SalesPad Desktop Release Notes (2020-2018)

Paul Manyen - 2024-11-22 - Release Notes

Version 5.1.4

Release Date 12/18/20

BREAKING CHANGE: Sales Line Mass Update: Some search fields are now hidden by default, but can be re-added by customizing the layout. The Custom Search Fields section can handle these options.

ADDED: Sales Batch Processing: There are now document type checkboxes which are set based on corresponding security. If no security defined then the check boxes are accessible to use normally. I security is blank then the last checked values will be remembered in the registry.

ADDED: Sales Batch Processing: There is now a Warehouse field which is populated based on corresponding security. If no security is defined there is access to all warehouses.

ADDED: Sales Batch Processing: There are now custom search fields options.

ADDED: Sales Document Audit: The stored procedure that is used to show the audit trail "sppGetSalesDocumentAudit" now has an spcp call "spcpGetSalesDocumentAudit".

ADDED: Sales Document Mass Update: Security - Can Delete From Sales Batches: A semi-colon delimited list of batches that documents can be deleted from.

ADDED: Sales Document Mass Update: Security - Can Delete Sales Document Types: A semi-colon delimited list of sales document types that can be deleted.

ADDED: Sales Document Mass Update: Security - Can Delete: When enabled the delete button will be enabled. The Sales Document Delete Password will be respected. (Default: False)

ADDED: Sales Document Mass Update: There are now document type checkboxes which are set based on corresponding security. If no security defined then the check boxes are accessible to use normally. I security is blank then the last checked values will be remembered in the registry.

ADDED: Sales Document Mass Update: There is now a Warehouse field which is populated based on corresponding security. If no security is defined there is access to all warehouses.

ADDED: Sales Document Mass Update: There is now a delete button with corresponding securities.

ADDED: Sales Document Mass Update: There are now custom search fields options.

ADDED: Sales Line Mass Update: There are now document type checkboxes which are set based on corresponding security. If no security defined then the check boxes are accessible to use normally. I security is blank then the last checked values will be remembered in the registry.

ADDED: Sales Line Mass Update: There is now a Warehouse field which is populated based on corresponding security. If no security is defined there is access to all warehouses.

ADDED: Sales Line Mass Update: There are now custom search fields options.

ADDED: Security: Ops Core Fulfillment Options: Force Save On Close - Forces the sales document to save when the plugin is closed. (Default: False) (Extended Module: BlueMoonOperationsCore)

ADDED: Security: Sales Line Mass Update: Can Delete Lines: Enables or disables the ability to delete lines. (Default: True)

UPDATED: Application: Various formlets bars are now properly themed and will stretch across the screen.

UPDATED: Case Tracker: Case Tracker Audit: The Audit On field now properly displays both the date and its associated time stamp.

UPDATED: Customer Contact Addresses: The toolbar is now properly themed along with the email and website hyperlinks. (NOTE: Changing themes requires the form to be reloaded.)

UPDATED: Customer Overview: Various fields are now properly themed.

UPDATED: Database Update: Calculated user fields that do not work for a table will no longer prevent other calculated user fields from being added to the table.

UPDATED: EDI Get Labels: Retrieving shipping labels through SPS's API will now respect their 200 pack limit per request. (Extended Module: SalesPadEDI)

UPDATED: License Plate Maintenance: Useless dropdown buttons will no longer appear on cells in the license plate grid.

UPDATED: Purchase Order Links: Any errors that occur while attempting to remove a link will now be audited.

UPDATED: Sale Entry: The toolbars, hyperlinks, and certain fields are now properly themed. (NOTE: Changing themes requires the form to be reloaded.)

UPDATED: Sales Batch Processing: The tool bar is now themed and the email and fax buttons have been moved for consistency.

UPDATED: Sales Batch Processing: When trying to do a search with no batch the grid will display that a batch is required.

UPDATED: Sales Document Entry: Shipment Tab: Performance enhancements have been made around displaying shipping labels. (Extended Module: SalesPadEDI) (Introduced: 5.0.2)

UPDATED: Sales Document Mass Update: The Sales Document Types Allowed security now has an editor for choosing document types.

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UPDATED: Sales Document Mass Update: The Warehouses Allowed security now has an editor for choosing warehouses.

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UPDATED: Sales Document Mass Update: When trying to do a search with no batch the grid will display that a batch is required.

UPDATED: Sales Document Notes: The bar is now properly themed.

UPDATED: Sales Document Purchase Links: Any errors that occur while attempting to remove a link will now be audited.

UPDATED: Sales Documents: Saving sales documents is now faster.

UPDATED: Sales Line Items: The toolbar is now properly themed. The focused line detail grid is now below the toolbar. There is also a splitter that can be adjusted (if needed) based on different themes sizing.

UPDATED: Sales Line Mass Update: The Sales Document Types Allowed security now has an editor for choosing document types.

UPDATED: Sales Line Mass Update: The Warehouses Allowed security now has an editor for choosing warehouses.

UPDATED: Sales Line Mass Update: The check for a blank search was tweaked to auto-set certain fields if they are blank, and therefore default back to security values.

UPDATED: Sales Line Mass Update: The tool bar is now themed.

FIXED: Activity Locks: Cash Receipt locks can now be deleted from this screen. (Introduced: 4.6.4.23)

FIXED: Assign Workflow To Business Object: Loading this plugin will now be faster.

FIXED: Business Object Workflow: Saving documents which can utilize business object workflow but are not configured to use it will no longer warn the user that the document was not assigned to a workflow.

FIXED: Case Tracker: Detail Properties: Detail issue, cause, and resolution fields now properly update upon selection within the Detail Properties pane.

FIXED: Customer Contact Addresses: The email and website hyperlinks work properly.

FIXED: Database Update: The progress text box now fills in the empty space below it. (Introduced: 5.1.3)

FIXED: Document Combiner: Shipping information will now combine correctly.

FIXED: Document Combiner: Tracking number will no longer be lost when combining documents while the 'Void Originating Documents' security is enabled.

FIXED: EDI Get Labels: Date fields on the shipping label request will no longer also send time data. (Extended Module: SalesPadEDI) (Introduced: 5.0.2)

FIXED: Import Manager: Performing imports will no longer display CellValueConversionError related messages.

FIXED: Inventory Transaction Monitor: Forwarding a transaction or sending a transaction to a queue will not give an eConnect error.

FIXED: Item Monitor: Forwarding an item or sending an item to a queue will not give a "Value cannot be null" error.

FIXED: Locks: Case Tracker Case locks can no longer be deleted by closing a case that is locked by another user. (Extended Module: Case Tracker)

FIXED: Locks: Customer locks can no longer be deleted by closing a customer that is locked by another user.

FIXED: Purchase Order Links: An audit log stating "the link was removed" will no longer be created if there was an error while attempting to remove the link.

FIXED: Returns: In a multi-bin environment, changing the warehouse will now remove the fulfillment record for the line item.

FIXED: Sales Document Addresses: The UPS Zone will no longer revert back to the customer address' UPS Zone every time the tab is loaded.

FIXED: Sales Document Purchase Links: An audit log stating "the link was removed" will no longer be created if there was an error while attempting to remove the link.

FIXED: Sales Line Excel Import: Unit price will now import correctly. (Introduced: 5.1.0)

FIXED: Sales Line Items: Extended Pricing: Using an item that triggers the Quantity Free promotion type will no longer give users a "Column name or number of supplied values does not match table" error.

FIXED: Sales Line Mass Update: The Allocate button will now work properly for line items that are on documents that use the Document/Batch allocation method.

FIXED: Sales Line Mass Update: The Sales Document Types Allowed security is now respected.

FIXED: Sales Line Mass Update: The Warehouses Allowed security is now respected.

FIXED: Sales Line User Field Dockable Plugin: The dockable plugin's UDF values were not always in sync with the line's UDF values if the line and its item number were set before the dockable plugin was opened. This has been fixed.

FIXED: Sales: Sales Entry: When updating the Ship To Address, if prompted to update the Shipping Method, it will change the header's Shipping Method as expected.

FIXED: Vendor Returns: Users will no longer receive an "Arithmetic Overflow" error when attempting to save a Vendor Return.

Version 5.1.3

Release Date 11/20/20

BREAKING CHANGE: Case Tracker Entry: Case Tracker Case: Removes the 'Return Order Num', 'Reorder Doc Num', and 'Reorder Doc Type' columns from this business object and table structure, as well as supporting views/procedures. (Extended Module: Case Tracker)

ADDED: Application: There is now a search box at the top of the ribbon that allows users to search for any module.

ADDED: Case Tracker: Detail Properties: Case Tracker Detail UDF Dock-able Plugin: Adds a new dock-able plugin to the case tracker details formlet. (Extended Module: Case Tracker)

UPDATED: Active Users: The Toolbars are now themed properly.

UPDATED: Application: GP versions were added for the October 2019 and 2020 releases.

UPDATED: EDI Business Object Mapping: The mapping for shipping labels (000) now supports mapping the "LicensePlateDetail", "ItemMaster", and "SalesLineItem" properties to the Pack/PhysicalDetails group. (Extended Module: SalesPadEDI)

UPDATED: Import Manager: Inventory Adjustment: When the unit cost is not given, the item's current cost will be used.

UPDATED: PayFabric Authorize and PayFabric Charge plugins: When the security "Charge Card Of Prior Authorization" is enabled, if no prior authorization is found, the default card of the customer's wallet is used instead.

UPDATED: Report Manager: The Toolbars are now themed properly.

UPDATED: Security Script Manager: The Toolbars are now themed properly.

UPDATED: Security: The Toolbars are now themed properly.

UPDATED: Settings: The Toolbars are now themed properly.

UPDATED: System User Card: The Toolbars are now themed properly.

FIXED: Application: There will no longer be a "Invisible or disabled control cannot be activated" error when switching between tabs under specific scenarios.

FIXED: Automation Agent Service: Fixed an issue where the Automation Agent service would not start up automatically after a reboot. (Extended Module: AutomationAgent)

FIXED: Case Tracker Entry: Saving a case with the user field tab open will now properly respect saved changes. (Extended Module: Case Tracker)

FIXED: Consolidated Shipment Get Labels: The values on the shipment header will no longer be overwritten by the values on the sales document when requesting labels. (Extended Module: SalesPadEDI)

FIXED: EDI 945 Inbound: When fulfilling an order from a 945, the fulfilled quantities on the order will now be correct when the items are packed in a non-base unit of measure. (Extended Module: SalesPadEDI)

FIXED: EDI Get Labels: The script on the business object mapping will now be run when getting labels. (Extended Module: SalesPadEDI) (Introduced: 5.0.2)

FIXED: EDI Service: Fixed an issue where the EDI service would not start up automatically after a reboot. (Extended Module: SalesPadEDI)

FIXED: Equipment Card: Equipment UDFs are now respecting the 'User Field Read Only' setting.

FIXED: Print Attachments: GP Attachments will now be printed properly.

FIXED: Print Attachments: Image file resources will now be printed properly.

FIXED: Remote Library Service: Fixed an issue where the Remote Library service would not start up automatically after a reboot. (Extended Module: RemoteLibrary)

FIXED: Sales Document Search - The Ship Complete field on historical sales documents is now accurate.

FIXED: Sales Fulfillment: Fulfillments will no longer be able to be added or removed on read-only documents when the 'Pickable Sites' security is set to anything other than "*".

FIXED: Sales: Sales Entry: When updating the Ship To Address prompts to update the Shipping Method, it will once again change the header's Shipping Method.

FIXED: SalesPad Desktop: The application will no longer revert to 100% scaling when an error occurs.

ADDED: Settings: Case Tracker Case Columns To Include In Audit: Removes the 'Reorder Doc Num' and 'Return Doc Num' options from this setting. (Extended Module: Case Tracker)

Version 5.1.2

Release Date 11/6/20

ADDED: Automation Agent: Added a description field to Automation Instances. (Extended Module: Automation Agent)

ADDED: Business Object Mapping: The SerialLotNums property has been added to 856 mappings. (Extended Module: SalesPadEDI)

ADDED: Case Tracker: Sales Document Case Tracker Entries: Adds a new virtual column "Link Type" that differentiates between documents displayed under the Case Tracker Entries tab on Sales Entry.

ADDED: Security: Create Assembly Plugin: Post Assembly Create Script - C# script that executes when Assemblies are generated (and after they are saved if Security -> Auto Save is true), and before the Sales Document is saved.

ADDED: Settings: EDI SPS Shipping Label ZPL DPI: When retrieving ZPL shipping labels from SPS, select the DPI used in the ZPL printer. Acceptable values are: 152, 203, 300. (Extended Module: SalesPadEDI)

ADDED: Workflow Setup: Key Fields: Added related fields to the fields available for field comparisons, e.g. Vendor fields for Purchase Orders and Item fields for Equipment.

ADDED: Workflow Setup: Rule Conditions: Added related fields to the fields available for field comparisons, e.g. Vendor fields for Purchase Orders and Item fields for Equipment.

UPDATED: Audits: Audits will now log the database value instead of the previous value. e.g. A change from 1 to 2 to 3 to 4 (without saving between steps) would previously log "changed from 3 to 4", and will now audit "changed from 1 to 4".

UPDATED: Case Tracker: Sales Document Case Tracker Entries: This tab now includes linked reorder / return document types in the search results. Viewing a return or reorder document will now display the linked case it was created from.

UPDATED: Save Prompts: Implemented View Changes for Save Prompts when closing tabs in many locations.

FIXED: Assembly Entry: Sub-assemblies components will no longer be allocated when the sub-assembly item is in stock.

FIXED: Automation Agent: Batch Forward: Additional checks are in place to prevent forwarding a document that was already forwarded independently of the automation job. (Extended Module: Automation Agent)

FIXED: Binary Streams MEM: New sales batches will now have a facility assigned to them when a document is forward into them. (Extended Module: Binary Streams MEM)

FIXED: Case Tracker Setup: Attempting to save case tracker statuses after deleting one will no longer throw an error. (Introduced 4.6.4.27)

FIXED: Case Tracker Setup: Creating and deleting a case status before saving will no longer throw an object reference error during saving.

FIXED: Counter Sales: UofM set from a barcode translation will now save correctly.

FIXED: CRM Events: If the security setting 'Email User Task Info' is set to 'True', the program will only send an email when a user creates an interaction or a user changes an interaction's assignee.

FIXED: CrossUpSell Plugin: The selected sales line will no longer lose focus when cross/upsell lines are added and the "Preserve Focused Row" setting is enabled.

FIXED: Distributions Bom Lines: The text for sub-boms are now readable when using a dark theme.

FIXED: Email Template Editor: Changes will now be immediately updated when leaving the Template field.

FIXED: Fulfillment: When fulfilling an exchange invoice, the fulfillment plugin will correctly switch between returns and available inventory for serialized items.

FIXED: Interactions: If the security setting 'Email User Task Info' is set to 'True', the program will only send an email when a user creates an interaction or a user changes an interaction's assignee.

FIXED: Login: Logging in with a previous version of SalesPad will now correctly respect the setting Limit Login For Prior Versions without needing access to the Database Update Security.

FIXED: OpportunitySearch: "Add Opportunity" button spelling fixed (from "Add Opporunity")

FIXED: PayFabric: Users will no longer be able to click the close button on the hosted page window after clicking the Process button on the Card Not Present screen.

FIXED: Purchasing Advisor: Items with a "Reorder Pt" Document Number weren't being returned in the search results when the "Include Reorder Pt. Demand" box is checked in some cases.

FIXED: Returns: Extended cost will no longer be updated when a return made from an RMA is saved in SalesPad. This unintended cost update was causing issues when posting the return in GP.

FIXED: Returns: RECV and COGS distributions will no longer be created when saving a return in SalesPad if the return was created via RMA and the RMA has been posted.

FIXED: Sales Document Entry: Fulfillment: When the Pickable Sites security doesn't equal * or empty, the Add and Delete fulfillment buttons will now always be enabled as long as the Warehouse of the selected Sales Line is included in the security.

FIXED: Sales Documents: Historical or Voided documents will no longer always display the Ship Complete flag as 'false'.

FIXED: Sales Entry: UofM set from a barcode translation will now save correctly.

REMOVED: Case Tracker: Case Tracker Detail Search: The following fields have all been removed from this grid and will no longer appear as options under the column chooser: Reorder Doc Num, Reorder Doc Type, and Return Doc Num.

REMOVED: Case Tracker: Case Tracker Workflow Monitor: The following fields have all been removed from this grid and will no longer appear as options under the column chooser: Reorder Doc Num, Reorder Doc Type, and Return Doc Num.

REMOVED: Case Tracker: Customer Case Tracker Entries: The following fields have all been removed from this grid and will no longer appear as options under the column chooser: Reorder Doc Num, Reorder Doc Type, and Return Doc Num.

Version 5.1.1

Release Date 10/23/20

BREAKING CHANGE: Shipping Review: Viewable Batches sub-security: The dropdown now displays the document type, in addition to the document ID and batch name. When changing this security, any batches selected in a previous build will be wiped out.

ADDED: Shipping Review: The screen can now be set to refresh automatically at a set interval.

UPDATED: Business Object Mappings: The default business object mappings for outbound transactions have been updated so that the CarrierInformation fields are no longer Core Mappings. (Extended Module: SalesPadEDI)

UPDATED: Case Tracker: Case Tracker Details: Serial/Lot Lookup: Historical serial numbers are now viewable/selectable within the serial/lot editor on cases that are not linked to a sales document. (Extended Module: Case Tracker)

UPDATED: Consolidated Shipments: A message now appears when you click the "Scan to Shipment" button without a package selected.

UPDATED: PayFabric: The form will now remember its previous size and location upon opening.

UPDATED: PayFabric: The PayFabric Hosted Page will now be opened in an embedded Chrome browser, rather than an Internet Explorer browser. Internet Explorer will no longer be supported by Microsoft in the future and this change will allow us to keep the browser up to date with security and general framework updates.

UPDATED: PayFabric: The theme used for the PayFabric hosted page has been modified to fit the new browser window.

UPDATED: Sales Document Workflow Address Validation: Address validation will now only run on documents that have not yet been validated.

UPDATED: Shipping Review: Improvements have been made to load times.

UPDATED: Shipping Review: The batch filter dropdown now displays the document type, in addition to the document ID and batch name. The dropdown also allows for multiple batches to be selected at a time.

FIXED: Automation Agent: Migrating Batch Forward jobs from the old Automation Agent application will now use the updated format for the Batch setting. (Extended Module: Automation Agent)

FIXED: Case Tracker Details: Do Not Copy Sales Line Comments: The "Do Not Copy Sales Line Comments" security setting will now properly be respected upon creating new cases from a sales document, or adding case details from a sales document on the case entry screen. (Introduced: 4.6.4.30) (Extended Module: Case Tracker)

FIXED: Cash Receipts: Non-Multicurrency users will no longer receive an 'Apply To and Apply From document are different currencies than function' error when attempting to apply a cash receipt to a document. (Introduced: 5.0.1)

FIXED: EDI 810, 855, 856 Plugins: Running these plugins through workflow on orders for customers not set up for EDI will now continue through workflow rather than stopping it. (Extended Module: SalesPadEDI) (Introduced: 5.0.6)

FIXED: EDI Shipping Labels: Carrier information is now sent correctly to SPS. (Extended Module: SalesPadEDI)

FIXED: Import Manager: When importing ServiceTransferLines, if the Qty_Base_UofM is not a mapped field, then the Service Transfer Distributions will still be updated correctly.

FIXED: In-Transit Transfer Fulfillment: Running the plugin will now trigger the pre-save script before saving the document.

FIXED: PayFabric Capture Plugin: This plugin will now respect the 'Allow Overcharge' setting. This change only applies if the 'Always Capture' securities are disabled.

FIXED: PayFabric Sales Batch Processing: This plugin will now respect the 'Allow Overcharge' setting. This change only applies if the 'Always Capture' securities are disabled.

FIXED: PayFabric: When the 'Default Processing Mode' setting in PayFabric Portal was set to "EMV Only" and the 'Overcharge' setting in SalesPad was set to "Not Allowed", changing the amount on the EMV screen of PayFabric would clear out the value. That has been fixed.

FIXED: Receipt Transaction Entry: Updating a line's unit cost that is linked to a PO line will no longer revert to the previous unit cost value upon saving.

FIXED: Receiving: Pressing "Enter" while the cursor is on the Purchase Order Number field will only run the search once.

FIXED: Sales Document Addresses: When an On Validating script is present, typing in the address code and tabbing off will now update the rest of the address fields.

FIXED: Workflow: Actions: Scripting: Fixed a 'type or namespace not found' compilation error that would occur in the script editor.

FIXED: Workflow: Actions: Scripting: Fixed an object reference error that would occur if a script was placed on an object in a queue that doesn't belong to its workflow.

FIXED: Workflow: Actions: Scripting: Fixed the parameter mismatch error that would occur with CancelEventArgs.

Version 5.1.0

Release Date 10/12/20

BREAKING CHANGE: Inventory Search Use Proc Override: When this setting is enabled and a custom inventory search procedure is not found, the default loading process will no longer exclude discontinued items with zero onhand quantity by default.

ADDED: Consolidated Shipments: Search By Document Packages: Added the column "Contains Movable Packages" to mark which documents have packages that can be moved using the "Move Packages to Shipment" button.

ADDED: Consolidated Shipments: Search By Document Packages: Added the column "Is Fully Packed" to mark which documents can be packed using the "Add Lines to Shipment" button.

ADDED: Sales Line Cross/UpSell: A dockable plugin designed to help users see replacement or related items to current sales line item.

ADDED: Cross/UpSell Maintenance: Allows users to define and maintain replacement and related items for root items.

ADDED: Settings: Additional Item Types - Semicolon delimited list of alt sell line types that will be added alongside a root item. (Default: CrossSell)

ADDED: Settings: Replacement Item Types - Semicolon delimited list of alt sell line types that will replace a root item. (Default: UpSell)

ADDED: Feedback: There is now a 'Submit Feedback' button near the top right corner of the application, it can also be found in the Help menu. Clicking it will open a survey.

ADDED: Inventory Lookup/Sales Inventory Lookup: Security - Use Filter Script For Location: When enabled, filter scripts that access the "Location" field will now work properly. This security will disable the "Warehouse" field. It is recommended that both of these securities be set to the same value. (Introduced: 4.6.4.31)

ADDED: Inventory Lookup/Sales Inventory Lookup: Security - Warehouse: When set, this will act as a filter script on the "Location" field and also disable the "Warehouse" field. This is an alternative to writing filter

ADDED: Inventory Lookup: There is now a Warehouse field (defaults to "All").

ADDED: Sales Document Generate Packages: Added a sales document workflow plugin that will generate a shipment and packages automatically.

ADDED: Security Setting: Sales Document Mass Update: Roll Down Shipping Method Changes to Shipping Headers: If set to 'True', sales document shipping method updates will roll down to shipping headers that directly belong to those sales documents.

ADDED: Settings: Cross/UpSell Items: Additional Item Types - Semicolon delimited list of alt sell line types that will be added alongside a root item. (Default: CrossSell)

ADDED: Settings: Cross/UpSell Items: Replacement Item Types - Semicolon delimited list of alt sell line types that will replace a root item. (Default: UpSell)

ADDED: Settings: Inventory Search: Include All Discontinued Items: When set to "True", Inventory Search will load all discontinued items, including those without quantity on hand, in the search results. (Default: False)

UPDATED: Automation Agent: Scheduling: If the Start Date and End Date have different years, the Start Date's month must now be January and the End Date's month must now be

December. This is because date ranges such as August 2020 - August 2030 would only run in August for each year from 2020 to 2030. This change is not automatically applied to existing schedules; it will be applied when opening the 'Schedule Editor' for a schedule and clicking 'OK'. Users may need to re-configure their schedules to account for this change. (Extended Module: AutomationAgent)

UPDATED: Automation Agent: Scheduling: When configuring an automation to run every "X" minutes or seconds, the Start Time's minute must be "0" and the End Time's minute must be "0" or "59" unless the Start Time and End Time are in the same hour. For example, an automation running every minute from 8:50 AM to 9:00 AM is no longer allowed and can be fixed by changing the End Time to 8:59 AM. This change is not automatically applied to existing schedules; it will be applied when opening the 'Schedule Editor' for a schedule and clicking 'OK'. Users may need to re-configure their schedules to account for this change. (Extended Module: AutomationAgent)

UPDATED: Automation Agent: The Start Time and End Time fields no longer show seconds, since setting a second wasn't supported. (Extended Module: AutomationAgent)

UPDATED: Consolidated Shipments EDI Print Labels: Running the plugin now checks if labels have been printed previously for this shipment. (Extended Module: SalesPadEDI)

UPDATED: Consolidated Shipments: Search By Document Packages: Search performance has been improved.

UPDATED: EDI Processing: Transaction log messages are no longer limited to 1000 characters. (Extended Module: SalesPadEDI)

UPDATED: Sales Document EDI Print Labels: Running the plugin now checks if labels have been printed previously for this shipment. (Extended Module: SalesPadEDI)

FIXED: Sales Document Shipment: Loading shipments no longer error out when using a filter script.

FIXED: Automation Agent: Scheduling: Automations will not run (up to) an hour past their End Time in scenarios where the End Time's minute is not 59. For example, if an automation is configured to run every 15 minutes from 4:00 AM to 8:00 AM, then the automation's last run for the day will be at 7:45 AM instead of 8:45 AM. This fix is not automatically applied to existing schedules; it will be applied when opening the 'Schedule Editor' for a schedule and clicking 'OK'. Users may need to re-configure their schedules to account for this change. (Extended Module: AutomationAgent)

FIXED: Automation Agent: Scheduling: The End Date will not reset to a year after the Start Date while 'Day Of Month' is selected as the frequency type. (Extended Module: AutomationAgent)

FIXED: Automation Agent: Scheduling: The minutes portion of the Start Time and End Time are now consistently respected. For example, if an automation is configured to run every 2 minutes from 8:30 AM to 8:50 AM, then the automation will only run during that time period instead of from 8:00 AM to 8:59 AM. This fix is not automatically applied to existing schedules; it will be applied when opening the 'Schedule Editor' for a schedule and clicking 'OK'. Users may need to re-configure their schedules to account for this change. (Extended Module: AutomationAgent)

FIXED: Automation Agent: Scheduling: When using the 'Weekly' frequency type, the schedule's description will not incorrectly refer to Saturday as Sunday. (Extended Module: AutomationAgent)

FIXED: Consolidated Shipments: Search By Document Packages: Documents that are fully packed in a consolidated shipment will no longer appear in the search results.

FIXED: Customer Card: The Dynamics GP button will now work properly. (Introduced: 5.0.2)

FIXED: Customer Overview: Customer Sales Rep will now be saved properly. (Introduced: 5.0.1)

FIXED: Customer Overview: Customer The Sales Rep field will now be displayed as the Sales Person's name rather than their ID. (Introduced: 5.0.1)

FIXED: Inventory Adjustments: Batch Num Editor: When the Inventory Transaction workflow is not in use, the batch field should function similarly to how it did previously.

FIXED: Inventory Adjustments: Batch Num Editor: When using workflow, changing the queue via this editor should now work.

FIXED: Inventory Lookup/Sales Inventory Lookup: Filter scripts can now be used to filter on the "Location" field. See newly added security options. (Introduced: 4.6.4.31)

FIXED: National Accounts: Users will no longer receive an 'Object Reference' error when attempting to use the plugin. (Introduced: 5.0.2)

FIXED: PayFabric: A failed transaction will now correctly be moved to the workflow queue set in security.

FIXED: Receipt: The receipt line item description for non-inventory items will now appear correctly.

FIXED: Receiving: Reverted recent changes to the receiving screen that were put in place to prevent users from over receiving linked lines. We will continue to work on a better solution for this issue in a future build. (Introduced: 5.0.1)

FIXED: Returns: RECV and COGS distributions will no longer be created when saving a return in SalesPad if the return was created via RMA.

FIXED: Sales Document Entry: Sales Line Excel Import: Imported sales lines will now be repriced correctly.

FIXED: Sales Document Entry: Shipments: Changing a sales document's shipping method will prompt to update the shipping method and carrier code on non-consolidated shipping headers belonging to that sales document, even if the Shipment tab isn't available or hasn't been opened yet.

FIXED: Sales Fulfillment: Available inventory will now load as expected when language is not English.

REMOVED: Submit a Suggestion: There is no longer a 'Submit a Suggestion' button near the top right corner and the Help menu. The 'Submit Feedback' feature replaces this.

Version 5.0.6

Release Date 9/25/20

UPDATED: Activity Locks: "Clear All" button has been updated to "Clear My Locks", the tooltip text has also been updated.

UPDATED: Business Object Mapping: The default business object mapping for the 810 has been updated. (Extended Module: SalesPadEDI)

UPDATED: EDI 940 Outbound: When running the EDI 940 plugin from workflow, if only one warehouse trading partner is set up in the system, then it will now use that when a specific warehouse trading partner is not found for the customer. (Extended Module: SalesPadEDI)

UPDATED: Workflow Setup: Disabling a workflow key script will now use "return false" which will allow the script to correctly compile.

FIXED: Consolidated Shipments: Scan to Shipment: The error sound will now only take time to load when the form is first opened, instead of every time the sound needed to be played. This should prevent issues causing the error sound to be delayed. (Introduced: 5.0.1)

FIXED: EDI 940 Outbound: When running the EDI 940 plugin manually, the trading partner IDs in the Destination dropdown are no longer duplicated. (Extended Module: SalesPadEDI)

FIXED: EDI Service: The EDI service now installs correctly when running SalesPad Desktop in 64-bit. (Introduced: 4.6.4.25) (Extended Module: SalesPadEDI)

FIXED: Login: Deleting a connection while using a 64-bit installation will no longer cause an exception.

FIXED: Purchasing Advisor: Scrolling through the item details grid while item costs are still loading will no longer cause a multithreading exception.

FIXED: Purchasing Advisor: The "By Location" checkbox is now checked and disabled if either the "Include Reorder Pt. Demand" or "Include Sales Summary" checkboxes are checked.

FIXED: Sales Document Notes: Notes will now be editable when moving a document from a readonly workflow batch into a non-readonly batch.

FIXED: Sales Line Item: When adding a package item via inventory search while using the Promo Pricing Prompt to adjust the quantity, the quantity will no longer revert back to 1.

Version 5.0.5

Release Date 9/11/20

BREAKING CHANGE: Inventory Adjustments: Allocation: Layouts for the 'Create Serial/Lot' and 'Available to Pick' grids now load and save to the spLayout table instead of a file. Old layouts will not be migrated to the spLayout table due to multiple previous issues with saving layouts for those grids, so layout changes for those grids will have to be recreated.

ADDED: Workflow Setup: Security: Business Object Tabs To Hide - A semicolon-delimited list of business object types to be hidden. (Default: empty)

ADDED: Workflow: Actions: Script actions are now passed a CancelEventArgs object that can be used to cancel the forward.

ADDED: Workflow: Rules: Or Conditions: If unchecked, all rule conditions must evaluate to true. If checked, one must evaluate to true.

UPDATED: Sales Territory Search: The Sales Territory search screen no longer includes a Sales Person ID field to be selected from the column chooser and is no longer a visible field on the grid.

FIXED: CRM: Sales Person Search: Setting a salesperson as Inactive will no longer cause fields to lose data on refresh.

FIXED: Case Tracker: Case Tracker Details: Resetting the default layout on this grid now properly resets the control's layout to the original configuration.

FIXED: Customer Card: Users will no longer receive an object reference error if they attempt to create a new document but no doc ID is chosen. (Introduced: 5.0.2)

FIXED: Customer Contacts: There will no longer be 2 overlapping text boxes below the Country field. (Introduced: 5.0.3)

FIXED: EDI 856 Outbound: When getting marked for location information from the Z7 address group in an 850, the same info will now be turned around correctly when sending an 856. (Extended Module: SalesPadEDI)

FIXED: Equipment: New Equipment no longer copies the Item workflow from the Item the equipment uses.

FIXED: Inventory Adjustments: Allocation: Layouts for the 'Create Serial/Lot' and 'Available to Pick' grids now load and save properly.

FIXED: Inventory Adjustments: Allocation: The Qty column in the 'Create Serial/Lot' no longer allows more decimal places than the item's maximum decimal places.

FIXED: License Plate Maintenance: License plate values are now loaded correctly when editing a child license plate. (Introduced: 5.0.0)

FIXED: PayLink: PayLinks will now be retrieved via Remote Library properly when the PayLink was created before the invoice was posted. Previously, this would result in a "DocNumber not found" error that was visible from within the PayFabric portal.

FIXED: Returns: Fulfillment Plugin: The fulfillment plugin will no longer allow for selection or deletion of fulfillment details for non-tracked, non-multi-bin items while fulfilling a return.

FIXED: Sales Document: When updating the backordered quantity in a non-multibin environment with the quantity shortage option not set to "Override Shortage", the fulfilled quantity will no longer be cleared out.

FIXED: Sales Documents: Tabbing to the Shipping Method field after selecting a Payment Term will not revert the Payment Term change.

FIXED: Workflow Setup: Manufacturing Order and Case Tracker Case tabs only show if the respective Manufacturing and Case Tracker .dlls are present.

FIXED: Workflow: Actions: If an object triggers a "Move to Queue" action while forwarding, it will no longer continue to the queue it was being forwarded to, as the action will override the forward.

Version 5.0.4

Release Date 8/28/20

BREAKING CHANGE: The SQL user that runs SalesPad database updates, now requires TYPE create permissions.

ADDED: Analytics: Capture analytics for Bus Obj Workflow and Sales Document Workflow.

ADDED: Detach PO Line From Sales Order - Detach multiple Purchase Line Sop To Pop links from Sales Documents.

ADDED: Detach Sales Line From PO - Detach multiple Sales Line Sop To Pop links from Purchase Orders.

ADDED: Sales Line Mass Update Detach Sop To Pop Links - Detach Sop To Pop links for multiple Sales Lines from the Sales Line Mass Update screen.

ADDED: Setting: EDI SPS Shipping Label ZPL Media Type: The ZPL media type to use when retrieving shipping labels from SPS. (Default: T) (Extended Module; SalesPadEDI)

ADDED: Setting: EDI SPS Shipping Label ZPL Print Mode: The ZPL print mode to use when retrieving shipping labels from SPS. (Default: T) (Extended Module; SalesPadEDI)

UPDATED: Setting: SPS Dev Center Credentials: Changing this setting requires SalesPad Desktop to be run with administrator privileges. There is now a message when attempting to change the setting without those privileges. (Extended Module: SalesPadEDI) (Introduced: 5.0.2)

FIXED: Assembly Line User Fields: Integer type user fields will now update and edit properly.

FIXED: BOM Line User Fields: Integer type user fields will now update and edit properly.

FIXED: Counter Sales: The caption for the "Don't Mail" column in the Customer Search grid has been fixed.

FIXED: EDI 846 Outbound: Sending an 846 to multiple trading partners at a time will no longer error out with an object reference error. (Introduced: 4.6.4.21) (Extended Module: SalesPadEDI)

FIXED: In-Transit Transfer Fulfillment Plugin: Serial/Lot/Bin information will now be populated correctly for historical in-transit transfer documents.

FIXED: In-Transit Transfer Printed Report: Line and Serial/Lot/Bin details will now be displayed correctly for historical in-transit transfer documents.

FIXED: Item Maintenance: The User Defined columns in the Customer Items tab are now displayed correctly.

FIXED: Opportunities: Opening an interaction with a deleted prospect will no longer cause an object reference error.

FIXED: Opportunity: Double-clicking the save button will no longer create multiple opportunities.

FIXED: Reports: Customer reports will sort Customer AR aging buckets in the correct order.

FIXED: Sales Document: Transferring an order to an invoice that had multiple transactions on it with different types (payment and deposit) will no longer throw a "Duplicate Key Error" if the 'Use Shipment Suffix' setting is disabled.

FIXED: Sales Documents: Packages: Trying to create a package in DataCollection version 4.5.6.0 or older will not give a "The server was unable to process the request due to an internal error" message. (Introduced: 4.6.4.30)

FIXED: Script Editor: The key combination of "SHIFT+ENTER" will no longer throw exceptions and lock up the application. (Introduced: 4.6.4.28)

FIXED: Workflow Comparison Editor: Value comparisons now allow a comparison to a blank string value.

REMOVED: Counter Sales: The Source column in the Customer Search grid has been removed. It was never populated and having it visible would cause data to not load correctly.

Version 5.0.3

Release Date 8/14/20

ADDED: Automation Agent: Process Recurring Sales Settings: Use All Recurring Sales Definition Names - If set to 'True', all Sales Definition Names will be used when the component is run (rather than the ones specified in the Recurring Sales Definition Names). This setting has priority over the 'Recurring Sales Definition Names' setting. (Default: False) (Extended Module: AutomationAgent)

ADDED: Customer: GP Inet fields are now accessible on the Customer Entry form.

ADDED: Inventory: Equipment Search: 'Queue' column for Equipment workflow.

