactions: Locks have been added to Inventory Transactions to keep users from editing the same transaction simultaneously.

FIXED: Item Maintenance: Item Class on existing items can now be changed. Previously, any changes made to this field were ignored when updating the item.

FIXED: Purchase Order Line: When adding an item to a purchase order that has a vendor item number, changing the item to another item will now update the vendor item number appropriately.

FIXED: Purchase Order Line: Users will no longer receive a popup each time they save a purchase order if no item has been added.

FIXED: Security: Sales Document CardControl Payments: ‘Allowed Payment Options’ – When the payment option “Deposit” is selected, Deposit will now be the only selectable payment option when creating a payment from a Sales Document.

Version 4.4.1.29

Release Date 4/8/16

BREAKING CHANGE: Security: "New Customer Item Number" was renamed to "Customer Item Maintenance".

ADDED: Inventory Analysis: There are now fields to limit the search by Item Number and Location.

ADDED: Customer PayFabric Wallet: Allows customers to create, edit, and delete customer wallets for PayFabric.

ADDED: Customer PayFabric Transactions: Allows users to view PayFabric transactions created within SalesPad on the customer card.

ADDED: Security: Report Printing: ‘Post Print Script’ – Script that will execute after documents are printed in SalesPad.

ADDED: sppRefreshProcs: This procedure is ran after sppRefreshViews and will re-fresh all stored procedures that start with 'spp' or 'spcp'. This will help with some performance issues since the underlying objects that stored procedures rely on may have changed.

UPDATED: Customer Item Maintenance: Cleaned up the user interface by removing unnecessary UDF fields as well as adding more informational fields like customer name and item description to make the form more intuitive.

UPDATED: Form Layouts: There is now better error handling when layouts do not load.

UPDATED: Inventory Analysis: Made some minor speed improvements to the SQL stored procedure.

UPDATED: Sales Document Related Documents: There are now better error handling messages when the tab fails to load.

FIXED: Item Configurator: When prices are overridden through Item Configurator the value will no longer be changed if the price level is changed on a Sales Document.

FIXED: Transfer to Invoice: Users should no longer receive a 'Duplicate Key' error when partial transferring an order to invoice multiple times.

FIXED: Customer CRM: Copying from Tasks to Contact Log window will no longer give a null reference error.

FIXED: Customer CRM: Creating a new note will no longer occasionally give the user an “Object reference not set to an instance of an object”

FIXED: Customer Contact: Users can now un-tab and re-tab the form as intended.

FIXED: Customer Search: Clicking on the e-mail options fields will no longer result in a

“Specified cast is not valid” error.

FIXED: SalesPad Today: Double clicking on the Customer Number column when the task does not have a customer number will no longer give an “InvalidCastException” error.

FIXED: SalesPad Today: There will no longer be an “index out of range” error when double clicking on Tasks or Interactions.

FIXED: Sales Document Entry: Deleting a document that hasn’t been saved yet will no longer throw an “Object reference” error.

FIXED: Sales Document Search: There will no longer be an “Unable to cast object of type System.Int32 to type System.String” error for new users.

Version 4.4.1.28

Release Date 4/4/16

ADDED: Sales Document Properties: Added a search button to the Third Party Billing field.

FIXED: Create Return: When using extended pricing and creating a return from a historical invoice, editing the UofM column will now properly popup the reprice window.

FIXED: In-Transit Transfer: Closing the window will no longer prompt users to enter From Site and To Site if it is a brand new transfer.

FIXED: Sales Document Entry: The allocate button will now always fulfill non-tracked non-multibin items that were partially backordered on an auto-fulfillment document type.

FIXED: Sales Document Setup: Saving changes will no longer result in a “Missing parameter in stored procedure sppUpdateSalesDocumentID” error message.

FIXED: SalesPad Dashboard Designer: Fixed an issue where data sources would not always load properly. (Introduced: 4.4.1.24)

FIXED: SalesPad Dashboard Maintenance: Clicking different rows continually will no longer cause SalesPad to crash.

FIXED: SalesPad Dashboard Maintenance: When designing a dashboard, clicking save multiple times will no longer cause SalesPad to crash.

FIXED: SalesPad Dashboard Viewer: Clicking close while a dashboard was loading will no longer cause SalesPad to crash.

FIXED: SalesPad Dashboard Viewer: Blank entries no longer show in the dashboard selector.

FIXED: Send Fax: When using the "Remove GP Trailing Zeros" the fax numbers will no longer show the four trailing zeros.

FIXED: User Fields: When using a decimal type user field with decimal places set to 0, users will no longer be able to occasionally add decimal places.

FIXED: VRM Note Entry: The securities "Can Delete Own Notes" and "Can Delete Others Notes" will now be respected properly when both are set to false.

Version 4.4.1.27

Release Date 3/25/16

ADDED: Smart Printing: Added the ability to send text reminders using the Smart Printing plugin. Supported texting services are data24-7 and Twilio.

ADDED: Sales Document Entry: Added the ability to send text reminders directly from the sales document using existing Smart Printing configuration.

FIXED: Counter Sales: First time Counter Sales users will no longer get an 'Object reference' error when using the Visible ID's security and a Walk-in Customer. A work around is for each user to select a Document ID after the error occurs.

FIXED: Item Maintenance: In a non multi-currency environment, List Price will now update if the Currency ID is set to null.

FIXED: Deposits: Bank Records created by SalesPad will no longer be marked as voided when removing a deposit if it is marked as deposited in GP's Bank Deposit Entry. Now a negative record for the total amount with the same payment number will be created and the original will remain as is.

FIXED: Opportunity Card: The Amount field will now allow cent values to be entered.

FIXED: Payments: "Payment total does not match deposits+payments" error will no longer occur when saving a document when a non-functional currency deposit was added. This only affected GP2013 R2 environments.

Version 4.4.1.26

Release Date 3/18/16

UPDATED: Counter Sales: Selecting a document type on the tool strip will now prompt the user to create a new document of the selected type.

FIXED: Avatax Address Validation: The address validation selection confirmation screen no longer has extra buttons.

FIXED: Bulk E-mailing: Improved memory usage.

FIXED: Bulk E-mailing: When bulk e-mailing and using a template that contains an image of a limited size, there will no longer be a "Not enough storage is available to process this command." error.

FIXED: CardControl: When using MSMQ you will no longer get a "CardControl is not running or logged in." message when trying to capture payments on documents that have a large number sales line items. This change will require CardControl 3.0.7.0.

FIXED: Counter Sales: The tax field will now display taxes if the save button is used or some other process saves the document before going to the check-out tab.

FIXED: Customer Card: Emailing from the customer card will now properly display the sales document selector. Previously the sales document selector screen would display behind the main SalesPad screen and this would cause Salespad to appear to be frozen.

FIXED: Item Sales Options: Users will no longer receive a "Length cannot be less than zero" error when trying add items with a certain combination of item options.

Version 4.4.1.25

Release Date 3/11/16

ADDED: Sales Line Mass Update: Document date column added to the Sales Batch Lines grid.

ADDED: Security: Back Ordered Items Report: ‘Report Auto Forward After Allocation’ - Automatically forward documents through workflow after allocating line items. (Default: False)

ADDED: Security: Item Maintenance: Copy Warehouses From Existing - When creating a new item or copying from an existing item, the warehouses will be copied. (Default: False)

ADDED: Security: Item Maintenance: On Copy Script - a C# script that will execute before item attributes are copied from another item.

ADDED: Security: Sales Batch Processing: ‘Transfer To Invoice Batches Allowed’ - List of queues that are enabled for transferring sales documents to invoice. (Default: *)

ADDED: Security: Sales Line Mass Update: ‘Automatically Refresh After Allocation’ - If enabled, Sales Line Mass Update will automatically refresh after allocating or unallocating. (Default: True)

ADDED: Security: Sales Line Replacement: ‘Post Replace Script’ - Runs a script after an item has been replaced using the 'Sales Line Replacement' plugin.

ADDED: Setting: ‘Remove Non Inventory Prefix When Converting Line Item’ - When converting a non-inventory sales or purchase line into an inventory item, the non-inventory prefix will be removed. (Default: False)

UPDATED: Database Update: Speed improvements.

UPDATED: Purchase Order Generation Plugin: Security - Email Templates now only shows Purchase Order templates.

UPDATED: Purchase Order Generation Plugin: Security - Vendor Email Smart Field now is a drop down with available Vendor UDF's.

FIXED: Auto Item Conversion: When converting a Non-Inventory Sales Line Item to an Inventory Item, we now preserve the Markdown Percent/Amount.

FIXED: Configure Actions: Removing Action Buttons will no longer cause additional buttons to be removed or add an unwanted button to the Sales Entry menu bar.

FIXED: Counter Sales: Cancelling out of the new customer tab now keeps the current customer instead of changing to the walk-in customer.

FIXED: Customer Card: Discounts are now properly saved when closing the Customer Card.

FIXED: Customer Card: Users will no longer receive a second prompt when choosing 'No' while deleting a contact address.

FIXED: Dashboard Designer: Adding data sets will no longer result in an 'Object Reference' error message.

FIXED: Group Pricing: After importing or exporting, the Excel task will now be properly stopped.

FIXED: Inventory Bin Transfers: When transferring, users will no longer receive the error: "@date_Received is not a parameter for procedure sppTransferSerialBin". This is a SQL stored procedure change and does not require an upgrade.

FIXED: Smart Printing Maintenance: The queues drop-down will now only contain queues pertinent to the Sales Doc Type and Sales Doc ID.

FIXED: User Fields: Users will no longer receive an error when clearing the value of a User Field that has a default value (Integer and Decimal user fields).

FIXED: Workflow Setup: The plugin drop-down is now sorted alphabetically.

Version 4.4.1.24

Release Date 2/29/16

ADDED: Security: Item Maintenance: 'Copy Warehouses From Existing' - When enabled, and creating a new item and copying from an existing item, warehouses will be copied. (Default: False)

ADDED: Security: Item Maintenance: 'On Copy Script' - a C# script that will execute before item attributes are copied from another item.

ADDED: Settings: ‘Remove Non Inventory Prefix When Converting Line Item’ - When enabled and converting a noninventory sales or purchase line into an inventory item, removes the non-inventory prefix. (Default: False)

ADDED: Vendor cards: VRM notes now have auditing.

ADDED: Customer cards: CRM notes now have auditing.

UPDATED: ShipCenter Module: Now works with ShipCenter versions >= 1.1.0.68.

FIXED: Auto Item Conversion: The setting 'Package Item Prefix' no longer causes an issue with auto item conversion running for package items when the setting contains lower case characters.

FIXED: Counter Sales: Changes to the miscellaneous amount on the sales document header will now save properly.

FIXED: Counter Sales: When using a non-English version of SalesPad, updating quantity will no longer throw an error.

FIXED: Create Return: A newly created return's discount amount value will no longer be double the originating document’s discount amount.

FIXED: CRM Event Entry: New line characters will no longer be removed from each note on a given CRM task after clicking Refresh on the customer card.

FIXED: Dashboards: The recent DevExpress upgrade had disabled SQL custom queries. This has been corrected. (Introduced: 4.4.1.20)

FIXED: Sales Line Items: When converting a non-inventory sales line item into an inventory item, markdown percent/amount is now preserved.

Version 4.4.1.23

Release Date 2/22/16

ADDED: Security: SalesPad Today: 'Auto Refresh' - Allows a user to turn auto refresh on or off.

REMOVED: Security: 'New Customer Custom' - This security is no longer used.

REMOVED: User Field Editor: The Customize Layout option on this screen has been removed.

FIXED: Assembly Entry: Layout changes now save properly.

FIXED: BOM Entry: Layout changes now save properly.

FIXED: Crash Log: Corrected an issue where crash logs would occasionally be blank.

FIXED: Counter Sales: Sales Totals are now updated when a user opens a document.

FIXED: Counter Sales: Sales Totals box will now be cleared completely after a user has saved and submitted the document.

FIXED: Counter Sales: Sales Totals box will be cleared when switching to the Customer Search tab.

FIXED: Customer Card: Sales Graph: The Plot drop box to show all options

FIXED: Customer Card: Sales Graph: Corrected an issue where the graphs would display incorrectly.

FIXED: Customer Contact: A more descriptive error message will be shown when there is an issue saving a contract address and using the 'Address Query Handler' setting.

FIXED: Inventory Adjustment: Emailing the Inventory Adjustment report from the Inventory Adjustment module will now work properly.

FIXED: Kit Components: The Extended Cost column will now be properly populated.

FIXED: Report Designer: When exporting a report and choosing to overwrite an existing report, the existing report will now always be overwritten properly with the exported file.

FIXED: Sales Batch Processing: When using batch capture, users will no longer receive extra forwarding messages if there are no authorizations to capture or if the 'Forward After CC' security is set to false.

FIXED: Sales Document Payments: CardControl authorizations will now show in the Sales Document payments link on the header without needing to re-open the document. (Introduced: 4.4.1.13)

FIXED: Sales Entry: Attempting to edit the price of a sales line item on a copied sales document before saving will no longer result in an error.

FIXED: Sales Entry: Package component’s price level will now be set to the package’s default price level rather than the header’s price level.

FIXED: SalesPad Today: This module will now load faster.

FIXED: SalesPad Today: CRM Event and Interaction columns will now properly display data on the grids.

FIXED: User Field Editor: Creating a user field with the 'Field is Rich Text Memo' option will no longer throw an Object Reference error.

FIXED: User Fields: Users will no longer be able to enter more characters than the text user field's character limit in the text edit screen that pops up when clicking on the ellipses.

FIXED: Vendor Card: Purchase Graph: The Plot drop down box will now show all options.

FIXED: Vendor Card: Purchase Graph: Corrected an issue where the graphs would display incorrectly.

Version 4.4.1.22

Release Date 2/12/16

ADDED: Licensing: BinaryStream, BinaryStreamMEM, SalesPad.EDI and Wennsoft modules are now licensed. User will need to update their SalesPad.GP license in the about screen.

UPDATED: Remote Library: When creating a new service, recovery options will now be set to "Restart the Service".

UPDATED: Sales Document Payments: Users will now receive an alert in the lower right hand corner when attempting to do a CardControl transaction and CardControl is not logged in or running. Previously users were prompted with a message box that required user interaction.

FIXED: Batch Charge: Batch charge will now properly create charges for selected documents. (Introduced in 4.4.1.19)

FIXED: Customer Overview: When attempting to delete documents that are currently open, a message will now display notifying the user which documents were unable to be deleted.

FIXED: Opportunity and Interaction: Un-tabbing and re-tabbing these modules will now work as intended.