ADDED: KwikTag: Users can now add, update, and clear comments for documents. (Extended Module: KwikTag)

ADDED: Manufacturing: MO Search: 'Queue' column for Manufacturing Order workflow.

ADDED: PayFabric Workflow Rules: Added a new PayFabric workflow rule that checks if the document has an authorization but does not check any related documents.

ADDED: Sales Document EDI Get Labels: Added a new workflow plugin so that shipping labels from SPS can be retrieved automatically. (Extended Module: SalesPadEDI)

ADDED: Sales Document EDI Print Labels: Added a new workflow plugin so that shipping labels can be printed automatically. (Extended Module: SalesPadEDI)

ADDED: Script Editor: The script editor screen that is outside the Security Script Manager will now show the Script Helper information. This form has also been updated and is themed more appropriately.

ADDED: Scripting: Extension methods from the namespace "Apollo.ExtentionMethods" no longer require a manual "#REFERENCE(using Apollo.ExtentionMethods;)" to be added. NOTE: This does not need to be removed in existing scripts.

ADDED: Security Script Manager: The Script Helper has been expanded to show child business objects (and their fields) along with certain utility methods. The new grid has a copy icon that will copy example code to the clipboard. Collection type business objects will have a template for each loop snippet of code.

ADDED: Workflow Rule: Fully Packed: Evaluates to 'True' when all fulfilled items on the sales document are packed into a shipment.

UPDATED: Inbound EDI 850: When Packaging Generation is set to 'Multiple', the packages that are created will start counting from 1 instead of 0. (Extended Module: SalesPadEDI)

UPDATED: PayFabric Workflow Rule: Changed the description text of the "PAYFABRIC AUTH PRESENT" rule to convey that it also checks related documents.

UPDATED: PayFabric Workflow Rules: Updated the "PAYFABRIC PMNT EXISTS" and "PAYFABRIC AUTH PRESENT" rules to use the new transaction types.

UPDATED: Sales Document Entry: Shipments: Changing a sales document's shipping method will prompt to update the shipping method and carrier code on non-consolidated shipping headers belonging to that sales document.

UPDATED: Sales Document Shipments: When transferring to invoice, packages on the historical document will no longer have their quantities cleared out.

UPDATED: Security Script Manager: There is now a loading progress bar and the screen will now draw properly when loading.

FIXED: Application: There was potential for specific shutdown processes to throw an exception when hitting cancel before actually logging in to the application. This should be resolved going forward.

FIXED: Application: Tree List grids row colors will display properly.

FIXED: Case Tracker Entry: There will no longer be a column error when clicking the header address field if there is a filter script on the CustomerAddr business object that accesses certain fields.

FIXED: Case Tracker Line Selector: The Quantity value for serial and lot-tracked items in non-base UofM has been corrected.

FIXED: Case Tracker: Interactions Tab: New case tracker cases will no longer show unrelated/unlinked interaction data within its interactions tab.

FIXED: Counter Sales: Double-clicking a row in the Customer Search will no longer throw an error if the Addr Code column is hidden from the grid.

FIXED: Customer Card: The toolbar will no longer create multiple rows when resized smaller.

(Introduced: 5.0.2)

FIXED: EDI 856 Outbound: When there is an issue with the link between the sales document and a package detail, the EDI 856 plugin on the Shipment tab will now display a more useful error message instead of an object reference error. (ExtendedModule: SalesPadEDI)

FIXED: Equipment: The service order drop-down will now populate properly when using the Binary Streams extended module.

FIXED: Inventory Lookup: Inventory plugins will now show properly. (Introduced: 4.6.4.31)

FIXED: KwikTag: The file name will now be sent when creating new documents. (Extended Module: KwikTag)

FIXED: PayFabric: Transaction amounts will no longer be incorrect for users using the French localization option in SalesPad.

FIXED: Import Manager: Fixed an issue that caused various Excel file types to not import correctly when performing an import. This applies to all definition types on the Import Manager.

FIXED: Purchase Receipt: Queue: When a workflow is assigned on the first save, queues in the same workflow will be available in the editor without having to close and re-open the receipt.

FIXED: Receiving: The toolbar will no longer create multiple rows when resized smaller.

FIXED: Reports: Fields from spcpARStatementReport will load on AR Statement reports. (Introduced: 4.6.4.30)

FIXED: Sales Document Entry: Payments: The Credit/Charge/Void buttons are now disabled if the document is read-only.

FIXED: Sales Document Entry: Shipments: When creating a shipping header, its carrier code will be set to its shipping method's carrier code.

FIXED: Sales Document: Creating a new package will now default the SSCC number. (Introduced: 5.0.0)

FIXED: Sales Document: Fulfillment: Fixed issue where order/invoice quantity would not fulfill for non-tracked items with no quantity available in non-multibin environments. (introduced 5.0.0)

FIXED: Sales Document: In the Shipment tab, the line numbers and component sequence numbers associated with package details are now displayed correctly.

FIXED: Sales Document: Packages created from the "Generate Multiple Packages" button will now have their dimensions defaulted correctly. (Introduced: 5.0.2)

FIXED: Sales Documents: When closing the Purchase Plan screen after creating a purchase order from a sales document, the message in the lower left will display "Reloading

Document..." instead of "Closing...", and reloading the document will be faster than before.

FIXED: Sales Line Item Resources: In rare situations, deleting a sales document or refreshing the Sales Line Item Resources plugin would cause a "The query processor could not produce a query plan because a worktable is required" error. This has been corrected.

FIXED: Scripting: Compiling or running a script will no longer give an "An assembly with the same identity [System.Dynamic or Microsoft.CSharp] has already been imported" error in low memory situations. (Introduced: 4.5.1.18)

Version 5.0.2

Release Date 7/28/20

BREAKING CHANGE: Shipping Labels: Shipping labels are now retrieved through SPS Commerce's REST-based API instead of the SOAP-based API. Click here for more information on this change. (Extended Module: SalesPadEDI)

BREAKING CHANGE: Customer On Load Script: The NewQuoteButton, NewOrderButton, NewInvoiceButton, and NewReturnButton parameters have been changed from ToolStripSplitButtons to BarButtonItems. This change could cause some issues with scripts that reference properties on these buttons that are not interchangeable. Please notify Support of any errors as a result of this change and they will be fixed.

BREAKING CHANGE: EDI Business Object Mapping: Any existing business object mappings for shipping labels (000 and 001) will no longer work. Create a new 000 mapping to replace the old ones. A 001 mapping is no longer needed. (Extended Module: SalesPadEDI)

ADDED: Sales Document Shipments: A button to un-nest packages has been added.

ADDED: Sales Document Shipments: Added a "Generate Multiple Packages" button, allowing you to generate a package for each quantity of an item on a sales document.

ADDED: Security: Sales Document Entry - Required Fields - Invoice: Set required fields for saving new Invoices ("String" requires a text value, "Date" requires a date greater than 1/1/1900, "Numeric" requires a value that is not zero, "Boolean" requires the field to be checked).

ADDED: Security: Sales Document Entry - Required Fields - Order: Set required fields for saving new Orders ("String" requires a text value, "Date" requires a date greater than 1/1/1900, "Numeric" requires a value that is not zero, "Boolean" requires the field to be checked).

ADDED: Security: Sales Document Entry - Required Fields - Quote: Set required fields for saving new Quotes ("String" requires a text value, "Date" requires a date greater than 1/1/1900, "Numeric" requires a value that is not zero, "Boolean" requires the field to be checked).

ADDED: Security: Sales Document Entry - Required Fields - Return: Set required fields for saving new Returns ("String" requires a text value, "Date" requires a date greater than 1/1/1900, "Numeric" requires a value that is not zero, "Boolean" requires the field to be checked).

ADDED: Settings: EDI Label Printing: Log in to SPS Dev Center to grant access to SalesPad to retrieve test shipping labels from SPS. (Extended Module: SalesPadEDI)

ADDED: Settings: EDI Label Printing: SPS Dev Center Credentials - Log in to SPS Dev Center to grant access to SalesPad to retrieve shipping labels from SPS. (Extended Module: SalesPadEDI)

UPDATED: Document Release: If the document needs to be saved it will now properly run the Sales Document Pre Save Script and do other checks that mirror pressing the save button.

UPDATED: Outbound 810: TotalTermsDiscountAmount and InvoiceAmtDueByTermsDate are now calculated for the Summary group. (Extended Module: SalesPadEDI)

UPDATED: Sales Document Entry: The following checks are now being done before a potential save happens when attempting to take a payment: blank 'Required Ship Date', blank 'Shipping Method', 'Sales Person Required' security, 'Prompt for Sales Document Notes' setting, and 'Auto Prompt for Notification Email' setting.

UPDATED: Sales Document Entry: Case Tracker Entries: The Case that the Reorder/Return document was created from is now displayed on this tab.

UPDATED: Sales Document Shipments: Packages can now be multi-selected.

UPDATED: Sales Document Shipments: When nesting packages, the packages available to be selected are now filtered by the current shipment.

UPDATED: Shipping Labels: Shipping labels are now retrieved through SPS' REST-based API instead of the SOAP-based API. (Extended Module: SalesPadEDI)

UPDATED: Application: The look of the tool strip on the Activity Locks, Customer Card, Sales Monitor and Security screen have been updated. More screens will be updated in the future.

FIXED: Application: Companies that use both SalesPad x86 and x64 versions will no longer have the database update prompt appear for one version even though it was run with the other version. This change will also fix the issue that prevented users from logging in because their version of SalesPad was older than the database version even though it was the same version.

FIXED: Automation Agent Settings: Settings that use non-ASCII characters are now saved properly.

FIXED: Automation Agent: Fixed issue that caused jobs to run with default settings unless the settings tab had been opened (introduced in 5.0.1).

FIXED: Create Return: The Return Total will now update properly as the user is selecting lines.

FIXED: Customer Contact Address: Marking an address as the 'Primary Address' will now update the customer's Sales Person and Sales Territory to match.

FIXED: EDI 856 Outbound: 'Divide by zero' errors will no longer occur on shipments with kit items. (Extended Module: SalesPadEDI) (Introduced: 4.6.4.25)

FIXED: EDI Processing: The "Start" button is no longer enabled while the process is running. (Extended Module: SalesPadEDI) (Introduced: 4.6.4.25)

FIXED: EDI: 850: Removed an exception that could occur when processing an 850 with the trading partner's packaging generation set to 'Single'.

FIXED: Equipment: Text in the queue field in equipment properties is now centered.

FIXED: Installer: The version number on the final screen will no longer be cut off.

FIXED: Manufacturing Orders: Text in the queue field in MO properties is now centered.

FIXED: Ops-Core Fulfillment: Saving a new sales document without any lines will no longer give the user an Object Reference error.

FIXED: Receiving: Fixed a bug that prevented receiving unlinked purchase orders (introduced 5.0.1).

FIXED: Receiving: Fixed an issue that allowed linked purchase orders to be over-received if they were first partially received.

FIXED: Sales Document Entry: Changing the quantity of a package item in the Promo Pricing Prompt will now roll down the quantity to the package components.

FIXED: Security: Allow Remove Manual Payments: Manual payments will properly respect this security regardless of whether the security "Can Edit Manual Payments" is enabled or not. (Introduced 4.6.4.25)

FIXED: Smart Printing Maintenance: Deleting a row while a filter was enabled would sometimes delete more than just the selected row. This has been fixed.

FIXED: Workflow: Saving a business object with a Workflow Key evaluating a C# Script will no longer throw a "True" or "False" message.

REMOVED: Settings: EDI Label Printing: EDI Labelary Request Rate - No longer using Labelary to get shipping label images. (Extended Module: SalesPadEDI)

REMOVED: Settings: EDI Label Printing: EDI ZPL Label Dimensions - No longer needed when requesting shipping labels from SPS. (Extended Module: SalesPadEDI)

Version 5.0.1

Release Date 7/14/20

ADDED: Assign Workflow To Business Object: A new plugin was added that allows users to assign a workflow to multiple unassigned business objects.

ADDED: Purchase Line Items: Tooltips for all purchase line item indicators have been added.

ADDED: Sales Line Items: Tooltips for all sales line item indicators have been added.

ADDED: Setting: EDI Create Empty Shipment - When enabled, an empty shipment will be created when an order is created from EDI and packaging generation is set to 'None'. (Extended Module: SalesPadEDI)

ADDED: Settings: Copy Address UDFs When Address Changes: When disabled, changing the ship to address from sales entry will not copy UDFs that share the same name between customer address and the sales document. (Default: True)

UPDATED: Avalara Address Validation: Address Validation will now update Latitude and Longitude during address validation if Avalara response with a Validated Result or a Recommendation Result.

UPDATED: Case Tracker Entry: The Sales Doc Num field can now be edited if a document hasn't been linked yet. (Extended Module)

UPDATED: Case Tracker: Case Tracker Line Selector: Layout customization has been disabled, and screen resizing is now supported.

UPDATED: Quick Report Columns: The grid now shows an error indicator when the Name cell is blank.

UPDATED: Sales Document Entry: When changing 'Ship To Address' UDFs that share the same name between the customer address and the sales document, the value will not be updated from the customer address.

UPDATED: Setting: System: SQL Parameters Mismatch: If 'Desktop' is selected and you are running a version of SalesPad Desktop newer than the database version, saving a sales document will not give errors such as: '@Parameter1 is not a parameter for procedure spptaSopHdrIvcInsert_SalesPad.'

UPDATED: ShipCenter: The ShipCenter module now works with the 64 bit version of

SalesPad.

UPDATED: Automation Agent: Scripts are now cached upon login and require a logout for script changes to be applied. Similar to security scripting. (Extended Module: Automation Agent)

FIXED: Application: The log viewer that shows the results of certain processes will no longer show behind the SalesPad and will be shown in the foreground.

FIXED: Assembly Entry: Changing the queue will no longer revert back to the original queue upon save.

FIXED: Assembly Entry: The queue drop-down will now populate correctly with GP batches if there are no assembly workflows created.

FIXED: Assembly Entry: Users will no longer receive a message stating the assembly was moved into a queue each time they save.

FIXED: Automation Agent: Having multiple automations scheduled will not cause 'Collection was modified' errors.

FIXED: Automation Agent: Resolved a null reference that would occur while executing scripts when AA was running as a service. (Introduced 4.6.4.31) (Extended Module: Automation Agent)

FIXED: Automation Service: The user name and password is now required when installing the service. (Introduced: 4.6.4.31)

FIXED: Business Object Workflow: Manufacturing Order workflows will now be limited to a queue length of 50.

FIXED: Case Tracker Details: Deleting a row while the "Show Historical" checkbox is not checked will now select the next row and update the detail properties.

FIXED: Case Tracker Entry: Details: Historical Details are no longer shown if the "Show Historical" checkbox is unchecked.

FIXED: Case Tracker Entry: Details: Items from the linked document can now be added before the Case has been saved.

FIXED: Case Tracker: Moving a case from one status to another, while there were historical details, would cause the details to revert to non-historical. There is now a prompt to ask the user if they want to update these lines.

FIXED: Case Tracker: When opening a case, the detail fields will now populate properly without needing to switch to a different row first.

FIXED: Counter Sales: Changing the currency will now work properly. Previously it would always switch back to the customer's currency upon saving.

FIXED: Customer Contract Pricing: Sales lines that are split as a result of the remaining contract quantity being consumed will now properly reflect the rollover quantity on the newly split line.

FIXED: Customer Properties: Some fields would not visually update if the values were changed in a pre-save script. Users would need to close and reopen the card to see the changes. This has been resolved.

FIXED: EDI Processing: An object reference exception will no longer occur when certain fields have been removed from the business object mapping. (Extended Module: SalesPadEDI)

FIXED: EDI Transaction: Certain fields on the transaction will no longer be blank when the transaction is successful. (Extended Module: SalesPadEDI)

FIXED: Import Manager: Importing Alternate items will no longer update the list price of the associated item master, unless the retail price field is defined in the import template.

FIXED: Inbound 945: Fulfilled quantities are now updated correctly when there are multiple packages. (Extended Module: SalesPadEDI)

FIXED: Item Maintenance: Copying an item from another item will no longer copy that item's workflow.

FIXED: Item Promotions: Some columns will no longer show "[Editvalue is null]" for older data, instead it will be blank.

FIXED: License Plate Maintenance: The Item Number and UofM fields no longer accept invalid input.

FIXED: ONESOURCE: Zip Codes using a +4 will now pass the additional 4 digits to the ONESOURCE service correctly, so local taxes will be calculated correctly.

FIXED: Outbound EDI 856: Kit items are now sent on the ASN, rather than the packed kit components, when the item is added after the order is created. (Extended Module: SalesPadEDI)

FIXED: PayFabric: When voiding a transaction from a document that has multiple transactions, it will no longer be possible for the wrong payment to be deleted.

FIXED: Purchase Order Entry: Line Items: Cancelling the Inventory Lookup will no longer throw an object reference error.

FIXED: Purchase Order: Saving a purchase order when no workflows were created for it would result in a save message saying 'PurchaseOrder assigned to queue .' This has been fixed.

FIXED: Quick Reports: Pivot Grid Quick Reports that contained a blank column field name will no longer result in a "Value cannot be null. Parameter name: key" error.

FIXED: Receiving: Allow Over Receiving: Lines can no longer receive more than their linked quantity if the "Allow Over Receiving" security is set to false.

FIXED: Sales Document Entry: Addresses: Clicking the "Add" button will no longer throw an error if the sales document doesn't have a ship to address.

FIXED: Sales Document Entry: Fulfillment: The default column layout in the "Create Return Fulfillment" grid will no longer be restored when you select a non-tracked line item in a non-multibin environment.

FIXED: Sales Document Line Items: An 'L' indicator will no longer appear if the quantity available for the item is negative.

FIXED: Sales Document: Payment terms discounts, that were calculated using taxes, would be larger than expected if freight or miscellaneous charges were part of the document's tax. This has been corrected.

FIXED: Shipment tab: Header layout now saves appropriately after layout customizations are made. (Introduced: 4.6.4.31)

FIXED: Workflow: New prospects, opportunities, equipment, and case tracker cases will not skip workflows which use the 'Once' Reevaluation Rule.

FIXED: Workflow: Time Entry records will no longer be created if a business object is assigned to a workflow but no queues are created for the workflow.

Version 5.0.0

Release Date 6/22/20

Click here to view the Release Highlights

ADDED: Settings: Customer TeleSales Frequency - Determines how many days pass after a customer's last order before they appear on the TeleSales Monitor.

ADDED: Settings: Shipments: Package Columns To Include In Audit: Package columns that will be audited. If no columns are selected, no auditing will be done. Defaults to many columns.

ADDED: Settings: Shipments: Package Detail Columns To Include In Audit: Package Detail columns that will be audited. If no columns are selected, no auditing will be done. Defaults to many columns.

ADDED: Settings: Shipments: Shipping Header Columns To Include In Audit: Shipping Header columns that will be audited. If no columns are selected, no auditing will be done. Defaults to many columns.

ADDED: Settings: Attempts To Retrieve Successful Transaction - Determines the number of attempts to retrieve verification on a successful transaction from PayFabric. (Default: 3)

ADDED: Workflow: Prospects and Opportunities can now have workflows.

UPDATED: Application: The splash screen image has been updated.

UPDATED: Bus Obj Workflow: Removed from Beta.

UPDATED: Group Pricing: Creating new groups will now increment the sequence by 10 instead of by 1 to match the resequence functionality.

UPDATED: License Plate Maintenance: License plate weight is now a calculated value based on items and child license plates.

UPDATED: License Plate Maintenance: When editing license plate details, changing the item number now clears the serial/lot number.

UPDATED: Sales Documents: Shipment: Deleting a shipping header, package, or package detail will be audited to the linked sales documents.

UPDATED: Workflow: Action Editor: Customer and Case Tracker Case can now use email templates for sending emails as workflow actions.

UPDATED: Workflow: Action Editor: Email Body: For Business Objects that support email templates, the body can now be saved as an email template.

FIXED: Case Tracker: Cases created from the Case Tracker tab on the customer card will no longer have the workflow copied from the customer.

FIXED: Grids: Grids with "Resequence" buttons will now resequence properly when an autofilter row is being applied.

FIXED: License Plate Maintenance: Detail editor form properly remembers its previous size.

FIXED: PayFabric: Fixed a number of scenarios that would cause users to receive a Null Reference error after authorizing or charging a card.

FIXED: PayFabric: There is a rare scenario where a charge transaction is successful on PayFabric's end but SalesPad is unable to retrieve the transaction's records. In this scenario we now retry multiple times before we inform the user of the problem. If you are receiving this error, it is recommended that the transaction's status be double checked in your PayFabric portal. If successful, the transaction can be voided from the portal, then reprocessed in SalesPad or manually created on the document.

FIXED: Purchase Order Monitor: Forwarding a purchase order will no longer result in the purchase order remaining locked.

FIXED: Sales Fulfillment: Sales fulfillment for returns no longer throws an exception.

FIXED: Workflow: Report Emailing: Removed a Null Reference exception that would occur when emailing a custom AR Statement National Account report.

FIXED: Workflow: Email Actions: Sending a custom report by email will no longer send the stock version of the report instead of the custom version.

FIXED: Workflow: Monitors: Forwarding to the end of a workflow using a monitor, when an object should move to a different workflow, will now function properly.

Version 4.6.4.31

Release Date 6/13/20

BREAKING CHANGE: Case Tracker Reorders: The "Allowed Reorder Doc Types" setting is now a security - located within the Case Tracker Reorders/Returns plugin. (Extended Module: Case Tracker)

ADDED: Case Tracker Entry: Case Tracker entry through a sales document will now utilize a plugin for users to select which sales lines to be converted into case details. (Extended Module: Case Tracker)

ADDED: Case Tracker Entry: 'Sales Rep ID' and 'Sales Territory' are now viewable, read-only fields. (Extended Module: Case Tracker)

ADDED: Case Tracker Entry: Case Tracker Entry now utilizes Activity Locks. (Extended Module: Case Tracker)

ADDED: Case Tracker Details: Added the 'Serial/Lot' column to case tracker details. (Extended Module: Case Tracker)

ADDED: Case Tracker: Reorder/Returns: When creating a return from a case, there is now an option to toggle viewing lines from either the linked sales document or the case details. (Extended Module: Case Tracker)

ADDED: Cash Receipts: Multi-currency cash receipts can now be applied to documents of the same currency.

ADDED: Cash Receipts: Users can now choose the currency from the dropdown when they are creating a Cash Receipt. It will still default to the customer's currency.

ADDED: Consolidated Shipments: Added a new search tab that allows users to add an entire sales document to the shipment at once.

ADDED: Consolidated Shipments: Added functionality to move packages from a sales document to a consolidated shipment.

ADDED: Equipment Management: Case Tracker History Tab: Adds a 'History' tab for tracking case tracker cases linked to an equipment/serial number. (Extended Module: Case Tracker)

ADDED: Equipment Management: Case Tracker History Tab: Adds the ability to create a case tracker case from an equipment number. (Extended Module: Case Tracker)

ADDED: Inventory Lookup: Case Tracker History Tab: Adds a 'History' tab for tracking case tracker cases linked to an item. (Extended Module: Case Tracker)

ADDED: Inventory Lookup: Case Tracker History Tab: Adds the ability to create a case tracker case from an item. (Extended Module: Case Tracker)

ADDED: Inventory Search and Sales Inventory Search: There is now the 'Custom Search' field and 'Custom Search Value' fields. These will only show if there is no spcpGetInventorySearch and the Setting -> Inventory Search Use Proc Override is false. If there have been any customized layouts saved these fields will need to be manually added to the layout or have the layout reset to default. The Custom Field will only be used for the Inventory Grid and not the other tabs (Vendor Items, Alternate Items, Customer Items, etc.).

ADDED: Sales Document Entry: A hyperlink will appear in the Shipment tab if items on the document are packed in a consolidated shipment. Clicking on the hyperlink will automatically bring up a list of shipments that contain items from this document.

ADDED: Scan to Shipment: This plugin allows users to scan sales documents and items to add them to consolidated shipments

ADDED: Security: Scan to Shipment: Error Noise WAV Path - Enter the WAV file path to play the WAV file whenever an incorrect or overpacked item is scanned.

ADDED: Security: Scan to Shipment: Unfocus Item Number After Error - Unfocuses the 'Item Number' field after an invalid item is scanned.

ADDED: Settings: EDI Stop Workflow Forward If EDI Plugin Encounters Processing Errors - When enabled, if an EDI plugin runs from workflow and encounters processing errors, the document will not forward. (Default: False) (Extended Module: SalesPadEDI)

ADDED: Workflow: Actions: Email actions now have a field for email priority.

ADDED: Workflow: Added workflow for Manufacturing Orders, Equipment, and Inventory Adjustments.

UPDATED: Active Support: Error submission prompt will now say "Close" instead of "Continue".

UPDATED: Application: Updated the EULA in the installer.

UPDATED: Case Tracker Case: Reorders/Returns: The DocNumber hyperlink can now open docs which have been voided since originally linked. (Extended Module: Case Tracker)

UPDATED: Case Tracker Entry: Add Detail (via Sales Document): If a case has a sales document linked, adding a case detail will now utilize a plugin for users to select which sales lines to be converted into case details. (Extended Module: Case Tracker)

UPDATED: Case Tracker Entry: Customer number and sales document number labels will now change mouse cursor to hand icon when hovered over. (Extended Module: Case Tracker)

UPDATED: Case Tracker Entry: Manually switching the status will now switch the layout accordingly. The layout will also switch if the save action would switch the status. (Extended Module: Case Tracker)

UPDATED: Customer Address: 'Latitude' and 'Longitude' columns will now allow null values. (Introduced 4.6.4.30)

UPDATED: Customer Card: Manually switching the Customer Class will now switch the layout accordingly.

UPDATED: Customer: Address: Added validation to the email, email to, email cc, and email bcc fields.

UPDATED: Data Cross Reference: When the Packaging Generation is set to "None", a shipping header is no longer created when the order is created from an 850. (Extended Module: SalesPadEDI)

UPDATED: EDI 945 Inbound: The 945 is now able to find and update an order based on the customer PO number. (Extended Module: SalesPadEDI)

UPDATED: EDI: EDI 810, 855, and 856 Plugins: Updated to use the "EDI Stop Workflow Forward If EDI Plugin Encounters Processing Errors" setting. (Extended Module: SalesPadEDI)

UPDATED: Group Pricing: Deleting a group is now faster.

UPDATED: Inventory Search and Sales Inventory Search: There was a change so that these screens will theme more consistently.

UPDATED: License Plate Maintenance: New Detail: Pressing Enter on the 'Item Number' field will now open the Inventory Lookup.

UPDATED: License Plate Maintenance: The 'Parent' field now has a dropdown for selecting a parent license plate.

UPDATED: License Plate Maintenance: Users can now delete multiple license plates or license plate details by selecting multiple rows and clicking the delete button.

UPDATED: Manufacturing: Editing an item will update the CT00102 table. (Extended Module: Manufacturing)

UPDATED: New Customer: There was a Minor UI tweak for the OK/Cancel buttons.

UPDATED: Sales Document Entry: Mouse cursor will now change to the hand icon when hovering over the customer number label.

UPDATED: Sales Document Transfer: The 'Entered Batch' field will properly update when transferring from a quote to an order.

UPDATED: Sales Document Transfer: The 'Entered Batch' field will properly update when transferring from an order to an invoice.

UPDATED: Sales Document: 'Latitude' and 'Longitude' columns will now allow null values.

(Introduced 4.6.4.30)

UPDATED: Sales Inventory Search: The screen can now be resized and the size will be saved to the registry and restored accordingly.

UPDATED: Sales Inventory Search: The search button is moved to the bar at the top of the screen. The original button can be re-added via customizing the layout if desired.

UPDATED: Sales Inventory Search: There is now an icon.

UPDATED: Search Screens: The custom search fields drop down will no longer show UDF fields that do not have Group View Permissions.

UPDATED: Search Screens: The custom search fields drop down will now show the UDF Labels instead of the field name.

UPDATED: Setting: Cache Scripts On Login: When this setting is enabled, workflow scripts are compiled and cached on login, in addition to the setting and security scripts.

UPDATED: Shipment Search: The 'Sales Doc Num' search field will now also search for consolidated shipments that contain lines from the sales document.

UPDATED: Shipment: Expanded the 'Carrier Pro Num' and 'Bill of Lading' columns to 41 characters.

UPDATED: Vendor Card: Manually switching the Vendor Class will now switch the layout accordingly.

UPDATED: Vendor: Address: Added validation to the email, email to, email cc, and email bcc fields.

UPDATED: Workflow: Expanded workflow plugin support so more plugins can be run from workflow.

UPDATED: Workflow: Scripting: The business objects passed to action or condition scripts are now more specifically typed (e.g. "Customer" or "PurchaseOrder" instead of "BusinessObjectWithWorkflow").

FIXED: Case Tracker Entry: The 'Customer Information' and 'Case Details' headers are no longer cut off. (Extended Module: Case Tracker)

FIXED: Case Tracker Entry: The splitter between the properties and tabs can no longer be moved behind the toolbar. (Extended Module: Case Tracker)

FIXED: Case Tracker Reorders: The "Allowed Reorder Doc Types" security is properly respected when creating/adding Reorders or Reorder Links within a Case. (Extended Module: Case Tracker)

FIXED: Inventory Search and Sales Inventory Search: When not using a spcpGetInventorySearch and the Setting -> Inventory Search Use Proc Override is false, and searching for an Item Number and Description the results will now include the description search.

FIXED: Kits: The kit cost is now calculated using current cost of the components if the component is using % of List Price.

FIXED: Layouts: Resolved a potential null reference related to form layouts in the LoadLayout method.

FIXED: License Plate Maintenance: Newly created Licence Plates will now always appear in the search grid and will automatically be focused.

FIXED: Receipt Transaction Serial/Lot Receiving: Serial and Lot quick report user fields can now reference the item number.

FIXED: Sales Document Setup: Saving changes will no longer throw an error on a missing "Days To Expire" parameter/field. (Introduced 4.6.4.25)

FIXED: Sales Document: When a sales line item is deleted, any associated package lines are now also deleted.

FIXED: Script Editor: When tabbing the current line will no longer be selected. (Introduced: 4.6.4.28)

FIXED: Search Screens: The From Date, when available, will now save to the registry more consistently.

FIXED: Workflow Setup: Removed issues that could happen when an already open workflow is opened again. This included resetting unsaved changes done to that workflow and caused an error saying "Column 'ReadOnlySecurityGroups' does not belong to table BusObjWorkflowBatch".

FIXED: Workflow: Script Editor: The namespace the script editor uses to compile scripts is now the same one used when workflow scripts are run.

FIXED: Workflow: Scripting: Resolved an issue caused by having multiple action or condition scripts, the first script to run would be run in place of other workflow scripts.

REMOVED: Automation Service: The Local System Account is no longer an option when configuring the service. This was removed because this account does not have access to printers and has some other limitations that cause issues with certain automation actions. (Extended Module: Automation Agent)

Version 4.6.4.30

Release Date 6/1/20

BREAKING CHANGE: Scripts: The enums for 'AssemblySerialLot.Qty_Type', 'InventoryLotNum.Qty_Type', 'ItemMaster.Quantity_Type', and 'SalesLineItem.QuantityType' have been consolidated into 'Enums.QuantityType'. Any existing scripts that use that enum will need to be updated in order to work again after upgrading.

ADDED: Avalara Address Validation: Geo-coordinates are now saved when using the AvaAddressQueryHandler.

ADDED: Consolidated Shipments: Links to sales documents have been added to the screen.

ADDED: Customer Address Tab: Added Latitude and Longitude fields to Customer Address tab.

ADDED: Customer Letter Report: New report type for Customers has added.

ADDED: Mark Packages As Historical Plugin: This new plugin allows users to set packages on a sales document as historical through workflow.

ADDED: Packaging Unit Maintenance: Mark Historical License Plates plugin: This utility will go through all packages associated with historical sales documents and mark them as historical.

ADDED: Sales Document Address Tab: Added Latitude and Longitude fields to Sales Document Address tab.

ADDED: Security: Equipment Maintenance: Can Create Invoices - Allows the security group to create Invoices. (Default: True)

ADDED: Security: Equipment Maintenance: Can Create Orders - Allows the security group to create Orders. (Default: True)

ADDED: Security: Equipment Maintenance: Can Create Quotes - Allows the security group to create Quotes. (Default: True)

ADDED: Security: Equipment Maintenance: Can Create Return - Allows the security group to create Returns. (Default: True)

ADDED: Settings: EDI Label Printing: EDI Labelary Request Rate - The delay, in milliseconds, between label requests sent to Labelary. If you are getting 'Too Many Requests' errors, this number should be increased. (Default: 500) (Extended Module: SalesPadEDI)

ADDED: Shipment Search: There is now a new screen to search for shipments in SalesPad.

UPDATED: Active Support: When an Out of Memory exception is thrown while accessing the ActiveSupport.xml there is now a better message and the real error will be visible.

UPDATED: Active Support: When there is an issue accessing the ActiveSupport.xml, the underlying error will also be returned.

UPDATED: Case Tracker Entry: Details can no longer be added if the case is linked to a void sales document. (Extended Module: CaseTracker)

UPDATED: Case Tracker Monitor: Historical cases are now displayed on this screen. They can be toggled on/off with the "Show Historical" checkbox. (Extended Module: CaseTracker)

UPDATED: License Plate Maintenance: The screen is no longer in beta.

UPDATED: Purchase Advisor: Two additional "OPTION (OPTIMIZE FOR UNKNOWN)" hints were added to help in some SQL performance issues.

UPDATED: Sales Document Entry: Case Tracker Entries: Cases can no longer be created if the sales document is void. (Extended Module: CaseTracker)

UPDATED: Sales Document: When splitting or transferring an order to an invoice, any packages that were on the original document will be set as historical.

UPDATED: Security: Case Tracker Reorders/Returns: Pre Create Reorder Script - Added CaseTracker as parameter for script. (Extended Module: CaseTracker)

FIXED: Automation Agent: The Company Info's Address field will now display properly on printed reports if triggered by Smart Printing via Automation Agent running as a service. (Extended Module: Automation Agent)

FIXED: Case Tracker Entry: The Sales Doc ID field was empty if the linked sales document is void or historical. (Extended Module: CaseTracker)

FIXED: Customer Card: Case Tracker Entries: Clicking the link for a historical Sales Document will no longer show a "document does not exist" message.

FIXED: Customer Workflow: Transitioning from one workflow to another with the forward button will now work.

FIXED: Inventory Transaction Report: Custom procedure functionality will now work as intended.

FIXED: Packaging Template: The decimal values of the Weight, Height, Width, Length, and Shipping Cost fields will now save correctly.

FIXED: RMA Entry: Changing the location, then immediately printing, will now trigger the validating event which creates the prompt to roll down the change to the lines.

FIXED: Sales Documents: Changing a sales document's Ship To Address code will roll down the address's tax schedule to the sales document, regardless of the number of line items the sales document has.

FIXED: Sales Documents: Changing a sales document's tax schedule will not show a 'Change line items to Tax Schedule' prompt if all line items not matching the new tax schedule are deleted.

FIXED: Workflow Setup: Keys: Deleting a key will no longer make it so the fields for another key can't be seen.

FIXED: Workflow: Re-saving certain business objects that are workflow compatible (e.g. Assembly, Purchase Receipt) will no longer re-show the old save message that was already shown.

Version 4.6.4.29

Release Date 5/19/20

ADDED: Case Tracker Details: Show Historical: Adds a "Show Historical" filter option for toggling visibility of historical details.

ADDED: Case Tracker Entries tab: Updated the grid on the Case Tracker Entries tab of the Customer Card to support additional header-level fields (spCaseTrackerCase) including the 'Created Date'. Also added support for UDFs (spxCaseTrackerCase) in the grid. (Extended Module: Case Tracker)

ADDED: Security: Case Tracker Details: Do Not Copy Sales Line Comments - Allows users to access note shortcuts in the new comment window. (Extended Module: Case Tracker)

ADDED: Security: Equipment Maintenance: Can Create Quotes, Can Create Orders, Can Create Invoices, Can Create Return.

ADDED: Security: Sales Analysis: Can View Margin - Allow users to view margin in the Sales Analysis. (Default: True)

ADDED: Settings: OneSource Tax Calculation Failure Hold Code - A hold code to apply to sales documents if tax calculation fails. (Default: ONESOURCE_HOLD) (Extended Module: ThompsonReuters)

ADDED: Settings: Show Workflow Prompt - For each business object, specify if a prompt appears after forwarding through workflow.

ADDED: Settings: Stop Forwarding When Document Combiner Fails - When enabled, failure to combine documents will stop the document from forwarding. (Default: True)

UPDATED: Blocked Items Report: The ‘Req. Ship Date’ column now loads from line items instead of the sales document header.

UPDATED: Blocked Items Report: The 'sppBlockedItems' stored procedure, which this report loads from, now has support for custom stored procedures named 'spcpBlockedItems'.

UPDATED: Case Tracker Entry: Details can no longer be added if the case is linked to a void sales document. (Extended Module)

UPDATED: Case Tracker Entry: The "PO Number" field has been renamed to "Customer PO".