FIXED: Opportunity and Interaction: Right clicking on the tab and choosing Security will now properly bring the user to the module’s security in Security Editor.

FIXED: Purchases Graph: The selectable options along the top of the tab will now be saved when exiting the Vendor Card.

FIXED: Purchase Line Item: Vendor Item Numbers are now populated in SQL when the "Update Missing Vendor Items" button is clicked.

FIXED: Purchase Order Properties: When the Vendor ID field is focused and the user attempts to print or close the PO, there will no longer be a prompt to update the purchase line item costs. This prompt will only occur now if the Vendor ID was edited.

FIXED: Quick Report: Default values will now be selected and displayed properly when a combo box is used.

FIXED: SalesPad Today: A scroll bar will now be present on the Task Lists grid when the number of tasks exceeds the size of the grid.

FIXED: Sales Batch Processing: When partially transferring documents to invoice with the “Use Shipment Suffix” setting set to false, users will no longer see a message stating that the order they transferred has been created.

FIXED: Sales Document Payments: CardControl credits will now be applied properly to the Sales Document. (Introduced 4.4.1.5)

FIXED: Sales Document Search: The Country Code column will now be populated correctly.

FIXED: Sales Graph: The selectable options along the top of the tab will now be saved when exiting the Customer Card.

FIXED: Vendor Address Card: Tab text will now be updated after saving a new contact.

Version 4.4.1.21

Release Date 2/5/16

BREAKING CHANGE: Security: 'Vendor Item History' - This security will need to be re-enabled for each security group.

ADDED: Inventory Transfer: A unit of measurement column that displays the base unit of measure for the items is now available.

ADDED: Item Maintenance: When changing Item Class ID for an item, the class default values for the Valuation Method, Sales Tax Option, and Purchase Tax Option fields will be pulled from the Item Class. Changes made before changing the Item Class field will have a prompt to overwrite.

ADDED: Printing: Historical A/R Transaction Reports.

ADDED: Settings: 'Save Resources as GP Attachments' - Allows SalesPad resources to be saved as GP attachments. The attachments will be available in GP and GP attachments will be available as SalesPad resources. This feature is only available for GP 2013 R2 or newer.

ADDED: Vendor Item: User fields can now be added to the Vendor Item business object. The fields will be viewable from the Vendor tab in the Item Maintenance screen.

FIXED: A/R Statement Settings: Returns will now appear on the A/R Statement Settings grid.

FIXED: Audit Log: Printer name will now properly display in the audit record when printing a Sales Document.

FIXED: Create MO Plugin: Now respects the Requested Ship date on Sales Line Items as the

Due Date for the MO.

FIXED: Customer Card: The Interactions tab will now properly format rich text User Defined Field values.

FIXED: Import Manager: Inventory Adjustment Unit_Cost value is now respected when used to import new adjustments.

FIXED: Interaction Entry: Contact person will now properly save when editing an Interaction.

FIXED: Sales Document Line Items: The Interactions tab will now properly format rich text User Defined Field values.

FIXED: Sales Document Line Items: The On-Row Pre Delete script will now run without exceptions being thrown due to invalid parameters.

FIXED: Sales Document Payment: The 'Credit' and 'Void' buttons will no longer be disabled based off of a time restriction.

FIXED: Security Editor: Plugin grid Find Panel is now disabled.

FIXED: Security: Customer Item History: Can Export to Excel is now properly being respected.

FIXED: Security: Vendor Item History: Can Export to Excel is now properly being respected.

Version 4.4.1.20

Release Date 1/29/16

BREAKING CHANGE: Dashboards - DevExpress no longer allows for certain SQL key words in custom queries (ex: UPDATE, DELETE, ALTER, CREATE, etc.). (This breaking change is no longer an issue as of 4.4.1.24)

ADDED: Security: Counter Sales: 'Default Doc ID' - Default document ID for new counter sales transactions.

ADDED: Settings: 'Pre-Invoice Script' - A C# Script that runs on a Sales Document before it is transferred to an Invoice. This script will run when shipping from a sales document or when transferring from Sales Batch Processing or Sales Document Mass Update.

ADDED: Import Manager: Ability to import Customer Items from Import Manager.

FIXED: Bulk Printing: There was a memory leak when printing from the bulk processing screens, this was fixed through the DevExpress upgrade.

FIXED: Counter Sales: Credit Card payment button states will now properly refresh when creating a new transaction.

FIXED: Equipment Search: User fields will now properly display data on the search grid.

FIXED: Recent Sales Documents: If the form is not docked and the users right-click on the header there will no longer be an 'Object reference' error. (Introduced: 4.4.1.9)

FIXED: Sales Document Line Items: User defined fields can now properly be edited when security 'Can Edit Historical Userfields' is true.

FIXED: Signature Pad: Signatures will now persist when reopening documents in Counter Sales.

Version 4.4.1.19

Release Date 1/22/16

ADDED: Export To Excel: When trying to export to an excel file that is already open the user receives a pop-up message that states the file is already open and it needs to be closed, or they do not have the permissions to open/save the file.

FIXED: Database Update: This no longer fails when using GP2013 and SQL Server.

FIXED: Sales Document Split: Splitting a document based on multiple criteria will no longer always create a document for each criteria when fewer documents is sufficient.

Version 4.4.1.18

Release Date 1/15/16

ADDED: Customer Default Item: Quantities of zero are now allowed.

FIXED: Purchase Order Line Items: Line numbers are no longer editable.

FIXED: Receiving: If the GP Purchasing Non-Inventory Currency decimal places setup (POP40600) is not properly setup then the user would receive a "Length cannot be less than zero." error. Now the currency decimals is defaulted to 2 decimal places if not properly setup.

FIXED: Sales Document Assembly: Double clicking on the line item inside of the Assembly tab will now open the Assembly Form instead of the Item Form.

FIXED: Sales Shipment: Invoices will now open properly when transferring an order to invoice and the 'Use Order Number As Invoice Number' security is set to true and the 'Open New Shipment' is checked.

FIXED: Sales Shipment: When the ‘Use Shipment Suffix’ setting is set to false, users will no longer receive a "Fulfillment quantity cannot be greater than the line items remaining quantity." error when partially transferring serial or lot tracked items.

FIXED: Transaction Entry: Customer Number will be preserved when creating a new transaction.

FIXED: Transaction Entry: The AR Transaction Search no longer creates another task in the taskbar.

Version 4.4.1.17

Release Date 1/8/16

REMOVED: Settings: The 'Avatax Tax Schedule' setting is no longer used. Any tax schedule that starts with 'AVATAX' is now respected.

ADDED: Sales Document Search: Security: ‘Allow Light Search’ - Enables the Light Search button. This will give back results much faster, however UDF’s and some fields may be blank. (Default: False)

ADDED: Sales Document Search: Security: ‘Can Change Max Results’ - Enables/Disables the Max Results option. (Default: False)

ADDED: Sales Document Search: Security: ‘Can Change Prior Months’ - Enables/Disables the Prior Months option. (Default: True)

ADDED: Sales Document Search: Security: ‘Max Results Limit’ - Sets the max number of results that will be returned. (Default: 10,000)

ADDED: Sales Document Search: Security: ‘Prior Months Limit’ - Sets the max number of Prior Months to search. (Default: 9)

ADDED: Store/Drawer: The System Log table is now written to if the Store and Drawer information does not properly load when logging into SalesPad.

UPDATED: Application: There were numerous areas that used the Sales Document Search view that now uses a Light version. This will improve performance around: Assembly header Sales Document link, Resources Links to Sales Documents, Sales Document Plugin - Blanket Order Invoicing, Counter Sales, Sales Document Numbers List and SalesPad Today Sales Document Resource Links.

UPDATED: Sales Document Entry: When splitting there will be a speed improvement when trying to determine the next "." order number. This would be most notable if a document has been split numerous times.

UPDATED: Sales Document Search: The confirmation message when doing a blank search will now display the number of results.

FIXED: Dashboard Designer: Adding data sets will no longer result in an 'Object Reference' error message.

FIXED: On Row Change Script: Using the Warehouse Code or Sales Territory fields to trigger the script will no longer sometimes result in the script’s changes not being respected.

FIXED: Sales Document Search: Users will no longer be able to customize the layout of the form.

FIXED: Sales Person Card: When creating a new sales person, all documents without a sales person were being loaded causing a SQL time-out error or a potential "System.OutOfMemory" exception. This has been corrected and now no documents will be loaded until the Sales Person card has been saved.

FIXED: Store/Drawer: The Store/Drawer was not always loaded quickly enough and would sometimes not show as loaded in the main form.

Version 4.4.1.16

Release Date 12/30/15

ADDED: Security: Sales Document CardControl Payments: CardControl Pre Payment Script - C# script that executes before the Card Control screen loads.

ADDED: Security: Smart Printing: Include Emails to CC and BCC - Allows the user to default the inclusion of CC and BCC email addresses for contacts within Smart Printing. (Default: None)

FIXED: Counter Sales: Open, Return, and Exchange were misnamed. (Introduced: 4.4.1.15)

FIXED: Dashboard Designer: Resolved issues that occurred when using select data sets and closing and reopening a dashboard.

FIXED: Printed Reports: The Date_Received field within the InventoryLotNums sub category will now retrieve values correctly.

FIXED: Remote Library: Installing as a service will now properly create the service with a startup type set to Automatic.

FIXED: Sales Document Line Item: Customer default document items will now load ordered by CustomerLineItem_ID rather than by Item Number.

Version 4.4.1.15

Release Date 12/22/15

FIXED: Counter Sales: Corrected the way that dates are stored when switching between languages.

FIXED: Counter Sales: Corrected various translation issues.

FIXED: Item Audit: When changing a backorder quantity from zero to another number, a blank space will no longer appear in the audit log.

FIXED: Receiving: Serial Receiving will no longer require the user to re-enter To Receive amounts.

FIXED: Sales Document Entry: Multiple clicks to the ship button will no longer create multiple shipment screens.

FIXED: Sales Document Line Item: Sample items will no longer come in with a blank item number in certain situations.

FIXED: Sales Document Tracking Number: The 'Tracking #' label will no longer disappear when clearing out the tracking number text box.

FIXED: Smart Printing: There will no longer be a "Value cannot be null. Parameter name: type" error when trying to print documents that have CardControl payments. (Introduced: 4.4.1.13)

Version 4.4.1.14

Release Date 12/18/15

ADDED: Sales Document Setup: There is now the option to turn off Return Auto Fulfillment for Non-Tracked Multibin items, per document ID. This can also be disabled for Exchange Invoices.

ADDED: Setting: Inventory Adjustments: 'Set New Batch To Post To Ledger Flag' - Automatically post to ledger upon batch creation in Inventory Adjustments. (Default: False)

FIXED: Application: When logging out of SalesPad, the Date and Version number will remain visible.

FIXED: Counter Sales: Creating a new customer from the New Customer tab will now create the new customer properly. (Introduced: 4.4.1.9)

FIXED: Create Assembly: Executing this plugin through workflow will now properly open create assembly entry screen in the background.

FIXED: Create Returns: There will no longer be an 'Object reference' error when creating returns from historical invoices. (Introduced: 4.4.1.13)

FIXED: Customer AR Detail: Sales Order Num and Original Order Value columns will now correctly show the order the invoice was created from and its value rather than repeating the invoice number and total.

FIXED: Customer Card: Corrected the display of margins in the hint displayed while hovering over the customer number.

FIXED: In-Transit Transfer Fulfillment Plugin: An 'Object reference' error will no longer be displayed if the user never had a layout saved to the database. (Introduced: 4.4.1.12)

FIXED: Purchase Orders: Released Date and Last Print Date will no longer be reset when a PO is set to change order.

FIXED: Purchase Orders: Times Printed will now increment correctly when changing the status from Change Order to Released.

FIXED: Purchasing Advisor: Sop To Pop links will now be created when using a purchase plan that includes both Reorder Points and Sales Lines.

FIXED: Purchasing Advisor: Users will no longer receive a "Cannot insert the value NULL into column 'QTYONPO'" error when attempting to save a PO created from a purchase plan that includes both Reorder Points and Sales Lines. This error only happened when the Reorder Points were sorted to the bottom of the grid.

FIXED: Sales Document Entry: Copying sales documents will now correctly roll down line items req ship date to match sales document header req ship date.

FIXED: Sales Document Entry: CCH Sales Tax Office taxes will now calculate correctly.

FIXED: Sales Document Entry: When using Allocate By Batch and auto fulfillment, there were some scenarios where the document would incorrectly fulfill.

FIXED: Sales Document Line Item: Corrected the margin percentage displayed in the hover hint.

FIXED: Sales Line Mass Update: Forwarding from this form will no longer cause a popup that cannot be closed.

FIXED: Signature Pad: Signatures will now resize properly.

FIXED: Signature Pad: There is no longer a UI ghost popup when loading the plugin.

FIXED: Intrastat Tracking Module: Intrastat Tracking columns on Item Class only overrides Item Master when no value was found.

Version 4.4.1.13

Release Date 12/11/15

ADDED: Setting: Sales Document Entry: 'Allow Partial Shipping when Ship Complete' - Allows users to transfer orders to invoice if the ship complete button is checked. If set to false, a prompt will tell the user that they are not allowed to transfer to invoice until all lines have been selected. (Default: True)

UPDATED: Application: There was out dated error logging when copying values between Business Objects. This removal will help some processes and cut back on unnecessary error logging traffic.

UPDATED: Sales Document Emailing: The Sales Document audit entry will now contain the list of attachments for the e-mail.

FIXED: Attach Sales Line to PO: Voided documents will no longer be selectable.

FIXED: Audit: An audit log will be added to a sales document if a report is printed while previewing.

FIXED: Create Assembly: Executing this plugin while forwarding a document from outside of the Sales Entry will now correctly create the assembly.

FIXED: Create Return: Line Item Cost will no longer populate as zero on the return/exchange document if the security Show Cost is set to false.

FIXED: Item Analysis: Corrected the way the dates in dd/mm/yyyy format are handled.

FIXED: Item Maintenance: Users will no longer receive "Cannot insert the value NULL into column 'DECPLCUR'" when trying to create a new item in a non-multicurrency environment.

FIXED: New Customer: Corrected spelling issue related to localization.

FIXED: Sales Document: Linked lines can no longer have their warehouse code changed by changing the warehouse code in the header and rolling down the change to the lines.

FIXED: Sales Document Entry: Copying sales documents will now correctly roll down line items Req Ship Date to match the sales document header.

FIXED: Sales Document Entry: Decreased database hits when entering new line items.

FIXED: Sales Document Entry: Reduced database hits when saving a document.

FIXED: Sales Document Entry: When partially shipping non-base UofM items that are bin or lot tracked, the invoice and remaining order will no longer have quantity inconsistencies.

FIXED: Sales Document Notes: Users will no longer receive "Item has already been added. Key in dictionary" error when the "Sales Document Note Categories" setting has duplicate names in it.

FIXED: Sales Line Mass Update: Forwarding from this form will no longer cause a popup that cannot be closed to occur.

FIXED: Script Manager: Corrected display when deleting a script without a name.

FIXED: Send Fax: Changes to the fax number field will now update without having to tab off the field.

FIXED: Smart Printing: When previewing with smart printing, certain report scripting will no longer be triggered twice.

Version 4.4.1.12

Release Date 12/4/15

BREAKING CHANGE: Sales Document Entry: Separate fulfillment documents will no longer allow the user to reduce the quantity fulfilled for Lot/Serial/Bin tracked items. Fulfillment for these item types are specifically picked and need to be manually removed via the 'Fulfillment' plugin. The line quantity can then be reduced. The setting 'Quantity Decrease will Decrease Fulfillment' can be turned on to allow this functionality to work similar to Auto Fulfillment Documents.

BREAKING CHANGE: 'Inventory Transaction Report' has been renamed for each respective Inventory Transaction Type.

ADDED: Application: When crash logs are sent, they will now contain the current running plugins.

ADDED: Customer Overview: Security - Update Customer With Customer Class Information: When set to false, changing the customer class will not change any other fields on the customer. (Defaults: True)

ADDED: Layout Maintenance: There is now a warning message stating that other users should be logged out of the system or changes may be overwritten.

ADDED: Printing: In-Transit Transfer Reports have been added.

UPDATED: Layouts: Grid and Tree Layouts are now cached when loaded and only saved to the database when changed. This will help cut back on extra database traffic.

UPDATED: Customer Overview: Changing the customer class will now prompt the user with fields that will be updated and update those fields based on user input.

UPDATED: Sales Document Entry: When reducing the quantity below the quantity fulfilled on auto fulfillment documents, the quantity fulfilled will also be reduced. For Lot/Serial/Bin tracked items, fulfillment entries will then be automatically reduced.

UPDATED: Sales Document Entry: Setting: 'Quantity Decrease will Decrease Fulfillment' now works properly for separate fulfillment documents.

FIXED: Email Template: Corrected the date display to match local date.

FIXED: Application Memory Leak: Fixed a memory leak caused by the System Windows Tool Strip when using drop down buttons. This mainly affected the customer card.

FIXED: Grid Layouts: Resetting to default layouts will now save properly.

FIXED: Req Ship Date: The date format has been changed in the Req Ship Date prompt that occurs when a user attempts to change the field.

FIXED: User Fields: When using UDF calculation, if the view creation fails, the UDF calculation will now be ignored and the view will still be created. A warning will be given to the user of these changes.

FIXED: Purchase Order Properties: Reduced the number of hits to the database when loading the layout for this form.

FIXED: Customer Overview: Users will no longer receive multiple prompts to save when changing the customer class.

FIXED: Sales Document Entry: When reducing the quantity for Non-Inventory items, the quantity fulfilled field will also be reduced if it is greater than the new quantity.

FIXED: Counter Sales: The setting 'Use Logged In User Sales Person ID' and 'Use Logged In User Default Warehouse' were not being respected all the time.

FIXED: Sales Document Entry: When a customer has a Pickup shipping method and the setting 'Use Logged In Users Default Warehouse' is enabled, the tax schedule would get pulled from the Site set in Sales Order Processing Setup within GP. This setting is now more universally respected when creating sales documents.

FIXED: Sales Line Dockable Plugins: With the plugin disabled and the 'Auto Run and Dock' security enabled, opening an existing document will no longer lock up SalesPad.

FIXED: Customer Card: Users will now only get the Customer Class has changed prompt when a change has been made to the field.

FIXED: Sales Document Entry: NOLOCK's were added to spptaSopHdrRecalc_SalesPad and spvSalesDocumentSearch_base to prevent deadlock issues around SOP10106.

FIXED: Customer Card: There was an extra hit to the database for Sales Rep when saving.

Version 4.4.1.11

Release Date 11/20/15

UPDATED: Sales Document Entry: An audit entry will now be created for un-allocating sales documents.

FIXED: Sales Line Items: Cost on drop ship items on documents not using functional currency will properly calculate using the exchange rate.

FIXED: System Information: In a French or Spanish region users can now properly switch the language back to English.

FIXED: Contact Search: Contact Name will pull its value from the Customer Address rather than the Customer Card.

FIXED: Vendor Card: Voided Purchase Orders will no longer appear in the Open Purchase Orders grid.

FIXED: Sales Line Item Pricing: Resolved a possible 'divide by zero' error.

FIXED: Sales Document Transfer: When transferring an order in non-functional currency after a deposit has been applied, if the originating currency has a divide type rate calculation method, the payment on the invoice will no longer be recalculated in functional currency.

FIXED: Sales Document Properties: Sales line items can now be properly updated using the On Validating Script.

FIXED: Purchase Order Properties: Purchase line items can now be properly updated using the On Validating Script.

FIXED: Sales Document Addresses: When adding a new address, the address will now roll down to any lines that matched the previous header address.

FIXED: Sales Document Entry: Resolved a potential 'PRIMARY KEY VIOLATION' on table SY00800 when opening a Sales Document.

FIXED: Sales Document Entry: If you click the Allocate/Un-allocate buttons multiple times, accidentally or otherwise, then the document would allocate/un-allocate for each click. There is now a prompt after the document has been allocated/unallocated once, while the document is still open.

Version 4.4.1.10

Release Date 11/13/15

UPDATED: Purchase Order Entry: When adding a kit item to a purchase order, users will be prompted to add the kit components since kit items are not allowed on Purchase Orders.

UPDATED: Quick Transfer To Invoice: There is now an audit trail on the original order and new invoice for this process.

FIXED: Item Maintenance: Price Level Maintenance: The 'Price' column will now be formatted to the correct number of decimal places based on the currency is being used.

FIXED: SalesPad Dashboard Maintenance: Speed and performance improvements when creating and designing new dashboards.

FIXED: Customer Card Notes: Users will no longer be presented with multiple prompts to save when adding more than one note.

FIXED: Customer Contact Address: Opening a Contact Address and changing and saving while having unsaved changes to the Customer Card will no longer result in losing the Customer Card changes.

FIXED: Sales Document Entry: When an item is not set to allow backorders and the Setting 'Shortage Option For Item No Backorders' is set to 'SellBalance', the extended price in the table SOP10200 will now be correct.

FIXED: Settings - Quick Transfer To Invoice: Resolved an issue when using this setting and transferring a document with cancelled quantities.

FIXED: AR Statement Report: Selected documents will now properly print. (Introduced: 4.4.1.8)

FIXED: Layout Maintenance: Copying layouts to different users will no longer result in an 'Object Reference' exception when trying to access the layout.

FIXED: Settings: Enable MultiCurrency Formatting - Resolved an issue with the setting always showing 5 decimal places. Now displays the appropriate decimal places for the selected currency.

FIXED: Interaction Entry: When using the security 'Email User Task Info', additional information has been added to the email that is sent.

FIXED: Sales Document Entry: Having a 'Quantity Cancelled' and a 'Trade Discount %' will no longer result in multiple prompts to save.

FIXED: Purchase Order Entry: Resolved an 'Object Reference' error when changing the 'Ship To Address Code' and saving a Purchase Order.

Version 4.4.1.9

Release Date 11/6/15

ADDED: Registry Maintenance: Allows the user to view and manage SalesPad settings stored in the local Windows Registry.

ADDED: Registry Maintenance: Security: Can Delete Entries: Allows the user to delete specific registry entries.

ADDED: Registry Maintenance: Security: Can Edit Connections: Allows the user to edit the connections that are stored in the registry.

ADDED: Sales Document Audit: New Manual Payments made on sales documents will now create an audit trail.

ADDED: Sales Document Line Items: Security: Can Create Sales Lines - Determines if the user can create new sales line items.

ADDED: Sales Document Line Items: Security: Can Delete Sales Lines - Determines if the user can delete existing sales line items.

UPDATED: Receiving: Updated layout to use tabs for the receiving type.

FIXED: Sales Document Line Items: Users can no longer add sales line items with the enter key when the document is read only.

FIXED: Item Maintenance: The 'Shipping Weight' field now allows 9 digits to be entered. Previously only 6 digits were allowed.

FIXED: Security Editor: Resolved an issue where the search would not display all of the proper results.

FIXED: Security Editor: The security plugins grid can no longer be sorted on the 'Access' column. This previously caused issues with saving security changes.

FIXED: Prospect Search: 'Prospect Number' is now part of the default fields that can be searched on.

FIXED: Dockable Plugins: Recent Order and Recent Customers plugins can now use the Autostart functionality.

FIXED: Purchase Order Entry: When the setting 'Purchase Full Quantity on the Line' is enabled, the first Purchase Order generated from a Sales Document will now have the correct ''Qty Committed' if the quantity on the PO has been increased.

FIXED: Purchased Line Editor: When there is quantity available and increasing the quantity on a fully backordered line before receiving, the line will now be fully backordered for the new quantity.

FIXED: Bulk Emailing: The BCC field will now be split on the ';' character to allow multiple entries.

FIXED: Smart Printing: When faxing documents through SmartPrinting, we now trim the trailing '0000' added on by GP on the Fax numbers when using the setting 'Remove GP Trailing Zeros'.

FIXED: New Customer: When creating a new customer, the user is now able to abort the creation by using the Customer Address Card pre save.

FIXED: Counter Sales: When the setting 'Warn When Updating A Customer Address' is enabled, users will no longer receive an unnecessary prompt when changing tabs.

FIXED: New Customer: When the 'Customer Address Code' is blank, the customer will no longer be saved when choosing No/Cancel on the following prompt.

FIXED: Signature Pad: If there is a blank signature saved, users can now save another signature without being required to click 'clear'.

FIXED: Sales Document Line Item: Focused line item viewer will now properly show quantities when using a non-base unit of measure on an item that has negative quantity available / on hand.

FIXED: Smart Printing: Smart Printing will no longer increment the times printed value on a document if nothing has been printed.

FIXED: Customer A/R Transaction Entry: Checkbook ID will no longer be a required field unless the Cash Amount or the Check Amount fields are populated.

FIXED: Security: Newly created security groups will now appear in the Security Group drop down list in User Properties.

FIXED: Sales Document Audit: Cash payments made on ORDERS will now show the payment type of Cash Payment in the audit trail.

FIXED: Recurring Sales Generator: Kits that are set to not allow backorders will no longer cause a continuous popup when generating sales documents.

Version 4.4.1.8

Release Date 10/30/15

ADDED: Resource Search: Allows for searching for Resources throughout all of SalesPad.

ADDED: Resource Links: Tab in the Resource Search screen to see all links for a specific resource.

UPDATED: Activity Locks: Purchase order batch locks are now visible in 'Batch Activity'.

UPDATED: Activity Locks: 'Transaction Source' is now visible in the Batch lock section and now shows 'Receipt Batch' locks.

FIXED: System Information: 'SalesPad.Module.DocumentManagement' will no longer show up as an extended module.

FIXED: Customer A/R Overview: The overview will now properly refresh when clicking the 'Refresh' button in the toolbar.

FIXED: Bin Transfer: Transferring a lot tracked item will no longer result in a "Given Key Was Not Present" error when closing the processing screen.

FIXED: Report Manager: The "Value cannot be null" error will no longer be given for the AR Transactions report if there are no AR Transactions in the system.

FIXED: Sales Document: Times printed will now reset to zero when transferring an order to invoice when the 'Quick Transfer To Invoice' setting is set to true.

FIXED: Activity Locks: The 'Clear Unused Batch Locks' button no longer clears all batch locks.

FIXED: Assembly Report: The base Assembly Report will now have the correct databinding for Assembly Component Items.

FIXED: Assembly Allocation: Resolved an error when using the plugin and the folder 'Assembly Allocation' did not exist in the user 'AppData folder'.

FIXED: Receiving: The Receipt Locks will now get properly applied during the receiving process.

FIXED: New Customer: When creating a new customer, the changes made in the customer address user field tab will now be properly saved.

FIXED: Splitting: Using the setting 'Allocate With DataCollection' will no longer result in an 'Object reference' error when attempting to do multiple splits.

FIXED: Sales Document Resources: When transferring a quote to order, the resources will now be transferred to the new document.

FIXED: Counter Sales: If there are multiple payments on a document, the ‘check out’ change will no longer revert back to 0 after saving a cash payment.

FIXED: SalesPad Today: Refreshing the screen now respects the 'Show Is Completed' flag to determine what needs to be loaded from the database.

FIXED: Sales Monitor: The ability to forward documents through the workflow will now be disabled if the 'Forward Documents in Workflow' security is disabled.

FIXED: Sales Document CardControl Payments: Setting: Preauth Hold Code: 'User ID' and 'Last Updated On' will now be populated when adding a hold through via the setting.

FIXED: Resources: The 'Changed By' and 'Changed On' columns are now properly updated when making a change to an existing resource.

FIXED: Contact Resource: The Transfers, Printable and Auto Print check box will now be displayed properly on the Contact Resource grid.

Version 4.4.1.7

Release Date 10/23/15

ADDED: SalesPad Today: 'Key Type' is now an available column. This displays the originating interaction type. (Customer, Vendor, Prospect, Contact, Opportunity, Sales Document)

ADDED: Report Manager: Dangerous Goods Declaration Report: International Shipping Document.

ADDED: Report Manager: Shippers Letter of Instruction: International Shipping Document.

ADDED: Report Manager: NAFTA Certificate of Origin: International Shipping Document.

ADDED: Report Manager: Non NAFTA Certificate of Origin: International Shipping Document.

ADDED: Report Manager: Proforma Invoice: International Shipping Document.

ADDED: Customer Card: 'Ship To Address Code' is now an available column on the Customer Sales Documents grid.

FIXED: Purchase Order: When receiving an error from the eConnect 'Post' stored procedure, the transaction for the header will now be properly rolled back.

FIXED: Sales Document Payment: Improved performance and memory usage when using the Payment Plugin via Workflow.

FIXED: Smart Printing: Improved performance and memory usage.

FIXED: Smart Printing: Resolved an issue with errors not being displayed in the log when using 'Background Smart Printing'.

FIXED: Application: Phone numbers that are using the Trunk Prefix will now be properly formatted.

FIXED: Purchase Order Entry: Updating the item 'Vendor Item Number' on the Item Master will no longer cause existing Purchase Orders to prompt to save when closed without making changes.