UPDATED: Case Tracker Monitor: Historical Cases are now displayed on this screen. They can be toggled on/off with a "Show Historical" checkbox. (Extended Module)

UPDATED: Sales Document Entry: Case Tracker Entries: Cases can no longer be created if the sales document is void. (Extended Module)

UPDATED: Sales Document Shipments: When creating an order through EDI and auto-generating multiple packages, packages for the same line item are created together. (Extended Module: SalesPadEDI)

UPDATED: Workflow Card: The "Conditions" and "Actions" grids on the 'Rules' tab are now disabled if a rule isn't selected.

UPDATED: Workflow Card: The 'Fields' grid on the 'Keys' tab is now disabled if a key isn't selected.

UPDATED: Workflow Card: The grids on the 'Keys' tab are now horizontally aligned.

UPDATED: Workflow: Action Editor: Email fields now validate email addresses.

FIXED: Bus Obj Workflow: Workflow rule conditions using boolean fields will now work properly, and no longer display "System.Data.DataRowView" when a choice is selected.

FIXED: Case Tracker Entry: Calculated user defined fields will now refresh upon saving a case.

FIXED: Case Tracker Entry: If a user moves a document into a workflow queue that is read-only for their security group, a prompt is now shown: "The queue "x" is read-only for your security group. Would you like to move the document to that queue and save?".

FIXED: Case Tracker Entry: The Sales Doc ID field was empty if the linked sales document is void or historical. (Extended Module)

FIXED: Consolidated Shipments: Data in all of the columns in the sales line search grid will now be displayed correctly.

FIXED: Customer Card: The On-Load script will be able to update values on the customer card again. (Introduced: 4.6.4.28)

FIXED: Document Combiner: When using Document Combiner manually, if there is an issue combining, the user will no longer receive multiple of the same error message.

FIXED: Import Manager: InventoryByLoc imports will no longer clear unspecified columns when attempting to update values for existing records.

FIXED: Item Maintenance: The tabs will now be themed properly.

FIXED: OneSource Sales Tax Query Handler: If an exemption reason code is provided at the document level, it will not also be required on the lines. (Extended Module: ThompsonReuters)

FIXED: OneSource: Sales documents can now be saved when OneSource servers are unresponsive. (Extended Module: ThompsonReuters)

FIXED: Purchase Order Entry: If a user moves a document into a workflow queue that is read-only for their security group, a prompt is now shown: "The queue "x" is read-only for your security group. Would you like to move the document to that queue and save?".

FIXED: Quick Report UDFs: Resolved a number of issues related to making selections in the dropdown results. (Introduced: 4.6.4.25)

FIXED: RMA Search: The 'Open' and 'History' options will now work properly when searching.

FIXED: Sales Analysis: If the security setting 'Can View Cost' is set to "False", the 'Cost' field can no longer be manually added to the report.

FIXED: Sales Document Entry: The Due Date is now calculated correctly when using a Due Type of EOM and Customer Grace Period option. This change only applies to GP 2015 and above. (Introduced 4.6.4.18)

FIXED: Sales Document Shipments: Viewing a shipment for the first time will no longer produce the "unsaved changes" prompt when nothing has changed (Extended Module: SalesPadEDI)

FIXED: Sales Document: Manually changing the queue will no longer create an audit log until after the document has been saved.

FIXED: Sales Documents: Having a credit memo with the same document number as a sales document will not cause the 'Total Paid' and 'Amount Due' at the top of related sales documents to display incorrectly.

FIXED: Workflow Card: If a user saves changes after deleting a rule or key, a save changes prompt will no longer appear upon closing the screen.

FIXED: Workflow: The Action Editor will no longer give "Email", "Print", or "Run Plugin" as action type options for business objects that lack support for those options.

Version 4.6.4.28

Release Date 5/1/20

ADDED: Case Tracker Monitor: Added the 'Customer Name' field/column to the case tracker monitor screen. (Extended Module: Case Tracker)

ADDED: Case Tracker Monitor: Added the 'Customer PO', 'Sales Doc Num', and 'Sales Doc Type' fields/columns to the case tracker monitor screen. (Extended Module: Case Tracker)

ADDED: Quick Report Columns: There is now an option for a 'PopupEditor' for a column, this gives the field an ellipsis button and a popup window will show the results of the field (mainly used for columns with a lot of text).

ADDED: Quick Report Editor: There is now syntax highlighting for XML and some SQL keywords.

ADDED: Quick Reports Search Field: The SQL option is now open to all field types, there is also an editor with example SQL.

ADDED: Sales Document Payments: There is now an "Accept Payment" button (below the payment totals) in the sales document totals section, clicking this button will load the sales document payments window.

ADDED: Script Editor: In the scripting settings page there is now an option to choose the comment style when using the key shortcuts; "Line" or "Block" styles.

ADDED: Script Editor: In the scripting settings page, there is now an option to pick the tabbing style and tabbing spacing; "Tab" or "Space". When "Space" is chosen, the TAB key will insert the number of spaces defined in the corresponding setting, and Shift+TAB will remove accordingly.

ADDED: Script Editor: Pressing Ctrl+KC will now comment out blocks of highlighted text.

ADDED: Script Editor: Pressing Ctrl+KU will now un-comment blocks of highlighted text.

ADDED: Script Editor: Pressing Shift+TAB will remove leading tab characters.

ADDED: Script Editor: Pressing the TAB key on highlighted text will now add tabs to each line.

ADDED: Vendor Card: There will now be a notification at the top of the card when the vendor is marked as "On Hold".

ADDED: Workflow Queue: 'Customer' and 'Vendor' business object queues now have a "Block Transaction" column to specify which security groups are not allowed to create new transactions while the object is in the queue.

UPDATED: Case Tracker Entry: Details: The "Add Note" button has been renamed to "Add Comment".

UPDATED: Case Tracker Entry: The 'Closed On' field will not be populated until the case is closed.

UPDATED: Case Tracker Maintenance: Clicking the 'Cancel' or 'X' button on the case tracker maintenance form will show a prompt asking the user if they want to save their changes (if there are any unsaved changes).

UPDATED: Case Tracker Maintenance: Trying to open case tracker maintenance while it is already open will not open a separate case tracker maintenance form.

UPDATED: Customer CRM: The UI of this form was updated to better conform with similar screens. No functionality has changed.

UPDATED: EDI Data Cross Reference: The 'TradingPartnerID' column is now limited to 15 characters. (Extended Module: SalesPadEDI)

UPDATED: EDI: Business Object Mapping: The transaction grid's 'Copy' button now copies all selected rows.

UPDATED: EDI: Business Object Mapping: The transaction grid's 'Delete' button now deletes all selected rows.

UPDATED: EDI: Data Cross Reference: The partner grid's 'Copy' button now copies all selected rows.

UPDATED: EDI: Data Cross Reference: The partner grid's 'Delete' button now deletes all selected rows excluding the blank partner.

UPDATED: EDI: Getting shipment labels will now process single item and mixed item labels separately. (Extended Module: SalesPadEDI)

UPDATED: Quick Report Editor: The Organize XML button is now always visible.

UPDATED: Quick Reports Search Field: Better error handling around the SQL field if an exception is thrown.

UPDATED: Quick Reports Search Field: The SQL field now respects the 'Restricted Keyword List' security, which limits potentially dangerous SQL words.

UPDATED: Resources: The file selection prompt that appears when clicking the 'New' button now allows users to select multiple files (a resource will be created for each selected file).

UPDATED: Shipping Labels: The XML file sent to SPS will be saved to the transaction and shipping header if retrieving the labels fails. (Extended Module: SalesPadEDI)

UPDATED: Workflow Card: The default width of the "Seq" field has been reduced.

UPDATED: Workflow Card: The description for the 'Standard Reevaluation Rule' has been updated.

UPDATED: Workflow Setup: Clicking the 'Delete' button while a Sales Document Workflow is selected will now prompt to delete the queues and rules.

UPDATED: Workflow Setup: Tab names with multiple words now have spaces in between the words.

UPDATED: Workflow Setup: The Import button is now disabled when the Sales Document tab is selected. Importing Sales Document Workflows must be done on the Sales Document Workflow Setup screen.

UPDATED: Workflow Setup: The tab names are no longer bold in some cases.

UPDATED: Workflow: Description is now a required field on Workflows, Workflow Keys, Workflow Rules, Workflow Rule Conditions, and Workflow Rule Actions.

FIXED: Case Tracker Entry: Changing the status to a non-historical status will now properly update the Case Tracker Status ID. (Extended Module: Case Tracker)

FIXED: Case Tracker Entry: Saving case tracker details will no longer cause a SQL exception. (Introduced: 4.6.4.25) (Extended Module: Case Tracker)

FIXED: Case Tracker Entry: The 'Details' tab will no longer be editable if the case is in a read-only workflow queue. (Extended Module: Case Tracker)

FIXED: Case Tracker Entry: The header will no longer be read-only after a user changes the status from historical to non-historical. (Extended Module: Case Tracker)

FIXED: Case Tracker Maintenance: Having 'Can Edit Causes', 'Can Edit Issues', or 'Can Edit Resources' set to 'False' will not cause saving changes on the case tracker maintenance form to give an object reference error.

FIXED: Case Tracker: Case Tracker Details: Case tracker details will now properly reflect the historical status of the case when the status is updated to/from a historical status. (Extended Module: Case Tracker)

FIXED: Case Tracker: Case Tracker Details: Historical case tracker details are now visible on a case. (Extended Module: Case Tracker)

FIXED: Case Tracker: Case Tracker Entry: If a user attaches resources to an email by selecting 'Print Manual' under 'Print Attachments', the email and its attachments will send successfully. (Extended Module: Case Tracker)

FIXED: Case Tracker: The setting 'Case Tracker Detail Columns To Include In Audit' is now respected. (Extended Module: Case Tracker)

FIXED: Customer Card: The information message panel will no longer flash when moving the customer through workflow.

FIXED: Import Manager: The "USCATVLS_2", "USCATVLS_3", "USCATVLS_4", "USCATVLS_5", and "USCATVLS_6" fields will now populate correctly on item master imports.

FIXED: Outbound 810, 855, and 856: The total quantity summary field will now be calculated correctly when using a UofM cross reference. (Extended Module: SalesPadEDI)

FIXED: Purchase Receipt: Emailing from a purchase receipt will no longer cause an object reference error.

FIXED: Quick Reports: Corrected a potential memory leak when running quick reports.

FIXED: Sales Document Workflow Setup: If a user deletes a workflow rule condition and then saves, there will no longer be a save prompt when closing the screen.

FIXED: Sales Document Workflow: The "B/O ITEM QTY > ON PO" workflow rule condition now works properly. It would previously evaluate 'true' if the item had a backordered quantity greater than zero, now it only evaluates 'true' if the backordered quantity is greater than the quantity on the PO.

FIXED: Sales Document Workflow: The "SERVICE ITEM BACKORDERED" workflow rule condition now works properly.

FIXED: Sales Document Workflow: The descriptions of multiple workflow rule conditions have been updated to mention "document" instead of "order".

FIXED: Sales Document Workflow: The descriptions of the "HAS SHIPPED ITEM" and "NOT SHIPPED" workflow rule conditions have been updated to reflect the actual functionality.

FIXED: Script Editor: When dragging text or word doc files into the scripting control, the text uses syntax highlighting.

FIXED: Security Script Manager: Changing the 'Dark Mode' toggle will now properly save.

FIXED: Workflow Setup: Sales Document Workflows can now be exported.

Version 4.6.4.27

Release Date 4/14/20

ADDED: EDI Business Object Mapping: Added a new column to the mapping elements, "Skip Turnaround". When checked, that field or group will not be populated with turnaround data from the inbound 850 file. (Extended Module: SalesPadEDI)

ADDED: EDI Business Object Mapping: The 810 business object mapping now contains the property "SerialLotNums", which contains fulfillment information for serial and lot numbers. (Extended Module: SalesPadEDI)

ADDED: EDI: There's now a sales document tab called 'EDI Processing Log' which shows attempted EDI transactions for the current sales document and related sales documents. (Extended Module: SalesPadEDI)

ADDED: Security: Purchase Order Entry: Pre Print Script: A C# script that executes before a purchase order is printed.

UPDATED: EDI: Business Object Mapping: Document subtypes will no longer display the "Select All" option on inbound EDI mappings. (Extended Module: SalesPadEDI)

UPDATED: EDI: Business Object Mapping: The transaction grid's 'Export' button is now called 'Export Selected' and will export all selected rows. (Extended Module: SalesPadEDI)

UPDATED: EDI: Data Cross Reference: The partner grid's 'Export' button is now called 'Export Selected' and will export all selected rows. (Extended Module: SalesPadEDI)

UPDATED: EDI: EDI Processing: Users can now select multiple rows in the Transactions grid, and the 'Re-Process' button will reprocess all selected rows (that are able to be reprocessed). (Extended Module: SalesPadEDI)

UPDATED: Print Labels: The layout of the popup has been modified to better show how it works. (Extended Module: SalesPadEDI)

UPDATED: Sales Document EDI Order Acknowledgement: Removed the 'Accept/Reject' and 'Send Details' toggle and replaced them with checkboxes.

FIXED: CRM Setup: New 'Prospect Sources', 'Prospect Classes', and 'Opportunity Statuses' are no longer duplicated when the row is edited and saved again, before reloading the screen.

FIXED: CRM: Fixed a few memory leaks throughout the module.

FIXED: Case Tracker Entry: Cases with a historical status can have their status changed and be saved. (Introduced: 4.6.4.25)

FIXED: Case Tracker Entry: The tab now says "Case Tracker Entry" instead of "Case Track Entry" when creating a new entry. (Extended Module: Case Tracker)

FIXED: Case Tracker Setup: New 'Case Tracker Statuses' are no longer duplicated when the row is edited and saved again, before reloading the screen. (Extended Module: Case Tracker)

FIXED: Case Tracker: Interactions: New Email: Clicking the 'To', 'Cc', or 'Bcc' hyperlinks will open a list of the associated customer's contacts, instead of giving an "Object reference not set to an instance of an object" error.

FIXED: Convert Opportunity To Quote: Closing the New Contact screen without saving, when a prospect with no contacts is chosen, will no longer result in a sales document being created with no address information.

FIXED: Convert Opportunity To Quote: Users will no longer be able to create a quote from an opportunity if they do not have appropriate security under the "Convert Prospect to Customer" plugin.

FIXED: EDI 810 Outbound: The "TotalLineItemNumber" field in the Summary group will now be sent correctly. (Extended Module: SalesPadEDI)

FIXED: Email: Pressing 'Enter' while typing in the email template area will no longer send the email. (Introduced: 4.6.4.25)

FIXED: Equipment Search: The search field operators can now be changed to "Equals" or "Begins With".

FIXED: EDI: Get Labels: Getting labels will no longer crash when the 850 that created the order does not contain a ProductOrItemDescription group. (Introduced: 4.6.4.25) (Extended Module: SalesPadEDI)

FIXED: New Customer: Borders and spacing were added to the 'OK' and 'Cancel' buttons to make them stand out..

FIXED: New Customer: Moved the Country and State fields to be beneath the other fields. This was done to prevent crowding.

FIXED: Opportunity Card: Linking a prospect to a new opportunity that has not been saved will no longer give the user an object reference error.

FIXED: Opportunity Card: Users will no longer receive a save prompt if they deleted a customer or prospect link.

FIXED: Opportunity Monitor: Opportunity statuses are now in sequence order, rather than alphabetical.

FIXED: PayFabric: All special characters are now encoded properly when sending data to PayFabric. This will prevent a wide variety of "Bad Request" errors some users were receiving.

FIXED: PayFabric: When using the "Export Transactions To Credit Card Advantage" setting, authorization transactions that are transferred from order to invoice will no longer have their sequence number updated to zero.

FIXED: Purchase Line Entry: Missing Vendor Item: Tabbing off of an entered item number will now format the vendor item string properly when selecting the 'Update Missing Vendor' Items button. (Introduced: 4.6.4.0)

FIXED: Sales Document: Saving orders and quotes with negative taxes on line items will no longer result in an eConnect error.

FIXED: Security Editor: Clicking the 'Apply' button after a user has already been deleted will no longer delete the newly selected user.

FIXED: User Fields: The popup textbox for read-only header UDF's can now be opened.

FIXED: Workflow Setup: The 'New' button is disabled while viewing the 'All' tab.

REMOVED: Application: Removed some unused dll files from the installation folder.

Version 4.6.4.26

Release Date 3/20/20

BREAKING CHANGE: CCH Sales Tax Office: This is no longer in the core product.

BREAKING CHANGE: CCH Sales Tax Online: This is no longer in the core product.

ADDED: Security: PayFabric Batch Capture: Always Capture Document On Account Amount - This supersedes the "Always Capture Full Authorization Amount" security. When enabled, the document's full On Account amount will be captured, regardless of the amount authorized. When disabled, the "Always Capture Full Authorization Amount" security is used. (NOTE: This security will not work for all gateways when capturing more than authorized.) (Default: False)

ADDED: Security: PayFabric Capture Plugin: Always Capture Document On Account Amount - This supersedes the "Always Capture Full Authorization Amount" security. When enabled, the document's full On Account amount will be captured, regardless of the amount authorized. When disabled, the "Always Capture Full Authorization Amount" security is used. (NOTE: This security will not work for all gateways when capturing more than authorized.) (Default: False)

UPDATED: EDI Business Object Mapping: The default business object mapping for the 945 has been updated to remove the core mapping from the TradingPartnerId field. (Extended Module: SalesPad EDI)

UPDATED: In-Transit Transfers: Status is no longer a primary key of the spxServiceTransferLine table.

UPDATED: PayFabric Batch Capture: The "Always Capture Full Authorization Amount" security has had its description updated to better reflect how it functions. No functionality has changed.

UPDATED: PayFabric Capture Plugin: The "Always Capture Full Authorization Amount" security has had its description updated to better reflect how it functions. No functionality has changed.

FIXED: Application: When using SalesPad as a remote terminal application, there were dropdowns on popup windows that could only be activated once, and then became unusable. This has been fixed.

FIXED: EDI 945 Inbound: The TradingPartnerId field on the business object mapping can now be unmapped. This will prevent issues with eConnect when the sales document tries to save. (Extended Module: SalesPad EDI)

FIXED: Funnel: Clicking the Shipment tab, while no document is loaded, will no longer give the user a 'null reference' error.

FIXED: Funnel: Leaving the ShipCenter Shipping Calculator tab, while no document is loaded, will no longer give the user a 'null reference' error. (Extended Module: ShipCenter)

FIXED: Funnel: Users will no longer receive an 'object reference' error when editing the ASN field without a sales document selected.

FIXED: Funnel: Users will no longer receive an object reference error when selecting the Time In Queue tab.

FIXED: Import Manager: Inventory adjustment allocations are now properly set when importing in a multi-bin environment. (Introduced 4.6.4.23)

FIXED: Inventory Lookup: Enabling the "Show Selling UofM Quantities In Inventory Lookup" with active search results in the grid will no longer result in a "Column 'Base_UOfM' " error. (Introduced: 4.6.4.23)

FIXED: Inventory Lookup: When Intrastat Tracking is enabled in Dynamics GP, there will no longer be an 'Input string was not in a correct format' error when searching with Country Origin or Country Description columns. In previous releases, this can be avoided by enabling the setting "Inventory Search Use Proc Override". (Introduced: 4.6.4.23)

FIXED: PayFabric: Certain HTML Errors will no longer cause a 'null reference' error and will now display properly.

FIXED: Sales Document Line Items: Right-clicking an empty grid will allow the paste menu to show up. (Introduced: 4.6.4.25)

FIXED: Sales Line Items: Deleting a sales line will now delete any Sales Line Resources related to the line.

FIXED: Sales Line Resources: Only Sales Line Resources related to the selected line will be shown (previously, it would show all line items and all sales document resources).

FIXED: Sales Line Resources: This plugin now works properly for historical documents.

Version 4.6.4.25

Release Date 3/6/20

BREAKING CHANGE: Automation Agent: Removed the seat requirement for running Automation Agent as a service. (Extended Module: Automation Agent)

BREAKING CHANGE: Login: SQL server connections will be lost if they are stored on the local machine and switching from x86 to x64 bit SalesPad.

ADDED: Assembly Monitor: A screen for viewing Assembly workflows.

ADDED: Case Tracker Case Workflow Monitor: A screen for viewing Case Tracker Case workflows.

ADDED: Customer Monitor: A screen for viewing Customer workflows.

ADDED: EDI Service: Added ability to run the EDI Processor as a Window service. (Extended Module: SalesPad EDI)

ADDED: Email On Load Script: There is a new flag that can be set "KeepOnLoadScriptSubject", which will allow any subject scripting change to not get reset by templates. This flag will get reset when the "Reset Subject" button is used.

ADDED: Emailing: When setting the Email Subject via scripting there will now be an Information button on the subject field that allows this user to reset the field to what was set via the script.

ADDED: Emailing: The Emailing and Bulk Emailing screen has a Reset Subject button that will restore the email subject field.

ADDED: Item Monitor: A screen for viewing Item workflows.

ADDED: Purchase Order Monitor: A screen for viewing Purchase Order workflows.

ADDED: Purchase Receipt Monitor: A screen for viewing Purchase Receipt workflows.

ADDED: Sales Document Time In Queue: Sales Document formlet that will display the amount of time a document has been in a queue.

ADDED: Security: Counter Sales: Enable Customer Suggestions - When enabled, customer names will be suggested in the Customer Lookup. (Default: True)

ADDED: Security: Receiving: Receive Selected Uses Linked Quantity - When enabled, the Receive Selected button will set the quantity received based on linked quantity if available. (Default: True)

ADDED: Security: Sales Document Payments: Can Edit Manual Payments - Allows a user to edit Manual Payments. (Default: True)

ADDED: Settings: Blue Moon Operations Core: Update Fulfillment Option Info When Changing Shipping Address - When enabled, Fulfillment Option information will be updated when the shipping address is changed on a Sales Document. (Default: True) (Extended Module: Blue Moon Ops Core)

ADDED: Settings: PayFabric: Send Document and Line Level Data - When enabled, SalesPad will send document and line level data to PayFabric. (Default: True)

ADDED: System Information: A text field that displays the software's current platform version was added.

ADDED: User Field Editor: Added the ability to set Quick Report UDFs as 'multi-select'.

ADDED: Vendor Monitor: A screen for viewing Vendor workflows.

ADDED: Workflow Monitors: Monitors have three new columns; Queue Days, Queue Hours, and Alert. Queue Days and Queue Hours show how long a business object has been in its current queue. Alert displays information depending on the time value set on a queue (i.e., "None", "Warning", or "Critical").

ADDED: Workflow Setup: Queues for Purchase Orders have a new field called Disable Printing that allows printing the purchase order to be disabled in that queue.

ADDED: Workflow Setup: Workflow queues now have two columns ("Warning Hours" and

"Critical Hours") that determine what the alert column in workflow monitors will say. If the number of hours a business object has been in a queue is greater than the warning hours, the alert will say "Warning". If it is greater than the critical hours, the alert column will say "Critical".

ADDED: Workflow: Re-evaluation Rules: Added rules to allow business objects to change workflows after reaching the end of a workflow.

ADDED: Workflow: Sequence: Added a sequence number to workflows to allow prioritization of one workflow over another if a business object matches multiple workflows' keys.

UPDATED: Application: DevExpress has been upgraded to 19.2.4.

UPDATED: Application: There is now a x64 bit version of SalesPad. This will relieve some 'out of memory' issues throughout the application by allowing the software to utilize more memory then it could in the x86 bit version. Note: The PaperSave and ShipCenter extended modules are not x64 compatible at the time. There are also some custom modules that are also not supported. Please email support with any requests for additional information.

UPDATED: Assembly Search: Changed the caption for the Batch Number column to Queue.

UPDATED: Bus Obj Workflow: Added workflow functionality to Items, Customers, and Vendors.

UPDATED: Business Object Mapping: The business object mapping for the 850 no longer has the Address fields marked as Core Mappings. (Extended Module: SalesPadEDI)

UPDATED: CRM Event Entry: CRM emailing is now done in a separate thread to leave the UI responsive.

UPDATED: Customer Card: Added a Queue editor and Forward button for Customer workflow.

UPDATED: Document Combiner: Line comments are now considered when combining like lines. If the comments on two or more lines do not match, the lines will not be combined.

UPDATED: EDI 856 Outbound: The PackingMaterial and PackingMedium fields are no longer Core Mappings. In addition, Packing_Material and Packing_Medium can be mapped to other fields under a PackLevel. (Extended Module: SalesPad EDI)

UPDATED: EDI Cross Reference: The Partner Carrier Routing field in the Shipping Method tab can now save 100 characters, up from 31. (Extended Module: SalesPad EDI)

UPDATED: Inbound 850: If the Ship To address was not sent on the file, it is pulled from the primary Ship To address on the customer instead. (Extended Module: SalesPadEDI)

UPDATED: Interaction Event Entry: Interaction emailing is now done in a separate thread to leave the UI responsive.

UPDATED: Inventory Lookup: The Safety Stock column will now be populated.

UPDATED: Item Maintenance: Added a Queue editor and Forward button for Item workflow.

UPDATED: Notes Tabs: The append line check box will now be stored in the registry.

UPDATED: Purchase Order: Printing/Emailing a purchase order from workflow will now release the purchase order.

UPDATED: Purchase Order Search: Changed the caption for the Batch column to Queue.

UPDATED: Purchase Receipt Search: Changed the caption for the Batch column to Queue.

UPDATED: Sales Document Workflow: Workflow Setup and Workflow Rule Setup were renamed to Sales Document Workflow Setup and Sales Document Workflow Rule Setup.

UPDATED: Sales: Sales Document Workflow is no longer on the Setup ribbon page. It can be accessed from the Workflow screen or the Sales ribbon page.

UPDATED: SalesPad Today: Security: The "Can View Other Users Tasks" and "Can View Other Users Interactions" now also applies to the calendar events. If both are disabled the ability to choose other users is also disabled.

UPDATED: SalesPad Today: Security: Renamed securities from "Can View Others Tasks" to "Can View Other Users Tasks" and "Can View Others Interactions" to "Can View Other Users Interactions.

UPDATED: SalesPad Today: The Showing User button now has a tool tip if securities are limiting visibility of Interactions or CRM Events.

UPDATED: Search Screens: The Clear button will now only drop down when the user clicks the down arrow.

UPDATED: Vendor Card: Added a Queue editor and Forward button for Vendor workflow.

UPDATED: Workflow Actions: The send email action now has the option to be sent to the currently logged in user.

UPDATED: Workflow Rule Conditions: The editor for value comparisons now is specialized for values of the field type being compared.

UPDATED: Workflow Setup: Sales Document Workflows are now visible and accessible from this screen.

UPDATED: Workflow: Workflow queues for Purchase Orders, Purchase Receipts, Assemblies, and Case Tracker Cases can be made read only for specified security groups.

UPDATED: Workflow: Bus Obj Workflow plugins were renamed such that they are now just Workflow, e.g. Bus Obj Workflow Rules is now just Workflow Rules.

UPDATED: Workflow: Business objects apart from those that have GP batches will no longer have a default queue before they are first saved.

UPDATED: Workflow: Workflow Keys: Keys for matching business objects to workflows can now be customized. Previously they were preset, so for example purchase orders could only have workflows for drop-ship or standard purchase order types.

FIXED: Application: Removed some extra DLL files from the installation folder that were not used by any core modules.

FIXED: Application: Resolved an error that prevented users from using the application due to insufficient permissions for 'Microsoft.Office.Interop.Word'.

FIXED: Automation Agent: Fixed an issue where jobs would sometimes stop running if multiple jobs were executing at the same time.

FIXED: Automation Agent: Fixed an issue where schedules set to run every x seconds would ignore the hourly restrictions.

FIXED: Blue Moon Operations Core: Fulfillment Options Plugin: Fulfillment Options fields will now use the shipping address's extended information fields when looking for default information. These fields will have a higher priority than the customer's extended information which used to be the default. (Extended Module: Blue Moon Ops Core)

FIXED: Blue Moon Operations Core: Fulfillment Options Plugin: Users will no longer receive an error if the Ship Payment Type was set to COD in the customer's extended information screen. (Extended Module: Blue Moon Ops Core)

FIXED: Cash Receipts: Non-Multi currency environment users will no longer receive a 'Currencies must match in order to apply' error when attempting to apply a cash receipt to a posted invoice.

FIXED: Cash Receipts: The user can no longer mistakenly change the PayFabric transaction type when creating a cash receipt with PayFabric.

FIXED: Contact Search: The caption of the Name column has been changed from "ResourceStrings" to "Name". (Introduced 4.6.4.0)

FIXED: Default Carrier Information: When creating a new row for a shipping method, the Carrier Routing field is now also copied to an EDI Cross Reference Shipping Method row correctly. (Extended Module: SalesPad EDI)

FIXED: EDI 856 Outbound: When kit components are packed, the kit item will now be sent out on the 856 instead of the components. (Extended Module: SalesPadEDI)

FIXED: Email Template: The Sales Document Paylink Url tag will now work. (Introduced: 4.6.4.20)

FIXED: Inventory Lookup: User Fields will properly load when not using an spcp. (Introduced: 4.6.4.23)

FIXED: Inventory Lookup: There will no longer be an error "Invalid column name Safety", if the Safety Stock column is in the grid. (Introduced: 4.6.4.23)

FIXED: Inventory Lookup: When the Setting "Show Selling UofM Quantities In Inventory Lookup" is enabled there will no longer be an error "Column Base Uofm does not belong to table". (Introduced: 4.6.4.23)

FIXED: PayFabric Batch Capture: Users will no longer receive an Object Reference Error when attempting to use this plugin. (Introduced: 4.6.4.21)

FIXED: PayFabric: The 'Enable Manual Card Selection in PayFabric plugin' security will now properly hide the Card Selection drop down when disabled.

FIXED: PayFabric: Users will no longer receive a Request Failed error when attempting to open the PayFabric screen. This error was caused by having non-standard characters in the item number field of sales lines.

FIXED: Sales Document Entry: Decreasing a line quantity below the Qty Unblocked will now also reduce the Qty Unblocked.

FIXED: Sales Document Entry: Line Items: Saving a line item marked for dropshipping when using a Quantity Shortage Option other than Override Shortage will no longer cause an eConnect error.

FIXED: Sales Document Entry: Resolved an issue where Item Promo BOGO would interfere with repricing a line during quantity adjustment on the original line.

FIXED: Sales Document Entry: The Quote Expiration Date can now be changed if the quote type is using Days To Expire. (Introduced 4.6.4.20)

FIXED: Sales Document Line Items: Clicking the autofilter row operator will no longer bring up the right-click menu.

FIXED: Sales Inventory Lookup: The blank column has been fixed to pull in the "Inactive" flag.

FIXED: Sales Line User Fields Dock: Pasted sales line will now work properly with this plugin.

FIXED: Sales Line User Fields Dock: When this plugin was visible, it could cause a slowdown when adding a new line item. This has been corrected. (Introduced: 4.6.4.16)

FIXED: SalesPad Today: Cut back on numerous database hits when the screen would refresh data.

FIXED: Shipments: Getting labels will now send OrderHeader and LineItem turnaround data from the 850 onto the 000 and 001 xml. (Extended Module: SalesPad EDI)

FIXED: Shipping Review: Errors will no longer occur when the "Can Change Return Cost" security is set to "False".

FIXED: Workflow Actions: When actions for On Enter Queue rules are executed, the business object's queue value will be the queue it is entering instead of the one it is leaving.

FIXED: User Field Editor: UDF import functionality no longer fails if the user hasn't clicked on each business object before running the import.

REMOVED: Bus Obj Monitor: This screen has been replaced with individual monitor screens for each type of business object with workflow.

REMOVED: Inventory Lookup: The "Allocatable" and "In Transit" columns were not used and have been removed.

Version 4.6.4.24

Release Date 2/30/20

ADDED: Activity Locks: BOM locks are now visible and editable from this screen.

ADDED: Application: There is now an option to "Un-tab and Maximize" for main forms.

ADDED: Application: There is now an option to "Un-tab to Monitor" for main forms. This supports up to four monitors and will resize the form to the work area size of the monitor it is sent to (this option will not be displayed if there is only one monitor).

ADDED: BOM Entry: Locks have been added to BOM Entry.

UPDATED: Document Combiner: Now combining shipment details when 'ASN_Sent' is not marked as true.

UPDATED: Sales Entry: The Active Support error for 11454 will now show what line and quantity is incorrect.

FIXED: Application: Un-tabbing a main form will no longer cause that form to become larger than the monitor.

FIXED: BOM Entry: Line Items: Clicking OK on the Item Lookup, without an item selected, will no longer cause an error.

FIXED: BOM Entry: Line Items: Opening the item lookup on a component line, then canceling the lookup, will no longer set an error.

FIXED: BOM Entry: Line Items: Serial and lot tracked items can now be added without receiving an error.

FIXED: Purchase Line Item Entry: On Row Changed Script: Selecting an item from the inventory lookup no longer sends incorrect information to the on row changed script.

FIXED: Resources: GP Attachments should now load quicker.

FIXED: Sales Document Entry: Document Combiner: Using the plugin will no longer result in lost or changed sales fulfillment on the combined document.

FIXED: Sales Document Entry: Replacing a serial/lot tracked/bin fulfillment and editing the line will no longer cause the line to be over-fulfilled on save. (Introduced 4.6.4.1)

FIXED: Sales Document/Purchase Order Line Item Plugins: Plugins (with an enabled autorun security) would cause a null reference error when used manually from the Action dropdown menu once an item number was specified. This has been corrected.

FIXED: Sales Line Availability Plugin: Having a blank location in IV40700 will no longer cause multiple errors; "Column '' does not belong to table" and "Object reference not set to an instance of an object."

Version 4.6.4.23

Release Date 1/17/20

BREAKING CHANGE: spcpAvataxPostSave: The timing of when this procedure is called was changed slightly, which could have an impact depending on what is being done in the custom procedure.

ADDED: Assembly Allocation: Added the ability to view serial and lot user fields.

ADDED: Assembly Allocation: Added the ability to remove multiple allocations by holding down the SHIFT key.

ADDED: OneSource Sales Tax Lines: Created a new tab for Sales Document entry that shows the tax details returned by the OneSource Sales Tax Query Handler. (Extended Module: ThompsonReuters)

ADDED: Security: Sales Monitor: Group By Batch - Group together batches with the same batch name, regardless of document type and document ID. If set to true, this will override the grouping done by the 'Show Sales Document Type ID Groups' security. (Default: True)

ADDED: Setting: Inventory Search Use Proc Override: When enabled Inventory lookup will call the original sppGetInventorySearch stored procedure. (Default: False)

ADDED: Settings: OneSource Document Exemption Reason Field: A sales document user field used to specify a reason for exempt documents. These reasons should match Exempt Reasons in OneSource configuration. (no default) (Extended Module: ThompsonReuters)

ADDED: Settings: OneSource Exempt Override Tax Schedule: A tax schedule beginning with IDT to be used on documents or line items that should be taxed, even if the customer is tax exempt. (Default: IDT_EXEMPT_O) (Extended Module: ThompsonReuters)

ADDED: Settings: OneSource Exempt Tax Schedule: A tax schedule beginning with IDT to be used on documents or line items that should be tax exempt, even for non tax exempt customers. This Tax Schedule should not be used when a customer has an exemption certificate configured in OneSource. (Default: IDT_EXEMPT) (Extended Module: ThompsonReuters)

ADDED: Settings: OneSource Line Exemption Reason Field: A sales line item user field used to specify a reason for exempt lines. These reasons should match Exempt Reasons in OneSource configuration. (no default) (Extended Module: ThompsonReuters)

ADDED: Settings: OneSource Sales Tax Enable SOAP Logging: When enabled, the SOAP Request and Response XML will be audited on the Sales Document. Useful for troubleshooting purposes. (Default: false) (Extended Module: ThompsonReuters)

UPDATED: Customer A/R: Added fields for viewing balances in the customer's assigned currency.

UPDATED: Inventory Lookup: By default the inventory lookup will now call views instead of a stored procedure. This allows for a fairly significant speed improvement by only loading visible columns in the grid. If there is an existing spcpGetInventorySearch, it will still be called as normal. Disabling the procedure and logging out of SalesPad will get the new speed improvements.

UPDATED: On Load Email Script: A "source" option was added to help differentiate between Smart Printing and Manual e-mailing. Source options are "EmailForm" and "SmartPrinting". NOTE: The Smart Printing source is only for Sales Documents.

UPDATED: On Load Email Script: A generic Business Object is now passed to the script to allow for scripting options when emailing from other areas. Ex: if (bo is CaseTrackerCase) or if (bo is SalesPad.Bus.Customer) or if (bo is SalesPad.Bus.Assembly) can now be used accordingly.

UPDATED: PayLink: The response message/audit has been improved when using PayLink in certain scenarios.

UPDATED: Settings: SalesTax Query Handlers: Added OneSourceSalesTaxQueryHandler, which uses a newer endpoint than the existing OneSourceTaxQueryHandler.