FIXED: Purchase Line Item: When a line item is linked to a Sales Document, inventory lookup can now be accessed through the 'Item Number' column. However, the 'Item Number' cannot be changed.

Version 4.4.1.6

Release Date 10/16/15

FIXED: SalesPad: Users will no longer receive a 'Root Element is missing' error on login if the Toolbar.xml file is corrupt.

FIXED: Purchase Order Entry: When creating a new Purchase Order, the 'Vendor Company' field is now properly populated with the Vendor Name.

FIXED: Sales Document Interaction: Users will now be prompted to save the document when attempting to add an interaction to a new sales document. This prevents orphan interactions.

FIXED: Sales Document Entry: The 'SalesLineItem Columns To Include In Audit' setting now functions correctly on Quotes and Returns.

FIXED: Purchase Advisor: When two items are both 'Reorder Pts' and assigned to the same Purchase Plan, creating a Purchase Order will now have the correct quantities for both items. (Introduced 4.4.1.0)

FIXED: Sales Document Entry: Locked documents are now properly marked as read only when the security 'Can Edit Functional Currency' is set to false. (Introduced 4.4.1.0)

FIXED: Purchase Order Entry: When not allowing hold edits in GP purchasing immediately prevent saving when checked. (Introduced 4.4.1.0)

Version 4.4.1.5

Release Date 10/9/15

ADDED: In-Transit Transfers functionality is now supported within SalesPad.

UPDATED: Settings: Cache Scripts On Login - This setting now also will cache scripts located within Settings on login. Previously only scripts within security were cached on login.

FIXED: Receiving: The toolstrip would not be visible if the user has a purchase line item user field that is a quick report.

FIXED: Purchase Order Properties: Resolved an issue with the On Hold checkbox remaining checked when using the setting 'Enable Functional Currency View'.

FIXED: Purchase Line Items: When using the setting 'Enable Functional Currency View' the purchase line focus will no longer revert back to the first line when entering a 2nd item.

FIXED: Database Update: When using GP 2010 or newer on SQL Server 2005, the spptaPoLine_SalesPad procedure will no longer cause the update to fail.

FIXED: Sales Document Entry: Resolved an issue with quantities zeroing out when entering items too quickly with security 'Allow Item Description Edits' or 'Allow Item Price Edits' set to false.

FIXED: Sales Document Payments: When saving an Invoice document with a payment, the payment number will no longer be incremented.

FIXED: Sales Document Entry: When changing the header 'Price Level' and rolling down to sales line items, the GP Sales Order Processing Setup setting "Prices Not Required in Price List" is now properly respected.

FIXED: Sales Document Entry: Partially cancelled line items no longer increase the tax amount. Included is a modified procedure - spptaSopTaxEngine_SalesPad.

FIXED: Sales Fulfillment Plugin: While using multi-bin, non-tracked items that have a default sales fulfillment bin defined, resolved issues in specific scenarios that resulted in multiple fulfillment entries. This was a procedure change (sppPickMultiBin).

FIXED: Sales Document Entry: The CustomSummaryCalculate will no longer result in an "Input string was not in a correct format" exception.

FIXED: Sales Line Item: Adding a non-inventory item using the 'Default Line Item Sales Rep By Item Number' will no longer result in an 'Invalid Value' error.

FIXED: Sales Shipment: In a multi-bin environment, the total on the Shipment screen is now calculated properly when using Non-Inventory, Services, Misc Charges and Flat Fee items.

FIXED: Sales Document Line Items: Changing the quantity on a kit item after the document was already saved will no longer result in an 'Invalid value' error if the setting 'Sales Line Item Package Smart Field' is not populated.

FIXED: SQL Custom Procedure: Only Salespad views / procedures that have been modified will be displayed.

FIXED: Sales Document Addresses: When creating, updating, or switching the ship to address, the tax schedule will now roll down to the sales line items. This respects the Setting: "Prompt User When Changing Tax Schedule".

FIXED: Sales Document Addresses: When creating a new ship to address with a different Warehouse, Shipping Method, or Sales Person than the current sales document, the prompt to roll down to the sales line items will now show.

FIXED: Signature Pad: The Reasons should not show up after signing, if there are no Signature Reasons setup.

Version 4.4.1.4

Release Date 10/2/15

ADDED: SalesPad Today: Interaction user defined fields are now available in the Interaction grid.

ADDED: SalesPad Today: 'Key' column added to the Interaction grid. This allows the user to quickly find the Customer / Sales Document / Vendor that the interaction was originally created on.

ADDED: Receiving: Security: Copy PO Line UDFs To Lot UDFs - When enabled and receiving Lot tracked items: If there is a PO Line UDF and a Lot UDF with the same field name, the PO Line UDF value will be copied to new Lot UDF.

ADDED: Receiving: 'Inventory Lot Number' tab.

ADDED: Inventory Transfer: Security: Transaction Date Source - Security to allow setting Inventory Transaction data to the application date or Today's date.

ADDED: Item Sales Option Entry: Item Quantity column.

ADDED: Item Sales Option Plugin: Item Quantity field - Displays the quantity for any item sales options that are marked as an item number.

UPDATED: Purchase Receipt Card: A 'Dynamics GP' button has been added on the purchase receipt card to open the current receipt within Dynamics GP.

UPDATED: Import Manager: Prospect Import - When 'Prospect Number' is included as a column in the mapping, the import will now key off of this field as opposed to 'Prospect Name'.

UPDATED: Inventory Transfer: Serial Lot Selector: Added a 'Lot UDF' pane to allow modification of Lot UDFs that will be applied when Inventory Transfer is posted.

FIXED: CRM Contact Properties: Resetting the layout will now properly save.

FIXED: Opportunity Properties: Resetting the layout will now properly save.

FIXED: Prospect Properties: Resetting the layout will now properly save.

FIXED: Sales Person Properties: Resetting the layout will now properly save.

FIXED: Item Maintenance: Resetting the layout will now properly save.

FIXED: CRM Contact Properties: Resetting the layout will now properly save.

FIXED: Opportunity Properties: Resetting the layout will now properly save.

FIXED: Prospect Properties: Resetting the layout will now properly save.

FIXED: Sales Person Properties: Resetting the layout will now properly save.

FIXED: Item Maintenance: Resetting the layout will now properly save.

FIXED: Item User Fields: Pre-Save scripts will now function properly.

FIXED: Receiving Item User Fields: Corrected available parameters in the Pre-Save script.

FIXED: Receiving Item User Fields: Corrected possible 'object reference' error when using image user defined fields.

FIXED: Item Inventory: Double clicking the 'Backordered' quantity no longer results in multiple windows being opened.

FIXED: Purchase Line Item: Improved performance when loading purchase line items.

FIXED: Quick Report: Export to Excel Template: When replacing the tag, SalesPad now looks at columns ranging from A to ZZ.

FIXED: Sales Batch Processing: Security: Sales Batch Allowed: The '*' character will now allow all batches to be visible.

FIXED: Vendor Purchases Graph: 'Plot By' and 'Break By' drop downs will now properly filter the data being displayed.

FIXED: Equipment Resources: When adding a resource to a new equipment, the resources will now properly be displayed on the tab before saving.

FIXED: Contract Pricing: When adding an item with a 'Quantity' greater than what a contract allows on a Sales Document, the split line will now use the unit of measure of the original line.

FIXED: Purchase Order Entry: When creating a Purchase Order from a Sales Document you can now change the 'UOfM' before saving. (Introduced: 4.4.1.3)

FIXED: Sales Line Items: 'Qty Fullilled' is no longer editable in the following scenarios for Non-Tracked items in a Non-Multibin environment when linked to a Purchase Order: The document is not using separate fulfillment; The document is using separate fulfillment and the 'Purchase Status' is "Purchased".

FIXED: Sales Line Items: 'Qty Fulfilled' can no longer be increased above the 'Qty Allocated' when the item is Non-Tracked, Non-Multibin, linked to a Purchase Order, Purchase Status is "Partially Received" or "Fully Received", and the document is using separate fulfillment.

FIXED: Purchase Order Addresses: When opened, the currently selected sub-tab defaults to the 'Ship To Address' tab.

FIXED: Payment Window: The 'Void' button will no longer be disabled when the transaction time is using UTC time.

FIXED: Inventory Backorders: When double clicking a Sales Document link, going directly to the document that opens, changing, and saving no longer results in an 'object reference' error.

Version 4.4.1.3

Release Date 9/25/15

BREAKING CHANGE: Sales Document Get Tax: The plugin was previously called 'Get Tax' and is now called 'Sales Document Get Tax'. All security for this plugin will require being re-enabled.

UPDATED: Setting: Renamed the 'Use Get Tax Plugin For Tax Calculations' to 'Use Sales Document Get Tax Plugin For Tax Calculations'.

REMOVED: Assembly Entry: Security: Auto Create Batch - Saving an Assembly with the default batch set when the batch does not currently exist will result in the batch being created within GP upon saving.

FIXED: Customer Address Card: The 'Can Edit Addresses' security will no longer disable the tabs. Users can also now copy fields.

FIXED: Export To Excel: Exporting no longer requires the user to enter a file extension when using the default .xls.

FIXED: Purchase Order Line Items: 'Can Change Vendor Item Number' security can now be edited when purchasing items from a Sales Document or from a Vendor Card.

FIXED: Sales Batch Processing: Previewing when using the 'Mass Preview' setting and the 'Print as a Single Job' no longer repeats the same document.

FIXED: Customer Search: The 'Ok' and 'Cancel' buttons are now visible when the customer search is used in lookup mode.

FIXED: Quick Reports: The 'Report Files' tab and 'Print Button' will no longer flash when printing a quick report. (Introduced: 4.4.1.0)

FIXED: SalesPad Resources: Security: Download On Double Click now functions on all columns except the 'File Name' column.

FIXED: Security Script Manager: The script editor will now allow users to tab within the editor.

FIXED: Inventory Adjustment Search: Clicking the clear button on the 'Doc Date' search field will now properly clear the current entry.

FIXED: User Defined Fields: Clicking the clear button on user fields of type 'DateTime' will now properly clear the current entry.

FIXED: Sales Person Card: Dashboards can now be properly edited without resulting in an 'Object reference' error.

FIXED: Inventory Transaction: The field 'Doc Num' on lines is no longer a clickable link.

FIXED: Inventory Transaction: The field 'Doc Type' will now display the document type name as opposed to the integer value.

FIXED: Inventory Transaction: The security 'Show Cost' will now also hide the 'Ext. Cost' on line items.

FIXED: Inventory Transaction: Attempting to close an inventory transaction that has errors will no longer result in losing the transaction.

FIXED: Application: Logging out and switching databases will no longer result in duplicate module menu icons.

FIXED: Item History: Add One Time Items will now allow users to append additional items if there have already been items added.

FIXED: Item History: Confirmation for 'Add One Time Items' and 'Add Default Items' will now be displayed in a toast notification located in the lower right hand corner of the application.

FIXED: Create Return: The 'Corrected Unit Price' will now properly write to the trade discount on the return when the setting 'Use Trade Discount For Price Corrections' is enabled.

FIXED: Create Assembly: Creating an Assembly from a Sales Document with security 'Auto Save' will now auto create the default batch if it does not currently exist.

FIXED: Distribution BOM: Bill of Material components with an item decimal place of 5 will now have the standard quantity properly calculated.

FIXED: Purchase Line Items: User fields can now be edited when a purchase line item is linked to a sales document.

Version 4.4.1.2

Release Date 9/18/15

FIXED: Create Return: When creating a 'Return' from a posted 'Invoice', the document 'Shipping Method' will be copied from the originating 'Invoice'.

FIXED: End Of Day Report: The base 'End of Day' report will now properly populate check numbers.

FIXED: End Of Day Report: The base 'End of Day' report is now grouped by Store/Drawer/Machine Name.

FIXED: System User Card: The 'System User' name will now be displayed in the application menu dropdown.

FIXED: New Customer: The layouts for the 'Customer Properties', 'Customer Class Properties' and 'Customer Address' will now be properly saved and loaded.

Version 4.4.1.1

Release Date 9/18/15

ADDED: Settings: Quantity Decrease will Decrease Fulfillment - Automatically unfulfill an item when a sales line item's quantity is decreased on a Sales Document.

ADDED: Customer Address Card: Auditing is no available for customer address changes.

ADDED: Settings: Customer Address Columns To Include in Audit - Defines what column changes will be recorded in the Customer Address Audit.

ADDED: Interaction Entry: A link to the originating business object will now be displayed on the Interaction Entry form (‘Customer Num’, ‘Sales Doc Num’, ‘Prospect’, ‘Opportunity’ and ‘Vendor Num’).

FIXED: Customer Address Resources: The form caption has been renamed to 'Contact Resources'.

FIXED: Opportunity Resources: Printable, Auto Print and Transfers values will now save properly.

FIXED: Prospect Resources: Printable, Auto Print and Transfers values would not save properly.

FIXED: Customer Address Card: The 'Can Edit Address' security will now properly be respected. (Introduced: 4.4.0.18)

FIXED: Customer Address Card: When the 'Can Edit Address' security is set to false, users are no longer prevented from creating a new address.

FIXED: Sales Document Return: Resolved an issue with decimal places when creating a return for Kit items that resulted in an issue when trying to post.

FIXED: Resource Card: The 'Version' field no longer allows users to input decimals.

FIXED: Counter Sales Search: 'End Date' can no longer be set to be before 'Begin Date'.

FIXED: Counter Sales: When creating a new customer from the 'New Customer Tab', the 'Location' and 'Shipping Method' will now get properly set on the 'Customer Address'. (Introduced: 4.4.0.18)

Version 4.4.1.0

Release Date 9/4/15

ADDED: Report Manager: Added an ‘End of Day’ Printed Report that is used and customized from the Quick Report Manager and Quick Report screen. This report cannot be previewed or designed from the Report Manager.

ADDED: Quick Report: Added a Print Report button that will now print the corresponding printed report that is defined in the Quick Report.

ADDED: Quick Report: Two new tags for quick reports are now available. These include 'Report Name' and 'ReportID', which must correspond with an existing printed report.

UPDATED: Quick Report: The Print button now says 'Print Grid' on the Quick Report Manager and Quick Report form.

UPDATED: Store Setup: When deleting Stores and Drawers, users will be prompted if the Stores and Drawers are assigned.