FIXED: Assembly Allocation: 'Selected Lot' and 'Expiration Date' columns are now read-only.

FIXED: Automation Agent: Fixed an intermittent deadlock issue caused by forwarding too many documents.

FIXED: Business Object Workflow: Email actions: The subject of emails will no longer be replaced by the body when the subject is blank, which was causing an invalid subject error.

FIXED: Cash Receipt: If multiple users attempt to create the same cash receipt at the same time using the PayFabric credit card option, they will no longer be able to charge the card more than once.

FIXED: Database Update: Fixed a database update error with the ThomsonReuters module that would happen if updating from a version before 4.6.3.0. (Extended Module: ThompsonReuters)

FIXED: EDI 856 Outbound: When using consolidated shipments, the LadingQuantity field will now count packages per order, instead of per shipment. (Extended Module: EDI)

FIXED: Equipment Warranty: Fixed an issue where new warranties would not appear. (Introduced: 4.6.4.14)

FIXED: Import Manager: Inventory Adjustments with the same Batch Number will now be imported to one document instead of a document for each line.

FIXED: Sales Monitor: Documents are no longer grouped by document ID if the 'Show Sales Document Type ID Groups' setting is false. (Introduced 4.6.4.18)

FIXED: Security: MultiFormlet is no longer a selectable security option. (Introduced: 4.6.4.22)

FIXED: Settings: Purge Job Schedule: Removed the incorrect drop-down editor. (Introduced: 4.6.4.22)

FIXED: Third Party Taxes: Resolved an issue with distributions being off by the change in the tax amount when saving an edited document for which tax amount changed.

Version 4.6.4.22

Release Date 1/3/20

ADDED: About: Added a checkbox that toggles sending user tracking analytics.

ADDED: Analytics: SalesPad will now send anonymous user tracking information. This data will be used to help determine areas in SalesPad that need work, as well as how our users are using SalesPad day to day. The data sent back contains form information, and button event information, along with the bare minimum needed to determine which company the data is from. No customer, vendor, or individual identifying user information is sent.

ADDED: Consolidated Shipments: A sales document number column has been added to the packaging detail grid.

ADDED: Installer: Added a checkbox that toggles sending user tracking analytics.

ADDED: Security: Consolidated Shipments EDI Advance Ship Notice: Can Change Packing Structure - When enabled, a popup will appear when running the plugin to allow the user to change the packing structure. (Default: True) (Extended Module: SalesPadEDI)

ADDED: Security: Consolidated Shipments EDI Advance Ship Notice: Default Packing

Structure - Sets the default packing structure when running the plugin. (Default: SOTPI) (Extended Module: SalesPadEDI)

ADDED: Security: Inventory Lookup: Kit Components: Show Cost - Controls the visibility of the following cost fields: Standard Cost, Current Cost, Landed Cost, Avg. Landed Cost, and Total Avg. Landed Cost. (Default: False)

ADDED: Settings: Automation Service: Purge Job Schedule - Specifies when the 'Purge Component History' job will run daily. (Default: 8:00 PM)

ADDED: Settings: Blue Moon Operations Core: Update Fulfillment Instructions Priority When Auto Releasing - When enabled, the 'Fulfillment Instructions' table's priority will be updated when the Auto Release plugin is activated. (Default: False) (Extended Module: Blue Moon)

ADDED: Settings: Load Packaging Fields: When enabled, packaging information can be accessed from the license plate tables on sales document printed reports. Warning: This could potentially slow printed reports when loading.

ADDED: Settings:Track User Analytics - When enabled, user analytical information is sent back to SalesPad for analysis. We track what forms are opened, how they are used and other general SalesPad usage information. This setting controls analytics company-wide. (Default: True)

UPDATED: Application: All Import with Excel functionality is now handled with DevExpress and no longer requires Excel to be installed on the user’s machine.

UPDATED: Consolidated Shipments: When the Shipping Method field is set, the associated Carrier Code will also be set.

FIXED: Application: Modules that interact with Excel now show meaningful error messages when Excel is not installed.

FIXED: Receiving Serial Entry: Fixed an issue that prevented manual serial number entry on lines with a quantity greater than 999.

FIXED: Sales Document Line Items: Attempting to use the inventory lookup functionality, after the Sales Line Item Replacement plugin was run, will no longer cause a 'Deleted row information cannot be accessed' error. (Introduced: 4.6.3.3)

Version 4.6.4.21

Release Date 12/23/19

ADDED: PayFabric Authorize Plugin: Added a plugin that creates a PayFabric authorization transaction for the document.

ADDED: PayFabric Capture Plugin: Added a plugin that captures any PayFabric authorizations on the document, and creates a payment.

ADDED: Security: EDI 846: Default Block Size of Import Function for EDI 846 - Use this setting to specify a block size when using the Import and Send function for inventory on an EDI 846 with very large spreadsheets. Users may encounter out of memory errors when importing a large spreadsheet if this number is too large. (Default: 1000) (Extended Module: SalesPad EDI)

ADDED: Security: In-Transit Transfer Entry: On Load Script: A C# script that executes when you open the In-Transit Transfer.

ADDED: Security: Quick Reports: Pivot Grid Excel Export Mode - Changes the format of the exported Excel document for Pivot Grid reports. DataAware - Provides data shaping options, ideal for pivot data analysis. WYSIWYG - Provides static data columns and disables data shaping options. (Default: DataAware)

ADDED: Security: Quick Reports: Pivot Grid Export To Excel Data Type - Allow users to change the data type when exporting a Pivot Grid to Excel. (Default: Text)

ADDED: Security: Receiving: Show Receiving Tab - When enabled, the purchase order item receiving tab will be shown. (Default: True)

ADDED: Security: Sales Monitor: Can Change Refresh Interval - If set to false, the user will not be allowed to adjust values in the refresh interval dropdown. (Default: True)

ADDED: Security: Sales Monitor: Default Refresh Interval - If set, the default refresh interval that will be used whenever the sales monitor is opened.

ADDED: Settings: SMTP Timeout - Specifies the amount of time (in milliseconds) before a sent email will timeout. (Default: 100000)

UPDATED: sppUpdateInventoryTransactionLine: Now allows for a custom stored procedure 'spcpUpdateInventoryTransactionLine'.

FIXED: Assembly: Historical assemblies load the historical line information as expected.

FIXED: Business Object Mapping: The number of Trading Partner IDs an EDI mapping can have assigned is no longer limited. (Extended Module: SalesPad EDI)

FIXED: EDI 850 Inbound: Arrays of groups on the XML file will now match the business object mapping, when the order on the file is different than the order defined in the mapping. (Extended Module: SalesPad EDI)

FIXED: Email Template Editor: The focused row will be remembered when saving.

FIXED: Purchase Order Entry: Changes to historical purchase order UDFs are now audited.

FIXED: Purchase Receipt: A number of distribution-related issues have been fixed.

FIXED: Purchase Receipts: Fulfillments of non-tracked items will now correctly update the bin fulfillment table (instead of the serial/lot fulfillment table).

FIXED: Purchase Receipts: Lot fulfillments will now properly update the in-use count of the lot attribute.

FIXED: Purchase Receipts: Taxable freight, or miscellaneous charges, will now follow the Dynamics GP purchasing setup.

FIXED: Purchase Receipts: The note index will now be set properly when creating or voiding a purchase receipt.

FIXED: Receiving: Pressing 'Alt'+'S' will receive the selected purchase order lines.

FIXED: Remote Library Settings: Remote library settings are now located in the 'Remote Library' category. (Extended Module: Remote Library)

FIXED: Remote Library: Calling the search endpoint will now properly search the customer lookup. (Introduced: 4.6.4.0) (Extended Module: Remote Library)

FIXED: Sales Document Entry: Changes to historical sales documents, and sales lines, are now audited.

FIXED: Sales Document Entry: Changing the shipping method type will now update the tax schedule, if the user did not tab off of the field before saving. Changing the warehouse will now update the tax schedule, with respect to the shipping method. This only applies if the "Use Shipping Method When Selecting Default Tax Schedule" setting is true.

FIXED: Sales Document Entry: Fixed a possible null reference exception when viewing shipments.

FIXED: Sales Document Entry: The extended price, and the extended cost, are now updating correctly when switching between functional and originating currencies.

FIXED: Sales Document Entry: Using the 'Unallocate' button on a manual fulfillment document will no longer set a backordered quantity on the line items in some scenarios.

FIXED: Sales Document Payment Plugin: Payments can no longer be taken on quotes.

FIXED: Sales Line Items: Blocked items will split properly if the lines were not fulfilled.

Version 4.6.4.20

Release Date 12/6/19

BREAKING CHANGE: EDI: Shipping Labels: Users can now receive multiple shipping labels per license plate. Old labels retrieved before upgrading to this build will need to be re-retrieved. (Extended Module: SalesPad EDI)

BREAKING CHANGE: Email Templates: Referenced Rich Text Memo fields will now keep most formatting. Previously, line breaks were not respected.

BREAKING CHANGE: PayLink Settings: Renamed 'PayLink Setup Id' to 'PayLink Gateway Account'.

UPDATED: Sales Document Line Items: The Insert menu has been visually updated. No functionality has changed.

UPDATED: Counter Sales: Improved memory usage and reduced the chance of receiving an 'out of memory' error.

UPDATED: Customer Card: Adding or removing a sales document hold will now write an audit to the customer.

UPDATED: EDI 855 Outbound: When a LineItemAcknowledgement is sent with the IB status code, the backordered quantity will be sent as well. When the status is IR, the ordered quantity is sent. (Extended Module: SalesPad EDI)

UPDATED: EDI Business Object Mapping: The default business object mapping for the inbound 850 has been updated. (Extended Module: SalesPad EDI)

UPDATED: EDI Processing: When retrieving files, document creation errors will no longer stop the service. (Extended Module: SalesPad EDI)

UPDATED: Email Template Editor: The "Bill To" options were renamed to "Customer Bill To".

UPDATED: Receipt Transaction Purchase Line Selector: This form is no longer beta.

UPDATED: Receipt Transaction Serial/Lot Receiving: This form is no longer beta.

UPDATED: Sales Document Entry: Addresses: An error will now be shown if the Shipping/Billing Email field values are above the maximum character limit.

UPDATED: Sales Document Line Items: In the Insert Menu, the 'Copy To Document' and 'Paste From Document' options have been renamed to 'Copy Line' and 'Paste Line', to better reflect their functionality.

ADDED: Email Template Editor: The Sales Document and Case Tracker Case business objects now have access to the Customer Primary, ShipTo and Statement Customer Addresses.

ADDED: Email Template Editor: Customer email templates are now available.

ADDED: Email Template Editor: Email templates now have access to the System User business object (this includes the System Users' avatar).

ADDED: PayFabric Migrator: The credit card ID will now be included in any error message popup that appears for failed migrations.

ADDED: PayFabric: A lookup editor was added that allows the user to select a stored card from the customer's PayFabric wallet.

ADDED: PayLinks: Added the ability to allow multiple paylinks on a single document.

ADDED: Receiving: Users can now manually set the date to be recorded as the receipt transaction date.

ADDED: Retrieve PayLink: Added a sales document plugin to retrieve completed paylinks.

ADDED: Sales Document Line Items: 'Insert Before' and 'Insert After' buttons have been added to the toolstrip. These buttons are hidden by default, but they can be added by right-clicking the toolstrip and choosing an option.

ADDED: Sales Document Line Items: Added 'Paste Line After' and 'Paste Line Before' options to the Insert menu.

ADDED: Sales Document Payments: Added a button to create or retrieve paylinks for this document.

ADDED: Security: Allow PayLinks - This security enables the ability to create or retrieve paylinks from the sales document payments screen (Default: False)

ADDED: Security: Sales Document Line Item: Enter Inserts New Line Below Selected Line - When enabled, pressing the Enter key will insert a line below the selected line on a sales document. (Default: False)

ADDED: Setting: PayLink Logging - Enables logging for the Paylink functionality. This setting should only be used for troubleshooting.

ADDED: Settings: Automation Agent: Allow Partial Invoicing - Enabling this setting will allow orders to be partially transferred to invoice. (Default: False)

FIXED: Resources: When sending resources to print, there was a potential memory leak for certain file formats. This has been corrected.

FIXED: Backordered Items Report: Batch forwarding will no longer fail when allocating and forwarding multiple documents in different batches.

FIXED: Customer/Vendor Address Card: The Email field now has a maximum character limit.

FIXED: EDI 850 Inbound: Mapping just the CarrierRouting field to a shipping method will now work correctly. (Extended Module: SalesPad EDI)

FIXED: EDI 856: An EDI object, with turnaround objects that only match by one static field, will no longer be overwritten. (Extended Module: EDI)

FIXED: Email Template Editor: The Case Tracker Case "Bill To" option now works properly.

FIXED: Email Templates: Rich Text Memo fields will now keep most formatting, including line breaks.

FIXED: Email Templates: The VendorAddress field for purchase orders will no longer error out.

FIXED: Funnel: Sales line user fields are now editable when processing a sales document.

FIXED: Import Manager: When importing price lists, if the Qty Base UofM field is 0 or undefined, the imported value now defaults to 1.

FIXED: Outbound EDI: When adding groups to the xml file through a script, empty groups will be removed correctly. (Extended Module: SalesPad EDI)

FIXED: Receiving. The default quantity to receive will now be set to the full quantity of the purchase line when a line is linked to sales orders with less than the purchase line quantity.

FIXED: Receiving: The eConnect error "There is an active Purchase Order Approval workflow" will no longer occur for active Purchasing workflows other than the "Purchase Order Approval" workflow.

FIXED: Sales Document Address: Changing a shipping address with a pickup type shipping method to a different shipping address with a pickup type shipping method would cause the Tax Schedule to be updated. This has been corrected, but will require the 'Use Shipping Method When Selecting Default Tax Schedule' setting to be enabled.

FIXED: Sales Document Entry: Fulfillment of serial/lot/bin tracked items will no longer be different than what was selected by the user when partially invoicing an order multiple times.

FIXED: Sales Document Entry: Quote Expiration Date is now recalculated when Quote Document Date changes.

FIXED: Sales Document: Load times have been reduced when using the Equipment Properties functionality. Equipment serials are now loaded when the drop down is opened.

FIXED: Sales Line Items: Users will no longer receive an 'Inventory item does not exist' error when adding a package item to a document via the inventory lookup screen. (Introduced: 4.6.4.14)

FIXED: System User Card: Now doing case-insensitive comparison when determining if the current user has access to their own System User Card.

REMOVED: Email Template Editor: Removed the "CustomerAddr" sub-object from the Sales Document options (see ADDED above).

Version 4.6.4.19

Release Date 11/18/19

ADDED: Security: New Customer: Can Assign Tax Registration Number - Allows a user to assign a tax registration number. (Default: True)

ADDED: Settings: AvaTax Disable Document Recording: When enabled, documents submitted to AvaTax will not be recorded by Avatax. This is meant to be used in conjunction with other integrations to AvaTax. (Default: false)

ADDED: Settings: AvaTax Enable SOAP Logging: When enabled, the SOAP Request and Response XML will be audited on the sales document. Useful for troubleshooting purposes. (Default: false)

ADDED: Settings: OneSource Bypass Tax Calculation Within Specified Batches - If a document is in a batch specified by this setting, no call will be made to OneSource to calculate its taxes. (Default: "") (Extended Module: Thompson Reuters)

UPDATED: Grids: Removing the last column in a grid will now restore the default layout, otherwise, the saved layout would need to be deleted using the Layout Maintenance screen.

UPDATED: Sales Document Line Items: The default grid layout no longer shows the Cost fields.

FIXED: Application: Closing an untabbed window will now completely close the window (previously, the window would be re-tabbed to the application). Users who wish to re-tab the window will find an option to do so when right-clicking the window's toolbar. (Introduced: 4.6.3.1)

FIXED: Application: SalesPad would occasionally lock up, with a “Compiling Scripts…” busy message in the lower left corner of SalesPad, if the Cache Scripts on Login setting was enabled. This has been corrected.

FIXED: Automation Agent. Issue with some AA Settings not saving. (Extended Module: Automation Agent)

FIXED: Dispatch: Schedule Route: An error will no longer occur when using this plugin if the Customer Number contains an apostrophe (Introduced 4.6.4.11). The issue has also been resolved when the Ship To Address Code contains an apostrophe. (Extended Module: Dispatch)

FIXED: EDI Module: EDI 846: We now check for blank lines on the Excel sheet during the import of an 846.

FIXED: PayFabric: Crediting or voiding an EMV payment, that was originally created on a different document, will no longer fail and give the error 'Original Sales Document Payment that matches this PayFabric transaction was not found'.

FIXED: PayFabric: When using the credit card mappings within the Store Setup module, auth transactions captured by a user on a different store than what the auth was originally created from would result in the wrong mapping being used on the payment. This problem also extended to credit transactions. This has been corrected.

FIXED: Sales Document: Users will no longer receive a 'Cannot construct data type date error when saving order' error when saving a Sales Document with an EOM type payment term.

FIXED: Sales Line Items: Blocked line items that were set to be partially unblocked, then split or invoiced, will now have their unblocked quantity set properly on the resulting documents.

FIXED: Settings: AvaTax URL: The button used to test this connection will no longer always fail.

Version 4.6.4.18

Release Date 11/8/19

ADDED: Inventory Lookup: The Analysis tab now supports a custom spcpInventoryItemSummary stored procedure.

ADDED: PayFabric Migrator: Added a checkbox to hide expired credit cards. (Extended Module: PayFabric Migrator)

ADDED: PayFabric: SalesPad now supports non-legacy transaction types.

ADDED: Quick Reports: Search fields now have a "User Filter" option which will set a search field to the current user and allow the use of the filter accordingly. This check box will disregard any Default Values set. Example: Created_By = 'sa'.

ADDED: Security: Counter Sales: Can Forward Documents - This security will enable or disable the forwarding button. (Default: True)

ADDED: Security: Sales Document Entry: Can Forward Documents - This security will enable or disable the forwarding button. (Default: True)

ADDED: Settings: PayLink: Default eCheck Gateway - Assign the name of an eCheck payment processor (set up in PayFabric in the 'Gateway Account Profiles' screen) as the default for eCheck payments.

ADDED: Settings: PayLink: PayLink Credit Card Restriction UDF - Customer UDF used when restricting customer payments to credit cards through PayLink.

UPDATED: EDI: Business Object Mapping: 856 sales document mappings now include ShipNoticeDate, ShipNoticeTime, ASNStructureCode, Bill To AddressTypeCode and Ship To

AddressTypeCode. (Extended Module: SalesPad EDI)

UPDATED: EDI: Business Object Mapping: Added default sales document mapping for TradingPartnerId. (Extended Module: SalesPad EDI)

UPDATED: PayLink: PayLink Payments now allow eCheck Payments.

UPDATED: Sales Monitor: Sales Monitor will now load and refresh more quickly.

UPDATED: Security: Counter Sales Document Properties: The "Can Forward Documents" security has been renamed to "Can Change Workflow Queue".

UPDATED: Security: Sales Document Properties: The "Can Forward Documents" security has been renamed to "Can Change Workflow Queue".

FIXED: Blanket Order Invoicing: When used as a workflow plugin, there will no longer be a message displayed for each of the documents that the plugin was run on.

FIXED: Inventory Lookup: The monthly average calculation is now calculated by dividing the quantity total by the approximate number of months (based on actual days, instead of whole months). For example: if 8/31/2018 is selected as the start date, only one day will be used to calculate the average, rather than the entire month of August.

FIXED: Item Barcode Maintenance: Deleting a row will no longer cause an error: "Deleted row information cannot be accessed through the row".

FIXED: Item Barcode Maintenance: Applying an Auto Filter Row will no longer cause issues with the grid's layout. Users experiencing this issue can temporarily fix this by deleting the grid layout in Layout Maintenance and then logging out and back in.

FIXED: PayFabric Batch Charge: Documents are now properly unlocked if any exceptions are thrown during the process.

FIXED: PayFabric Batch Charge: Users will no longer receive an object reference error when attempting to charge a zero dollar document.

FIXED: PayFabric: When using a P2P card swipe encryption device, the text field will no longer be pushed off of the page.

FIXED: Purchase Order Entry: After upgrading GP, some users would receive an "Item has not been assigned" error. This error was actually related to GP Purchase Order workflow. Both the error's description and the cause of the error have been corrected.

FIXED: Sales Document Entry: The Due Date and Discount Date are now calculated correctly when the Payment Terms has a "Calculate Days From" value. This change only applies to GP 2015 and above.

FIXED: Sales Document Payments: Deposit transactions can now be viewed on historical documents. (Introduced: 4.6.3.0)

FIXED: Sales Monitor: Having a negative or zero value in the Sales Monitor Refresh Debounce Time setting will no longer result in an error " '0' is not a valid value for 'Interval'." If negative, or zero, the default '750' will be used.

FIXED: Sales Monitor: Sales Monitor now sorts documents by Batch and Sales Doc ID.

FIXED: Workflow Setup: The auto-filter row will no longer show a message about duplicate queues.

Version 4.6.4.17

Release Date 10/25/19

ADDED: Security: Sales Entry Quick Pick Maintenance: Can Copy Configurations - This security allows the user to copy Quick Pick configurations between security groups. (Default: False)

ADDED: Settings: Avatax: AvaTax Use GP Customer Usage Types - When enabled, the customer usage type field will use the Dynamics GP corresponding field. When disabled, the customer usage type will be pulled from the defined SalesPad UDF. (Default: False)

UPDATED: Cash Receipts: Cash Receipt amount fields will now be displayed in their originating currency, rather than in the functional currency. This change was made in preparation for a future change that will allow users to apply non-functional currency cash receipts.

UPDATED: Import Manager: Importing a Prospect with an existing Prospect Number will now create a new Prospect using the next valid number.

UPDATED: Prospect Card: New Prospects can no longer be saved with an existing Prospect Number.

UPDATED: Prospect Card: The Prospect Number field is no longer editable on existing prospects.

UPDATED: Request For Quote: When adding a non-inventory item, the Unit of Measure will now default to EACH.

UPDATED: Settings: WorkWave: Post Import Script - The script parameters now include another property to allow for more customization of the import process. (Extended Module)

FIXED: Import Manager: Reverted a change that prevented users from changing primary key fields while importing, which caused multiple different imports to fail. (Introduced: 4.6.4.14)

FIXED: Back Plugin: User fields and a few other fields in the header were not having their

Read Only status properly reset upon using the Back plugin. This has been corrected.

FIXED: Cash Receipts: Users will now receive a prompt when attempting to apply a cash receipt to a document that is in a different currency.

FIXED: Customer Search: The New Customer hotkey (Alt+N) will now work properly.

FIXED: Dispatch: Route Entry: User defined fields will now load correctly. (Extended Module)

FIXED: Dispatch: Route Entry: Validation of overlapping Driver Schedules and Vehicle Schedules will now respect the 'Number Of Days To Check For Conflicting Schedules' setting. (Extended Module)

FIXED: Dispatch: Upgrading with routes created prior to 4.6.0.15 will now correctly default the Route Type to One Time. (Extended Module)

FIXED: RMA Reports: spcpRMAReport procedures will now properly pass in the parameters when designing or printing a report.

FIXED: Request For Quote: When adding a non-inventory item to an RFQ and then editing the Unit of Measure, there will no longer be an object reference error in the grid that locks you into the screen.

FIXED: Sales Document Entry: Send Email: The email's subject line can now be changed by the script in the 'On Load Email Script' setting. (Introduced 4.6.4.8)

FIXED: Sales Document Properties: The 'Can Change Quote Expiration Date' security will now be properly respected.

FIXED: Sales Document Properties: The Store and Drawer fields will no longer be editable when the document is marked as Read Only.

FIXED: Sales Line Item: Adding an alternate item that is set to an existing Item Number will now load the Item Master properly and the non-inventory flag will not be set on the line.

FIXED: Sales Line Item: Adding an alternate item while the Sales Line UDF Dock is set to auto-run will no longer clear out the Item Number field.

FIXED: SalesPad EDI: EDI 855: Order Acknowledgement: A null reference error that could occur was fixed. (Extended Module) (Introduced in 4.6.412)

FIXED: Send Email: The Address merge field now works correctly for sales documents and purchase orders. (Introduced 4.6.4.6)

FIXED: Vendor Search: The New Vendor hotkey (Alt+N) will now work properly.

FIXED: WorkWave: Importing routes will now correctly allow for opening the linked sales documents from the Driver Schedule. (Extended Module) (Introduced: 4.6.0.15)

FIXED: WorkWave: Route dates will now correctly import instead of being set to 1/1/1900. (Extended Module) (Introduced: 4.6.0.21)

Version 4.6.4.16

Release Date 10/15/19

BREAKING CHANGE: Security: Import Manager - The 'Table Item Options Allowed' (Introduced: 4.6.4.12) was replaced with 'Can Clear Import Table'.

ADDED: Email Template: Case Tracker Email Template Types have been added. (Extended Module)

ADDED: Import Manager: Security: Can Clear Import Table - When disabled, the toggle to Leave/Clear import table data will display a security message and toggle back to Leave. (Default: True)

ADDED: Inventory Lookup: There is now a busy cursor showing the file path for images that are being loaded.

ADDED: Automation Agent can now forward business objects using business object workflow. (Extended Modules: Automation Agent)

ADDED: Case Tracker Layout: Added ability to save the Case Tracker Properties and UserField control layout based on the Status of the Case. (Extended Module: Case Tracker)

ADDED: Security: Business Obj Workflow Monitor - Sets the text of the button that will appear on the ribbon.

ADDED: Security: User Field Securities: Custom Caption - Override the default user field tab display text.

ADDED: Settings: Doc IDs To Skip Tax Calculation - Semi-colon delimited list of Doc IDs to skip calculating taxes via saving a document.

ADDED: Settings: Load Case Tracker Entry Tabs By Field - A value used to determine which tabs are loaded based on setup in the Layout Tab Setup Screen. (Extended Module: Case Tracker)

ADDED: Settings: Sales Document Entry: Line Num Increment Value When Inserting Sales Lines - This is the integer value the Line Num will be incremented by when inserting new sales lines. (Default: Default)

UPDATED: Import Manager: The last focused row will be remembered when saving or after completing an import.

UPDATED: Inventory Lookup: In the event that an error occurs when attempting to load an image UDF, a Log Messenger with the file path will now be displayed.

UPDATED: Sales Document Profitability: The GM% summary will now recalculate immediately when changing individual line percentages.

FIXED: Import Manager: Previously, the 'Table Item Options Allowed' could be bypassed. It was replaced by the 'Can Clear Import Table' security.

FIXED: Inventory Lookup: Users will no longer receive an Out Of Memory exception when switching between items that have large images on UDFs.

FIXED: Sales Document Entry: Shipment: Users will no longer receive an "Object reference not set to an instance of an object" exception when selecting an item to pack by using a mouse wheel or by typing the item number.

FIXED: Sales Document Line Items: Item Configurator: Using this plugin will no longer revert the Description and Unit Price of existing Item Option lines to their default values.

FIXED: Sales Document Manual Split: Splitting a non-Base Unit of Measure line item that is bin- or lot-tracked will no longer result in incorrect fulfillments on the resulting split documents.

FIXED: Sales Document Profitability: If the 'Show Recent Receipts' sub-security is set to True, Unit Cost and Extended Cost will now properly retain their values when the Calculate button is selected.

FIXED: Sales Document Profitability: The GM% summary will now properly recalculate when the 'Show Recent Receipts' sub-security is set to True.

FIXED: Sales Document Splitting: Manufacturing links are now properly retained on line items after splitting a sales document. (Extended Module)

FIXED: Sales Person: The Commission Percent field is no longer rounded to whole numbers.

FIXED: Shipping Review: Batches that contain a dash will now be shown on this screen.

FIXED: Sop To Pop: When creating a purchase order from a dropship sales line, the MEM PO Type would be set to the Standard PO type rather than the Dropship PO Type. This has been corrected. (Extended Module)

FIXED: Workflow Setup: Workflow Queues will now save correctly when the Next Queue(s) field is blank.

REMOVED: Sales Document Reports: The SalesLineComponent dataset has been removed. If components are needed for a report, they can be found in the SalesLineItem dataset.

Version 4.6.4.15

Release Date 10/1/19

ADDED: Security Editor: When the database version is reset, a system log is recorded.

ADDED: Security: Counter Sales: Pre Delete Script - This is a C# script to execute before deleting a sales document in Counter Sales.

ADDED: Security: Sales Document Entry: Pre Delete Script - This is a C# script that executes when trying to delete a sales document from sales document entry or the Customer card.

ADDED: Security: Sales Monitor: Disable Auto-Refresh - This security restricts users to only being able to manually refresh Sales Monitor. (Default: False)

ADDED: Security: Security Editor: Can Reset Database Version - This security allows users to reset the database version, which forces a database update. (Default: True)

ADDED: Settings: Show All Related Document Resources - This setting shows resources from all related documents. (Default: False)

UPDATED: Security Editor: When using the Reset Database Version, button there is now a prompt for verification.

FIXED: Counter Sales: The Gift Certificate tab on the Check Out screen will no longer be visible if the 'Gift Certificate Item Number' setting is empty.

FIXED: Customer Overview: Deleting a sales document will no longer keep the document locked if the document cannot be deleted for any reason.

FIXED: Purchase Order Entry: Saving a line item when using an Item Restriction that has the "Comment" Field Name and "=" Search Operator will no longer cause an "The data types text and varchar are incompatible in the equal to operator" error.

FIXED: Sales Document Entry: Previously, running Dynamics GP's Paid Transaction Removal routine on invoices that had cash receipts applied to them in SalesPad Desktop would sometimes cause the Amount Paid on the invoice to appear double the actual amount. This has been corrected.

FIXED: Sales Document Entry: When special pricing is applied to the sales line and then un-applied, the markdown percent will now be reset to 0.

FIXED: Sales Document Payments: The Gift Certificate tab will no longer be visible if the 'Gift Certificate Item Number' setting is empty.

FIXED: Sales Monitor: There was a potential memory leak around the timer used for the AutoRefresh that will no longer be a concern.

Version 4.6.4.14

Release Date 9/16/19

ADDED: Settings: Sales Monitor Refresh Debounce Time - This setting determines the length of time in milliseconds to wait between selecting a batch checkbox and reloading the Sales Monitor. Choose a value that is long enough to allow selecting multiple checkboxes before the Sales Monitor refreshes. (Default: 750)

UPDATED: Import Manager: Imports no longer change primary key fields.

UPDATED: Sales Monitor: There is now a short delay after clicking a batch checkbox and before reloading, in order to cut down on successive loads when multiple checkboxes are checked.

UPDATED: View Changes: The View Changes form now hides UDF values when the user does not have view permissions for the UDFs. (Introduced: 4.6.4.10)

FIXED: Avatax Commit Plugin: Forwarding a sales document will no longer be cancelled when this plugin returns a warning.

FIXED: Inventory Lookup: Selecting items with image UDFs will no longer cause an "out of memory" exception.

FIXED: PayFabric Batch Capture: Using this plugin will now update the Processing Log properly. This will allow users to see when the processing happened and whether it was successful or not.

FIXED: PayFabric Batch Charge: Using this plugin will now update the Processing Log properly. This will allow users to see when the processing happened and whether it was successful or not.

FIXED: Sales Line Item: When a new line's Item Number was changed from a non-inventory item to an inventory item, the line's Item Master would load improperly, which sometimes resulted in an over-allocation of inventory. This has been corrected.

Version 4.6.4.13

Release Date 9/2/19

ADDED: AutomationAgent: Clicking the Run Now button will now show the component name in the results pop-up box. (Extended Module)

UPDATED: 810 Outbound: The default business object mapping has been updated. (Extended Module: SalesPadEDI)

UPDATED: 846 Outbound: The default business object mapping has been updated. (Extended Module: SalesPadEDI)

UPDATED: 855 Outbound: The default business object mapping has been updated. (Extended Module: SalesPadEDI)

UPDATED: 856 Outbound: The default business object mapping has been updated. (Extended Module: SalesPadEDI)

UPDATED: 940 Outbound: The default business object mapping has been updated. (Extended Module: SalesPadEDI)

UPDATED: Manual Split: The UI for this plugin has been updated to better conform with similar plugins.

UPDATED: Sales Document Line Items: Highlighted rows that fall into an Item Restrictions category will now be outlined in the Item Restrictions color.

FIXED: 850 Inbound: When the 'Add Unfulfilled Lines to Package' setting is enabled and the Packaging Generation option is set to Multiple, the packages will now be created correctly. (Extended Module: SalesPadEDI)

FIXED: AutomationAgent: Clicking the Run Now button and then closing the tab before it finishes will no longer throw an exception. (Extended Module)

FIXED: Interaction Entry: When the 'Email User Task Info' security is enabled, updating an interaction task will now send contact, notes, and start/end date information in the body of the email.

FIXED: Item Lookup: Previously, attempting to delete a small portion of text for most item fields throughout SalesPad Desktop would sometimes force the cursor to move to the end of the item number and delete from there instead. This was caused by the 'Enable Item Suggestion' setting and has been corrected.

FIXED: Manual Split: A number of issues related to backorder quantity not being moved correctly when splitting has been fixed.

FIXED: Manual Split: Attempting to split a non-inventory item by its backorder quantity on a multi-bin enabled environment will no longer cause a fulfillment-related error.

FIXED: Receiving: The Qty To Recv. column value will no longer be changed to zero when a row is selected and the value is empty. (Introduced: 4.6.3.14)

FIXED: Report Designer: Attempting to design a Purchase Receipt Return report will no longer result in an object reference error when the designer opens and closes.

FIXED: RMA Entry: Sales Invoice Return Item Selection: Non-inventory items that do not include the Non-Inventory Item Prefix will now be shown properly.

FIXED: Sales Document Entry: Payments: An error that occurs upon making a payment when the Sales Document UDF "sf_CreditCardProcessorName" is blank has been resolved.

FIXED: Sales Document Line Items: When using the 'Change Color of Out of Stock Items' security, the focused row would not show what individual cell was focused. Now the cells will be outlined in the color for the focused rows.

FIXED: Sales Document: Shipments and Packages are now properly carried over when transferring to an invoice.

FIXED: Search Screens: Search screens that have a Show Inactive checkbox will now save the check state to the registry. (Introduced: 4.6.4.0)

Version 4.6.4.12

Release Date 8/20/19

ADDED: 850 Inbound: The CrossDockSalesLine property can now be set outside of the QuantitiesSchedulesLocations group to set the Marked For Location for packages. (Extended Module: SalePadEDI)

ADDED: Security: Import Manager: Table Item Options Allowed - This security lists the options available for the toggle button when importing to the CustomPrice, AlternateItem, and ItemPromo tables. If no options are selected, the Leave option will be used. (Default: "Leave; Clear") (This setting will be removed in 4.6.4.16 and replaced with 'Can Clear Import Table' security.)

ADDED: Security: Sales Entry: Post Copy Script - This is a C# script that executes after a document has been copied.

UPDATED: 000 and 001 Label Requests: Marked For Locations on packages will no longer be required to match a customer address in order to appear on labels. (Extended Module: SalePadEDI)

UPDATED: 000 and 001 Label Requests: The default business object mappings have been updated. (Extended Module: SalePadEDI)

UPDATED: 810 Outbound: The default business object mapping has been updated. (Extended Module: SalePadEDI)

UPDATED: 850 Inbound: The default business object mapping has been updated. (Extended Module: SalePadEDI)

UPDATED: Business Object Mapping: The default mapping for the 945 outbound has been updated. (Extended Module: SalesPadEDI)

UPDATED: EDI Cross Reference: The Customer/Vendor Num field is no longer required for warehouse trading partners for EDI 945. (Extended Module: SalesPadEDI)

UPDATED: Sales Line Items: Pasting sales lines will now focus the new line item.

FIXED: Bulk Email: The subject of the email will no longer be the same for each email sent out. (Introduced: 4.6.4.8)

FIXED: Copy Sales Documents: When copying a document from one customer to another, all line item Price Levels will now be updated to the new customer's, if the 'Reprice On Copy' setting is enabled.

FIXED: EDI Processing: EConnect errors that occur during EDI Processing will now be displayed on the screen. (Extended Module: SalesPadEDI)

FIXED: EDI Processing: It is no longer possible to re-process a successful transaction. (Extended Module: SalesPadEDI)

FIXED: In-Transit Transfer Entry: In-Transit Transfer Fulfillment: An object reference error that occurred when a user without user field edit permissions opens this screen was resolved.

FIXED: Inventory Adjustment: Inventory Adjustment Allocation: An object reference error that occurred when a user without user field edit permissions opens this screen was resolved.

FIXED: Posting Receipts: In very rare situations when batch posting receipts in Dynamics GP, it was possible for the posting window to hang indefinitely. This was caused by a discrepancy between the spxInventoryLotNum table and spxFutureInventoryLotNum table that would cause a procedure to never complete properly. This has been corrected.