FIXED: Counter Sales: The Sales Entry and Checkout tabs are now disabled until a valid Walk-in customer is setup. (Introduced 4.4.0.18)

FIXED: Counter Sales: On the New Customer tab, default values for Currency and Address Code will now populate correctly. (Introduced: 4.4.0.18)

FIXED: Counter Sales: When closing Counter Sales after navigating to the New Customer tab, users will no longer receive an extra prompt to save. (Introduced: 4.4.0.18)

FIXED: Counter Sales: The New Customer button is now disabled when the sales document has been saved, the customer cannot be swapped out if the document is saved. (Introduced: 4.4.0.18)

FIXED: Counter Sales: Removed an extra prompt when switching between tabs and the New Customer tab had been disabled. (Introduced: 4.4.0.18)

FIXED: Counter Sales: The New Customer Tab and the New Customer button are now disabled when a plugin forces the document to save. (Introduced: 4.4.0.18)

FIXED: Store Setup: The first new Store/Drawer created will no longer be assigned to all users. (Introduced: 4.4.0.18)

FIXED: Store Setup: Right-clicking the column headers will no longer show the Walk-In Customer menu.

FIXED: Customer Overview: When resetting the layout, users will no longer see two grids displayed.

FIXED: Sales Document Line Items: Copying lines from historical documents will now appear as fulfilled.

FIXED: Layout Maintenance: The Resources tab should now be available when selecting Customer / Sales Document, Vendor or Purchase Order tabs to be visible.

FIXED: Sales Batch Processing: When free typing a batch name, the search will now use a 'like' on the text typed. This allows searching for multiple batches that are similarly named.

FIXED: Shipping Weights: Double clicking on a row will now open the item lookup for that item.

FIXED: Fast Ship: When using filters, Fast Ship will select the top most contact rather than defaulting to the primary shipping or billing address.

FIXED: Settings: Split CC Payment: The name of this setting has been changed to Split Manual Payment and the description has been changed to reflect that this setting does not function for CardControl payments.

FIXED: Inventory Transfer: In the Lot selection screen, users can now edit the quantity available column to add or remove quantities from selected lots.

FIXED: Inventory Transfer: The fields in the footer of the grid will now function properly on the Lot/Serial selection screen.

FIXED: Inventory Transfer: Users can no longer create zero quantity transfers.

FIXED: Purchasing Advisor: Purchase Plans will no longer duplicate for Reorder Point lines if the user applies the plan more than once.

FIXED: Customer AR Details: Cash Receipts will now be included in the AR Details.

FIXED: Profitability Plugin: When sorting the grid by 'Price', updating the top row will no longer result in updating all rows.

FIXED: Settings: Backorder Made To Order Items: This setting will no longer cause fulfilled items to backorder when transferring a document.

FIXED: Dashboard Viewer: Master Filters will now function properly when viewing Dashboards.

FIXED: Assembly Line Items: Quantities will now be properly displayed when a new line item is added.

FIXED: New Customer: When creating a new customer the Tax Schedule and Sales Territory will now be set properly for the customer address. (Introduced: 4.4.0.18)

FIXED: Sales Document Resources: Resource links will no longer be duplicated when splitting documents.

Version 4.4.0.19

Release Date 8/28/15

ADDED: BOM Resources: Resource functionality added to the BOM card.

ADDED: Assembly Resources: Resource functionality added to the Assembly card.

ADDED: BOM Resources: BOM Resource transfer to Sales Document when adding a new Item that is a BOM.

ADDED: BOM Resources: Item Resources transfer to BOMs when it is first created.

ADDED: Inventory Lookup: Item Class search field.

ADDED: Inventory Transfers: Item Class Column.

ADDED: Inventory Lookup: ability to have popup plugins.

FIXED: Customer Address Card: Resolved a 'ScreenSync binding is invalid error' when the last tab selected is not the user field tab.

FIXED: Resources Tabs: Un-tabbing / re-tabbing now properly works on Resource tabs throughout the application.

FIXED: Resources Tabs: Right clicking the tab will now display a 'Security' menu item.

FIXED: Item Analysis: Resource tab buttons are disabled until the user performs a search.

FIXED: Sales Document Payments: If the Security 'Allowed Payment Options' is set to ‘Deposits’, opening payments on a Return or Invoice will no longer result in the application crashing.

FIXED: Sales Monitor: Adding a document in a queue not currently displayed in Sales Monitor will no longer require the user to reload the screen for it to be visible.

FIXED: Counter Sales: Linking a sales document to a purchase order will no longer prevent users from closing the counter sales screen.

FIXED: Avatax: Corrected a country code issue when using Shipping Methods of type 'Pickup' for customers not located in the United States.

FIXED: New Resource: When adding a new resource, the 'Download' button is no longer visible.

FIXED: Sales Document Line Item: When deleting a sales line, the resources link from the selected item will also be removed from the Sales Document.

Version 4.4.0.18

Release Date 8/21/15

ADDED: Quick Report Manager: Quick report templates now include an End of Day report.

ADDED: Sales Document Setup: Exchange Doc ID is used for the newly added exchange process.

ADDED: Create Exchange: A negative quantity Invoice or Exchange, can now be created from a posted Invoice. This allows the user to add additional documents to the Exchange document, instead of doing a normal Return document.

ADDED: Create Return: Security: Can Switch Between Return and Exchange – When set to ‘true’, the user can toggle the Exchange check box to switch between a Return and Exchange. (Default: True)

ADDED: Sales Document Entry: When manually creating negative quantity Invoice items, Lot/Serial/Bin tracked items can now have fulfillments created through the 'Sales Fulfillment' plugin.

ADDED: New Customer: Security: On Load Script - C# script that will execute when loading the new customer form.

ADDED: New Customer: Security: Open Customer Card On Completion: When enabled, the Customer Card will be opened after the customer is created.

ADDED: New Customer: Security: Quick Address Creation: When enabled, users can create an address and update address information while creating a new customer.

ADDED: New Customer: Security: Allow Screen Layout Customization - When enabled, layouts can now be customized and saved to the database.

ADDED: New Customer: Form size and location will now be saved to the registry.

ADDED: Store Setup: A maintenance screen that allows users to set-up Stores, Drawers and Walk In Customers as well as assign them to users/groups.

ADDED: Setting: Can Change Store – Defines Groups or Users that have access to change the current active application Store.

ADDED: Setting: Can Change Drawer – Defines Groups or Users that have access to change the current active application Drawer.

ADDED: Lock Screen: Users have the ability to lock their SalesPad application without logging out.

ADDED: Counter Sales: Security: Visible Batches - Limits the documents that are visible to the security group based on the Sales Batch.

ADDED: Counter Sales: Security: Can Process Return or Exchange - Allows the user to process Returns and Exchanges. (Default: False)

ADDED: Counter Sales: Security: Include Historical Invoices - The search results will include historical documents for Returns and Exchanges. (Default: False)

ADDED: Counter Sales: Walk In Customer functionality.

ADDED: Security: Counter Sales: Can Only Use Walk In Customer - Prevents users from creating new customers from Counter Sales and requires them to use the 'Walk In Customer'. (Default: False)

ADDED: SalesPad Today: Security: Default Task Tab: Defines which tab will be focused when SalesPad Today is first loaded.

ADDED: System User Properties: Can Edit Store - Allows users to edit the System User Card Store. (Default: NONE)

ADDED: System User Properties: Can Edit Drawer - Allows users to edit the System User Card Drawer. (Default: NONE)

ADDED: System User Properties: The Store and Drawers are available to view and change.

ADDED: Inventory Transaction Entry: Inventory Adjustments can now be created and edited.

ADDED: Inventory Adjustment Search: Allows users to search for Inventory Adjustments.

REMOVED: Settings: Contact Purch Agent Field: Was not used.

REMOVED: Settings: Contact Bill To Field: Was not used.

REMOVED: Settings: Contact Ship To Field: Was not used.

UPDATED: Security Editor: Plugins now display their name and descriptions.

UPDATED: Create Return: The position and size of the form will now be saved in the registry.

UPDATED: Sales Document Setup: Upon saving changes, users will be prompted to log out of SalesPad for the changes to be applied.

UPDATED: Sales Document Entry: Security: Can Edit Functional Currency - Allows users to edit Sales Documents when viewing in functional currency.

UPDATED: Purchase Order Entry: Security: Can Edit Functional Currency - Allows users to edit Purchase Orders when viewing in functional currency.

FIXED: System User Card: Attempting to open a user that is not a SalesPad user will no longer open a blank user card.

FIXED: Create Return: Creating a return for a posted invoice with partially cancelled lines will now use Invoice Quantity for the return as opposed to Quantity.

FIXED: Purchase Order: Saving a new PO with a non-inventory item will no longer result in an 'Object Reference' exception. Introduced in (4.4.0.17)

FIXED: Attach Sales Line To PO: Service items can no longer be attached to POs when they are not backordered.

FIXED: Sales Line Mass Update: 'Update Line Items' now functions correctly for all document types.

FIXED: Sales Document: The Master Number will no longer be incremented when splitting or transferring documents.

FIXED: Sales Batch Processing: Using the 'Mass Preview' functionality will now properly load each selected document.

FIXED: Sales Document Entry: Forwarding a sales document and closing the confirmation prompt will no longer forward the document.

FIXED: Customer Contact Card: Re-tabbing the Userfields or Resources tab will no longer result in an 'Object Reference' error.

FIXED: Counter Sales: Improved performance and memory usage.

FIXED: Sales Document Payments: Customizing the form has been disabled.

FIXED: SalesPad Today: When editing interactions from SalesPad today, the Contact dropdown will now be properly populated.

FIXED: SalesPad Today: Functionality to Show/Hide and to see past / future / all interactions will now function properly.

FIXED: System User Properties: Resetting the layout will now properly save.

FIXED: User Defined Fields: Values are no longer displayed as decimals. Negative values are also now supported.

FIXED: Customer Reports: added Cash Receipts Applied to Customer Reports.

FIXED: BOM Entry: Saving and closing after adding a note no longer results in an error.

FIXED: Purchase Order Line Item: Line items copied from an existing PO will now reload updated vendor item descriptions.

FIXED: New Customer Special Pricing: 'UofM', 'Begin Date', and 'End Date' are now populated using a drop down box as opposed to free typing.

Version 4.4.0.17

Release Date 8/14/15

ADDED SUPPORT: The SalesPad application now supports Microsoft Dynamics GP 2015 R2.

ADDED: Settings: Include Item Details In Purchase order Audit - Adds item details to audit records when saving a purchase order.

ADDED: Settings: Purchase Line item Columns To Include In Audit: Allows users to specify columns on Purchase Order Line items that they would like recorded in the audit when they are modified.

ADDED: Settings: Purchase order Columns To Include In Audit: Allows users to specify columns on the Purchase Order Header that they would like recorded in the audit when they are modified.

ADDED: Item Maintenance: Users can now edit currency decimal places per currency.

ADDED: Item Maintenance: Allow Backorders, Valuation Method, Quantity Decimals, Currency Decimals and Tax Commodity Code are now available fields.

ADDED: Equipment Resources: Resources are now available for Equipment.

ADDED: Equipment Resources: Equipment Resource transfer to Sales Document when creating a Service Order from Equipment Maintenance. Customer Resources transfer to Equipment when assigned using the assign to customer functionality.

UPDATED: Sales Line Mass Update: Users can now search by a date range for the sales document 'Doc Date'.

UPDATED: Sales Document Transfer: Transferring a sales document will now utilize the GP setting 'Search for New Rates During Transfer Process' in Sales Order Processing setup. With this setting enabled and transferring documents in SalesPad with exchange rates, the new document will use a current valid exchange rate if the original rate has expired.

FIXED: Phone Formatting: Extensions from countries other than US and Canada are now handled properly.

FIXED: PO Taxes: When the GP Company setting "Use Shipping Method when selecting default Tax Schedule" is unchecked, the line level purchase address tax schedule will now be correctly handled.

FIXED: Sales Document Manual Split: Improved performance and resolved a memory issue when splitting.

FIXED: Funnel: Resolved an ‘Object Reference’ error when using Interactions and/or Resources.

FIXED: Sales Document: Fully cancelled lines will no longer transfer to invoices.

FIXED: Split Sales Document: Resolved memory issues with using the plugin when the document has nothing to split.

FIXED: Item Configuration Maintenance: Resolved an error when closing the screen if the layout does not exist.

FIXED: Item Resources: Resolved issues with adding an Item Resource if the tab is the last one selected previously and then reopening.

FIXED: Purchase Advisor: When purchasing a Non Inventory line item and manually entering a purchase plan for that line, the cost will now be populated properly.

FIXED: Tracking Numbers: When partial invoicing a sales document, tracking numbers will now be removed from the original order.

Version 4.4.0.16

Release Date 8/07/15

BREAKING CHANGE: Layout Tab: Renamed to Layout Maintenance, security will be lost for the layout tab screen.

ADDED: Layouts: Layouts are now saved based on the language selected for the application.

ADDED: Layouts: Grid Layouts are now stored in the database per user / per language.

ADDED: Layouts: Grid Layouts can now be made read only per group / per user.

ADDED: Layout Maintenance: Security: Can Change Read Only Grids - Allows a user to change a specific grid layout to read only.

ADDED: Layout Maintenance: Security: Can Edit Card Tabs - Allows a user to change which tabs are visible on Customer, Sales Document, and Purchase Order cards.

ADDED: Layout Maintenance: Security: Can Copy To - Allows a user to copy grid layouts to other groups.

ADDED: Layout Maintenance: Security: Can Delete Layout - Allows a user to delete a grid layout.

ADDED: Layout Maintenance: Security: Can Only View Layouts For Current User - When enabled, only layouts for the current user will be visible.

ADDED: New Resource: Security: Default Transfers: Sets the default value for the 'Transfers' checkbox when adding a new resource.

ADDED: New Resource: Security: Default Auto Print: Sets the default value for the 'Auto Print' checkbox when adding a new resource.

ADDED: New Resource: Security: Default Printable: Sets the default value for the 'Printable' checkbox when adding a new resource.

ADDED: SalesPad Resources: Allows for creating, editing, and managing file attachments on various business objects in SalesPad. These include: Customer, Customer Address, Sales Documents, Sales Line Item, Item, Opportunity, Prospect, and Vendor Address.

ADDED: Interaction Emailing: Emailing in SalesPad can now be done through in CRM interactions. Includes features such as replying, forwarding, and attaching files using resources. Applicable to all Interactions throughout the application.

ADDED: Vendor Interactions: Interactions can now be created for Vendors.

ADDED: Purchase Order Search: Added the column 'Times Printed'.

ADDED: Sales Entry Options: Security: AutoRun: Determines if the plugin will automatically run when adding a sales line with 'Sales Entry Options'.

ADDED: Security: Counter Sales: Show Cost - Allows users to view line item cost. (Default: False)

ADDED: Security: Counter Sales: Show Price- Allows users to view line item price. (Default: True)

ADDED: Security: Counter Sales: Can Change Price - When set to false, the user cannot change the price of line items. (Default: True)

ADDED: Configuration Import: A message box will be displayed if there is an issue with the config file when attempting to import.