FIXED: Quick Report UDFs: Using the where clause "/*Field_Name*/" syntax in a Quick Report UDF will no longer result in an "Incorrect syntax near '='" error on the following screens: Interactions Entry, System User Properties, Prospect Properties, Sales Person Properties, and Sales Territory Properties.

FIXED: Sales Document Entry: Addresses: New customer addresses created from this screen now default with the values from the Ship To Address, instead of the customer's Primary Address.

FIXED: Sales Document Entry: Fulfilled dropship lines will no longer cause an 'Allocations and fulfillment are not allowed with the document id being used' error if the sales doc ID is set to allocate by none.

FIXED: Sales Document Entry: Fulfillment: An object reference error that occurred when a user without user field edit permissions opens this screen was resolved.

FIXED: Sales Document: Printed Reports: The Amount Due on historical invoices will no longer be incorrect if credit memos or returns have been applied to the document.

FIXED: Sales Entry: The Create Purchase Order and Dynamics GP buttons were not triggering validation events properly when selected. This could cause some fields to be cleared or not updated properly after being edited, and has been corrected.

FIXED: Sales Entry: Validation events were not being triggered properly when pasting lines to a document. This has been corrected.

FIXED: User Fields: Text UDFs that are edited in the pop-up window will no longer have new lines added. (Introduced: 4.6.4.1)

FIXED: Workflow Rules: The Copy To functionality will no longer duplicate the rule on another Sales Document ID and delete the original rule in certain scenarios.

Version 4.6.4.11

Release Date 8/2/19

UPDATED: View Changes: View Changes now respects ShowCost securities in SalesDocumentLineItems and PurchaseLineItems, and hides values if user does not have permission to view. (Introduced: 4.6.4.10)

FIXED: Counter Sales: The Checkout tab will now respect the 'Can Apply Gift Certificates to Returns' setting.

FIXED: Customer A/R Detail: Original Order Value is now displayed in the functional currency instead of the originating currency, to match up with the rest of the Customer A/R tab.

FIXED: Customer Search: Adding certain columns to the search grid when it is already populated will no longer cause an error.

FIXED: Dispatch: Schedule Route: This plugin no longer shows Routes that have a different Customer Number than the customer on the sales document. (Extended Module)

FIXED: Email: Selecting Enter while typing in the Email Template area will no longer send the email. (Introduced: 4.6.4.8)

FIXED: Google Zip Code Query Handler: Zip codes classified by Google as a "sublocality" or a "neighborhood" will now populate the City field correctly.

FIXED: Inventory Bin Transfers: The Destination Bin field is now required to process a transfer.

FIXED: Inventory Lookup: The Vendor Item and Alternate Item tabs will now search using the Item field when the 'Enable Item Suggestions' setting is enabled. (Introduced: 4.6.4.8)

FIXED: Inventory Transfers: The Destination Bin field is now required to process a transfer in a multi-bin database.

FIXED: Purchase Line Items: The correct GL Account will now be used for non-inventory purchase lines if the Vendors Purchases Account is blank.

FIXED: Purchase Order Line Items: The Comment ID is now updated when a comment is added or removed.

FIXED: Purchase Order: The Comment ID is now updated when a comment is added or removed.

FIXED: RMA Entry: Sales Invoice Return Item Selection: Non-inventory items are now shown on this screen.

FIXED: RMA Entry: Sales Invoice Return Item Selection: The Quantity column, which displayed the Allocated Quantity of the item, has been changed to Invoice Quantity.

FIXED: Receiving: The multi-line right-click pop-up is now functioning as intended. (Introduced: 4.6.3.14)

FIXED: Sales Document Entry: Avatax Commit Tax: If there are discounts on the sales document, using this plugin will no longer return an error.

FIXED: Sales Document Entry: Document Combiner: Using this plugin on a document that has a Freight or Misc Charge amount will no longer result in the amount being doubled on the combined document.

FIXED: Sales Document Entry: Purchase Order Generation: When using this plugin, Sales Line UDF values are now transferred to matching Purchase Line UDFs.

FIXED: Sales Document Entry: Sales Document Profitability: Sales Line UDFs are no longer editable on this plugin if the user doesn't have group edit permissions. The object reference error that occurred upon opening the plugin in this scenario has also been resolved.

FIXED: Sales Document Entry: Sales Line Items: When adding multiple items from the Sales Inventory lookup, the OnRowChanged script will now trigger for all of the items instead of just the first one.

FIXED: Sales Document Search: The On Account amount for historical documents is now displayed in originating currency instead of functional currency, to match up with the rest of the amount columns in the grid.

FIXED: SalesPad Today: When selecting the Snooze button on a Task/Interaction reminder, the time selected for when the user wishes to be reminded again is now respected. (Introduced: 4.6.3.0)

FIXED: Settings: Non-recalculating Tax Schedules: Taxes will no longer be calculated if no Sales Tax Query Handler has been selected. (Introduced: 4.6.4.10)

FIXED: Vendor Address Card: The Email field no longer overlaps the Tax Code field.

FIXED: Workflow Rule: The "ITEM FIELD=" workflow condition will now evaluate correctly on sales lines with a non-inventory item. (Introduced: 4.6.4.6)

Version 4.6.4.10

Release Date 7/19/19

ADDED: AutomationAgent Schedule: The ability to schedule a job every x hour(s) between a specified start and end time was added. (Extended Module)

ADDED: Prospects: Contacts: Existing contacts can be linked to a prospect with the Add Existing button, and unlinked from a prospect with the Delete Link button. Linked contacts can be chosen for prospect and opportunity interactions, and when converting a prospect to a customer, the linked contacts will be copied to customer addresses.

ADDED: Purchase Receipt: Users can now set the Type to Inventory Return w/Credit if the purchase receipt is being created from a sales return.

ADDED: Settings: Non-recalculating Tax Schedules: The ability to not calculate taxes on documents, in lieu of using custom tax calculation elsewhere, was added through the use of this new setting. Multiple tax schedules can be specified in a semi-colon delimited list to prevent tax recalculation on documents that have that tax schedule.

ADDED: Save Changes: A new save changes prompt, with a View Changes link and a more specific save changes message, was added. Clicking the hyperlink opens new modal form displaying all changes to the Business Object being saved. This is currently implemented on Customer, SalesDocument, Vendor, and PurchaseOrder Business Objects.

ADDED: Settings: Note Revisions - This stores a history of note revisions for selected Business Objects. (Default: Empty)

ADDED: ShipCenter Shipping Calculator: There is now a Residential Delivery checkbox that should be checked whenever shipping to a residential address, in order to get the most accurate rates. (Requires ShipCenter 1.2.0.20)

ADDED: Vendor Card: A Vendor Item Setup tab for configuring Vendor Items was added.

UPDATED: Bulk Pick Ticket Report: Lines are now also grouped by Unit of Measure on the default report.

UPDATED: EDI 945: The default Business Object Mapping has been updated. (Extended Module: SalesPadEDI)

UPDATED: Historical Sales Line Items: Small speed improvements were made to the Historical Sales Line Items view.

UPDATED: Inbound EDI: The Shipping Method cross reference will now work with the Partner Carrier Routing field. (Extended Module; SalesPadEDI)

UPDATED: Inventory Item Sales, Customer Item History, Customer Sales Documents, Sales Person Documents, System User Contacts, System User Purchase Orders, System User Sales Documents: Each form now uses the LoadColumns method to help improve performance. They also have been updated to include some missing columns. Unused columns may have been removed.

FIXED: Application: Previously, forms that used a LoadAsync method could silently fail. Now, the error is shown in the Log Messenger.

FIXED: Assembly Entry: Assemblies will no longer use existing assembly numbers. (Introduced: 4.6.4.1)

FIXED: Customer Contact Addresses: The Comments column will now display line breaks when the 'Only Load Visible Columns' security is set to True. (Introduced: 4.6.0.19)

FIXED: Customer Sales Documents: The 'Can Export Grid' security is now respected.

FIXED: EDI 945: The Shipping Method on the Shipping Header can now be set from the 945. (Extended Module: SalesPadEDI)

FIXED: EDI 945: The sales document can now be updated from the 945. (Extended Module: SalesPadEDI)

FIXED: Item Sales: The Can Export Grid security is now respected.

FIXED: Pick Ticket Printing: Quantities are now returned in the correct Unit of Measure.

FIXED: Purchase Receipt: A number of distribution-related issues have been fixed.

FIXED: Receipt Transaction Line Selector: Previously, creating a purchase receipt using a sales return with multiple lines that have the same item number would result in an incorrect number of lines being added. This has been corrected.

FIXED: Receipt Transaction Line Selector: Searching by item number is no longer case-sensitive.

FIXED: Resources: Previously, loading purchase order and sales line item resources would sometimes be a slow process or cause a timeout. This has been corrected.

FIXED: Sales Document Entry: Transferring or voiding a document will now update the RequestForQuote link. (Extended Module)

FIXED: Sales Document Payments: This screen will no longer take a long time to load if the customer associated with the sales document has a large number of addresses.

FIXED: Sales Document: Previously, the 'Available Shipping Methods' security would cause an Index out of Bounds error if too many Shipping Methods were chosen in the list. This has been corrected.

FIXED: Summary Packing Slip: Previously, incorrect sales lines could be displayed if two documents with the same number existed. This has been corrected.

FIXED: User Fields: An issue where Rich Text UDFs would cause a save prompt even if nothing was changed has been fixed. (Introduced 4.6.4.0)

Version 4.6.4.9

Release Date 7/8/19

BREAKING CHANGE: Sales Line Item: The Focused Line Item Inventory grid will no longer attempt to load a local file version if there is no layout saved in the database.

ADDED: Cash Receipt Audit: A Cash Receipt Audit tab has been added to the Cash Receipts screen. Audits are displayed by Customer Number and can be filtered to Open or Historical documents.

ADDED: Cash Receipt: Auditing has been added to cash receipts.

ADDED: Create Return Plugin: This plugin adds an On Row Changed script hook.

ADDED: EDI: 852 EDI documents are now supported. (Extended Module)

ADDED: EDI: 855 EDI documents are now supported. (Extended Module)

ADDED: EDI: An EDI Outbound Scheduler was added. It currently only supports sending EDI 852 documents on a schedule. (Extended Module)

ADDED: Inventory Lookup: The Inventory tab now includes columns for In Transit To and In Transit Via for each Location.

ADDED: Item Promotions: Include and Exclude fields were added, along with a value list for each. Sales document fields will be evaluated against the Include and Exclude values to determine if the promo should be considered.

ADDED: Security: RFQ Line Items: Can Change Vendor Item Number - This setting allows Vendor Item Numbers to be modified and saved directly from RFQ entry.(Default: True) (Extended Module)

ADDED: Security: Sales Document Back Button: Close Document After Move - When enabled, the document will be closed after it has been moved to the destination queue. (Default: True)

UPDATED: RFQ Line Items: Vendor Item Number and Vendor Item Description are now editable. (Extended Module)

UPDATED: Sales Line Item: If the Focused Line Item Inventory information layout fails to load properly, any errors will be logged to the System Log table.

FIXED: RMA Entry: Decimal precision on line price will now be set properly in Dynamics GP 2010.

FIXED: RMA Entry: Max character limit on Return Item Desc is now in line with the Dynamics GP 2010 version.

FIXED: Sales Document: Previously, when GP's Intrastat option is enabled, the EU flag on sales documents was not being set properly. This has been corrected.

FIXED: Sales Line Item: The Focused Line Item Inventory information grid will no longer be reset under certain circumstances. A similar issue could happen on the In-transit Transfer lines.

FIXED: Sales Line Mass Update: The Item Number and Required Ship Date search fields now work properly. (Introduced: 4.6.4.1)

Version 4.6.4.8

Release Date 6/24/19

BREAKING CHANGE: Settings: Enable Item Suggestions - This setting now applies to Inventory Lookup and Sales Document Inventory Lookup. Previously, it was always enabled for these two screens, but now the setting is required to be enabled.

ADDED: Configurator: A new Pricing Type called Root Plus Configurator was added. This Pricing Type uses the root item's base price summed with any additional pricing the configured item might have. (Extended Module: Configurator)

ADDED: Email Templates: Email Subject Template: The ability to define subject templates for an email was added. Email Subject Templates will take precedence over any existing Email Subject settings.

ADDED: Equipment Card: A Read Only Item Description field has been added.

ADDED: Sales Document: An Equipment Description field has been added to the Equipment Properties.

ADDED: Security: Blanket Order Release Plugin: On Row Changed Script - This is an On Row Changed script to run after a cell value has changed.

ADDED: Security: Purchase Order Generation: Split Dropship On Ship To Address Code - Set this to True to split drop-ship sales lines onto separate purchase orders, based on their Ship To Address. (Default: False)

ADDED: Settings: UPS Address Validation: Automatically Apply Recommendations In Workflow - This setting allows you to specify whether or not to automatically apply changes in workflow when UPS validation responds with a valid recommendation. (Default: False)

ADDED: Workflow Rules: An Example Parameters column was added to the grid.

ADDED: Workflow Rules: Grid layout changes are now saved upon closing the screen.

ADDED: Workflow Rules: Users can now resize this form.

UPDATED: Purchase Advisor: Many small improvements were made in order to improve performance for some users.

UPDATED: Security: Equipment Properties: The 'Allow Item Description Changes' security has been renamed to 'Allow Equipment Description Changes'. The description on the security has been updated as well.

UPDATED: Settings: Show Immediate Drop Down For Suggested Items - The description of this setting has been updated to mention that it requires the 'Enable Item Suggestions' setting to be enabled.

UPDATED: User Fields: Decimal type user fields will now always be aligned to the right.

FIXED: Configurator: The Standard Plus Config pricing now sets the List Price on the Item Master of any newly created configured item to be the same as the root item's List Price. (Extended Module: Configurator)

FIXED: Customer Card: Updating a customer with values from a Customer Class will now update all of the fields seen on the Customer Maintenance Options window in Dynamics GP.

FIXED: Equipment: Saving or transferring equipment will no longer cause the following error: "Procedure or function 'sppUpdateInventorySerialNum' expects parameter '@Serial_Number_Sold', which was not supplied." (Introduced: 4.6.4.4)

FIXED: Equipment Card: Changing the Item Number will now update the Item Description field.

FIXED: Equipment Card: The Equipment Description field was mislabeled as "Item Description". This has been corrected.

FIXED: Equipment Card: The Equipment Description field will no longer show the value of the Item Description if the Equipment Description value is NULL.

FIXED: Inventory Bin Transfers: Lot transfers can now be performed without receiving the "@Receipt_Seq is not a parameter for procedure sppTransferLotBin" error. (Introduced: 4.6.4.4)

FIXED: Inventory Bin Transfers: Serial transfers can now be performed without receiving the "@Serial_Number_Sold is not a parameter of procedure sppTransferSerialBin" error. (Introduced: 4.6.4.4)

FIXED: Item Maintenance: When the account information from an Item Class is applied to an Item Master, the Item Account Costing fields will now be updated.

FIXED: Report Manager: Selecting an opportunity from the Sample Doc dropdown will now properly load the Opportunity and no longer always display a message reading "Invalid opportunity."

FIXED: Report Manager: The Report Manager will now load faster when first opening and when switching between reports.

FIXED: Report Manager: The Sample Doc dropdown will now work and refresh properly. (Introduced: 4.6.4.5)

FIXED: Sales Document: The Equipment Item Description field was mislabeled as "Equipment Description". This has been corrected, and this field is now Read Only.

FIXED: Sales Document: The Equipment Properties fields will now be Read Only on historical/voided documents.

FIXED: Sales Document: The Item Description now properly updates when a Non-Inventory Serial Number is selected.

FIXED: Sales Line Items: An issue where the Package Item Prefix would remove the Item Number after adding a Package from the lookup was corrected.

FIXED: Sales Line Items: Kits that contained serial, lot, or multi-bin tracked items were not being properly un-allocated if the line was fully back-ordered. This has been corrected.

FIXED: Sales: Sales Document Convert To BOM: Saving the created BOM no longer results in a message saying "An active BOM already exists for this item. You can have only one active BOM per item."

FIXED: Sales: Sales Document Convert To BOM: Saving the created BOM no longer results in a message saying "Enter at least one active component before saving the BOM."

FIXED: Vendor Card: The first Contact Address created is now properly marked as MAIN. This resolves an object reference error that would occur when trying to create a purchase order.

FIXED: Workflow Rule Conditions: Multiple typos in the descriptions for various workflow rule conditions were fixed.

REMOVED: Security: Purchase Order Generation: Preserve Line Item Order - This security has been removed because preserving line item order is now the default behavior.

Version 4.6.4.7

Release Date 6/10/19

ADDED: Vendor Special Costing: Support for UDFs on Vendor Special Costing (Custom Costing) was added.

ADDED: Workflow: The Country Code Not Like workflow rule condition was added.

UPDATED: Application: DevExpress was upgraded to version 18.2.8.

UPDATED: Workflow: The description of the Country Not Like workflow rule condition was changed to reflect the functionality of the condition.

FIXED: Application: On Validating Scripts: An On Validating script running will no longer result in reset changes made to fields not handled by the script.

FIXED: EDI 850: Location information for cross-dock orders will now be saved correctly when packages are set to not automatically generate. (Extended Module: SalesPad EDI)

FIXED: Export To Excel: Certain grids will no longer have an error message stating, "Please check your Excel permissions." when trying to export to Excel in Workflow Setup or anywhere else that error message occurred previously. (Introduced: 4.6.3.6)

FIXED: Purchase Order Generation: In some situations when used as a workflow plugin, users could receive a "Cannot insert the value NULL into column 'CONFIRM1'" message when attempting to create a purchase order. This has been corrected.

FIXED: Receipt Transaction Entry: Previously, when creating an Inventory Return type receipt, some fields in the header were editable when they should not have been. This has been corrected.

FIXED: Receiving: There will no longer be an "object null reference" error when using Group By on columns.

FIXED: Report Designer: Adjusting the page height and width will now save properly.

FIXED: Report Designer: An out-of-memory error will no longer occur when opening and closing the Expression Editor multiple times.

FIXED: Sales Document: EOM Payment Terms will now take into account any Add Days specified when calculating the due date.

FIXED: ShipCenter Shipping Calculator: Rates are no longer retrieved for packages that have been removed, and attempting to save the document after deleting a package no longer causes an error.

FIXED: Shipment: When adding an item to a cross-dock package, the system no longer errors out if that item is the first to be packed. (Extended Module: SalesPad EDI)

FIXED: UPS Address Validation: The zip code will now be correctly formatted to nine digits. (Extended Module: UPS Validation)

FIXED: Vendor Card: Purchasing Graph: Columns to the right the Pivot Grid no longer contain "ERROR." (Introduced 4.6.4.0).

Version 4.6.4.6

Release Date 5/24/19

ADDED: Customer Card: Case Tracker Entries: A Show Historical checkbox has been added. (Extended Module)

ADDED: Customer Special Pricing: Support for UDFs on the Customer Special Pricing tab was added.

ADDED: PayLink: PayLinks can now be created on historical invoices. When these PayLinks are paid by the customer, they will create cash receipts that are then applied to the sales document.

ADDED: Pick Ticket Printing: There is now a Busy Cursor/Busy Object when searching.

ADDED: Sales Document Entry: Case Tracker Entries: A Show Historical checkbox has been added. (Extended Module)

ADDED: Security: Customer Address Card: Can Change Tax Code - This setting allows a user to change the Tax Code for a customer address. (Default: True)

ADDED: Security: Customer Search: Allow Free Typing In Sales Rep Search Field - When enabled, the Sales Rep search field will be a free-type text field instead of a dropdown.

ADDED: Security: Smart Printing: Auto Send To Resources - When enabled, a PDF version of any report printed or emailed will automatically be attached to the sales document as a resource.

ADDED: Settings: PayLink Default Cash Receipt Batch ID - This is the default Batch ID used when creating a cash receipt through PayLink.

UPDATED: Customer CRM: The Task Entry pop-up screen is now re-sizable and will save its size. Icons were also added to the Recurring Event/Schedule Again buttons.

UPDATED: Sales Promotion Coupon: When attempting to remove a coupon from a document, the sales document pre-save script will now run.

FIXED: AutomationAgent: A potential memory leak caused by mass forwarding a large amount of documents was fixed. (Extended Module)

FIXED: AutomationAgent: Document imports will no longer duplicate when the original's source is changed. (Extended Module)

FIXED: AutomationAgent: Forwarding a Sales Document ID will now correctly recalculate the batch total and number of transactions for all associated batches. (Extended Module)

FIXED: AutomationAgent: Forwarding a batch will now correctly recalculate the batch total and number of transactions. (Extended Module)

FIXED: Customer Search: The search operators on the Statement Name search field now work. Previously, it would always do a Like search, regardless of which operator was selected.

FIXED: Dispatch: Route Entry: An error will no longer occur if this screen is opened when a Dispatch Route Stop UDF is disabled. (Extended Module)

FIXED: Email Template Editor: An error that occurred when using merge fields other than sales document or purchase order merge fields has been resolved. (Introduced 4.6.4.3)

FIXED: Inventory: A kit item's inventory allocated quantity will no longer be reduced when deleting a kit item sales line or deleting a sales document with a kit item on it.

FIXED: Printing: Errors that occurred when attempting to attach reports as resources to documents were not being displayed properly. This has been corrected.

FIXED: Purchase Advisor: Users will no longer receive an object reference error when changing rows in certain rare circumstances.

FIXED: Quick Reports: Lookup and Multi-Lookup searches with an empty SQL attribute or without a SQL attribute will no longer throw an exception, but instead provide a helpful message.

FIXED: Receipt Transaction Entry: The Trade Discount field will no longer change to zero upon saving the document.

FIXED: Returns: Fulfillment quantities on returned lot-tracked items will no longer have incorrect decimal values.

FIXED: Sales Document Entry: When the 'Enable MultiCurrency Formatting' setting is True and the Discount Percent field is updated, the Discount Amount field will no longer revert to 0.

FIXED: Sales Document Splitting: Manufacturing links were not splitting properly when splitting on quantity backorder. This has been corrected.

FIXED: Sales Promotion Coupon: If the sales document pre-save script unsuccessfully executes when the plugin is closed, any recently applied coupon will now be removed.

FIXED: Search Screens: The 'Max Results Limit' security will now be respected if there is no corresponding registry value. The Max Results registry value will only be saved/loaded if the user has the 'Can Change Max Results' security enabled. The workaround is to delete the corresponding search screen's MaxResults registry value. (Introduced: 4.6.4.0)

FIXED: Thomson Reuters OneSource: The 'OneSource Company Role' setting was removed. This value will now always be set to Seller for all sales orders. (Extended Module)

FIXED: Workflow: Workflow procedures have been reconfigured to increase performance.

Version 4.6.4.5

Release Date 5/10/19

ADDED: Customer Address: Using Google Zip Query validation will now return an error when using an invalid Google API Key.

ADDED: PO Selection: Functionality that allows users to link purchase orders to a purchase receipt was added.

ADDED: Receipt Search: Security: Can Create New Receipts - This security allows users to create new purchase receipts. (Default: False)

ADDED: Receipt Search: The New Receipt dropdown button allows users to create Shipment and Shipment/Invoice purchase receipts.

ADDED: Receipt Transaction Entry: Purchase Orders: The Receipt Transaction Entry card now has a Purchase Orders tab that displays linked purchase orders and allows adding/removing purchase order links from a purchase receipt.

ADDED: Sales Shipment: Sales line user fields are now available on the grid as read-only columns that can be selected from the column chooser.

ADDED: Security: Case Tracker Reorders/Returns: Prompt For Reorder PO Number - If True, a prompt to enter the customer's purchase order number will appear when adding a new reorder. (Default: True) (Extended Module)

ADDED: Security: Receipt Transaction Entry: Can Forward Receipts - This security allows users to forward purchase receipts using workflow. (Default: False)

ADDED: Security: Receipt Transaction Line Items: Unreceived Line Color - This is the color of a receipt line that has not been fully received. (Default: Red)

ADDED: Security: Receipt Transaction Properties: Allow Edit - This security allows users to edit fields on the purchase receipt header. (Default: False)

ADDED: Security: Receipt Transaction Properties: Default Receipt Batch - This is the default receipt batch for new receipt transactions. (Default: SALESPAD RC)

ADDED: Security: Receipt Transaction Properties: Default Shipment Invoice Receipt Workflow Queue - This is the default workflow queue where new Shipment/Invoice receipts will be placed. If no value is provided, the 'Default Receipt Batch' security value will be used to populate the new Shipment/Invoice receipt workflow queue. (No Default)

ADDED: Security: Receipt Transaction Properties: Default Shipment Receipt Workflow Queue - This is the default workflow queue where new Shipment receipts will be placed. If no value is provided, the 'Default Receipt Batch' security value will be used to populate the new Shipment Receipt workflow queue. (No Default)

ADDED: Settings: Generate Pack Slip Number on Print or Email - This setting, when set to 'true', will generate the next packing slip number for the sales document if it doesn't already exist. (Default: False)

ADDED: Settings: Generate Pick Ticket Number on Print or Email - When enabled, generate the next pick ticket number for the sales document when printing a pick ticket. (Default: False)

ADDED: Settings: Close Receipt On Forward - This setting closes the purchase receipt automatically after it is forwarded to another queue. (Default: True)

UPDATED: Application: Columns that use a lookup editor, such as Item Number or Warehouse, will now have the filter mode for their auto-filter row defaulted to Display Text. This can be changed to the previous filter mode of Value by right-clicking the column and changing the filter mode. This is saved as part of the layout for the grid and does not apply to grids that use a tree layout, such as Assembly grids.

UPDATED: Inventory Lookup: The Backspace key will now delete highlighted text, instead of selecting more text.

UPDATED: Purchase Order Entry: When using the Item Suggestion settings, the Backspace key will now delete highlighted text, instead of selecting more text.

UPDATED: Sales Entry: When using the Item Suggestion settings, the Backspace key will now delete highlighted text, instead of selecting more text.

FIXED: Report Designer: Users will no longer receive an object reference error when deleting objects within the designer and then attempting to save. (Introduced: 4.6.4.3)

FIXED: Consolidated Shipment: When sending an EDI 810 file from a consolidated shipment, the invoice numbers will now be populated correctly on the file. (Extended Module: SalesPadEDI)

FIXED: Customer Search: Searching using multiple search criteria will be more consistent. (This change affects all search screens.) (Introduced: 4.6.4.0)

FIXED: EDI 856: Sending kit components on the 856 will no longer cause a crash. (Extended Module: SalesPadEDI)

FIXED: Group Pricing: User Field Quick Reports will no longer throw a Null Reference Exception on the Group Pricing Item Details grid.

FIXED: Item Configurator: Making a change to a configured item while the Export Sequence smart field is set to sf_CfgKey will no longer cause other Item Configured lines to have their sf_CfgKey user field improperly set.

FIXED: Item Pricing: A small optimization was made to the way item pricing is retrieved, in order to reduce the number of hits made to the database and increase speed. This change mainly affects scripts and some custom modules.

FIXED: Landed Cost: If the currency of a landed cost does not match the currency of the receipt, the landed cost will no longer have an exchange rate applied to it.

FIXED: Purchase Order Entry: Adding a line item from the Item lookup will now trigger the On Row Changed script.

FIXED: Purchase Order Entry: When a purchase order is copied, the Required Date, Promised Date, and Promised Ship Date on the copied line items will now be set to the current date.

FIXED: Purchase Order: Purchase orders will now be properly marked as received if the remaining quantity of a partially received line is cancelled and the Unit of Measure of that line is not in the base Unit of Measure.

FIXED: RMA Search: Not having the Sales Doc Type column in the grid will no longer result in a "Sales_Doc_Type does not belong to the table" error. (Introduced: 4.6.4.0)

FIXED: RMA Search: The Sales Document link will now properly open the document.

FIXED: Report Manager: The RMA report no longer errors out when entering or exiting the Report Designer.

FIXED: Sales Document Entry: Convert To BOM: The components of the BOM will now be displayed in the BOM Entry window.

FIXED: Sales Document Mass Update: Searching will be faster now, especially in conjunction with the securities that restrict warehouse, document type, or batches.

FIXED: Sales Document Mass Update: Updating fields or adding lines to a large number of documents will no longer crash SalesPad Desktop or result in an Out Of Memory exception.

FIXED: Sales Document Mass Update: When updating documents, the Status menu now says "Updating" instead of "Allocating."

FIXED: Setup Wizard: If the Show Release Notes box is checked when the app has finished installing, the correct web page will open.

FIXED: UPS Address Validation: The Sales Document Workflow Address Validation plugin will now stop forwarding through workflow if there are changes recommended by UPS that should be made. (Extended Module: UPSValidation)

FIXED: Vendor Search: The Address Code field is no longer a false link.

Version 4.6.4.4

Release Date 4/26/19

ADDED: Cancel PayLink: This allows the user to cancel all unpaid PayLinks associated with the document.

ADDED: Purchase Receipts: Distributions and variances for purchase receipts will now function properly.

ADDED: Settings: PayFabric Post Transaction Script - This setting executes after a PayFabric Transaction object is created on payments or batch processing.

UPDATED: User Fields: Users can now rename labels on all User Field tabs if the user field's label is empty in User Field Editor. This change will be saved to the tab's layout.

FIXED: Customer Notes: The Comment and Notes fields will now longer clear out upon a save if the the last remembered tab was a different tab than the current tab.

FIXED: Dashboard Maintenance: An issue where custom dashboards could freeze the app upon loading this screen has been resolved.

FIXED: Dispatch: Driver Board: An issue where changes to Routes would sometimes not save has been resolved. (Extended Module)

FIXED: Dispatch: Route Entry: Deleting a Route will now also delete its sales document links. (Extended Module)

FIXED: EDI Processing: Special XML-related characters will be read correctly when an XML file is viewed. (Extended Module)

FIXED: New Customer Special Pricing: The Unit of Measure's dropdown options will no longer always display with upper-case letters.

FIXED: Receipt Transaction Fulfillment: The Available grid will no longer display inventory that has been sold or transferred to another warehouse. Fulfilling these items could cause issues with inventory. These issues can be corrected with an Inventory Reconcile in Dynamics GP.

FIXED: Receipt Transaction Line Selector: In some situations, the Orig Qty Remaining field would not take into account quantity that has been sold or transferred to a different warehouse. This has been corrected.

FIXED: Sales Document Comments: Clearing out a Dynamics GP comment on a document and then transferring the document will no longer result in the comment reappearing on the new document.

FIXED: Sales Document Entry: Schedule Route: The Dispatch sales document link will no longer be silently created when there are more than one potential Routes to be linked. The user will have the option to select which Routes to link. (Extended Module)

FIXED: Sales Person Card: An issue where custom Sales Person dashboards could freeze the app upon loading the Sales Person card has been resolved.

Version 4.6.4.3

Release Date 4/12/19

ADDED: Printed Forms: The ability to make unique document numbers across pick tickets and packing slips was added.

ADDED: Settings: PayFabric: EMV Timeout - This setting prompts the user to close the EMV connection screen after a certain period of time (in milliseconds). Set to 0 to disable. (Default: 180000)

ADDED: Settings: PayFabric Post Transaction Script - This setting executes after a PayFabric Transaction object is created on Payments and Batch Processing.

UPDATED: Sales Document Entry: Copying a sales document that has a blank Tax Schedule will now pull the current address's Tax Schedule. Econnect will set this during the save. This also fixes a bug where third party tax engines (Avatax, Thomson Reuters, etc) would not be calculated on the first save but the Tax Schedule would be set during the save.

UPDATED: Search Screens: The Date Range validation now occurs when searching, instead of when entering date ranges. This was changed so that it would be easier to enter a Historical date range.

FIXED: Dispatch Route Search: The Location search field will no longer throw an "Invalid column" error when used. (Introduced: 4.6.4.0)

FIXED: Email Template Editor: The Rich Text Memo UDF merge fields no longer cause unexpected line breaks or font issues.

FIXED: PayFabric: Splitting a document will now update any authorizations on that document to the new document in Credit Card Advantage.

FIXED: Purchase Advisor: When clicking the Search button multiple times, there will no longer be an "Object reference" type exception targeting the CustomColumnDisplayText.

FIXED: Purchase Order Search: The Vendor search field will no longer throw an "Invalid column" error when used. (Introduced: 4.6.4.0)

FIXED: Report Designer: A memory leak that occurred when opening and closing the Report Designer multiple times has been resolved.

FIXED: Returns: COG distribution entries will no longer be incorrect if all items do not use the same COGs account. This was a SQL stored procedure update. (Introduced: 4.6.4.0)

FIXED: RMA Search: The New button now works properly. (Extended Module) (Introduced: 4.6.4.0)

FIXED: RMA Search: There will no longer be a "Return_Type_Record does not belong to table error" when searching. The workaround is to add the Return Type Record and Source columns to the grid.

FIXED: Sales Document Entry: Create RFQ From Sales Doc: Non-inventory items are now included in the Create RFQ screen, regardless of Sales Document Type. (Extended Module)

FIXED: Sales Search: The Customer field now properly searches on both Customer Name and Customer Number. (Introduced: 4.6.4.0)

FIXED: Search Screens: The Vendor search, Purchase Order search, Resource search, and System Log search fields now have the Clear/Reset Search buttons. (Introduced 4.6.4.0)

FIXED: Vendor Search: The Phone and Contact search fields will no longer throw an "Invalid column" error when used. (Introduced: 4.6.4.0)

REMOVED: Item Inventory: The In Transit column was unused and has been removed.

Version 4.6.4.2

Release Date 3/29/19

UPDATED: BOM Search: The Distributions BOM search screen now uses the new search screen functionalities. (See 4.6.4.0 release notes)

UPDATED: Group Pricing: When using the Copy To functionality for groups other than items, there is now a log message showing any errors that may have occurred.

UPDATED: Recurring Sales Generator: The Cutoff Date, Build List, Generate, and Generate Endless to Cutoff Date controls have been moved to a tool strip on the Documents tab. This was done for conformity and usability reasons. No functionality changes were made.

UPDATED: Recurring Sales Generator: The Generate Endless to Cutoff Date is now automatically checked when the form is opened.

FIXED: Assembly Search: Searching with UDFs in the grid will no longer result in an "Invalid cast" error. (Introduced: 4.6.4.0)

FIXED: AutomationAgent: An issue where stopping the AutomationAgent service would sometimes cause the Remote Library service to stop has been fixed. (Extended Module)

FIXED: Backordered Items Report: When using the split plugin in workflow with a document that has been split for the first time, clicking the Release & Allocate button will no longer result in a message about the document already existing in History.

FIXED: Case Tracker Entry: Case Tracker resources can now be printed.

FIXED: Counter Sales: When using the 'Auto Increment Quantity' security, deleting an item from a sales document will no longer prevent that same item from being re-added to the document.

FIXED: Dashboard Maintenance: Free-typing in the Dataset column has been disabled. This will prevent invalid datasets from being entered into the column, which could cause "The given key was not present in the dictionary" errors.

FIXED: Dispatch Route: After creating a Dispatch Route UDF, opening a Route will no longer result in an "Invalid cast" error. (NOTE: This is a SQL view fix which does not require an upgrade.) (Extended Module)

FIXED: Group Pricing: Item Quantity start/end can now be properly changed. This fix includes a better error message when unable to save the changes. (Introduced: 4.6.3.0)

FIXED: PayFabric Payments: Phone numbers with letters in the number will no no longer result in the EMV payment to succeeding but the payment not processing in SalesPad Desktop.

FIXED: Recurring Sales Generator: The correct number of documents to be created will now be displayed to the user when generating documents from a definition that is set to Endless.

FIXED: Remote Library: An issue where stopping the Remote Library service would sometimes cause the AutomationAgent service to stop has been fixed. (Extended Module)

FIXED: Sales Entry: When purchasing from a sales document with the Close when PO is Created checkbox not checked in the Choose Purchase Plan window, directly forwarding after purchasing will no longer lose the PO links in scenarios where workflow manipulates the document.

FIXED: Sales Inventory Lookup: The Alternate Items sub tabs will now display the same way as the Inventory lookup.

FIXED: Search Screens: The "An item with the same key has already been added." error will no longer be thrown when using DateTime UDFs. (Introduced: 4.6.4.0)

REMOVED: Email Template Editor: The Customer Address merge field dropdown has been removed on sales document email templates.

Version 4.6.4.1

Release Date 3/15/19

BREAKING CHANGE: AutomationAgent: A security was added to the AutomationAgent Service form. (Extended Module)

ADDED: EDI 945: A checkbox was added to the Business Object Mapping screen to allow for completing the fulfillment on a sales document. (Extended Module)

ADDED: Sales Fulfillment Plugin: There is now a busy cursor and busy message when multi-selecting and fulfilling.

ADDED: Sales Fulfillment: The Fulfillment Details grid's layout will now be saved for serial, lot, and multi-bin tracked items.

ADDED: Settings: AvaTax Sales Document Fields To Check - When saving a sales document, SalesPad will check the sales document fields specified here to determine whether tax needs to be re-calculated for the document.

ADDED: Settings: AvaTax Sales Line Item Fields To Check - When saving a sales document, SalesPad will check the sales line fields specified here to determine whether tax needs to be re-calculated for the document.