ADDED: User Field Editor: Update All Database Tables: Updates the views for all business objects containing User Fields.

ADDED: User Field Editor: Import Data: Functionality to import data from an excel file into the SalesPad user field tables.

FIXED: Sales Batch Processing: When partially invoicing a document, the invoice will now auto forward through the first workflow queue.

FIXED: Report Manager: Users will no longer receive an 'object reference' error when attempting to design the stock Excel Sales Document report.

FIXED: Group Pricing: An 'Object Reference' error will no longer appear when attempting to edit customer details after saving.

FIXED: User Fields: Attachments can no longer be added to attachment user fields when set to read only.

FIXED: Security Editor: Passwords will now be properly encrypted upon saving.

FIXED: Security Editor: Resolved issues caused by having an apostrophe in a Security Group name.

FIXED: Equipment History: When creating a service order, the context menu will now have a fixed length when only one service document is populated in Settings.

FIXED: Inventory Analysis: The month average columns will now correctly use the sales document line item's warehouse rather than the customer's default warehouse when determining the average quantity sold in the previous months.

FIXED: Inventory Analysis: Fixed performance issues when there are large quantities of items and locations.

FIXED: Receiving: Receipts created for Dropship Purchase Orders will now use the 'Payment Terms' from the Purchase Order.

FIXED: Purchase Order Entry: 'Buyer ID' will now be properly populated when opening a new Purchase Order.

FIXED: Purchase Order Printing: Printing a PO will increment the 'Times Printed' field if the purchase order is previewed, emailed or printed.

FIXED: Purchase Order: The revision number field will only increment when a Purchase Order moves from a 'Released' status to a 'Change Order' status.

FIXED: Sales Monitor: Batch totals will now properly refresh when the screen is refreshed.

FIXED: Sales Document Split: Improved memory usage when splitting documents with a large number of line items.

FIXED: Sales Entry Options: The AutoRun security for the Sales Line Components plugin will no longer determine if the Sales Entry Options are set to autorun.

FIXED: Customer Overview: When using the security 'Enable Open Sales Documents Quick Load Grid', the time will no longer be displayed in the 'Date' column on the grid.

FIXED: Sales Document: Using the allocate functionality on a sales line that is linked to a PO will no longer allocate / fulfill that line item.

FIXED: Sales Order Entry: When purchasing a kit sales line and having the setting 'PO Cost Selection' set to 'PO Cost Selection User Field', the setting 'PO Cost Selection Fallback' will now be used.

FIXED: Customer AR Detail: Clicking on a document in the balance screen will no longer open an incorrect document if another document with the same name existed.

FIXED: Configurator: Having an attribute with no name will no longer cause an 'object reference' error when navigating to the pricing tab.

FIXED: Configuration: Attributes without names and options will now be deleted upon save.

FIXED: Configurator - Attribute Price Details: Updated and adjusted the visual style to conform to the previous screen.

FIXED: Configuration Import/Export: Users can no longer Import/Export when no configurations are selected.

FIXED: Sales Line Configurator: The text above a configuration attribute will now display a message that the 'Config Item Number is missing' if this field is empty.

Version 4.4.0.15

Release Date 7/31/15

BREAKING CHANGE: Settings: Removed setting 'Convert to BOM Suffix'. Converting sales line items to a BOM will default the new item number to a blank value.

FIXED: Sales Document Convert to BOM: Resolved issue with new BOM item not properly saving.

FIXED: Group Pricing: Closing and reopening the export and import windows will no longer result in an error.

FIXED: Sales Monitor: Resolved an issue for a potential 'Divide by zero' error message when refreshing.

FIXED: Purchase Order Generation: Non-Inventory items will now correctly have 'Item Purchase' and 'Item Tax Schedules' set correctly.

FIXED: Purchase Order Generation: Package lines will no longer throw an econnect error stating "Invalid Purchase Item Taxable status" when using Purchase Order Generation. The top level non-inventory package line will not be added to the PO.

FIXED: Item Maintenance: Items will no longer save when cancelling out of the item maintenance window.

FIXED: Inventory Maintenance: Resolved an issue with warehouses not getting properly saved.

FIXED: Purchase Line Items: The changes made to the field 'Capital_Items' will now properly save.

FIXED: Purchase Order Entry: When changing the vendor on the header of a purchase order, the cost on the line will no longer be re-calculated for non-inventory items.

FIXED: Report Manager: Exporting a report that is an exact copy of a SalesPad default report will no longer fail.

FIXED: Sales Monitor: Security: Sales Doc IDs Visible and Show Sales Document Type ID Groups were conflicting with each other.

FIXED: Direct Sales Entry: Security: Sales Doc IDs Visible - The default value will now properly show all document IDs.

FIXED: Sales Document Payments: When partially invoicing a document with a deposit, the deposit will now properly move to the invoice.

FIXED: Purchase Order Addresses: Loading the tab with no vendor selected will no longer result in an 'Object reference' error.

FIXED: Create Return: Resolved the error 'missing column' when creating a return from a posted invoice. Introduced in 4.4.0.14.

FIXED: Group Pricing: The 'Sales Doc ID' drop down list will no longer be populated with the previous groups list if 'Sales Doc Type' is not selected.

FIXED: Sales Document Payments: The setting "Authorization Up-Charge" no longer applies to charge amounts.

Version 4.4.0.14

Release Date 7/24/15

BREAKING CHANGE: Removed several Equipment UDFs from Setup. A migration tool has been created to move the data in the previously referenced UDF fields to new core fields.

BREAKING CHANGE: Settings: Opportunity Sales Doc Type - Moved to Security > Convert Opportunity To Quote.

BREAKING CHANGE: Settings: Prospect Customer Class - Moved to Security > Convert Prospect To Customer.

ADDED: Equipment Migration Tool: Migrates previous equipment User Defined Field data to newly added core equipment fields.

ADDED: Equipment Troubleshooting: Enables functionality for tracking troubleshooting for Equipment.

ADDED: Equipment Warranty: Enables functionality for tracking warranties on Equipment.

ADDED: Equipment Contract: Enables functionality for tracking contracts for Equipment.

ADDED: Equipment CRM Task: Enables the creation of CRM Tasks from an Equipment card for the Customer that the Equipment is assigned to.

ADDED: Equipment Notes: Enables the ability to add notes to Equipment.

ADDED: Equipment Card: A banner will now display Warranty and Contract Date information.

ADDED: Generate Equipment Contracts: Enables the generation of Equipment Contracts from Existing Equipment Warranties.

ADDED: Renew Equipment Contracts. Enables the renewal of existing Equipment Contracts.

ADDED: Item Equipment Troubleshooting: Enables the Item Equipment Troubleshooting tab on an Inventory Card that shows all solutions for a given item.

ADDED: Setting: Equipment Contract Item Number UDF - Item Master UDF used to defined the Item to be added to Equipment Contract Sales Documents.

ADDED: Setting: Sales Line Serial Numbers - A Sales Line Item UDF used to store the

Equipment Serials that contributed to the creation of the line when generating an Equipment Contract Sales Document.

ADDED: Setting: Equipment Type - A semi-colon delimited list of Equipment Types that are available in the Equipment Type drop down on an Equipment Card.

ADDED: Setting: Restrict Equipment Contract Start and End Dates - When true, Equipment Contracts will always begin on the first of a month.

ADDED: Sales Entry Options: Security: Decline Option - Text that will be used as the options when declined. A comment will be added to the 'Sales Line Options' user field. (Default: “”)

ADDED: Create Return: Sales Line user fields are now visible and can be edited (non-tracked items). The new values are saved on the newly created return.

ADDED: Security: Counter Sales: Show Cost - Enables the ability to see line item cost. (Default: False)

UPDATED: Create Return: There are now informational panels when the original document has a 'Discount Percentage' or 'Discount Amount'.

UPDATED: SalesPad Ribbon: Menu option will now be hidden instead of being disabled if the user does not have access.

FIXED: Equipment Card: Assign Equipment. Fixed an issue where Equipment was not getting assigned to a Customer.

FIXED: Equipment Search: Fixed an issue where Equipment Search results were showing duplicate entries.

FIXED: Item Maintenance: Vendor Item Numbers and Locations will no longer save if the user chooses to not save the item.

FIXED: Create Return: When creating a Return from an Invoice that has a Discount Amount or Discount Percentage and additional return charges are added, the new document total will now be correct.

FIXED: Create Return: When the Document has a Discount Percentage and an additional return charge percentage is used then the total discount will be added as a Discount Amount, along with a corresponding audit trail.

FIXED: Create Return: 'Return Total' will now reflect Discount Amount or Discount Percentages from the original document.

FIXED: Counter Sales: Read Only Sales Line User fields are no longer editable.

FIXED: User Defined Fields: Hyperlink User Defined Fields set to read only can now be clicked to open the link.

FIXED: Sales Document Entry Plugins: User defined fields on 'Document Release', 'Sales Document Manual Split', 'Fulfillment', 'Shipping Weight', and 'Split Sales Document' are no longer editable. (Introduced: 4.4.0.13)

FIXED: Interaction Event Entry: 'Assigned User' now defaults to the current user when creating a new interaction.

Version 4.4.0.13

Release Date 7/17/15

BREAKING CHANGE: Convert Prospect To Customer: Security: Pre Convert Script - The alias for the business object 'Prospect' changed from 'o' to 'p'. Requires current scripts to be updated.

ADDED: Purchased Line Editor: Security: Pre Save Script - A C# script that runs before saving.

ADDED: Document Release: User defined fields for Sales Line Items are now accessible in the plugin screen.

ADDED: Sales Document Manual Split: User defined fields for Sales Line Items are now accessible in the plugin screen.

ADDED: Sales Fulfillment: User defined fields for Sales Line Items are now accessible in the plugin screen.

ADDED: Shipping Weight: User defined fields for Sales Line Items are now accessible in the plugin screen.

ADDED: Split Sales Document: User defined fields for Sales Line Items are now accessible in the plugin screen.

UPDATED: sppPickLots: Now allows for a custom stored procedure 'spcpPickLots'.

UPDATED: sppAutoFulfill: Now allows for a custom stored procedure 'spcpAutoFulfill'.

FIXED: CRM Event Entry: Emails sent when a new task is created will now display the correct date.

FIXED: Equipment Service Order Search: Voided Service Orders will no longer be displayed in the search results.

FIXED: SalesPad Licensing: Resolved an issue when logging into SalesPad with querying the Seat Count which would result in the error 'Sequence Contains No Matching Element'.

FIXED: Receiving: Receiving a bin tracked item in non-base unit of measure will now correctly calculate the bin quantity on the receipt.

FIXED: Fulfillment: Resolved an 'Object Reference Error' when clicking on the select fulfillment button with nothing selected in the grid.

FIXED: Purchased Line Editor: Users will no longer receive an "unable to allocate/fulfill" error when using the 'Sync To Received' functionality and the Sales Document and Purchase Order are in different unit of measures.

Version 4.4.0.12

Release Date 7/10/15

ADDED: Setting: Limit UofM Dropdown to Pricing Only - Limits the unit of measures displayed for sales line items in Sales Entry to only unit of measures which have a price setup for the item. (Default: False)

ADDED: Inventory Lookup: Users now have the ability to search by 'Item Class'.

ADDED: Inventory Transfers: The column 'Item Class' is now available to add to the grid.

ADDED: Purchase Line Item: Security: StrikeThrough Qty Zero - Changes the appearance of the Purchase Line (strike through), if the quantity ordered on the line is zero.

FIXED: Application: The appropriate ProgramData and AppData folders will now automatically be created when installing SalesPad on a new machine.

FIXED: Settings: Serial/Lots to Print Per Row - Printing serials/lots per row will now break the row based on a new bin and/or warehouse.

FIXED: Customer Card Control Transactions: The 'Transaction Type' column now displays the proper name for the transaction type instead of the number.

FIXED: Sales Document CardControl Payment: Double clicking the buttons 'New Auth', 'New Charge', or 'New Credit' will no longer result in opening the CardControl transaction screen multiple times.

FIXED: AR Detail: Double click a link on the AR Detail will no longer result in opening multiple windows.

FIXED: SalesPad Today: CRM Interactions are now visible in SalesPad Today.

FIXED: Purchase Line Item: Changing the quantity on a line item to 0 and using the greatest unit of measure out of the schedule will no longer result in a divide by zero error.

FIXED: Sales Line Package Editor: When manually creating a package using the package editor, the quantity fulfilled will now be editable when the user is in a Multi-Bin environment.

Version 4.4.0.11

Release Date 7/02/15

ADDED: Setting: CRM: Use Opportunity Sales Person And Territory When Converting To Quote - Use the sales person and territory on the opportunity rather than the customer's sales person when converting an opportunity to a quote.

ADDED: Purchase Line Item: When adding a non-inventory line item to a purchase line, SalesPad now respects the GP setting for currency decimal places.

ADDED: Sales Inventory Lookup: 'Item Sales Tax Option', 'Item Sales Tax Schedule', 'Purchase Tax Option' and 'Purchase Tax Schedule' columns have been added.

ADDED: Inventory Lookup: 'Item Sales Tax Option', 'Item Sales Tax Schedule', 'Purchase Tax Option' and 'Purchase Tax Schedule' columns have been added.

ADDED: Security Script Manager: A plugin that allows administrators to create and manage Security scripts, for one or more user groups at the same time.

ADDED: Security scripts now have versioning that allows administrators to keep track of changes made to scripts over time.

ADDED: There is now a unit of measure dropdown on the item inventory tab in inventory lookup. If the unit of measure is changed then the inventory levels in the tab will be converted to use that unit of measure rather than the base.

ADDED: Grid Extender: Auto filters can now be named, saved, re-used, and deleted from the "Saved Filters" and "Save Current Filter" buttons available in the grid extender.

ADDED: Security: Sales Document Properties: Roll Down Warehouse Changes - Allows a user to either always or never roll down warehouse changes or prompt to roll down warehouse changes.

FIXED: Workflow Rule Evaluation: The 'COMPLETELY BACKORDERED' workflow rule will no longer evaluate as true if all the items on the document are non-sales inventory items.

FIXED: Group Pricing: Deleting a Group Price and then attempting to save will no longer result in an error.

FIXED: Group Pricing: The address code drop down will now be populated immediately after adding a customer.

FIXED: Group Pricing: Adding an item, saving and then changing information on the new row will no longer cause duplicate rows to appear after closing and reopening Group Pricing.

FIXED: Group Pricing: Saving a group price after adding a customer without a name will no longer cause an empty entry to appear in the list after the module is closed and reopened.

FIXED: Inventory Analysis: The save button will no longer attempt to save if no item is selected.

FIXED: Purchase Line Item: When adding an item that is set to taxable, 'Purchase Item Tax Schedule' will now be selected as the tax schedule as opposed to the 'Sales Item Tax Schedule' instead of the.

FIXED: Purchase Order Entry: Adding multiple items from Inventory Lookup would not fill in the 'Vendor Item Number' properly.

FIXED: Sales Document Payments: Cash/Check payments will no longer show as two payments if using payment user fields and a previous credit card/manual payment was placed on the document.

FIXED: Sales Document Payments: Users will receive a popup message if they attempt to create a deposit payment with an invalid checkbook ID.

FIXED: Sales Document: When using the Ship button on a sales document to partially invoice specific lines, the new orders will now properly get created. (Introduced in 4.4.0.4)

FIXED: Security: The reset password checkbox will no longer get set for all users when setting it for a select user.

FIXED: Group Pricing: Resolved an issue with item duplicates.

FIXED: Settings: Shortage Option For 'No Backorder Doc ID' and Shortage Option For 'Item No Backorders' no longer have the option for 'AllocateAvailableComponents'.

Version 4.4.0.10

Release Date 6/26/15

BREAKING CHANGE: BOM Entry: The unit of measure on Bill of Material component items can no longer be edited and will always use the base unit of measure. This is to stay consistent with GP functionality.

ADDED: There is now a unit of measure dropdown on the item inventory tab in inventory lookup. If the unit of measure is changed then the inventory levels in the tab will be converted to use that unit of measure rather than the base.

ADDED: Sales Line Mass Update: Security: Show Indicator for Safety Stock: Shows a blue exclamation point on the line if the quantity backordered is greater than 0 put the item is available in inventory.

ADDED: Sales Document Line Item: Inventory Quantities displayed when selecting a line are now calculated based on the unit of measure selected at the line level. Previously quantities were always listed in Base Unit of Measure.

ADDED: Convert Prospect To Customer: Security: Enter Customer ID Manually - Users can now manually enter the customer number when converting a prospect to a customer. If the field is left blank, a customer number will be automatically generated.

FIXED: Sales Line Mass Update: The backorder indicator will now use the same calculation as the sales line indicator. The indicator will be shown when there is quantity available for the selected warehouse.

FIXED: Application: Increased performance when switching between application themes.

FIXED: Sales Document Properties: The 'Req Date' and 'Doc Date' fields will now properly save when modified and the document is saved without un-focusing the field.

FIXED: Messenger: Reduced the width message prompts within the application.

FIXED: Convert Prospect To Customer: Running the plugin will now require the prospect to be saved.

FIXED: Application Date: The format used to display the application date in the status bar will now remain consistent with the windows settings for the current user.

FIXED: Application: When the language is set to English, grids and date fields will now respect the regional settings set in Windows.

FIXED: Setting: Show Status Bar: Now defaults to true on new installs.

FIXED: Application: The default theme is now 'Office 2013 Light Gray'.

FIXED: Item Analysis: The begin date and end date will now be validated.

FIXED: Sales Line Purchases: Posting a receipt while the sales document is open and then breaking the link to the PO will no longer cause the line to be permanently linked.

FIXED: Purchasing Advisor: When using 'Qty Needed' to create POs, the unit of measure used should always be the base unit of measure.

FIXED: Purchase Line Item Cost: When using the setting 'Use Vendor Costing for Vendor Selection' on a vendor that does not have vendor costing setup, the cost will now default to use the setting 'PO Cost Selection'.

FIXED: PO Taxes: When the GP Company setting 'Use Shipping Method when selecting default Tax Schedule' is unchecked the line level purchase address tax schedule will now be correct.

FIXED: Smart Printing: The 'Times Printed' will now be incremented when printing/emailing/faxing a document using Smart Printing.

FIXED: Sales Document Search: The 'Times Printed' column will now be displayed properly for historical documents.

FIXED: Attach Sales Line to PO: Users will no longer receive a confirmation message if a link no does not exist when attempting to break a link.

FIXED: Sales Document: Shipping a sales document with lines that have 0 quantities will no longer result in a eConnect error. The functionality is now consistent with GP.

FIXED: Sales Document: When using the un-allocate functionality on a document setup to use 'Allocation By Batch', the fulfillment will no longer be removed if the line is fulfilled.

FIXED: Sales Batch Processing: Added a check to 'forward' to ensure something is selected.

FIXED: Sales Document: When allocating a document using 'Allocation By Batch', inventory availability will now be properly updated.

FIXED: Profitability Plugin: The cost on the line is now calculated properly based on the unit of measure selected.

FIXED: Sales Document Line Item: Standard cost on the line is now calculated properly based on the unit of measure selected.

FIXED: Sales Batch Processing: When selecting multiple batches, the search results will now display documents for all selected batches.

FIXED: Direct Sales Entry: Security: Sales Doc IDs Visible - The security will now be properly respected.

FIXED: Create Assembly: The unit of measure on the assembly will now correctly display the base unit of measure for the Bill of Material used.

FIXED: Create Assembly: Assembly quantities will now be calculated using the base unit of measure from the BOM item.

FIXED: Convert To BOM: Using this plugin will now use the base unit of measure from the line items that are being converted to a BOM.

FIXED: CardControl: SalesPad will now properly pass the Commodity Code to CardControl when configured as a UDF on the Sales Line.

FIXED: Manual Split: Users will no longer be able to split returns if a credit has already been applied to the document.

Version 4.4.0.9

Release Date 6/12/15

ADDED: Security Script Manager: A tool that allows administrators to create and manage scripts for one or more security groups.

ADDED: Security scripts now have version control that allows administrators to keep track of changes made to scripts over time.

ADDED: Split Sales Document: Sales documents of type 'RETURN' can now be split using the plugin.

UPDATED: Purchased Line Editor: There is now an appropriate audit record written to the Sales Document and the Purchase Order when a line is updated.

FIXED: Layout Tab: Resolved various issues when modifying layout tabs.

FIXED: Sales Document Split: Having an empty 'Ship Qty' on splitting will no longer result in an error.

FIXED: Security Editor: Deleting a user will now properly remove the user. (Introduced 4.4.0.8)

FIXED: Purchase Order Entry: Purchase Tax Option will now be defaulted in from the Item Master or the Purchasing Options when a new line is added to a Purchase Order.

FIXED: General: When restricting searches to a certain numbers of months on various screens, an error will no longer be thrown when entering in an extremely large value.

FIXED: Blanket Order Release: Several columns in Blanket Order Release are no longer editable to prevent invalid values from being entered.

FIXED: Blanket Order Invoicing: Users will now only receive one popup when moving a blanket order to invoice.

FIXED: Sales Document Profitability: Empty lines will no longer be added to the 'Profitability' grid when opening.

FIXED: Sales Line Item Hint: The hover hint will no longer display margin or cost information if the user does not have security access to these fields.

FIXED: Backordered Item Report: 'Move to Batch' functionality will now display a results log upon completion.

FIXED: Purchased Line Editor: Resolved rounding issues with the 'Sync To Received' process if the Purchase Order and Sales Document are in different Unit of Measures.

FIXED: Sales Document Shipping: Resolved fulfillment issues when partial invoicing from a Sales Document a second time with lines that are not in the base Unit of Measure.

FIXED: Sales Document Fulfillment Plugin: If a 'UofM Schedule' has the reverse conversion setup (ex. Feet to Yards, and Yards to Feet) this will no longer result in a SQL error: "Subquery returned more than 1 value."

FIXED: Sales Document: Shipping a sales document with lines that have 0 quantities will no longer result in an eConnect error. This is now handled the same way as GP.

FIXED: Sales Document Entry: When transferring a quote to an order, we now rollback the transaction in case of errors when saving the new document.

FIXED: Workflow: The 'COMPLETELY BACKORDERED' rule will no longer evaluate as true if all the items on the document are non-sales inventory items.

Version 4.4.0.8

Release Date 6/05/15

ADDED: System User Card: SalesPad user information can now be updated/viewed.

ADDED: System User Sales Documents: Displays Sales Documents created by the user or assigned sales rep.

ADDED: System User Purchase Orders: Displays Purchase Orders created by the SalesPad user.

ADDED: System User Contacts: Displays CRM Contacts created by the SalesPad user.

ADDED: System User Notes: Notes that can be added/edited/viewed for individual SalesPad users.

ADDED: System User Fields: User fields can be added to the ‘System User’ business object.

ADDED: User Defined Fields: In the User Field Editor there is now a Group Permissions option for individual UDF's, when set for specific groups those UDF's will only be visible for the appropriate groups.

ADDED: SalesPad Today: Grouping functionality added to the module. Task dates also sorted by time of day.

UPDATED: SalesPad Dashboard Maintenance: Improved speed and performance.

UPDATED: Dashboard Designer: Improved speed and performance.

UPDATED: SalesPad Dashboard Viewer: Improved speed and performance.

FIXED: New Customer: The 'Sales Rep' drop down list will no longer display inactive sales reps.

FIXED: Sales Document Properties: Minor improvements to 'Batch/Q' combo box padding.

FIXED: Price Level Maintenance: Users can no longer free type a 'Unit of Measure' or a 'Price level'. The values must be selected from the dropdown.

FIXED: Sales Document Mass Update: When updating the 'Warehouse' or 'Req Ship Date', the updated value will now roll down to the line items.

FIXED: System Information: Users can no longer free type in the language selection combo box.

FIXED: System Information: The 'Printing Module' will no longer be shown as a custom module.

FIXED: Security: Blanket Order Release: Visible Blanket Order Quote IDs: Users will no longer be able to create blanket orders from documents that are not specified

FIXED: Security: Blanket Order Release: Descriptions of misc securities will now display properly.

FIXED: Payment Window: Credits and other transactions are now voidable on returns if they have not been settled.

FIXED: Payment Window: Authorizations are always voidable

FIXED: SalesPad Grids: When clicking the grid menu, the column will no longer be sorted at the same time.

FIXED: Item Maintenance: Users will no longer receive an 'Object reference' error if the column 'Order Point' is left blank in the 'Warehouse & Resource Planning' tab.

FIXED: Purchase Line Item: Convert Non Inventory Items on purchase line would not change the NI flag automatically.

FIXED: Purchasing Advisor: Setting: PO Cost Selection: When using the Vendor 'Item Special Cost' option, users will no longer receive an error when trying to create a PO.

FIXED: Payments: Cash\Check - The 'Checkbook' dropdown will now be enabled when selecting the deposit radio button.

FIXED: Sales Document Payments: Quick save will no longer prevent a payment from being saved on invoices with backordered items.

FIXED: Sales Batch Processing: When capturing credit card authorizations and choosing to not forward the documents, the grid will now refresh be refreshed.

FIXED: Sales Batch Processing: Improved the column sizing on the log displayed after capturing Credit Card Authorizations.

FIXED: Sales Line DC Allocate: When unable to connect to the DC server, users will now receive a message box detailing the error as opposed to a crash log.

FIXED: Shipping: Sales Document Freight Calculator: USPS fixes to account for changes in the API for international shipments.

FIXED: Sales Document Entry: The 'Read Only' flag will now be reset when copying Sales Documents.

FIXED: Attach Sales Line To PO: The lines to be purchased will now be properly displayed correctly when the language is set to Spanish.

FIXED: Customer: Users will no longer receive a 'NULL insert' error when saving a customer with a mapped GP user field.

FIXED: Sales Document Transfer: Transferring a document will now be recorded as "Transferred" on the original document audit log. Previously was recorded as "Deleted".

FIXED: Smart Printing: The 'User' criteria in smart printing is no longer case sensitive.

FIXED: Assembly Entry: When an assembly is deleted and a user attempts to reopen that assembly, they will be prompted that the assembly no longer exists.

Version 4.4.0.7

Release Date 5/29/15

FIXED: Filter Scripts: 'Customer Emails' and 'Customer Contact Emails' will now allow the use of filter scripts.

FIXED: Customer Card: Users will no longer receive a 'disposed object' error upon closing the 'Customer Card' when using the notes tabs.

FIXED: Vendor Card: Users will no longer receive a 'disposed object' error upon closing the 'Vendor Card' when using the notes tabs.

FIXED: Item Card: Users will no longer receive a 'disposed object' error upon closing the 'Item Card' when using the notes tabs.

FIXED: SalesPad: Resolved various 'Object Reference' Errors when logging out while having forms that need to be saved.

FIXED: Database Update: Resolved a 'datetime conversion' error when running the database update on a French SQL server.

FIXED: SalesPad: Improved memory usage and speed on login.

FIXED: Sales Document Line Items: When using a language other than English, the quantity on the sales line will now be editable on a new document.

FIXED: Sales Line Item: The quantity changed on kit items does not re-sequence the line item and will maintain the initial line position.

Version 4.4.0.6

Release Date 5/22/15

ADDED: Item Maintenance: The fields 'Sales Tax Option', 'Sales Tax Schedule', 'Purchase

Tax Option' and 'Purchase Tax Schedule' are now part of the Item Maintenance screen.

ADDED: Purchase Line Item: The fields 'Purchase Tax Option', 'Tax Schedule' and 'Item Tax Schedule' are now dropdowns that can be modified for tax calculation purposes.

ADDED: Security: Sales Line Mass Update: Post Allocate Script - A C# script that executes on each sales line after allocation.

ADDED: Assembly Search: 'Assemble Qty' is now a visible column.

ADDED: FedEx Quote: Rate quote support added for international shipments originating from Canada and Canadian domestic shipments.

ADDED: Customer Contact: Audit records will now be recorded in the 'Customer Audit' when inserting, updating, and deleting a contact.

UPDATED: Receiving: Security: Write Back Cost: The PO Audit will now be updated when the cost is written back.

UPDATED: Settings: On Load Email Script - This setting will now run when emailing via 'Smart Printing'.

UPDATED: Purchase Order Line Items: Security: Cancelled Line Color - When a PO is released, this security will now be respected.

UPDATED: Purchase Order Line Items: Security: Strike Through Cancelled Lines - When a PO is released, this security will now be respected.

FIXED: Application: Logging out of a SalesPad connection will now refresh the title info.

FIXED: Email Template Editor: Resolved an 'Out of Range' error when opening the screen with a blank template saved in the database.

FIXED: Application: 'Item Analysis', 'Vendor Purchases Graph' and 'Customer Sales Graph' will now let the user re-tab the window after it has been un-tabbed.

FIXED: SalesPad: A new folder with the version number will no longer be created in the ‘ProgramData’ folder with each new install.

FIXED: Purchase Order Address: ‘Ship To Name’ will now populate with the value from the ‘Name’ field from the address rather than the ‘Company Name’ field.