ADDED: Settings: Default Months For Historical Sales Items - This setting defines the previous number of months that SalesPad will search to suggest historical items on sales lines, purchase lines, and inventory lookup forms. (Default: 24)

ADDED: Settings: Enable Item Suggestions - When enabled for a user/group, item numbers on sales line and purchase line will be suggested. (Default: (NONE))

ADDED: Settings: Suggest Historical Non Inventory Sales Items - When enabled, the item suggestion list will include historical non-inventory items on sales lines, purchase lines, and inventory lookup forms. (Default: False)

UPDATED: EDI Outbound Processing: A more descriptive error will now be logged when there is bad data found in the business object mapping. (Extended Module: SalesPadEDI)

UPDATED: EDI Processing: While the process is running, connection issues will now be handled better and error messages will be logged on the screen. (Extended Module: SalesPadEDI)

UPDATED: Sales Fulfillment Plugin: Multi-selecting and fulfilling now happens faster, and is mostly noticeable when there are large quantity of serials being fulfilled.

UPDATED: Sales Line Mass Update: Auditing is better in multiple scenarios.

UPDATED: Sales Line Mass Update: Code was combined to create more consistent actions and logging when saving for each action.

UPDATED: Sales Line Mass Update: Searching is much faster and only loads the visible columns.

UPDATED: Sales Line Mass Update: The Allocating button no longer requires the 'Unblock and Allocate' security to be enabled if the items being allocated are not blocked items.

UPDATED: Settings: 'Show Immediate Drop Down For Suggested Items' is no longer Beta and works for sales line and purchase line item entry. (Default: (NONE))

UPDATED: Settings: The 'Prompt For Credit Card Payments' setting's description has been updated to more accurately describe its functionality.

FIXED: Assembly Entry: An issue where a new assembly would sometimes be saved with an existing Assembly ID has been resolved.

FIXED: Counter Sales: The Unit Price on line items added from the Inventory Lookup will now be rounded to the correct currency decimal places.

FIXED: EDI Business Object Mapping: Importing mappings will now correctly create the mapping fields. (Extended Module: SalesPadEDI)

b: EDI Processing: When using an EDI Schedule with an end date that has passed, the process will now stop instead of looping forever. (Extended Module: SalesPadEDI)

FIXED: Equipment Auto Assign: If the last document associated with the equipment is a return, the assigned customer will be cleared out.

FIXED: Equipment Card: The customer assigned to the equipment will now match what is shown on the Equipment Lookup screen.

FIXED: In-Transit Transfer Entry: Hitting the Enter key will now add a new line item.

FIXED: Intrastat: An issue where the Country text box wouldn't populate correctly was fixed.

FIXED: KwikTag: An issue with the database update failing has been fixed. (Extended Module)

FIXED: Kwiktag: An error that occurred when trying to log into the KwikTag server has been fixed. (Extended Module) (Introduced: 4.6.3.15)

FIXED: PayFabric: If the 'Allow Overcharge' setting is disabled for their security group, users will no longer be able to capture values greater than the sales document's On Account value.

FIXED: Purchasing: Choose Purchase Plan: When a purchase order is created from a sales document and the first sales line item has a vendor, the rest of the purchase order lines will have their vendor updated to match that vendor before the purchase order is saved.

FIXED: Sales Document Entry: Previously, the 'Prompt For Credit Card Payments' setting could cause an infinite loop in certain scenarios. This has been fixed.

FIXED: Sales Document Entry: Related Documents: Having this tab focused and switching to a new tab will no longer result in a null reference error. (Introduced: 4.6.4.0)

FIXED: Sales Fulfillment: In some scenarios, the Available To Pick grid's layout could be overwritten by another Item Type's layout. This has been corrected.

FIXED: Sales Line Item: The Inventory Account index will now be set properly for dropship sales lines when Dynamics GP's 'Posting Accounts From' setting is set to Customer. This is a procedure change.

FIXED: Sales Line Items: Previously, entering a partial item number and tabbing or navigating to the Inventory Lookup would auto-complete to the first item and search on that item. This issue could be circumvented by turning off the 'Enable Inventory Auto Complete Setting'. This functionality will now work as intended and search on the partial item number. (Introduced: 4.6.4.0)

FIXED: Sales Line Mass Update: Manipulating large documents or a large number of line items will no longer end with an Out of Memory exception.

FIXED: Sales Line Mass Update: The Event Log viewer will now properly display results.

FIXED: Sales Person Search: The New Sales Person button now works. (Introduced: 4.6.4.0)

FIXED: Search Screens: The 'Can Create' Securities on the Customer, Vendor, Assembly, Prospect and Opportunity search screens now work properly. (Introduced: 4.6.4.0)

FIXED: Smart Printing: The Fax_UDF field will now properly save.

FIXED: UDFs: Value Option UDFs that are marked as Read Only will no longer contain the Delete button. The workaround is to deny edit permissions.

FIXED: Vendor Search: Vendor Name is now searched by default again. (Introduced: 4.6.4.0)

DELETED: KwikTag: An unneeded reference was deleted. (Extended Module)

Version 4.6.4.0

Release Date 3/1/19

BREAKING CHANGE: Search Screens: Registry values will be reset and are now saved in screen-specific folders in the registry.

BREAKING CHANGE: Search Screens: Sub-securities may have been reset for some search screens.

BREAKING CHANGE: Search Screens: The Export To Excel and Print with Preview options on grids' orange triangle menu is now driven by security and disabled by default.

BREAKING CHANGE: Search Screens: There is no longer a Prior Months field. This is driven by a security which limits the month date range limit for the new date range fields (when applicable).

BREAKING CHANGE: Application: .NET 4.7.2 is now required. This will be installed during the application installation if it is not already installed. Please refer to Microsoft .NET framework system requirements for OS limitations.

UPDATED: Sales Document Mass Update: The restriction of only being able to add items to orders was removed. Items can now be added to orders, quotes, returns, or invoices.

UPDATED: Search Screens: All of the search screens now share a base security which give the same options across all search screens. A few sub-securities are not available on every screen based on usability and functionality parameters.

UPDATED: Search Screens: Most search screens have been made more uniform and use a base search screen.

UPDATED: Search Screens: Search screens now properly use themes.

UPDATED: Search Screens: Search screens will now perform a search when a new column is added to the grid. Users no longer will need to manually re-search to populate these columns.

UPDATED: Search Screens: The prompt to continue on large searches will only show up if you are going to exceed the max results limit.

UPDATED: Thomson Reuters: The integration now works with more recent versions of the tax service. (Extended Module)

UPDATED: User Fields: Load speed for forms that have Customer Lookup user fields on them was improved.

UPDATED: Application: DevExpress has been upgraded to 18.2.6.

ADDED: Sales Document Entry: The Dynamics GP button now supports BACKORDER document types.

ADDED: Search Screens: Each field has a search operator associated with the field. (Is Like, Begins With, Equals, etc)

ADDED: Search Screens: Screens that have a date range also have the option to change what field the date range will search on. This field is saved to the registry.

ADDED: Search Screens: The date range area has an option to pick a date range such as Today, Yesterday, or Last Week. This range is limited based on security for prior months allowed. For example, if you can search only nine months then you will not see Last Year.

ADDED: Search Screens: There is now a Clear button on all search screens that will clear the fields.

ADDED: Search Screens: There is now a Custom Search field option available which allows users to search on any specified search field.

ADDED: Search Screens: There is now a Reset Search sub-option on the Clear button. This button will reset all search operators and the date fields.

ADDED: Search Screens: There is now a date range on screens where date range is appropriate.

ADDED: Settings: Enable Inventory Auto Complete - When enabled for a user group, the item number will auto-complete from the dropdown list of suggested items on the inventory lookup form.

ADDED: Settings: Show Immediate Drop Down For Suggested Items - When enabled for a user group, suggested items will become a dropdown on the inventory lookup form that will auto-complete.

FIXED: Bulk Fax: The 'Remove GP Trailing Zeros' setting is now respected. This change also dictates that fax numbers be numeric. Fax numbers will be un-formatted if necessary. NOTE: This functionality previously existed as a Smart Printing work-around solution.

FIXED: Case Tracker Detail Search: The screen will properly pull Case Tracker detail UDFs.

FIXED: Customer Search: When used as a lookup mode, two searches will not be performed when loading.

FIXED: Equipment Card: Rental Order: Using this action when only one Sales Document ID exists for the Order Sales Document Type will no longer result in an error.

FIXED: Grid UDF's: The Multi-select Value Option UDF will no longer clear out when using the dropdown.

FIXED: Item Maintenance: An issue where some fields would revert to default values when an existing item is edited was resolved. (Introduced: 4.6.3.13)

FIXED: Item Maintenance: Changing the Item Class on an existing item will no longer roll down the UofM Schedule, Valuation Method, Item Type, or Tracking Type.

FIXED: Returns: Fee and Misc Charge type items' Extended Cost will no longer be added to any inventory or cost-of-goods distribution entries.

FIXED: Returns: Inventory distribution entries for multi-currency documents will no longer be incorrect if all items do not have the same inventory account.

FIXED: Send Email: The Enter key can now be used to send an email.

FIXED: UDF's: When copying Value Option type UDFs (including multiselect), the values will now copy regardless of the target UDF's value options list.

REMOVED: Search Screens: Light Search and the 'Only Load Visible Columns' security were removed. By default, only columns that are visible are loaded.

REMOVED: Search Screens: There is no longer a Starts With field. This has been replaced with field-specific search operators.

Version 4.6.3.16

Release Date 2/15/19

BREAKING CHANGE: Sales Document Entry: When security to allow saving Historical/Voided documents is enabled, the 'Queue Access' security and the WorkFlow Readonly flag are no longer respected. UDFs will be editable regardless of what queue they are in.

ADDED: Customer Search Screen: Checkboxes for selecting specific Address Types were added.

ADDED: PayFabric Logging: Logging to discern when a user clicks credit or debit on the EMV transaction screen was added.

ADDED: PayFabric: A method to retrieve the signature for the last PayFabric transaction on a document was added. This method is designed for sales document reports, and documentation can be found on our website.

ADDED: Security: Allow Alternate Customer Number Row Colors - This security enables alternating row colors on the Customer Search results grid. (Default: True)

ADDED: Security: Sales Document Line Items: On Row Paste Script - This is a C# script that executes when a line item is pasted to a document. If multiple lines are pasted, this script will run for each line.

ADDED: Security: Sales Line Quick Report: Default Filter - When set to Sales Doc Num, the quick report will filter based on the current sales document number. When set to Item Number, the quick report will filter based on the currently selected line item number.

ADDED: Settings: Use FedEx For 12 Digit Numeric Tracking Numbers - When set to True, 12-digit numeric tracking numbers will be considered FedEx.

UPDATED: Application: Even rows in grids are now themed properly.

UPDATED: Item Maintenance: The Price Level Maintenance tab will now have the Price Level dropdown sorted alphabetically.

UPDATED: Sales Document Line Items: 'Can Edit Historical Userfields' was renamed to 'Can Edit Historical/Voided Userfields', to match the functionality. The description also has been updated.

UPDATED: Security Editor: Speed was improved for when changing security groups.

UPDATED: Security Editor: The number of hits to the database when loading the form, adding a user, or deleting a user was reduced.

FIXED: Assembly Entry: Assembly S/L Allocation: Users will no longer receive an error if, when allocating a serial number, different items have that same serial number in the same location.

FIXED: Assembly Entry: Pre-save scripts will now respect code to cancel the save.

FIXED: Configurator: Users are now able to tab through options fields and use keyboard input correctly when on the Configurated Item entry screen. (Extended Module)

FIXED: Customer Card: Contract Pricing: Customer Contract data will now load more quickly.

FIXED: Manufacturing Detail Report: This report will no longer throw an error when opening up the Scripts Code editor in the Report Designer. If a custom report is having this issue, it will need to be remade from a copy of the stock version. (Extended Module)

FIXED: PayFabric: Debit Card EMV transactions will now properly lock down the control box.

FIXED: PayLink: PayLinks will now take into account existing payments on documents.

FIXED: Remote Library: Users can now have multiple instances of Remote Library running in different databases.

FIXED: Sales Document Entry: Changing the Ship To Address field on the header will now more consistently prompt for other changes as needed, such as Sales Rep, Warehouse, and Shipping Method.

FIXED: Sales Document Properties: 12-digit FedEx tracking number hyperlinks will now take users to the FedEx website instead of the Tracking Number Catch All URL, as long as the 'Use FedEx For 12 Digit Numeric Tracking Numbers' setting is set to True. (Introduced: 4.6.3.6)

FIXED: Sales Document Properties: When the Save Editable securities are enabled, UDFs are only editable for Historical and Void documents. Previously, they would be editable on Historical/Voided documents, but the document could not be saved.

FIXED: Sales Line Promotions: Changing the quantity of a line item with a promotion will now remove the promotion's markdown amount or percent from all related lines if the promotion's criteria is no longer met.

FIXED: Third Party Billing: Users with the 'Use Shipment Suffix' setting disabled will no longer receive a "CUSTNMBR does not exist" error when attempting to partially invoice using the Third Party Billing plugin.

REMOVED: Sales Document User Fields: Security - 'Allow Historical Edit' was removed. These Sales Document Entry securities are now respected: 'Can Save Historical Documents' and 'Can Save Void Documents'.

Version 4.6.3.15

Release Date 2/4/19

ADDED: Security: AutomationAgent Audit: An Automation Audit tab was added to Automation Instance cards. (Extended Module)

ADDED: Security: Sales Document Entry: Save Before Deletion - When enabled, a save prompt will appear before deleting a sales document with unsaved changes. (Default: False)

UPDATED: Purchase Advisor: The Vendor field in the Purchase Plan section is now a dropdown.

FIXED: Database Update: The post-SQL script to populate the spNextNumbers table with the initial SSCC serial numbers will no longer run indefinitely in certain situations.

FIXED: KwikTag: An NLog reference was added to fix KwikTag Authentication (current users will just need to put the NLog dll in their installation folder).

FIXED: Manufacturing: MO Search: The text in the bottom left of this screen now says "Searching for MOs...". (Extended Module)

FIXED: Purchase Advisor: Using the Create All Purchase Plans button will no longer lead to purchase orders being created with the incorrect Vendor Name if the vendor on the plan was changed.

FIXED: Sales Doc Payment: All grid layouts will now be saved and loaded properly.

FIXED: Sales Doc Payment: The Date field will now display the Doc Date value of the selected existing payment instead of always showing today's date. This change only affects non-CardControl builds.

FIXED: Sales Document Entry: Add Item: This plugin now works when triggered from workflow.

FIXED: Sales Document Entry: Third Party Billing: Invoices generated from the Third Party Billing plugin will now use the Third Party Billing customer's Bill To Email Address.

FIXED: SalesPad Today: Interaction Entry: Sales Document Number is now shown when editing an Interaction that is linked to a Void/Historical sales document.

FIXED: TeleSales: The Customer Num column is a link again. (Introduced: 4.6.2.6) (Extended Module)

Version 4.6.3.14

Release Date 1/18/19

ADDED: Assembly Allocation: Added the ability to view serial and lot user fields.>

ADDED: Assembly Allocation: Added the ability to remove multiple allocations by holding down the SHIFT key.

ADDED: AutomationAgent: Action Center: A column called "Other Details" was added to the grid. This column contains a link to the Other_Details field when clicked. (Extended Module)

ADDED: Sales Document Plugin: Generate Missing SSCC Numbers: When run, the plugin will generate all missing SSCC numbers for packages associated with that sales document. (Extended Module: SalesPadEDI)

UPDATED: EDI Get Labels: The SSCC number will now be populated on packages that are missing it when labels are retrieved. (Extended Module: SalesPadEDI)

UPDATED: Sales Batch Processing: If using "Forward After Print", the screen will refresh after printing and forwarding occurs.

FIXED: Customer Address: Dynamics GP2013 or newer will no longer truncate the "Alt Company Name" parameter in the sppUpdateCustomerAddr stored procedure. (Introduced: 4.6.3.12)

FIXED: Application: Changes were made in order to help with some potential deadlock scenarios on table SY00500 when saving sales documents.

FIXED: Assembly Allocation: 'Selected Lot' and 'Expiration Date' columns are now read-only.

FIXED: AvaTaxQueryHandler: The "" '' is not a column of 'SalesLineItem'" error will no longer happen if the the 'Calculate Tax Field' setting is not set.

FIXED: Bulk Printing: There will no longer be a "Controls created on one thread cannot be parented to a control on a different thread" error when the Forward After Printing checkbox is checked. This error can be avoided by turning off the 'Allow Background Printing' setting. (Introduced: 4.6.3.9)

FIXED: Customer Card: Clearing the customer note will now correctly delete the note.

FIXED: Customer Card: Item History: Historical Sales Lines using a non-functional currency will now display the originating currency's Price and Cost values.

FIXED: Customer Card: Updating any value of a customer will no longer create a blank note.

FIXED: Dispatch: Changes to Route Stop appointment times now save correctly.

FIXED: Equipment Maintenance: Properties: The values in the Equipment Type dropdown will no longer contain extra white space.

FIXED: Equipment Search: Generate Equipment Contracts: The "Equipent" typo has been fixed.

FIXED: Equipment Search: Generate Equipment Contracts: The window the pops up when generating contracts now reads "Would you like to Generate Equipment Contracts for the serials?" instead of "Would you like to Renew Equipment Contracts for the serials?".

FIXED: Equipment Search: Generate/Renew Equipment Contracts: Not setting a value in the Expiration/End date fields will no longer cause an "SqlDateTime overflow" error when the user clicks OK.

FIXED: Equipment Search: When generating or renewing equipment contracts, the values in the 'Equipment Type' setting are now matched with the types in the 'Valid Equipment Types For Contracts' security, regardless of letter casing.

FIXED: Import Manager: It's no longer possible to import Vendor Items with a blank Vendor ID.

FIXED: Inventory Lookup: The data in the User Fields tab is now cleared if a non-inventory item is searched for.

FIXED: Manufacturing Order Card: Scripting will now correctly assign values to Manufacturing Order Properties fields that have been modified through scripts.

FIXED: PayFabric: Failing to connect to an EMV terminal will no longer result in the PayFabric window being unable to be closed.

FIXED: PayFabric: Users who have no EMV devices set up in their PayFabric Portal will no longer receive a "doCredit is undefined" error. (Introduced: 4.6.3.13)

FIXED: Purchase Order Entry: Purchase Line Distribution Entry: GP Account Format setting 'Separate with' is now respected. Database update is required for changes to take effect.

FIXED: Quick Reports: The column header height has been increased for captions that are split into two rows.

FIXED: Receiving: Dynamics GP 2010 users will no longer receive "Invalid object name PA43001" errors when receiving non-inventory items. This was an eConnect SQL change and does not require upgrading. (spptaPopRcptLineInsert_SalesPad)

FIXED: Resources: An out of memory exception that could occur after attaching many resources has been resolved.

FIXED: Sales Document GP Attachments: Edited resources in SalesPad will no longer be updated incorrectly if flow is turned off in Dynamics GP. Previously, this could cause an "Illegal address for field Origin" error when posting the document.

FIXED: Sales Order Entry: Sales Line Distribution Entry: The Dynamics GP Account Format 'Separate with' setting is now respected. A database update is required for changes to take effect.

FIXED: Sales Promotions: An issue with the Auto Filter Row in the Coupon grid has been resolved.

FIXED: Security: Equipment Management Auto Assign Serial: Multiple typos in the description have been fixed.

FIXED: User Defined Fields: When UDFs that use Value Options and share the same name are copied to a new business object, they will now properly copy if their options had new line characters, for example, Copy Customer.xUdf -> SalesDocument.xUdf (Introduced: 4.6.3.10)

REMOVED: AutomationAgent: The Other Details box was removed from the Action Center formlet. This box showed contents of the Other_Details field for every error. (Extended Module)

Version 4.6.3.13

Release Date 12/21/18

ADDED: Credit Card Device: Pax's PX7 has been added to the list of supported devices.

ADDED: PayFabric: Additional logging was added for when the 'PayFabric Logging' setting is enabled.

ADDED: PayFabric: Created By/On and Updated By/On fields have been added to PayFabric transactions.

ADDED: Request For Quote: RFQ Entry: A Related RFQs tab has been added. This tab shows all RFQs with the same Master Number. RFQs can be removed from or added to the chain from this tab. (Extended Module)

ADDED: Security: Convert Opportunity To Quote: Convert Status - When set, the opportunity's status will be flipped to this status upon conversion. If the status is a Historical status, then the opportunity will also be marked as Historical.

ADDED: Security: Interaction Entry: An 'Allow Layout Customization' security has been added.

UPDATED: Kit Exploder: This plugin can now be triggered from the AutomationAgent service.

UPDATED: Request For Quote: All RFQs generated at the same time will now have the same Master Number. (Extended Module)

UPDATED: Request For Quote: Generating a PO from an RFQ will now prompt to cancel all other related RFQs. (Extended Module)

UPDATED: Security: Sales Document Manufacturing Orders: "Requires Manufacturing extended module" has been added to the 'Can Remove Link' security description.

FIXED: Customer Special Pricing: Unit of Measure is now accounted for in the cost calculation.

FIXED: In Transit Transfers: Changing the UofM or Qty Fulfilled value after a serial, lot, or bin-tracked item has been fulfilled will now properly reset the field to its previous value.

FIXED: In Transit Transfers: If the destination site has a location segment specified but the from site does not, GL account specification will now still use the appropriate location override for the destination site.

FIXED: Inventory Lookup: Item Properties: Unsaved changes will no longer be pulled back from Item Maintenance if the user cancels the changes.

FIXED: PayFabric Batch Capture: Batch Capture will now work with the 'Export To Credit Card Advantage' setting.

FIXED: PayFabric Batch Charge: Batch Charge will now work with the 'Export to Credit Card Advantage' setting.

FIXED: PayFabric Cash Receipt: The PayFabric hosted page can no longer be closed once an EMV transaction has been started. Users will need to cancel the transaction on the EMV Terminal or let the transaction time out.

FIXED: PayFabric Cash Receipt: The transaction amount fields (EMV and Manual) are no longer editable.

FIXED: PayFabric: Pressing Enter multiple times on the Manual Credit Card Entry screen will no longer result in multiple attempts to submit the transaction.

FIXED: PayFabric: The Credit and Create GP Payment buttons will now be disabled on historical and voided documents.

FIXED: PayFabric: The PayFabric hosted page can no longer be closed once an EMV transaction has been started. Users will need to cancel the transaction on the EMV Terminal or let the transaction time out. The previous fix for this issue was discovered to not work in some users' environments.

FIXED: Receiving: Lines to receive can now be saved if the Unit Cost field wasn't changed and the purchase order is locked. This applies when the 'Write Back Cost' security is True.

FIXED: Sales Document Entry: An error will no longer occur if the Line Items tab is not the default tab and requested ship changes roll to the line items before loading the tab.

FIXED: Sales Document Entry: An issue where tiered sales document promotions were not applied when Freight or Misc Amount was added to the total has been resolved.

FIXED: Smart Printing Maintenance: Saving while the grid is grouped by a column will no longer cause an object reference error.

Version 4.6.3.12

Release Date 12/7/18

ADDED: Receiving Form: If the screen is closed when there are still lines set up to be received, a prompt will appear reminding the user and giving the option to cancel the close.

ADDED: Sales Document Promotions: The Promo plugin will now preserve window size and splitter location.

ADDED: Security: PayFabric Batch Charge - If enabled, when charging a document, the system will attempt to charge a card that was used to previously authorize the document. The charge amount will be for the remaining total of the document, and not for the authorization total. (Default: False)

ADDED: Security: Sales Line Excel Import: Non Inventory Override - When enabled, items that do not exist will be marked as Non-inventory. This overrides any flags in the Excel file or the Non-inventory Item prefix check. (Default: False)

ADDED: Setting: Pack Kit Instead of Components - When enabled, kit items will be packed, rather than kit components. Warning: Enabling this setting may cause conflicts with packing in DataCollection and ShipCenter. (Default: False)

ADDED: Settings: Default Purchasing Email Subject Line Format - The CustomerName and CustomerNumber options have been added.

ADDED: Settings: PayFabric: Prompt User When Closing Unprocessed Transaction - When set to True, attempting to close the PayFabric window without processing a transaction will prompt the user to confirm. (Default: False)

ADDED: Settings: Show Zero Dollar Auth On Payment Link - If enabled, it updates the payment link on sales documents that have a zero dollar PayFabric authorization. (Default: False)

UPDATED: Case Tracker Entry: A Historical banner will now be shown on historical cases. (Extended Module)

UPDATED: EDI Processing: When files are grabbed from the FTP folder, they will now be ordered by Last Write Time, so that older documents will process first.

UPDATED: Sales Document Manual Split: The Ship Qty column has been renamed to Split Qty.

UPDATED: Sales Entry Quick Pick Maintenance: Support for various UDF types was added to the Item Categories grid.

FIXED: AutomationAgent: Several components around scheduling jobs were optimized.

FIXED: AutomationAgent: The Batch Forward job will no longer audit sales documents if it fails to forward them.

FIXED: Customer Address: The sppUpdateCustomerAddr stored procedure now limits the "Alt Company Name" parameter to match the field's 31 characters.

FIXED: Dispatch Vehicle Entry: License Plate # now saves. (Extended Module)

FIXED: EDI Cross Reference: The quantity conversion functionality of the UofM cross reference is now applied to outbound files. (Extended Module)

FIXED: EDI Cross Reference: When trying to do a conversion, the UofM cross reference will now take into account the item's UofM Schedule. (Extended Module)

FIXED: Purchase Orders: Non-Multicurrency users will no longer receive a 9207 econnect error when attempting to save a partially received purchase order after making any changes.

FIXED: Quick Transfer To Invoice: Better error handling is now in place. Error messages will be logged to the original document. In the event of an error occurring, the normal transfer process is used.

FIXED: Sales Entry Quick Pick Maintenance: UDFs no longer need to be double-clicked in order to edit them.

FIXED: Sales Entry: When updating Microsoft GP user fields we no longer make, the parameters NVarChar and now use VarChar. This may help with some speed issues and potentially some deadlocking issues.

FIXED: Sales Person Card: Saving the Dashboard with a grid will no longer cause an error.

Version 4.6.3.11

Release Date 11/26/18

ADDED: Security: Customer Special Pricing: Hide Cost Source - When enabled, the cost type (standard or current) is hidden on the Special Pricing form on the Customer Screen. (Default: False)

ADDED: Security: Customer Special Pricing: Show Current Cost - When enabled, the current cost is visible on the Special Pricing form on the Customer Screen, as well as the margin and profit percentage calculated using the current cost. (Default: True)

ADDED: Security: Customer Special Pricing: Show Standard Cost - When enabled, the standard cost is visible on the Special Pricing form on the Customer Screen, as well as the margin and profit percentage calculated using the standard cost. (Default: False)

ADDED: Security: Customer Special Pricing: Use Standard Cost For Margin - When enabled, the New Customer Special Pricing Form will calculate the margin using standard cost instead of current cost. (Default: False)

ADDED: Thomson Reuters OneSource: Settings: 'OneSource Default Country Code' will default a Country Code if one is not set up on the warehouse or address. (Extended Module)

UPDATED: Security Editor: Removed some extra spacers between buttons on the toolbar of the Security section of the form.

FIXED: 850 Inbound: Shipping Methods are now correctly applied to the created sales document when the Default Carrier Information screen contains rows with the same Carrier Alpha Code. (Extended Module)

FIXED: Activity Locks: User names that are 16 or more characters will now properly show up as the user locking the document. This can be fixed with the latest spvActivityLock view.

FIXED: Application: A general memory leak that, over time, would cause an Out of Memory (or similar error) to occur was resolved.

FIXED: AutomationAgent: AutomationAgent errors will now have a Component History ID.

FIXED: AutomationAgent: Jobs that may use PayFabric will no longer cause errors. (Introduced: 4.6.3.5)

FIXED: Case Tracker Monitor: A blank status will no longer result in an error. (Extended Module)

FIXED: Case Tracker Monitor: Multiple statuses being checked will now work properly. There was a character limit in the stored procedure, so this does not require an upgrade. (Extended Module)

FIXED: PayFabric Migrator: Previously, credit cards from CardControl would give a Authorization Failed error when attempting to migrate. This has been corrected. (Introduced: 4.6.3.2)

FIXED: PayFabric: The 'Allow Overcharge' setting will now prevent users from increasing the transaction amount in the PayFabric Payment window.

FIXED: Paylink Plugin: This plugin can now run from a service.

FIXED: Thomson Reuters OneSource: There will no longer be an Unmarshalling Error when a Country Code is not set. If the setting and Country/Country Code are all blank, then "US" will be sent. (Extended Module)

FIXED: Workflow Rules: Another queue's rules will no longer be evaluated if the current queue's name is contained within the other queue's name. Example: ORDER and NEW ORDER.

REMOVED: Thomson Reuters OneSource: Settings: 'OneSource Use Country Code' was replaced. (Extended Module)

REMOVED: Thomson Reuters OneSource: Settings: 'OneSource Void Deleted Documents' and 'OnceSource Include Non Taxable GP Items' were not implemented. (Extended Module)

Version 4.6.3.10

Release Date 11/12/18

ADDED: Inventory By Location: The Qty Drop Shipped column has been added to the grid and views.

UPDATED: AutomationAgent: Error logging was improved.

UPDATED: Counter Sales: The Customer Number field dropdown will now be populated with two columns: Customer Name and Customer Number. Typing will match on either column, and if a Customer Name is found, it will auto-complete. If the Customer Number is required, then the user must select the customer from the dropdown.

FIXED: Sales Line Item: Country Code will now save properly instead of being cleared out. (Introduced: 4.6.2.0)

FIXED: AutomationAgent: Event logs are now categorized under AutomationAgent.SalesPad.GP.log.

FIXED: Bulk Printing: When bulk printing, there will no longer be a "Controls created on one thread cannot be parented to a control on a different thread." error. This error can be avoided by turning off the 'Allow Background Printing' setting. (Introduced: 4.6.3.9)

FIXED: CardControl Payments: Having an autofilter row will no longer lock up SalesPad

Desktop or result in a "Value cannot be null" error. Deleting the layout from the database is the work-around fix.

FIXED: Case Tracker Detail Search: Previously, if the return or reorder document was posted or voided, the link would give a message saying the document did not exist. Now, however, the document will open.

FIXED: Case Tracker Detail Search: When opening a reorder or return document that is linked to a case, users will no longer receive an "Invalid object name spv3SalesDocument_Light" error. The view could be created as a work-around.

FIXED: Configurator: Item Description on the sales line will now match the Item Master's Description if the Configurator's Pricing Type is set to Configurator or Standard Plus Config, or if the users sets a flat fee. (Extended Module)

FIXED: Customer Overview: Changing the Territory or Sales Rep will no longer clear out pending changes.

FIXED: Customer Overview: When changing the Territory but picking the same Territory, there will no longer be a prompt to save your changes.

FIXED: Dispatch: Google Geocode Service: The Google Geocode Service was updated to use their new API.

FIXED: Document Combiner: When combining through workflow, the final document will now be forwarded properly to the next queue.

FIXED: Emailing: When emailing, there will no longer be a "data would be truncated" error on sppEmailAudit. This error can be resolved by changing either the sppEmailAudit procedure or the spEmailAudit table.

FIXED: Inventory: On Order and Qty Drop Shipped for an item will now be updated properly if the warehouse on a purchase order is changed after being released.

FIXED: New Customer: Users can now set the Primary Bill To, Primary Ship To, and Statement Address code with a pre-save script.

FIXED: Non-Extended Pricing: Unit Price will no longer be incorrect if, in GP, the Price Level is using a round option of "Ends In" with a Round Amount whose value happens to match the price set in the Price Level Maintenance screen.

FIXED: PayFabric: L3 ItemDiscount amount data was not working properly if the user added a markdown percent rather than a markdown amount. This has been corrected.

FIXED: Purchase Advisor: Item Warehouse Primary Vendor will now be used properly if the sales line is missing a vendor in the Sales Line Vendor smart field.

FIXED: Purchase Advisor: Unit Cost will no longer populate as the Last Invoice Cost if the Sales Line Vendor smart field was not set on the sales line and the item only had one vendor associated with it.

FIXED: Purchase Order: The PrevVersion property on purchase order lines will no longer be a copy of the current version.

FIXED: Receiving: When a bin is not defined, the default bin (Item/Warehouse combo or Warehouse) will now be properly set for the Inventory Lot UDFs that are created.

FIXED: Sales Document Entry: Deleting a line item with a transferable resource will no longer cause an error when the line item is added before saving the document.

FIXED: Sales Document Mass Update: Fields will now be properly cleared out after an update has been applied.

FIXED: Settings: ZipCode Query Handlers: The ZipInfoFromBing query handler was updated to work with the new Bing API.

FIXED: Vendor: Special Costing: The Special Costing grid can now be exported to Excel.

REMOVED: Shipments: The Shipping Cost column has been removed from the Packages grid.

Version 4.6.3.9

Release Date 10/26/18

BREAKING CHANGE: Shipments: Package Weights now include the Package Template Weight by default.

ADDED: Cash Receipts: An Amount To Apply column was added to the Cash Receipt side that, with security enabled, allows users to apply a partial amount of the cash receipt to a document.

ADDED: Security: Cash Receipts: Allow Partial Cash Receipt Application - This security allows a user to apply less than the original cash receipt transaction amount to a posted document. (Default: False)

ADDED: Setting: Include Template Weight In Package Weight Calculation: When enabled, the Package Weight calculation will sum up the Package Template Weight with the Item Shipping Weights. When disabled, only the Item Shipping Weights will be summed. (Default: True)

UPDATED: Login: The number of hits to the database upon first login has been greatly reduced. This may result in a speed increase for some users.

UPDATED: Smart Printing: Error handling messages that appear when Smart Printing fails to print or throw exceptions have been improved. The dockable log messenger is now used when errors are displayed, rather than multiple message boxes. Messages are also logged to the System Log table.

FIXED: AutomationAgent Schedules: Creating a custom schedule will no longer throw a "too many arguments specified" error. (Introduced 4.6.3.8) (Extended Module)

FIXED: Case Tracker Entries Tab: The Status column is now visible. (Extended Module)

FIXED: Configurator: Dynamic Configured Items: Users can now set Fixed Text rows to be empty spaces if needed. These empty spaces will be displayed as a placeholder value (/S/), but replaced with an empty space when the item is searched for. (Extended Module)

FIXED: Document Combiner: Opening combined documents created through workflow will no longer cause the application to freeze. These documents were not actually being combined once SalesPad Desktop loaded again. (Introduced: 4.6.3.1)

FIXED: EDI Business Object Mapping: The parameters for the EDI 846 mapping script will no longer be null. (Extended Module)

FIXED: Emailing: The Emailing window will no longer shrink every time it is opened. (Introduced: 4.6.3.1)

FIXED: Grid User Fields: The View permissions will now properly work for each user selected. Previously, only Groups were respected. (Introduced: 4.5.1.20)

FIXED: Group User Selector: When switching between a "select all" and selecting specific users/groups, the editor will now return a value. (Introduced: 4.5.1.20)

FIXED: Import Manager: The Updated By and Updated On fields will now populate correctly for Custom Price imports.

FIXED: New Item: The List Price from the Currency tab and the List Price text box will now stay in sync for the functional currency.

FIXED: New Item: When creating a new item and using "copy from item", the List Price will properly copy and save. Previously, this affected when the Item Class was copied from the previous item. (Introduced: 4.6.2.8)

FIXED: PayLink: Line items with a Unit Price of $0.00 will no longer be added to PayLink documents.

FIXED: PayLink: PayLinks will now correctly show the document header information.

FIXED: Printing: The memory leak around Background printing was fixed.

FIXED: Sales Batch Processing: A message is now displayed in the Results window for documents that fail address validation when forwarding.

FIXED: Sales Entry: The Shipping Methods are now sorted alphabetically. (Introduced:

4.6.2.3)

FIXED: Sales Entry: When updating Historical document notes/comments/UDFs, taSopHdrRecalc will no longer be called, which could cause inappropriate eConnect errors.

FIXED: Sales Fulfillment: Over-fulfilled bins on orders that were transferred to invoice or split will no longer be reevaluated, resulting in different bins being fulfilled.

FIXED: Smart Printing: The memory leak around Background Smart Printing was fixed.

FIXED: Transfer To Invoice: When running SalesPad Desktop in Spanish and 'Quick Transfer to Invoice' is enabled, it will no longer error out.

FIXED: Transfer To Invoice: When running SalesPad Desktop in Spanish, there will no longer be an "Input string was not in a correct format" error.

FIXED: Workflow Rules: There will no longer be a "Cannot insert the value null" error for Reevaluate When Line Changes and Reevaluate When Header Changes. (Introduced: 4.6.3.2)

FIXED: Workflow: Handling of the WorkFlow Controller, which may have caused memory leaks in some scenarios, was improved.

REMOVED: Remote Help: The Remote Help button has been removed from the Help menu.

Version 4.6.3.8

Release Date 10/12/18

ADDED: Automation Instance Schedule: A Once A Day option was added. The user will be able to select which days to run the job, as well as at what time of day.

UPDATED: Item Restrictions: The Customer Address Value field will no longer be truncated to 16 characters.

UPDATED: Item Restrictions: The Group Details Value field will no longer be truncated to 16 characters.

UPDATED: Customer Contact Card: When an Address Query Handler is set but the dll is either missing or not licensed, a log message will show, rather than a message box.

UPDATED: Sales Line Items: The Custom Groups tabs will now have a (BLANK) tab for groups that do not have a group.

FIXED: Sales Line Items: When adding line items, the Custom Groups tabs will now be populated accordingly.

FIXED: Binary Streams MEM: If the 'MEM Customer' security in Microsoft Dynamics GP is disabled, customers that were not assigned to facilities will now be available to open in SalesPad Desktop. (Extended Module)

FIXED: Configurator: Adding a non-root configured item number to a sales line will now populate the Config ID and Configuration String Code columns. This will allow users to run the Sales Line Configuration plugin to make changes to options, if needed. (Extended Module)

FIXED: Counter Sales: If it was the tab used on the previously used document, the Cash/Check Amount field will now be properly populated.

FIXED: Document Combiner: Users will no longer be able to use the document combiner on a single document with no related documents.

FIXED: Opportunity Monitor: Clicking in the auto-filter row of the tree grid will no longer throw an exception.

FIXED: Opportunity Monitor: If changes have been made, the tree grid will properly save layouts.

FIXED: PayFabric: The Transaction Time column will now properly display both date and time. (Introduced: 4.6.3.2)

FIXED: Quick Reports: An OnRunScript that uses a DataView Filter will no longer throw an exception when resetting the layout.

FIXED: Quick Reports: When tied to a printed report and with an OnRunScript that uses a DataView Filter, the report will no longer error out, and the data on the printed form will be filtered.

FIXED: Receipt Transaction Line Selector: Clicking in the auto-filter row will no longer throw an exception.

FIXED: Sale Entry: When an Address Query Handler is set but the dll is either missing or not licensed, a log message will show, rather than a throw exception.

FIXED: Sales Document Entry: The sales document number validation now looks at historical documents as well as open documents.

FIXED: Sales Fulfillment: Small designer changes were made to update this visual appearance of the plugin.

FIXED: Sales Fulfillment: The layout for serial-tracked items will now be saved properly when closing the plugin.

FIXED: Sales Line Items: Speed improvements were made for updating custom groups.

FIXED: Sales Line Items: The Custom Group field is now limited to 15 characters, in order to match the ITEMCODE field in Microsoft Dynamics GP.

FIXED: Sales Line Items: When loading sales line items, the Source field (Open/History) is now case-insensitive.

FIXED: Sales line Item: The number of Item Master loads that occurs when typing in an item number that does not exist in inventory was reduced.

Version 4.6.3.7

Release Date 10/2/18

BREAKING CHANGE: Application: New Versions of SalesPad Desktop will no longer work with older versions of Address Validation dlls, and vice versa.

ADDED: AutomationAgent: Added 'Order By Field' Setting to Batch Forward Job - This setting determines which field the document list will be sorted by. (Defaults: "") (Extended Module)

ADDED: AutomationAgent: Added 'Order By Field' Setting to Sales Doc ID Forward Job - This setting determines which field the document list will be sorted by. (Defaults: "") (Extended Module)

ADDED: AutomationAgent: Added 'Order By Sort' Setting to Batch Forward Job - This setting determines which direction the document list will be sorted in. (Defaults: Ascending) (Extended Module)

ADDED: AutomationAgent: Added 'Order By Sort' Setting to Sales Doc ID Forward Job - This setting determines which direction the document list will be sorted in. (Defaults: Ascending) (Extended Module)

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

ADDED: PayLink: PayLinks can now be created on both orders and invoices.

ADDED: PayLink: Transferring is not restricted to a document to an invoice, splitting a document, and combining a document while there is an active PayLink waiting for payment on a document.

ADDED: Settings: Document Combiner: Additional Sales Line Fields Required To Combine - This is a list of additional fields required to be equivalent before lines will be combined. (No Default)

ADDED: Settings: Pre Address Validation Script - This is a C# script that will execute prior to address validation.

UPDATED: Application: Nolocks were added to the Company Info load SQL to help prevent potential login lockups when loading company information.

UPDATED: Document Combiner: Items with different Descriptions or Unit Prices will no longer be combined.

UPDATED: Group Pricing: The Match Field Name can no longer be changed once an Item Search Value is set. The line will need to be deleted in this scenario.

UPDATED: Sales Document: Shipment: A shipment is no longer automatically created when viewing the Shipment tab.

UPDATED: Sales Document: Shipments: Kit components are now packed into packages instead of kit items.

UPDATED: Security: When searching for a security or navigating to Security from a tab using a right-click, the autofilter row in the Security grid will now default to "contains" instead of "equals". (Introduced: 4.6.2.0)

UPDATED: The default value for the 'Tracking Catch All Link' setting has been changed to "http://www.parcelcode.com/Tracking/Track?TrackingNumber=".

UPDATED: The process for determining which carrier website to open from a given tracking number has been improved.

FIXED: Cash Receipt: Clicking the Save or Clear button when a Cash Receipt UDF is disabled will no longer cause an object reference error.

FIXED: Export To Excel: Using the Text to Columns feature after exporting a grid from SalesPad Desktop will no longer crash Excel.

FIXED: Future Lot Numbers: The Receive to Bin value will now be set to the Bin field when a record is created.

FIXED: Group Pricing: When trying to set the Match Field Name to use Item Class, the Item Search Value will now properly show the list of item classes. (Introduced: 4.6.3.0)

FIXED: Printed Reports: Package and Kit component items for each sales document printed report will now be in a bulleted list, as they were in previous builds. Regular line items will no longer unintentionally be bulleted. These changes will not update any custom printed reports.

FIXED: Purchase Receipt: This business object's view was changed so that the PO_Type field will now better represent the purchase order related to the receipt.

FIXED: Receipt Transaction: This business object's view was changed so that the PO_Type field will now better represent the purchase order related to the receipt.

FIXED: Sales Document Payments: Deposit-type payments (cash or credit card) were not being audited properly. This has been corrected.

FIXED: Sales Document: Shipment: The Carton # on retrieved labels now matches up with the order that the packages were created. (Extended Module)

FIXED: Sales Documents: Line Items: Default Item Reps on the document's customer that specify an Item Class instead of an Item Number will be respected when choosing an Item Number for a line item.

FIXED: Sales Line Item User Fields: Users will no longer receive a "String or binary data would be truncated" error when attempting to change a rich text memo type UDF on a sales line item.

FIXED: Sales Monitor: Selecting the autofilter row in the Sales Batches grid will no longer cause an object reference error.

FIXED: Suppress Country Code: Some country codes were being unintentionally suppressed if their letters happened to be contained within an intended suppressed country code. This has been corrected.

Version 4.6.3.6

Release Date 10/1/18

Internal Release Only.

Version 4.6.3.5

Release Date 9/14/18

ADDED: PayFabric: Store/Drawers can now hold a default gateway and credit card mappings that take priority over the PayFabric settings.

ADDED: Settings: EDI: EDI Restrict Sending 810 Files To EDI Orders - When enabled, only orders created from an 850 will be allowed to send 810 files from the Workflow plugin. (Default: False) (Extended Module)

ADDED: Settings: EDI: EDI Restrict Sending 856 Files To EDI Orders - When enabled, only orders created from an 850 will be allowed to send 856 files from the Workflow plugin. (Default: True) (Extended Module)

ADDED: Smart Printing: The Include Resources column will determine whether to attach the resources to the print/email job.

ADDED: Store/Drawer: A Copy PayFabric Setup To Store button was added to copy any store's current PayFabric setup to any other store/drawer with the same store name.

UPDATED: 856 Outbound: SSCC numbers will automatically be generated for packages that were created without one. (Extended Module)

UPDATED: PayFabric Settings: Default Gateway - This is now a dropdown that populates with all gateways found created in PayFabric. It will also act as an easy way to determine if the provided device/password credentials are working properly.

UPDATED: PayFabric: ItemDiscount amount will now be sent in L3 Data.

FIXED: Application: SalesPad Desktop can now be closed if the database connection is lost.

FIXED: Application: Store/Drawer Ribbon Config: Terminal Name and Device Name are no longer editable in PayFabric versions of SalesPad Desktop.

FIXED: Assembly Entry: UDFs on assemblies are no longer reverted to their previous value after changing the warehouse.

FIXED: BOM Entry: If a component's status is set to Obsolete or Pending, all sub components will be updated to the same value.

FIXED: Inventory Lookup: The User Fields tab is now less likely to flicker when switching between items.

FIXED: Inventory Transfer: Serial Lot Selector: User fields in this screen will no longer be editable.

FIXED: Opportunity: If a line item was deleted and the Opportunity was saved, a save prompt will no longer appear when closing the Opportunity.

FIXED: PayFabric: When using the 'Export Auths to CCA' setting, users will no longer receive a "String or binary data would be truncated" error when any of the shipping address lines are greater than 31 characters long. This change only affects users who are using older versions of CCA.

FIXED: Purchase Order Email Audit: If the purchase order and sales document share the same number, audits will no longer show Sales Document audits.

FIXED: Returns Management: Users will now be required to select a Non-SVC RMA type before an RMA can be created from a posted invoice.

FIXED: Sales Document: When switching currency view of a non-functional currency document to functional currency, the Extended Cost will now update properly.

FIXED: Sales Document: When switching currency views for a non-functional currency document multiple times, sales line item Unit Prices would sometimes go up or down by a penny. This was caused by a rounding issue that has been resolved.

FIXED: UPS Address Validation: If an exception is thrown during validation, the document will now properly be sent to the Fail batch set in security. (Extended Module)

Version 4.6.3.4

Release Date 9/4/18

ADDED: Automation Agent Process Recurring Sales Job: A setting was added which specifies how many months of documents to generate based on the Recurring Sales Definition. (Default: 5)

ADDED: Case Tracker Detail Search: There is now functionality to search for Historical details. (Extended Module)

ADDED: Quick Report Editor: Columns: Buttons for rearranging the order of Quick Report columns were added.

ADDED: Security: Funnel: Auto Send To Resources - When enabled, a PDF version of the report printed will be automatically uploaded to the Resources tab on the active sales document. (Default: False)

ADDED: Security: Sales Line Mass Update: Allow Search With No Parameters - This security setting turns on the ability to do a search with no parameters. (Default: True

ADDED: Workflow Rule Conditions: PAYFABRIC AUTH PRESENT: This rule evaluates as True when a PayFabric authorization is present on the sales document.

ADDED: Workflow Rule Conditions: PAYFABRIC PMNT EXISTS: This rule evaluates as True if there are any PayFabric charges or captured PayFabric authorizations that have been made into sales document payments.

UPDATED: Case Tracker Entry: The Details tab will now be Read-Only when the case is historical. (Extended Module)

UPDATED: Group Pricing: Deleting a group will now delete its customer details and item details from the database.

UPDATED: Opportunities: The view spvOpportunityLineItem now has a Historical column which indicates if the line item belongs to a historical opportunity.

UPDATED: Report Manager: An Item Description column has been added to the Item Component grid on the default MO Detail Report.

UPDATED: Security Editor: "(Can Run From Service)" and "(Can Run From Web)" language was added to the descriptions of all securities that can be run from service or web.

FIXED: Application: Tabs that are beta will no longer have (Beta) added to the tab text each time the form is loaded. (Introduced 4.6.3.2)

FIXED: Automation Agent Process Recurring Sales Job: The 'Recurring Sales Definitions' setting was fixed and now uses a dropdown menu of all available definitions.

FIXED: Case Tracker Entry: When the case moves to a Historical status, the case and details will be updated as well. (Extended Module)

FIXED: Funnel: Sales Document Audits will now properly record which reports have been printed.

FIXED: Group Pricing Maintenance: Picking multiple items in the Inventory lookup will now properly add those lines to the group.

FIXED: Import Manager: Imported dates from Excel spreadsheets will no longer be two days later than the source date.

FIXED: Inbound 850: When creating an order from an 850, the unit of measure conversion set in the EDI Cross Reference is now applied correctly. (Extended Module)

FIXED: Inventory Lookup: Alternate Item Search: The Alternate Properties tab will again appear in the correct place. (Introduced 4.6.3.2)

FIXED: Item Promotions Maintenance: Clicking the New Item or New Offer buttons without setting up a new promo first will no longer cause an object reference error.

FIXED: Lot Number Entry: A save prompt will now appear if the screen is closed with unsaved changes.

FIXED: Purchase Line Items: Cancelling a new line item will no longer create an audit.

FIXED: Quick Reports: Export to Template: Formulas in Excel templates will no longer be removed when exporting.

FIXED: Related Documents: Adding an auto filter row will no longer result in an error.

FIXED: Related Documents: Adding columns to the grid will no longer result in an object reference error.

FIXED: Remote Library Service: The service will no longer fail to start if there are no available SalesPad seats left, but one of the taken seats is for Remote Library from a previous session that wasn't logged out properly.

FIXED: Returns: Returns in a non-functional currency with just non-inventory, service, fee, or misc items will no longer throw a "Cannot insert the value NULL error for column OREXTCOST" error.

FIXED: Returns: The originating extended cost will no longer be calculated incorrectly for returns containing non-inventory items and using a non-functional currency.

FIXED: Sales Batch Processing: A more informative error message is now displayed when a document is forwarded and the next queue is not set in workflow.

FIXED: Sales Document Manual Split: Measures were put in place to prevent the original document from going historical if there were any failures in saving the split documents.

FIXED: Sales Document Splitting: Splitting a Sales Document by Req Ship Date will now set the Req Ship Date in the header of a split sales document to that of its lines' Req Ship Date.

FIXED: Sales Line Item User Field Plugin: Rich Text Memo user fields will now be updated and saved properly when edited from the plugin.

FIXED: Sales Line Item: If the 'Item Restriction' setting is enabled and the 'Sales Line Item Restriction Override' plugin security is disabled, sample items added through the Inventory lookup will no longer revert to the original item upon saving.

FIXED: Sales Line Item: Users can now properly select multiple line items and choose the 'Add as Sample' checkbox to add multiple sample items to the sale document.

FIXED: Sales Promotions: Loading cached data was improved.

FIXED: Sales Transfers: Partially fulfilled line items are now included when creating a transfer if multi-bin is disabled and the item is non-tracked or service.

FIXED: Settings: Universal Script: Compiling the Universal Script or scripts that use it will no longer give compilation errors when not running SalesPad as admin.

FIXED: Shipment: Shipping headers will now load correctly on historical documents. (Extended Module)

FIXED: Shipments: Adding lines to packages will now check for overpacking correctly. (Introduced: 4.6.2.0) (Extended Module)

FIXED: Shipments: It is no longer possible for duplicate ASN numbers and SSCC numbers to be generated. (Extended Module)

FIXED: TeleSales: The Sales Rep filter is now an exact name filter rather than a contains/like filter. (Extended Module)

FIXED: Vendor Item Numbers: Updating the Vendor Item Number on a purchase order line will no longer occasionally cause a "Cannot insert duplicate key row in object 'dbo.IV00103'" error.

FIXED: Workflow: Triggering a Sales Entry plugin through workflow will no longer prompt to save the sales order.

Version 4.6.3.3

Release Date 8/31/18

Internal Release Only

Version 4.6.3.2

Release Date 8/17/18

ADDED: Create Manufacturing Order: Users can now run the Create Manufacturing Order plugin from AutomationAgent.

ADDED: PayFabric Migrator: PreCardControl card migration was added. (Extended Module)

ADDED: Security: PayFabric Migrator: Credit Card Origin - This security controls where credit cards are migrated from. (Default: CardControl) (Extended Module)

ADDED: Security: Sales Document Line Items: Can Edit Package Component Lines - This setting allows users to edit the component lines of a package. Defaults to True.

ADDED: Setting: Can Apply Gift Certificates To Returns - When enabled, users can apply gift certificates to returns in order to credit the gift card with a value. When disabled, the Gift Certificate tab will no longer appear in the Sales Doc Payments window on returns. (Default: False)

ADDED: Settings: PayFabric Logging - When enabled, some actions performed in the PayFabric window will be logged to the Sales Document audit. This will only be used when troubleshooting. (Default: False)

UPDATED: 850 Inbound: Packages that are automatically generated with a single item will pull in dimensions from the item's properties.

UPDATED: About SalesPad: Case numbers are now formatted correctly so that when users send system information to SalesPad, that information will be properly attached to the support ticket.

UPDATED: Application: Features only available with a Beta license are now marked as "(Beta)."

UPDATED: Distribution BOM: Assembly Entry: Assembly Allocation: The window size and location of the Assembly Allocation plugin will now be saved and restored upon closing and opening the plugin.

UPDATED: Inventory Analysis: This tab labels no longer display the word "Item".

UPDATED: Item Sales Options: This layout can no longer be customized.

UPDATED: PayFabric: Users will no longer be able to close the PayFabric window once an EMV transaction has been started. The user must now complete, abort, or let the transaction time out from the EMV terminal.

UPDATED: System Information: Case numbers are now formatted correctly so that when users send system information to SalesPad, that information will be properly attached to the support ticket.

UPDATED: User Field Editor: The Field is Required (Returns Only) field will no longer be able to be selected for Sales Line Item user fields. These user fields were never considered when creating returns, so no functionality has changed.

FIXED: Application: Some background threading issues that could cause undesired errors were resolved. This was accomplished by using a lock object to make sure that business objects were not accessed multiple times by different threads.

FIXED: Application: Button bars no longer have the option to customize them.

FIXED: Assembly: Lot Number Sold was not being set properly when allocating the remaining quantity of a lot. This has been corrected.

FIXED: Case Tracker Entry Details: All case details are now added correctly when selecting multiple sales lines to add to the case. (Introduced: 4.6.3.0)

FIXED: Case Tracker Entry: The Opened By and Closed By values will now be set and displayed correctly.

FIXED: Customer and Sales Document Case Tracker Entries Tab: The Reorder Document Number, Reorder Document Type, and Return Document Number columns will now be populated with correct information. (Introduced: 4.6.3.0)

FIXED: Dashboard Designer: SQL credentials for data sources are now saved.

FIXED: Document Combiner: If the Sales Line Item Package Smart Field is empty, users will no longer receive a object reference error when combining documents.

FIXED: Gift Certificates: When a gift certificate is applied to a return, the applied amount will no longer deduct from the gift certificate's Open Amount.

FIXED: Inventory Lookup: If the Sales Line Item Package Smart Field is empty, the Sell Price label now displays the Price Sheet ID.

FIXED: Note Shortcut Maintenance: Editing and saving a new Note Shortcut before reloading the screen will no longer cause the Note Shortcut to duplicate.

FIXED: Note Shortcut Maintenance: Typing in the Note Type cells is no longer allowed.

FIXED: Outbound EDI: An "Index Out Of Range" exception will no longer occur in certain situations when sending outbound EDI files. (Extended Module)

FIXED: PayFabric Customer Wallet: The Default Card column will now update correctly after the user has updated as the default wallet.

FIXED: PayFabric Customer Wallet: Users will no longer receive errors after setting a wallet as the default, saving, unselecting the wallet as the default card, and then saving again.

FIXED: PayFabric: Users will no longer receive an "Unable to create new transaction. The country in the shipping address is required" error if the sales document's Country field is empty and the 'Send Shipping Address Info' setting is enabled.

FIXED: Prospect Opportunities: UDFs are now available.

FIXED: Quick Quote: Opening this screen no longer causes an object reference error.

FIXED: Quick Report: The error icon is now removed when there are no errors in the Quick Report query.

FIXED: SMTP Setup: Setup for SystemUser and User_Name is no longer case sensitive.

FIXED: Sales Document Entry: The Sales Entry Quick Pick function can no longer be used on read-only documents.

FIXED: Sales Document Payments: PayFabric Tab: This tab has been redesigned to fix screen resizing issues and better conform with similar SalesPad windows.

FIXED: Sales Document: Previously, when transferring split sales orders to invoice with the 'Sequence Document Number When Partial Invoicing' setting enabled, depending on which documents were invoiced first, the resulting invoice could have an out of sequence document number. This issue has been resolved.

FIXED: Sales Person Opportunities: UDFs are now available.

FIXED: Sales Promotions: Adding a Coupon Code to a new sales document and then immediately deleting that coupon will no longer invalidate the coupon.

FIXED: Sales Promotions: Causing the subtotal on a document to change and then immediately saving will no longer sometimes cause the promotion to lose its discount amount.

FIXED: Sales Promotions: Freight will not longer be factored into whether or not a coupon is valid for a document on SpendXGetYFreightOff or SpendXGetFreeShipping coupons.

FIXED: Sales Promotions: Items with the Exclude From Sales Promotions box checked will now be properly calculated in Freight Promotions.

FIXED: Sales Promotions: Making a sales document invalid will now properly remove the discount when using a Freight promo.

FIXED: Sales Promotions: Making a sales document valid will now properly apply the discount when using a Freight promo.

FIXED: Sales Promotions: Refreshing the Sales Promotion card will now properly update the used codes, if a coupon code has been applied to a sales document.

FIXED: Sales Promotions: The Coupon Code grid will now properly update when the Show Disabled checkbox is toggled.

REMOVED: Workflow Rules: The Reevaluate When Line Changes and Reevaluate When Header Changes columns have been removed. These fields were not used.

Version 4.6.3.1

Release Date 8/3/18

BREAKING CHANGE: Send Email Layouts: Any layout customization may be reset.

ADDED: AutomationAgent: A setting was added to each job to specify whether or not its components can run concurrently.

ADDED: Consolidated Shipments: Users are now able to get shipment rate quotes from ShipCenter.

ADDED: Counter Sales: Security: Default Address Type - This security can be used to default an address type when choosing a customer. If Primary Bill To or Primary Ship To are used and the customer does not have those values set, the Primary Address will be used. When None is used, the address from the highlighted row will be used. Options: None, Primary, Primary Shipping, Primary Billing (Default: None)

ADDED: Sales Document Shipments: Users are now able to get shipment rate quotes from ShipCenter.

ADDED: Security: Automation Lookup: AutomationAgent Auto Search - When set to True, all automations will be loaded when the Lookup screen is opened. (Default: False) (Extended Module)

ADDED: Settings: ShipCenter: Legacy Service: Use Legacy Service - Set to True when using a version of ShipCenter older than 1.2.0.5. ShipCenter must be running locally. (Defaults to True) (Extended Module)

ADDED: Settings: ShipCenter: Legacy Service: Use MSMQ - Set to True to use Microsoft Message Queueing. MSMQ must also be enabled in ShipCenter. (Defaults to False) (Extended Module)

ADDED: Settings: ShipCenter: ShipCenter Service Host - This is the host or IP address where the ShipCenter service is running. When using the legacy service, this setting is not used. (Defaults to localhost) (Extended Module)

ADDED: Settings: ShipCenter: ShipCenter Service Port - This is the port the ShipCenter service is configured to listen on. When using the legacy service, this setting is not used. (Defaults to 5501) (Extended Module)

UPDATED: All Screens: Closing an un-tabbed form now re-tabs it.

UPDATED: AutomationAgent Setting: AutomationAgent Service settings are now categorized under "AutomationAgent Service". (Extended Module)

UPDATED: Binary Streams MEM: When creating a new customer, the user's currently selected facility will no longer be automatically added to the new customer's available facilities. (Extended Module)

UPDATED: Busy Message: The busy message at the base of the screen now has better visibility when certain themes are applied.

UPDATED: Email Audit: Users will no longer receive a "Procedure or function 'sppEmailAudit' expects parameter '@Date', which was not supplied" error prompt. Instead, the error will automatically be logged to the sales document.

UPDATED: Login: The "Not connected" message now looks better when themed.

UPDATED: Sales Document Returns: Return documents created from posted invoices now respect the Return AutoFulfill option in the Sales Document Setup.

UPDATED: Send Bulk Email: Layouts are now more consistent, a splitter was added, and form size now saves.

UPDATED: Send Email: Layouts are now more consistent, a splitter was added, and form size now saves.

UPDATED: ShipCenter Shipping Calculator: The new ShipCenter Windows service is now supported. (Extended Module)

FIXED: Automation Agent: Exceptions thrown by automation scripts are no longer suppressed and will now generate a log in the Action Center. (Extended Module)

FIXED: AutomationAgent Card: The schedule description now reflects the correct start and stop time. (Extended Module)

FIXED: AutomationAgent Service: Deleting the Automation Agent Active User seat will now stop the service from running. (Extended Module)

FIXED: Binary Streams MEM: Vendors that were not assigned to facilities will now be available to open in SalesPad if the 'MEM Vendor' security in Dynamics GP is disabled. (Extended Module)

FIXED: Binary Streams MEM: When creating a new customer, the resulting Customer card that opens will now have its sales document dropdowns refreshed. (Extended Module)

FIXED: Case Tracker Tabs: The Status column now correctly populates the value for each case. (Extended Module)

FIXED: Counter Sales: Inactive customers will no longer be shown in the Customer search.

FIXED: Counter Sales: Inactive items can no longer be added in to a sales entry.

FIXED: Customer Search: The Priority Code column now populates.

FIXED: Database Update: SalesPad will no longer create the tempdb..Dex_Lock table.

FIXED: Document Combiner: An issue where a document in the Combiner failing to save could result in the other documents still saving has been fixed. Now, all of the combined documents are rolled back if the save fails on any of them.

FIXED: Equipment Maintenance: Images can now be deleted from the Additional Properties tab.

FIXED: Gift Certificates: Documents that had a gift certificate applied to them but were subsequently deleted will no longer count towards the gift certificate's applied amount.

FIXED: Kits: Backordering kits will now properly update the backorder quantity in the Inventory by Locations table (IV00102).

FIXED: Printing: Exporting to Excel will now look only at the addresses on the sales document. It will not pull from the customer.

FIXED: Quick Report Editor: Untabbing the Quick Report Editor will no longer throw exceptions.

FIXED: Quick Reports: Using the query builder no longer throws an object reference error.

FIXED: RMAs: RMA line items created from invoices will have return costs which account for their sales line item's unit of measure. This results in the RMA's distributions also having amounts which account for the unit of measure.

FIXED: Receiving: Serial tracked items in a non-base UofM can now be received if the serial numbers were manually entered.

FIXED: Receiving: When entering serial numbers for an item in non-base UofM, the serials now must be entered in multiples of the UofM factor. This applies when manually entering or auto-generating serial numbers.

FIXED: Remote Library: ShipTo will now be able to connect to Remote Library running as an installed service (Introduced 4.6.0.15).

FIXED: Sales Document Entry: The Return button dropdown seen in the tool strip on a historical invoice will no longer show RMA, unless the user has security access to RMA Entry.

FIXED: Sales Documents: Line Items: If the 'Default Line Item Rep By Item Number' setting is enabled, the document's customer's Default Item Reps will be respected when choosing an item number for a line item, regardless of whether or not the item number has an Item Class.

FIXED: Sales Promotions: Applying a promotion that is using a conditional field value will no longer crash SalesPad. (Introduced: 4.6.3.0)

FIXED: Security Editor: A typo in the 'New Vendor - Can Assign Shipping Method' security has been corrected.

FIXED: Send Email: The "No Attachments" message will no longer show multiple times.

FIXED: Smart Printing: A memory leak around forwarding a document through a queue with the Smart Printing plugin was fixed.

FIXED: Splitting: Users can now partially invoice and then split the original order document as needed without receiving a "Duplicate Document Number" error.

Version 4.6.3.0

Release Date 7/20/18

ADDED: AutomationAgent Service: Users can now install the AutomationAgent Service for each database.

ADDED: AutomationAgent: A button to clear out the schedule on a task was added.

ADDED: Security: PayFabric Batch Capture: Always Capture Full Authorization Amount - When enabled, the full authorization amount will always be captured. This can result in over-charged documents. When disabled, the captured amount will be determined by the sales document's On Account value. (Default: False)

UPDATED: AutomationAgent Service: The "SalesPad Integration Service" was renamed to "SalesPad AutomationAgent Service".

UPDATED: Group Pricing: Changes to the Items tab are saved immediately.

UPDATED: Group Pricing: Speed improvements were made for when the system is loading large numbers of items per group.

UPDATED: Opportunity Card: Non-inventory line items can now be added.

UPDATED: Sales Document Entry: Address validation is now triggered any time the document is saved.

UPDATED: Sales Promotions: Having multiple promotion details will now work properly. This only works for the SpendXGetYAmount and SpendXGetYPercent promotions.

UPDATED: Sales Promotions: Users can no longer have multiple details for the Freight promotions.

FIXED: Assemblies: Un-allocating a lot tracked item that has been marked as Sold will now properly update the lot to Not Sold.

FIXED: Assemblies: Users will no longer receive an object reference error when attempting to adjust the Assemble Qty after the assembly has been released.

FIXED: AutomationAgent Scripting: An error where scripts would fail on account of RestSharp failing to load has been fixed.

FIXED: AutomationAgent Service: The active seat will now be properly named "AutomationAgent' when both Remote Library and AutomationAgent are included in SalesPad.

FIXED: AutomationAgent: Canceling the Schedule Editor after changing the Frequency Type will now cancel the change.

FIXED: AutomationAgent: Disabling a custom schedule will now properly update the custom schedule description.

FIXED: AutomationAgent: The Predefined Options selection will no longer be enabled when the frequency type is set to Empty.

FIXED: BOM Component Entry: Selecting an item from the Inventory lookup will now correctly update the Component Item Number, if it was partially typed.

FIXED: BOM Entry: Saving a new pending or active BOM when a BOM already exists with that Bill Number and Status no longer causes an error.

FIXED: BOM Search: An issue where duplicate BOM entries are shown has been resolved.

FIXED: EDI: Business Object Mapping: The 945 Warehouse Shipping Advice script will now be passed the correct parameters.

FIXED: Email Template: Sales document fields are now displayed with the correct currency format.

FIXED: Google Zip Validation: The "OVER_QUERY_LIMIT" error message that appears when attempting to validate zip codes through Google has been fixed.

FIXED: Opportunity Card: Changing the Item Number on a line item now correctly updates the line.

FIXED: Opportunity Card: Line items with no Item Numbers are now deleted on save.

FIXED: Opportunity Card: The Save prompt will now appear on close if it has already been cancelled once.

FIXED: Print Reports: Many of the default printed reports were using an incorrect format for Date type fields. These fields have now all been updated to use the US standard "mm/dd/yyyy" format. (Introduced: 4.6.2.0)

FIXED: Quick Reports: Checkbox search fields now correctly filter the report.

FIXED: RMA Entry: Changing the Repair Price/Cost on a line item will now correctly update the Originating Repair Price/Cost.

FIXED: Sales Batch Processing: The search now only returns batches that exactly match the selected batch names in the search bar.

FIXED: Sales Entry: Allocations will no longer go negative for items that have partial quantity available for a case but the item is set to zero quantity decimal places. It will backorder the case instead of over-allocating the full case. This scenario only applies when using BackOrderBalance for your Sales Order setup.

FIXED: Sales Person Card: Opening this card will no longer take a long period of time or potentially freeze SalesPad.

FIXED: Sales Promotions Coupons: The plugin will no longer show multiple coupons being applied when the Sales Promotion had multiple details.

FIXED: Sales Transfers: Partially fulfilled line items are no longer included when creating a transfer.

FIXED: SalesPad Today: The correct reminder time is now displayed when hovering over an appointment in the calendar. Previously, it would always display "15 Minutes".

FIXED: Smart Printing: When sending emails through the Smart Printing plugin, attached resources will now include file type extensions.

REMOVED: CardKnox: This is no longer supported.

Version 4.6.2.9

Release Date 7/6/18

ADDED: AutomationAgent: Error handling was added to Transfer to Invoice Job for when the 'Batches' setting fails to parse correctly.

ADDED: Settings: Cash Receipt Enable Account Substitution - This is a Cash Receipt Binary Stream setting which dictates whether or not Account Substitution is enabled or disabled. (Default: False) (Extended Module)

FIXED: AutomationAgent: An issue around parsing the 'Batches' setting under Transfer To Invoice Job was fixed.

FIXED: Binary Streams MEM: Cash Receipts: When the 'Use AR' setting is enabled in MEM, users will no longer receive an "Entity ID is not valid" error when attempting to create a cash receipt. (Extended Module)

FIXED: Configurator: Flat fees will no longer be added to the List Price of newly configured items.

FIXED: Configurator: Flat fees will now be correctly calculated on the sales line if the item is a newly configured item.

FIXED: Configurator: If the root item does not have any pricing set up, any new BOMs created from the item will have one created for it using 100% list price, with the list price set to the configurator's custom price. (Extended Module)

FIXED: Configurator: The unit price on the sales line will now be correct if the configurator's Pricing Type is set to Default and the item was just generated by the Sales Line Configurator. (Extended Module)

FIXED: Counter Sales: Sales document user fields will now appear if all of the Show on Sales Document Types boxes are checked in the User Field Editor.

FIXED: Customer Address Card: The Add Comment button text is now fully displayed.

FIXED: Item Maintenance: The "Class defaults will not be applied." message is now fully displayed.

FIXED: PayFabric Customer Wallet: Users can now copy and paste when creating new wallets or editing existing wallets.

FIXED: PayFabric: Users will no longer be able to attempt to credit returns with amounts greater than the document's total.

FIXED: Receiving: Receiving a lot-tracked item no longer causes an object reference error if the 'Copy PO Line UDFs To Lot UDFs' security is set to True.

FIXED: Sales Document Entry: Fewer database hits will occur when using kits and packages sales line items. (Item Master, Sales Line Item, Sop To Mop)

FIXED: Sales Document Entry: Sales Line UDFs may no longer be edited on historical documents without security permissions.

FIXED: Sales Promotions: Applying a promotion that is not valid will no longer apply the discount. It will be applied when applicable. (Introduced: 4.6.1.14)

FIXED: Sales Promotions: Fewer database hits are made when using conditional field promotions.

FIXED: Sales Promotions: If 'Coupons Per Assign Type' is set to zero, it is now considered an invalid promotion and will now longer cause loading/speed issues.

FIXED: Sales Promotions: Splitting will no longer cause a Discount Amount to appear on each split document when using a Spend X get Y Amount Off sales promotion. (Introduced: 4.6.1.14)

FIXED: Sales Promotions: The Freight Promotions button on the sales document header will now be more accurately visible.

FIXED: Settings: Default Purchasing Email Subject Line Format - The CustomerName option has been replaced with VendorName.

FIXED: Settings: The None option on the 'Default Email Address' setting now works correctly.

FIXED: Split Sales Document: The Qty Process on line items will no longer be changed when the sales document is split. This resolves an issue where manufacturing orders couldn't be created from line items on a split document.

FIXED: Themes: The Disable Theme On Forms option will now work correctly.

FIXED: Themes: Themes are now better applied visually throughout the application.

Version 4.6.2.8

Release Date 6/22/18

ADDED: Send Error Report: A Don't Send button has been added.

ADDED: System Information: A Database Version tab was added.

ADDED: Vendor Card: An Import button was added that will pull in data from a file, look for a matching GP Item Number using only a Vendor Item Number, and either create an Alternate Item (if no matching GP Item Number is found) or create a custom cost (if a matching GP Item Number and Vendor Item Number already exist).

UPDATED: Bus Obj Workflow: All "Batch" references have been renamed as "Queue."

UPDATED: Inventory: The functions used to calculated the On Order and Drop Ship quantities have been updated to improve performance for large purchase orders.

UPDATED: Item Maintenance: The item account indices can now be updated when the Class ID is changed.

UPDATED: New Item: Setting the Item Class field will now update the Currency tab with the class's default currencies when creating a new item.

UPDATED: Sales Transfers: When attempting to transfer a document with a partially fulfilled item, a more informative error message will be shown in the log viewer.

UPDATED: Send Error Report: The message has been updated to accurately reflect the functionality of the Send Report button.

FIXED: All Outbound EDI: The CarrierTransMethodCode is now sent correctly based on the Shipping Method in the sales document. (Introduced: 4.6.1.13) (Extended Module)

FIXED: Case Tracker: The 'Auto Assign User' security setting now sets the User Name instead of the Display Name. (Extended Module)

FIXED: In Transit Transfer: When copying, the new document will no longer be allowed to save if there is not enough inventory to allocate.

FIXED: Interactions / CRM Events: The Snooze feature on reminders now works correctly.

FIXED: Inventory Lookup: The Sales tab now includes voided sales.

FIXED: Inventory: For items that have had a vendor return with the related purchase order line's status set to Released or Change Order, the On Order and Vendor On Order quantity will no longer be incorrect.

FIXED: Item Maintenance: Saving a currency without a Currency ID will no longer cause an object reference error.

FIXED: Purchase Line Items: The Qty Shipped and Qty Remaining values will now be reduced if a vendor return has been created/posted for the line.

FIXED: Purchase Order Generation: Dropship purchase orders generated from a sales document now retain the Country Code from the Ship To Address of the sales document.