FIXED: Receiving: The 'Extended Cost' is now calculated properly when the user changes the unit cost on the receiving line.

FIXED: Receiving: Security: Write Back Cost: Users will no longer receive an Econnect error when using this security with an item of Non-Base Unit of Measure.

FIXED: Choose Purchase Plan: Changing the rounding option will now trigger the recalculation of the quantity.

FIXED: Split Sales Document: Splitting a document in an automated (+) queue after using a Run Script will no longer throw an exception to the user.

FIXED: Sales Document Properties: On Validating Script: When opening a document in a read only queue and using the 'Back' plugin to modify the document, 'On Validating Scripts' will now be triggered without having to close and reopen the document.

FIXED: Sales Batch Processing: Improvements to speed and performance when searching in 'Sales Batch Processing' and using the security 'Sales Batches Allowed'.

FIXED: Item Sales: Rows for Historical documents will now be shown with a slightly different color font.

FIXED: Avatax: When using Avatax to calculate taxes, the tax amount on the sales line will now match the amount on the header.

FIXED: Purchase Line Item: Tax Amount will now be displayed properly on the line items.

FIXED: Purchase Order Properties: Changing the vendor at the header of the document will now recalculate the cost on the purchase line to account for changes in 'Vendor Special Costing'.

FIXED: Assembly Entry: Stock assembly components will now be allocated and unallocated correctly when using the Assembly Allocation plugin.

FIXED: Assembly Entry: The correct batch source will now be used when creating an Assembly. Previous was a problem if a SOP Batch of the same name existed.

FIXED: Assembly Entry: Stock and Assemble quantities will now be correctly populated for BOM components set to 'Build Stock Method'.

FIXED: Assembly Entry: All components will now get allocated when the Assembly is released. If an over allocation exists and the user chooses to not over allocate, the Assembly will not be saved and released.

Version 4.4.0.5

Release Note 5/15/15

ADDED: Sales Shipment: The following hotkeys have been added: 'Alt + s' - Selects all quantities fulfilled. 'Alt + n' - Deselects all quantities for shipping. 'Alt + h' - Creates the shipment.

ADDED: Printing: An audit message will now be recorded when printing a PO or Sales Document from print preview.

ADDED: Purchase Line Editor: The column 'Customer Number' was added along with the ability to search on this field.

ADDED: Security: Purchase Order Line Items: 'Show Cost' - Determines whether or not users in the security group can see the cost on PO line items.

FIXED: Group Pricing: When saving, the group that was currently selected will retain focus rather than focusing to the first group on the list.

FIXED: Customer Search: The Statement Name field will now properly clear when the 'Clear' button is clicked in the toolbar.

FIXED: New Customer Contact Address: Customer audit message will be recorded for when the new customer was created.

FIXED: Printing: Using Report Controlled in the Print Attachments drop down will no longer cause an 'object reference' error if using 'Print as a Single Job'.

FIXED: Smart Printing Maintenance: Add size restriction for the tool bar buttons.

FIXED: Sales Territory Commissions: Changes to 'Keep Period History' and 'Keep Calendar History' will no longer ignore changes to them when saving.

FIXED: Framework: Fixed error when calling Microsoft eConnect stored procedure that does not exist in the customer's database. This is to improve compatibility between our Mobile and Desktop products.

FIXED: Purchase Order Properties: Changing the vendor at the header of the document will now recalculate the cost on the purchase line to account for changes in 'Vendor Special Costing'.

FIXED: Sales Monitor: Sending documents to a queue that contained lower case characters will no longer create a duplicate entry in the queue tree.

FIXED: Workflow Setup: Lowercase characters are no longer valid in queue names.

FIXED: Sales Document Payments: Creating a cash payment for more than the document's total will set the Amount field to 0 rather than the document's on account value.

FIXED: Sales Monitor: Re-added the parameter '@CustomFilter' to the ‘sppSalesMonitor’ stored procedure. This can be utilized in filter scripts.

FIXED: Sales Monitor: The 'Sales Doc IDs Visible' security will now filter Sales Monitor properly when using similar document IDs.

FIXED: Customer Special Pricing: Pricing will now be applied properly when using an item that does have pricing setup for the base unit of measure.

FIXED: Sales Document: Quick Transfer Setting: Resolved an issue that prevented users from creating a partial shipment when using this setting. The quantity selected on the Shipment screen are now respected.

FIXED: Sales Document Search: When clicking the fax button with no documents selected, users will no longer receive an 'Object Reference' error.

FIXED: Sales Document Splitting: Splitting a document a 2nd time will no longer result in an error. Introduced in 4.4.0.4.

FIXED: Inventory Analysis: Resized the fields for 'Item Class' and 'Generic Description' to a more appropriate size. 'Order Point Multiplier:' was also moved for appearance.

FIXED: CardControl Payments: The default amount for credits is now calculated more accurately.

FIXED: Receipt Audit Tab: Opening the audit tab will now longer result in an error.

FIXED: Assembly Search: Print preview will now function correctly for Assemblies.

FIXED: Assembly Entry: Opening an existing assembly will maintain the correct batch number.

FIXED: Assembly Entry: Deleting an assembly will now properly delete any existing sales document links.

Version 4.4.0.4

Release Date 5/04/15

ADDED: SalesPad Licensing: Select extended modules now require additional licensing in order to be used. (Affected modules: AutoGlass, BusinessRules, Configurator, Kwiktag, Manufacturing and OperationsCore)

ADDED: Security: Prospect Card: On Load Script - A C# script to execute when loading a Prospect.

ADDED: Security: Prospect Card: Pre Save Script - A C# script to execute when saving a Prospect.

ADDED: Security: Opportunity Card: On Load Script - A C# script to execute when loading an Opportunity.

ADDED: Security: Opportunity Card: Pre Save Script - A C# script to execute when saving an Opportunity.

ADDED: Security: Interaction Event Entry: On Load Script - A C# script to execute when loading an Interaction Event.

ADDED: Security: Interaction Event Entry: Pre Save Script - A C# script to execute when saving an Interaction Event.

ADDED: Security: CRM Contact Card: On Load Script - A C# script to execute when loading a CRM Contact.

ADDED: Security: CRM Contact Card: Pre Save Script - A C# script to execute when saving a

CRM Contact.

ADDED: Security: Convert Prospect To Customer: Pre Convert - A C# script to execute when converting a Prospect to a Customer.

ADDED: Security: Convert Opportunity To Quote: Pre Convert - A C# script to execute when converting an Opportunity to a Quote.

ADDED: Security: Assembly Entry: Auto Create Batch – A batch will automatically be created if a batch does not exist when creating an Assembly..

FIXED: SalesPad Credit Card Processing: Litle Processor - Users will no longer receive a date conversion error when processing a transaction. (Non-CardControl)

FIXED: Sales Document Payment: Users will no longer receive a conversion error when creating an authorization on a document with a very large master number.

FIXED: Sales Document Convert To BOM: The 'Standard Cost' and 'Current Cost' will now be calculated correctly based on the BOM components and quantities.

FIXED: Sales Document Convert To BOM: A converted BOM will now use the quantity from the Sales Line Items for the component quantity.

FIXED: Sales Document Convert To BOM: Saving the Sales Document is now required before using the plugin.

FIXED: Security: Split Sales Document: Updated categories for various sub securities.

FIXED: Sales Document: Setting: Backorder Document Type ID - This will no longer be used when the document is split, unless the setting 'Use Backorder ID on New Line Only' is set to false.

FIXED: Sales Document Line Item: When changing the unit of measure, the cost on the line item will now reflect the unit of measure change.

FIXED: Customer Special Pricing: When entering a new special price and changing the unit of measure, the cost will now be calculated based on the unit of measure selected.

FIXED: Sales Document Line Items: When using SalesPad in a language other than English, the various quantities on the sales line can now be edited.

FIXED: Sales Document Profitability Plugin: When manually changing the Margin Percent or Margin Amount, the price calculated will now be reflected on the Sales Document.

FIXED: Sales Document: Users will now longer receive a 'SQL DateTime' error when saving a return created from a posted invoice and setting 'Def Required Ship Date To Blank' set to true.

FIXED: Sales Document: When copying a document that was previously fulfilled, the Actual Ship Date for the line items should be reset.

FIXED: Sales Document Payment: When partially invoicing an order with a deposit, the deposit will no longer be lost. (Introduced in 4.4.0.2)

FIXED: Settings: Vendor Notes: Note Type List - This setting now correctly applies to the creation of CRM notes attached to a vendor.

FIXED: Settings: Customer Notes: Note Type List - This setting now correctly applies to the creation of CRM notes attached to a customer.

Version 4.4.0.3

Release Date 4/24/15

ADDED: Quick Reports: Checkbox Search Fields can now be used to filter True/False values in reports.

ADDED: Sales Person Card: Added an inactive checkbox that sets the inactive status of the Sales Person.

REMOVED: Group Pricing: The 'Adjustment_Type' column in the Item Details section has been removed.

REMOVED: Security Editor: The undo button in the user section has been removed.

FIXED: Customer Address: When creating a new address, File Location 1 and 2 will now properly save to the database. (GP2013R2)

FIXED: Counter Sales: Plugin text will now refresh properly as a document is saved or updated.

FIXED: Sales Territory Commissions: 'Keep Period History' and 'Keep Calendar History' will now properly save.

FIXED: CardControl: The default amount passed from SalesPad to CardControl is now correctly calculated.

FIXED: Fulfillment: On Return documents and using multi bin, quantity fulfilled for items returned in the non-base unit of measure will now be properly updated.

FIXED: Payment Processor Setup: Resolved issue with adding a new payment processor. (Non-CardControl)

FIXED: Sales Document Payment: CardControl is no longer required to process Sales Document payments. (Introduced in 4.4.0.2)

FIXED: Sales Document Payment User Fields: When the payment is a deposit, user fields will now transfer properly to the invoice when created.

FIXED: Sales Document Payment User Fields: When adding a second payment to the same sales documents, the user fields for the first payment will now be shown on the screen.

FIXED: Sales Document Payment User Fields: When capturing an authorization using the Authorize.Net or EBiz payment processor, 2 records will no longer be displayed to the user.

FIXED: Item Maintenance: Saving items through the Item Maintenance screen will no longer clear the Inventory Account and Inventory Offset Account. (Introduced in 4.4.0.0)

FIXED: Quick Reports: The 'Reset Layout" button will now remove unused columns.

FIXED: Sales Person Search: The inactive button is no longer read only and will set the inactive status of the Sales Person.

Version 4.4.0.2

Release Date 4/17/15

ADDED: Setting: Default Transaction Amount - Allows the user to choose how the default transaction amount is calculated when using CardControl.

FIXED: Sales Batch Processing: Users are no longer able to capture authorizations on RETURN documents.

FIXED: Package Editor: Existing components on packages will now properly be displayed when opening Package Editor.

FIXED: Assembly Entry: An assembly note index will now be created when saving an Assembly that has no content entered in the note field.

FIXED: Assembly Entry: The 'Quantity_Shortage_Status' will now be set based on the users GP configuration.

FIXED: Assembly Entry: When saving an Assembly that contains items not assigned to the selected warehouse, users will be prompted to assign them to the warehouse.

FIXED: Assembly Line: Quick Report user fields will now display values properly.

FIXED: Purchased Line Editor: When using an Auto-Fulfillment document type, the 'Sync To Received' functionality will now use the correct fulfillment.

FIXED: Purchased Line Editor: The 'Sync To Received' button no longer throws an error if the 'Auto Filter Row' is selected.

FIXED: Sales Shipment: Creating a partial shipment will now properly transfer lot tracked items that are fulfilled using a decimal quantity.

Version 4.4.0.1

Release Date 4/10/15

ADDED: Sales Document Entry: When deleting a document and setting 'Sales Document Delete Password' is enabled, users will now be prompted if an incorrect password is entered.

ADDED: Purchase Line Items: Multiple line items can be added by selecting multiple items in the Inventory Lookup window.

FIXED: Item History: Users can no longer enter non-integer values into the 'Months to Show' field.

FIXED: Create Assembly: The field 'Sales Doc Link' field on assemblies will now be populated with the sales document number it is linked to.

FIXED: Vendor Special Costing: Quickly adding multiple special cost records with different customers will no longer overwrite the customer number on the original entry.

FIXED: Purchase Order Generation Plugin: SOP to POP link information will now be recorded to the Sales Document and Purchase Order audit trails.

FIXED: Purchase Order: Comments will now properly be removed when deleted.

FIXED: Sales Line Address Editor: The 'Country Code' field is now a drop-down menu populated with available country codes.

FIXED: Payments: Checkbook dropdown is enabled upon selecting the 'Depost' as the payment type.

FIXED: Payments: Payment buttons are now enabled/disabled more accurately.

Version 4.4.0.0

Release Date 4/02/15

ADDED: Localization: SalesPad can now be ran using multiple languages. Supported languages are English, French, and Spanish.

ADDED: Sales Document Search: Added a footer for summary calculation. Requires a default layout restore to become available.

ADDED: Sales Document Line Items: Added the ability for users to change quantities of kit items.

ADDED: Sales Document Line Items: Security: Can Change Kit Quantities: Allows users to change quantities of kit items.

REMOVED: Help Menu: Removed the 'Check for Updates Automatically' button.

UPDATED: Application Menu: Removed excess empty space along the right side.

FIXED: Main Application: The SalesPad application will now open in the same screen position it was previously closed in.

FIXED: SalesPad Dashboard Maintenance: No longer requires refreshing the screen to display newly added Dashboards by the user.

FIXED: SalesPad Dashboard Maintenance: After deleting a dashboard, the next dashboard in the list is now given focus.

FIXED: Column Chooser: Resolved an issue with the Column Chooser window opening outside the bounds of the users monitor.

FIXED: User Field Editor: The UDF Quick Report editor will no longer appear as a separate item in the Windows taskbar.

FIXED: CardControl: The default amount of an authorization now takes previous authorizations on a sales document into account.

FIXED: Sales Document Payment User Field: When transferring an order to an invoice and setting 'Quick Transfer' is enabled, payment user fields will now transfer to the invoice.

FIXED: Sales Document Payment User Field: Users will no longer receive an 'Object Reference' error when entering user fields on payments.

FIXED: Item Attribute Class Editor: Users will no longer receive an 'Object Reference' error when clicking the 'Move Down' button with no rows in the grid.

FIXED: Purchasing: Non-Inventory Items will no longer round to the nearest integer when first added to an unsaved document.

FIXED: Purchase Line Items: Resolved eConnect error (11482) when cancelling the full quantity and using a non-base unit of measure. (DYNAMICS GP 2013 and later)