FIXED: Purchased Line Editor: The Quantity field can now be adjusted on line items that aren't set to allow backorders.

FIXED: Receipt Transaction Entry: Saving a vendor return will now properly set the Qty Reserved in IV10200 for the original shipping receipt.

FIXED: Receipt Transaction Entry: When creating a vendor return and selecting the Replace Returned Goods, SalesPad will now create a new purchase order for the line items if the original purchase order is closed, cancelled, or moved to History.

FIXED: Receiving: Qty Shipped will now be reduced by any quantity returned to the vendor.

FIXED: Sales Batch Processing: When multiple documents are selected and Forward After Email is checked, the documents will be forwarded correctly when Email as Single Job is also checked.

FIXED: Sales Document Reports: The Amount Due, Amount Paid, and Amount Paid Cash Receipt fields will no longer be incorrect for historical invoice documents.

FIXED: Sales Document Shipments: The Ship Complete flag on the Shipping header now takes kits into account correctly.

FIXED: Sales Line Configurator: Previously, if the configurator string code's length was greater than 30, it was possible that the resulting item number that was created could already exist in the system. This would cause new BOM components to be added to the existing item, rather than a new item being created with the components. This has been corrected.

FIXED: Sales Line Items: The Summary bar will no properly update when new line items are added.

FIXED: Security Script Editor: The CardControl Pre Payment Script now compiles.

FIXED: Vendor: The On Order Quantity and Quantity Dropshipped values will no longer be updated incorrectly if there are different Vendor Item Numbers for the same vendor on open purchase line items.

Version 4.6.2.7

Release Date 6/13/18

ADDED: Assembly Reject To Queue Plugin: This plugin allows the user to reject an assembly, sending it to a different batch with notes which will be written to the Assembly Notes.

ADDED: Assembly: Audit Log: An Audit Log tab was added.

ADDED: Bus Obj Monitor: Assemblies was added to the Bus Obj Monitor.

ADDED: Bus Obj Workflow Setup: Assemblies were added to Bus Obj Workflow.

ADDED: Configurator: Flat Fee: The Flat Fee is added to the price of the item regardless of the quantity of items on the sales line. This is done by dividing the Flat Fee by the quantity of items on the sales line and then adding it to the Unit Price on the sales line. (Extended Module)

ADDED: Customer Card: The Customer Short Name field is now available.

ADDED: Lot Number Entry: There is now a Refresh button that will reload the lot number data from the database.

ADDED: Security: Assembly Reject To Queue Plugin: Require Rejection Notes - If True, this security will require notes or instructions when rejecting an assembly into another queue. (Default: False)

ADDED: Security: Assembly Reject To Queue Plugin: Show Only Previous Queue Names - If True, this security will only show previous queue names in the Queue Selection dropdown. (Default: False)

ADDED: Security: Resource Card: Scripts: Pre Save Script - This is a C# script that executes before the Resource is saved.

ADDED: Security: Resource Properties: Can Create New Tags - This security specifies whether or not the user can add new Resource tags. (Default: True)

ADDED: Security: Resource Properties: Can Permanently Remove Tags - When enabled and attempting tag removal from a Resource, if no other Resources contain the tag, the user will be prompted for Tag Deletion from the database. (Default: True)

ADDED: Settings: Attach Reports As PDF/A Compatible - When enabled, reports attached to emails will be sent as PDF/A compatible PDFs. (Default: False)

ADDED: Settings: Configurator: Show Flat Fee When Flat Fee is Zero - If True, this setting will display the Flat Fee field in Configurator when it is set to 0. (Default: True) (Extended Module)

ADDED: Settings: Distribution BOM: Assembly Audit Fields - This setting specifies Assembly Detail columns that will be audited. If left blank, no auditing will be done. (Default:

Batch_Number, BOM_Transaction_Status, Assembly_Doc_Num)

ADDED: Settings: Distribution BOM: Write Assembly Audits to Linked Sales Documents - This setting causes any audit written to an assembly to also be written to any sales document linked to that assembly. (Default: False)

UPDATED: 945 Inbound: The Audit Log for the sales document is now updated after the 945 is processed. (Extended Module)

UPDATED: Add Resource Form, Resource Card: The Tags field has been changed from free type text to TokenEdit control. Tags are stored in a database table (spResourceTags) per Business Object, and will be displayed in the Tags dropdown on Resource Cards of corresponding Business Objects when the user enters the control.

UPDATED: Interaction Entry: The window location, window size, and splitter position is now saved.

UPDATED: Note Entry: The New Note window is now re-sizable, and the size is saved per Business Object.

UPDATED: Quick Report UDF: When marked as Read Only or missing group edit permissions, Quick Report UDFs will now be able to be viewed, but they will not set a value.

UPDATED: Quick Report UDF: Grid View Quick Report UDFs now can use the ControlEditable tag. This allows for a free-type option on the field.

FIXED: 945 Inbound: The batch on the sales document is now updated if one specified on the Business Object mapping. (Extended Module)

FIXED: Database Update: The database update will no longer fail if DataCollection was installed before SalesPad Desktop.

FIXED: EDI Processing: The Show Failed Only checkbox now shows all failed transactions correctly.

FIXED: In Transit Transfer Entry: The ITT’s Line Items field will no longer clear out when saving.

FIXED: In-Transit Transfers: Users will no longer be able to save the document if any of the line item sites are not valid for the item.

FIXED: Interactions: There is no longer an "Invalid object name spvCaseTrackerInteractionLink" error when deleting Interactions. (Introduced: 4.6.2.3)

FIXED: Item Maintenance: Users will no longer be able to edit the Current Cost field if the item's Valuation Method is set to Average Perpetual.

FIXED: PayFabric: Tax Exemptions are now pulled from the sales document instead of the customer.

FIXED: PayFabric: The ItemAmt field was renamed as ItemAmount. (Introduced 4.6.2.5)

FIXED: PayFabric: Users will no longer receive the "Request does not adhere to the DTD" error when attempting to process a credit transaction.

FIXED: Payment Plugin: This plugin will now be titled as "Payment" rather than "Payment:" in the Action dropdown menu.

FIXED: Purchase Line Item: Clicking the Update Missing Vendor Items button will now update the vendor item number properly, if its previous value has been changed.

FIXED: Purchase Line Item: Users will no longer receive a "Cannot insert duplicate key row in object IV00103" error when attempting to use the Update Missing Vendor Items button on a purchase order. (Introduced: 4.6.2.5)

FIXED: Quick Report: Grouping columns will now work properly if the Sort column is empty or set to None.

FIXED: Sales Document Assembly Links: Users are no longer able to create multiple assemblies for a single BOM. (Introduced: 4.6.2.2)

FIXED: Sales Document: The Exchange Date field will no longer be cleared out when transferring an order to an invoice. This may cause some invoices to have issues when posting if Microsoft Dynamic GP's SOP Setup setting 'Search for New Rates During Transfer Process' is disabled. If this is the case, we recommend extending the Expiration Date of the document's Exchange Rate out past the invoice's Document Date.

FIXED: Sales Entry: Users will no longer be double prompted with the Payment plugin if the plugin is manually run from the Action dropdown menu and the 'Prompt For Credit Card Payments' setting is enabled.

FIXED: Sales Entry: Users will no longer receive a script error when attempting to save a document with the 'Prompt For Credit Card Payments' setting enabled.

FIXED: Sales Line Assembly Links: Users can now delete Assembly Links when the assembly is either posted or deleted.

FIXED: Shipment: If a sales line on an EDI document is packed into multiple packages, when invoicing or splitting the document, the line will be repacked correctly in the new document. (Extended Module)

FIXED: Smart Printing: The Reply To field will now correctly populate on the email.

FIXED: Telesales Monitor: Clicking on a hyperlink of a voided sales document will no longer result in an error. (Extended Module)

FIXED: Telesales Monitor: Users will no longer receive errors when attempting to create an order from an Interaction when the Last Order column is empty. (Extended Module)

Verion 4.6.2.6

Release Date 6/8/18

Internal Release Only

Version 4.6.2.5

Release Date 5/25/18

ADDED: Inventory Lookup: The ABC Item Code column from the Item Master table was added to the main grid on the Inventory lookup.

ADDED: Settings: Contact Addresses: Customer Card Address Lookup Fields - Fields selected with this setting will appear as columns in the Address Lookup dropdown on the Addresses tab of the Sales Document screen. (Defaults: Address Code, Contact Person, Address Line 1, and City)

ADDED: Settings: Sales Document Resources: Preserve Sales Document Resources - When enabled, sales document resources will be preserved after the document has been voided or moved to History.

UPDATED: EDI 945: The .xml file has been updated to use the Shipments schema instead of the StockTransferShipments schema. (Extended Module)

UPDATED: EDI: The EDI 846 Inventory Inquiry plugin was updated so that the trading partners are selected from a grid showing the customer or vendor's name, rather than from a dropdown without names.

FIXED: Case Tracker Detail Search: The Clear button now clears the Status field. (Extended Module)

FIXED: Case Tracker Detail Search: The Status column has been renamed from Case Tracker Status ID to Status. (Extended Module)

FIXED: Case Tracker Detail Search: The Status field now filters the search by Status. (Extended Module)

FIXED: Case Tracker Detail Search: The search now loads if a Cause, Resolution, or Issue is selected. (Extended Module)

FIXED: Customer A/R: The Note Description field is no longer empty when an existing note is edited.

FIXED: Customer Address Card: Setting checkbox fields through a pre-save script will no longer only set one field on the form. (Introduced: 4.5.1.29)

FIXED: EDI Business Object Mapping: Scripts for mappings of the Shipping Header type now have the correct parameters specified. (Extended Module)

FIXED: Funnel: There will no longer be an "Object reference" error when the Address tab is focused and processing a document.

FIXED: Interactions: The Customer, Sales Document, Vendor, and Prospect fields now contain a hyperlink to the respective card. (Introduced: 4.6.2.1)

FIXED: Item Maintenance: Vendor item information created here is now compatible with GP.

FIXED: Item Restrictions: Item Restrictions will no longer incorrectly create a restriction query resulting in an incorrect SQL syntax.

FIXED: PayFabric Payment Window: Credit card numbers are no longer cut off by the Input field.

FIXED: PayFabric: The ItemAmount field to was renamed as ItemAmt to adhere to Level 3 data naming conventions.

FIXED: PayFabric: Users will no longer receive an "Unable to save payment: ERROR: Invalid Payment Type (4=Cash Payment, 5=Check Payment, 6=Credit Card)" error when attempting to credit a payment on a return that originated from a deposit payment.

FIXED: PayFabric: Users will no longer receive the "Request does not adhere to the DTD" error when attempting to process a sales transaction.

FIXED: Purchase Order Generation: Sales document UDFs will now be copied to the newly created purchase order when the UDF names match.

FIXED: Purchase Order: When a dropship purchase order is moved from Released to Change Order, the On Order quantity of any changed item will no longer be updated.

FIXED: Quick Transfer To Invoice: The invoice details are now correctly saved if the 'SalesTax Query Handler' setting is being used.

Version 4.6.2.4

Release Date 5/11/18

BREAKING CHANGE: License Plate Forms: These forms have been renamed using the word "packaging" instead of "license plating". The affected securities have been reset.

ADDED: Automation Agent Jobs: The following jobs were added to Automation Agent: Forward Sales Doc ID, Process Recurring Sales, Update Batch Entered, Remove Sales Batch Holds, and Email. (Extended Module)

ADDED: Automation Search: A button which imports old Automation Agent data to

Automation Agent 2.0 was added. (Extended Module)

ADDED: Document Combiner: This is a sales document plugin that will take related documents and combine them back together into a single document.

ADDED: Inventory Lookup: The Quantity Available column has been added to the Inventory Bin Quantity grid.

ADDED: Item Maintenance: Packaging properties, such as length and width, have been added to the screen.

ADDED: PayFabric Customer Transaction: A new column called Last Modified was added. It is populated with the last date the transaction was modified on. This replaces the old Date column.

ADDED: Security: Automation Lookup: Allow Migration from Automation Agent - This security determines whether or the Migrate from Automation Agent button is visible on the Automation Lookup screen. (Extended Module)

ADDED: Security: Item Purchases: Show Vendor Info - When False, this security hides the Vendor Name, Vendor ID, Vendor Item Description, and Vendor Item Number columns on the Item Purchases grid. (Default: True)

ADDED: Security: Sales Document Notes: Comment Max Characters - This security sets the maximum number of characters allowed on a sales document note. (Default: 0)

UPDATED: Dispatch Configuration: An Appointment status may no longer be saved with the same name as another Appointment status. (Extended Module)

UPDATED: Inventory Transfer: The Vendor ID, Vendor Name, PO Number, Receipt Number, Date Received, and Purchased To columns have been removed.

UPDATED: Packaging Conversion Tool: Users now have the option to import package templates from ShipCenter.

FIXED: Summary Packing Slip: Data is now properly loaded for split documents. (Introduced: 4.6.2.0)

FIXED: Application: Sending crash reports to SalesPad will no longer result in the application freezing if the server can't be reached.

FIXED: Assemblies: Deleting lot allocations will now only update the Qty Allocated for the exact lot removed, and not all lot numbers for that item/warehouse combination.

FIXED: Assemblies: There will no longer be a primary key violation when trying to allocate lot-tracked items which have multiple lots with the same lot number.

FIXED: BOM Entry: Un-tabbing or re-tabbing the window will no longer cause sub-BOM components to duplicate.

FIXED: Binary Streams: Purchase Orders: When creating a purchase order from a sales line item, the facility from the sales order will properly transfer over to the purchase order, if the item has no primary vendor. If a vendor is chosen that is not set up for this facility, then it will still need to be chosen from the MEM Purchase Order plugin before the purchase order is saved. (Extended Module)

FIXED: Case Tracker Details: The Created By column may no longer be edited. (Extended Module)

FIXED: Case Tracker Maintenance: The Description column and the extra columns in the column chooser can be right clicked and resized in the Issue Maintenance and Resolution Maintenance tabs. (Extended Module: Case Tracker)

FIXED: Cash Receipts: Speed improvements were made, and old credit card log loading processes that were not being used were removed.

FIXED: Customer Search: Exporting to Microsoft Excel while the grid is grouped no longer causes an object reference error.

FIXED: Dispatch: Creating a Route Stop while the 'Default Dwell Time' setting is greater than 59 will no longer cause an error. (Extended Module)

FIXED: EDI Get Labels: The CarrierAlphaCode is now correctly sent for label requests. (Extended Module)

FIXED: PayFabric Customer Transaction: The Date column will now be populated with the transaction's creation date and time.

FIXED: Purchase Line Items: The Comment field is now limited to 500 characters.

FIXED: Quick Reports: Queries executing a stored procedure using the execute keyword will now have search parameters passed to the procedure as intended.

FIXED: Sales Document Entry: Having Item Restrictions enabled but not set up will no longer cause sales and purchase line item entry to not focus new lines properly. (Introduced: 4.6.2.3)

FIXED: Sales Line Item: Quick Report user fields were not displaying content when they were viewed from a security group not included in the Group Edit permissions on the user field. This issue has been resolved. (Introduced: 4.6.2.0)

FIXED: Sales Line Items: The Comment field is now limited to 500 characters.

FIXED: SalesPad Today: Clicking the buttons on the Reminder Alert window will no longer cause an error if SalesPad Today was refreshed while the window was open.

FIXED: User Fields: Image user fields marked as Read Only and as being a file attachment will no longer throw an exception when being loaded.

REMOVED: Security: BOM Properties: The 'Effective Date Default' security has been removed.

Version 4.6.2.3

Release Date 4/27/18

ADDED: Case Tracker AR Transactions: Allows addition and linking of multiple AR Transactions to a Case Tracker case from the Case Tracker Entry form.

ADDED: Case Tracker Reorders/Returns: Allows addition and linking of multiple reorders and returns to a Case Tracker case from the Case Tracker Entry form.

ADDED: Settings: Default Gateway For Sales Doc ID - Create mappings of Gateway Names and Sales Doc IDs. If a mapping is found for the current document's Sales Doc ID, the mapped Gateway will be used. Otherwise the Gateway from the Setting: 'Default Gateway' will be used. (Default: Empty)

ADDED: Security: Case Tracker AR Transactions: Can Add AR Transactions - Determines whether a user can add AR Transaction entries to the selected case. (Default: True)

ADDED: Security: Case Tracker AR Transactions: Can Remove AR Transactions - Determines whether a user can delete AR Transaction entries from the selected case. (Default: True)

ADDED: Security: Case Tracker Reorders/Returns: Can Create Reorders/Returns - Determines whether a user can create new Reorder or Return entries to the selected case. (Default: True)

ADDED: Security: Case Tracker Reorders/Returns: Can Link Existing Reorders/Returns - Determines whether a user can link existing Reorder or Return documents to the selected case (Default: True)

ADDED: Security: Case Tracker Reorders/Returns: Can Remove Reorders/Returns - Determines whether a user can remove Reorder or Return documents from the selected case. (Default: True)

ADDED: Security: Case Tracker Reorders/Returns: Default Reorder Doc Type - Specifies the Sales Document Type that will be assigned when generating a new reorder document from a Case Tracker case. If empty, users will be prompted to select a document type upon creating a new reorder document from a Case Tracker case. (Default: Empty)

ADDED: Security: Customer Search: Can Change Contact Address Max Results - Allows users to edit the Contact Address Max Results field in order to limit the number of records returned after performing a blank customer search. (Default: False)

ADDED: Security: Customer Search: Contact Address Max Result Limit - Limits the number of Contact Address records returned after performing a blank customer search. (Default: 10000)

UPDATED: Google Zip Code Query Handler: The Country Code field will now be populated. This requires the GP Country Code setup to match what Google returns.

UPDATED: Sales Document Entry: Optimizations were made for the sppUpdateSalesDocumentSY90000 SQL stored procedure.

FIXED: Assembly Sales Document Link: Deleting a sales line item with a linked assembly will now clear out the associated sales document link.

FIXED: Configurator: Dynamic Configured Items: Conditions would occasionally evaluate as True if the Value column was set to a text value that also existed as an attribute option. This has been corrected. (Extended Module)

FIXED: Dispatch Route Entry: An object reference error that could occur when clicking the Down arrow button has been resolved.

FIXED: EDI: TermsDiscountDate and TermsNetDueDate will no longer be swapped on 810 invoices. (Extended Module)

FIXED: In Transit Transfer Entry: If the line items have been edited, a save prompt will now appear when closing the document.

FIXED: Inventory Allocation: If the 'Filter By Location' security is enabled, the In Transit Transfer tab will no longer give the user an "Invalid column name ReceivedShippedQty" error.

FIXED: PayFabric CCA Integration: CCA was creating multiple transaction records in SalesPad when capturing an authorization or voiding a transaction. This issue was caused by a procedure created in SalesPad and will require an upgrade to both CCA and SalesPad in order to fix it. Please contact Nodus to coordinate updating CCA.

FIXED: PayFabric: Users can now copy and paste in appropriate fields on the PayFabric window.

FIXED: Purchase Order Generation: Running the Purchase Order Generation plugin from Automation Agent will now work as expected. (Extended Module: Automation Agent)

FIXED: Purchase Order Line Items: Previously, when working with large purchase orders, changes to a field on a line item could be slow to appear after tabbing off of the field. This has been corrected.

FIXED: Quick Report: User fields can no longer be modified when the user or group has view permissions enabled but edit permissions are not enabled.

FIXED: Returns: When creating a return from a historical invoice, bin tracked items will now be properly fulfilled.

FIXED: Run Script: After executing a run script for the Sales Document Entry screen, the screen will now refresh properly. (Introduced: 4.6.1.14)

FIXED: Sales Document Entry: Document-level comments no longer have a 500 character limit.

FIXED: Sales Document Entry: GP default comments will now be applied properly upon saving the document.

FIXED: Sales Order Entry: Create MO: The plugin now creates an manufacturing order for each back-ordered BOM, rather than linking them all to the same manufacturing order. (Introduced: 4.6.1.13)

FIXED: SalesPad Today: Interactions can now be marked as complete using the checkbox on the grid.

FIXED: Settings: Number of Serial/Lots to Print Per Row: This setting will now function properly for users in non-multibin environments.

Version 4.6.2.2

Release Date 4/16/18

UPDATED: Assembly Entry: Transaction Source is now a Read Only field.

UPDATED: EDI 940 Outbound: Customers no longer need to be cross referenced in order to send a 940 to the warehouse. (Extended Module: EDI)

UPDATED: EDI 940 Outbound: The warehouse's trading partner ID, rather than the customer's, is now sent out at the header level. (Extended Module: EDI)

UPDATED: Emailing: Error handling was improved for when there is no To address during emailing but there is a Pre Email script or On Load Email script.

UPDATED: Packaging Conversion Tool: The plugin has been moved to the Packaging Template Setup screen. (Extended Module: EDI)

UPDATED: Setting: Enable Custom Menus - If this setting is enabled and there is an issue loading the custom ribbon, the user will now have a log message with instructions on how to fix the ribbon.

FIXED: Assembly Links: Sales line assembly links will no longer be broken upon saving the assembly.

FIXED: Binary Streams MEM: SalesPad will now properly pass in the correct fields for Binary Stream's econnect procedure to run when saving a sales document payment. (Extended Module)

FIXED: Binary Streams: Previously, distribution accounts were not being properly substituted because of an extra call to taSopHdrRecalc. SalesPad will now do an additional call after the recalculation to BSSI_taSopHdrIvcInsertPostCommon in order to get the distribution values properly substituted. (Extended Module)

FIXED: Import Manager: Quantity Decimals will now always be set to 0 on serial-tracked Item Master imports.

FIXED: Log Message: When closing SalesPad with an active log message, there will no longer be an object reference error.

FIXED: Packaging Conversion Tool: The tool has been optimized to avoid a "System Out of Memory" error. (Extended Module: EDI)

FIXED: Quick Report Editor: Quick Report Scripting: The Add New Row script will now work for tables that have no rows.

FIXED: Quick Report Editor: Scripts returning a string will now be able to run on quick reports.

FIXED: Sales Document Assemblies: Breaking an assembly link will now properly remove the sales document link from the linked assembly.

FIXED: Sales Document Payments: If the sales document's Currency field is empty and the Multi-Currency option is checked, the sales document payment’s Doc Date field will no longer be incorrectly set to the sales document’s Doc Date field.

FIXED: Sales Document: Allocating a multi-bin non-tracked item a second time will no longer over-allocate the line. This only affects documents that use auto-fulfillment. (Introduced: 4.6.0.17)

FIXED: Sales Entry: If the Days To Expire field is set to 0, saving a quote in SalesPad will no longer set the Quote Exp Date to the Doc Date.

FIXED: Sales Entry: Sales Promotion Coupons: Tabbing out of the Enter Coupon Code field will no longer throw double validation prompts when the code isn't valid.

FIXED: Sales Entry: Users will no longer receive a "Sequence contains no matching element" error when potentially changing document values and using Sales Promotions. (Introduced: 4.6.1.14)

FIXED: Sales Line Items: Clicking the New Line button will now correctly focus the newly created line. (Introduced: 4.6.2.0)

FIXED: SalesPad Today: The default Assigned To user will now be set correctly when creating a task from the calendar.

FIXED: Smart Printing: There will no longer be an "Index out of range" error when a To email is not defined when emailing.

FIXED: Smart Printing: Users will no longer receive SMTP exceptions when sending too many emails through the Smart Printing plugin.

FIXED: User Fields: User fields with the same name as a disabled field will no longer be prevented from being added to a view.

FIXED: Workflow Setup: Selecting the Autofilter row on the Eval When in Queue column will no longer cause an object reference error.

Version 4.6.2.1

Release Date 3/30/18

ADDED: Sales Document Print Reports: Better serial/lot tracked item information and user field access under the Sales Fulfillment table was added. This has the potential to slow the loading of print reports, so these fields are protected by settings.

ADDED: Settings: Sales Document Print Reports: Load Sales Fulfillment Lot Tracked Item Fields - When enabled, lot tracked item information can be accessed from the Sales Fulfillment table on sales document printed reports. (Default: False)

ADDED: Settings: Sales Document Print Reports: Load Sales Fulfillment Serial Tracked Item Fields - When enabled, serial tracked item information can be accessed from the Sales Fulfillment table on sales document printed reports. (Default: False)

ADDED: Settings: Sending Emails: Default Customer Email Address - This setting specifies which customer email address will be defaulted into the Send Email screen when emailing from the Customer card. (Default: None)

ADDED: User Fields: Security Group and User Name permission levels have been added to user fields.

ADDED: Warehouse Maintenance: Security: Can Edit Bin - This security enables the ability to change bins. (Default: False)

UPDATED: EDI: EDI plugins can now be run via AutomationAgent. (Extended Module)

UPDATED: Email: When sending bulk emails, selecting to send the emails to either the billing address or shipping address is now required.

UPDATED: Item Audit: Changes made to Price Level Maintenance will now be logged.

UPDATED: PayFabric: HTML Element errors will now be displayed to the user and logged to the sales document.

UPDATED: Warehouse Maintenance: The 'Can Create Bins' security now only controls if a user can create bins, and not also the ability to change bins.

FIXED: Binary Streams: Sales Monitor: Selecting the Auto Hide Queues checkbox will no longer result in a "@Hide_Auto_Queues is not a parameter for procedure sppSalesMonitorSummary" error. (Extended Module)

FIXED: CRM Note Entry: Created On and Created By labels have been removed.

FIXED: CRM Note Entry: Created and By column names have been changed to Created On and Created By.

FIXED: Customer Card: The Item History tab now includes voided items.

FIXED: Customer Card: The grid layout on the Extended Pricing tab now saves properly.

FIXED: Database Update: The EDI module's database update is now compatible with SQL Server 2008. (Extended Module: EDI) (Introduced: 4.6.2.0)

FIXED: Interaction Entry: When creating an interaction from an opportunity that has multiple customer or prospect links, the dropdown to choose these links will no longer be Read Only.

FIXED: Interaction Entry: When creating an interaction from an opportunity, the contact dropdown will now be properly filtered depending on the selection made in the Customer/Prospect dropdown.

FIXED: Inventory Lookup: Previously, if barcodes were not set up, an error would occur when opening the Barcodes tab. This has been resolved.

FIXED: Item Audit: Items with long item numbers will now be properly audited.

FIXED: Item Maintenance: Users will no longer be prompted to change the tracking option for serial tracked items if the quantity of decimals is greater than 0. (Introduced 4.6.2.0)

FIXED: Purchase Order Entry: Printing a fully released purchase order will no longer result in an attempt to update the purchase order line status. This was a speed improvement for re-printing purchase orders.

FIXED: Purchase Order: Payment Terms will no longer be cleared if the Payment Terms have a non-whole number discount percentage.

FIXED: Quick Reports: Autolinks now work for interactions.

FIXED: Quick Reports: The Expression Conditional formatting option now works correctly.

FIXED: Receipt Transaction Line Selector: Lines will no longer pull in the current cost if the item's valuation method is Average Perpetual.

FIXED: Sales Entry Quick Pick Maintenance: An error no longer occurs if the user clicks the Move Down button when there are no items.

FIXED: Sales Entry Quick Pick Maintenance: Selecting the Autofilter row no longer causes an error.

FIXED: Sales Entry Quick Pick Maintenance: The correct text is now displayed when hovering over the arrow buttons.

FIXED: User Fields: If a Date/Time UDF is set to Read Only, it's no longer possible to clear the value on the field.

FIXED: Warehouse Maintenance: When new bins are entered, they are now labeled in upper case.

Version 4.6.2.0

Release Date 3/16/18

BREAKING CHANGE: Application: SalesPad no longer supports SQL server versions older than 2008.

BREAKING CHANGE: Licensing: The Avatax and PayFabric modules now require licenses.

BREAKING CHANGE: Packages: The SQL tables that stored package data have moved from spPackage to spLicensePlate. This was done to allow compatibility between different applications. To port over any existing packages, run the conversion tool located on the License Plate Maintenance screen.

BREAKING CHANGE: Packages: The sub-securities for this form have been renamed and will need to be set up again.

BREAKING CHANGE: Settings: The following settings have moved from the EDI module to core: 'SSCC GS Company Prefix', 'SSCC Starting Serial Value', 'Default Packing Medium', 'Default Packing Material', and 'Add Unfulfilled Lines to Package'.

BREAKING CHANGE: Application: Once upgraded to 4.6.2.0, users will not be able to downgrade SalesPad back to an older version. This is related to the DevExpress upgrade.

ADDED: Automation Agent: Automation Agent now adheres to the 'Allow Partial Sales Batch Transfers' setting. (Requires: Remote Library)

ADDED: EDI: 856 SOTPI: ASNs can be generated using the SOTPI format. (Extended Module)

ADDED: Licensing: The Avatax, PayFabric, ThomsonReuters, and AutomationAgent modules now require licenses.

ADDED: PayLink Integration: A sales document plugin was added to retrieve a PayLink Url from PayFabric for the current document.

ADDED: PayLinkPaymentComplete Endpoint: An Endpoint in which a PayLink document is received as a Json object and the transaction information is saved to the database was added. (Requires Remote Library)

ADDED: Sales Document: The Shipment tab has moved from the EDI module to the core Desktop application.

ADDED: Sales: Consolidated Shipments: A new screen was added to create shipments containing multiple sales documents.

ADDED: Settings PayLink: PayLink Device Password - This is the Device Password from PayLink you must use when creating PayLink documents. Navigate to your PayLink account -> Settings -> Secure Token -> Device Password. (Default:"")

ADDED: Settings: PayLink Contact Information Preference - This is the email address/phone number to be used when sending PayLink notifications automatically. Phone numbers must contain the correct country calling code. Note that this will only be used if the 'Manually Send PayLink Url' setting is False. (Default:"Billing")

ADDED: Settings: PayLink Notification Type - This setting specifies the type of notification the created PayLink document will use. Note that this will only be used if the 'Manually Send PayLink Url' setting is False. (Default:"None")

ADDED: Settings: PayLink: Manually Send PayLink Url - This setting determines whether or not to retrieve the PayLink Url to manually send to customers, or to have PayLink automatically send the notifications. (Default:"true")

ADDED: Settings: PayLink: PayLink Device ID - This is the Device ID from PayLink you must use when creating PayLink documents. Navigate to your PayLink account -> Settings -> Secure Token -> Device ID. (Default:"")

ADDED: Settings: PayLink: PayLink Email Template - This is the email template to use when sending PayLinks automatically. This is set up through your PayLink account. Note that this will only be used if the 'Manually Send PayLink Url' setting is False. (Default:"")

ADDED: Settings: PayLink: PayLink SMS Template - This is the phone SMS template to use when sending PayLinks automatically. This is set up through your PayLink account. Note that this will only be used if the 'Manually Send PayLink Url' setting is False. (Default:"")

ADDED: Settings: PayLink: PayLink Setup ID - This is the Gateway Profile Setup ID from your PayLink Account. Navigate to your PayLink Account -> Settings -> Gateway Profile. (Default:"")

ADDED: Settings: PayLink: PayLink Url - This is the URL for the PayLink API. (Default: "https://sandbox.payfabric.com/v2/PayLink/api/")

ADDED: Settings: Search Item Number and Description Using Item Field - If set to False, Inventory Lookup will only search Item Number and Item Description when the corresponding field is populated. If set to True, both fields are searched when either field is populated. (Default: True)

UPDATED: Application: DevExpress has been upgraded to 17.2.6.

UPDATED: Cross Reference: Carrier Alpha Codes for the Shipping Method cross reference can now have more than four characters. (Extended Module)

UPDATED: Customer Card: Changing the splitter position on the Notes tab now applies to all customers.

UPDATED: EDI 940: The 940 business object mappings have been updated with new fields. (Extended Module)

UPDATED: Manufacturing Order Entry: If the MO doesn't have a status of Open or Quote, the header fields and Delete button will now be Read Only. (Extended Module)

UPDATED: Manufacturing Order Entry: The status can now only be changed to Open or Quote in SalesPad. (Extended Module)

UPDATED: Purchase Order Entry: The spvPurchaseLineItem_base no longer uses a function to get the Purchase Order Type. This will help with some potential speed issues.

UPDATED: Application: Auto filter rows have been updated to allow more flexibility when filtering. The default for most text fields will be Contains, which allows the user to type in text to find all fields in that column that contain that text. Because of these changes, the wildcard character (*) is no longer necessary when searching in this manner. To change a filter option, simply click the filter icon in the auto filter row to get a dropdown list of available options.

FIXED: Customer AR Detail: Exchange invoices will no longer give a "Customer '[]' does not have a valid Bill To Address" error when the document's hyperlink is clicked.

FIXED: Dashboards: An issue where data sources were not loading correctly has been resolved.

FIXED: Equipment Search: The In Stock and Sales Document Num columns were not always accurate. This has been corrected.

FIXED: Item Maintenance: Users will no longer be able to set the quantity decimal places when the Tracking option is set to Serial Number.

FIXED: Manufacturing Order Entry: Cancelling an MO is no longer possible unless the status is Open or Quote.

FIXED: PayFabric Migrator: An issue where some credit cards created through SalesPad were not showing up in the PayFabric Migrator screen has been fixed.

FIXED: PayFabric: The Create GP Payment button will now work properly on return documents for credit transactions.

FIXED: Printed Reports: The Vendor Address field now correctly formats the phone number according to the Vendor Country Code.

FIXED: Purchase Order Entry: If the 'Allow Editing of Purchase Orders On Hold' setting is disabled in GP, it's now possible to remove the hold from a purchase order.

FIXED: Purchase Order: Setting a line quantity to 0 now correctly sets the purchase order's status.

FIXED: Purchased Line Editor: Attempting to update quantity when the PO is received will no longer result in the quantity being updated but the sales document not being saved. This would cause issues with the sales document total and the sales line items' extended price being incorrect.

FIXED: Purchasing Advisor: Optimizations were added to the Purchasing Advisor procedures in order to prevent timeout issues when the Include Reorder Pt checkbox is checked.

FIXED: Receiving: Distribution, Unit Cost, and Subtotal values will now be correct when receiving a non-functional currency dropship purchase order.

FIXED: Recurring Sales Generator: Shift-click and Ctrl-click functionality now works in the Documents grid.

FIXED: Sales Document Entry: The Discount Amount field is now working properly. (Introduced: 4.6.1.14)

FIXED: Sales Document Entry: The 'Validate Customer PO' security now only checks for documents with the same customer number.

FIXED: Sales Document: Users will no longer receive a "parameterized query" error in rare situations when saving a sales document.

FIXED: Sales Fulfillment Plugin: Loading the plugin is now faster for large quantities of fulfilled serial tracked items.

FIXED: Sales Line Item: New lines will now be properly focused when created. This problem was environment specific and may not have affected everyone.

Version 4.6.1.16

Release Date 3/2/18

ADDED: Security: Funnel: On Load Script - This is a C# script that executes before the next sales document is loaded.

UPDATED: Application: Support for GP 2018.

UPDATED: EDI Processing: A Summary footer is now available. (Extended Module)

FIXED: Configurator: Any manufacturing BOM created from a configurator will now have the Default From and Default To sites rolled down from the base item's manufacturing BOM if it exists. (Extended Module)

FIXED: Customer Search Popup: When searching with no criteria, the warning will no longer be displayed twice.

FIXED: Exchange Document: Creating an Exchange will no longer put a negative discount on the invoice document. (Introduced: 4.6.1.14)

FIXED: Opportunity Card: Changes to the Opportunity Status are now applied correctly.

FIXED: Opportunity Card: Opportunity now must be saved before converting to a Quote.

FIXED: Packages: The Get Labels process will no longer error out and give a "Too Many Requests" message. (Extended Module)

FIXED: Report Designer: An error that occurred when previewing the AR Transaction Report has been resolved.

FIXED: Sales Analysis: The Item Qty calculation for exchange invoices has been corrected.

FIXED: Sales Line Excel Import: Imported Sales Lines will no longer take the Ship To Address value for Excel fields that are left blank.

FIXED: Shipping Review: Sales Line UDFs are now editable.

Version 4.6.1.15

Release Date 2/23/18

ADDED: Security: Customer Search: Can Change Contact Address Max Results - This security allows user to edit the Contact Address Max Results field in order to limit the number of records returned after performing a blank customer search. (Default: False)

ADDED: Security: Customer Search: Contact Address Max Result Limit - This security limits the number of Contact Address records returned after performing a blank customer search. (Default: 10000)

FIXED: Smart Printing: All errors derived during smart printing will now be audited properly on the sales document.

FIXED: Vendor: Address Card: All address fields can now be saved with the sizes allowed by the Dynamics table.

Version 4.6.1.14

Release Date 2/16/18

ADDED: Binary Stream MEM Settings: Send Department ID - This setting determines whether or not the Department ID is sent when saving a sales or purchase order document.

(Default: True) (Extended Module)

ADDED: Customer: CRM tab: A Schedule ID column was added to the Tasks table.

ADDED: Item Maintenance: There is an option to mark items as Exclude From Sales Promotions. Those items will not be used in calculating the subtotal for the Sales Promotion applicability.

ADDED: Item Promotions: Markdown Amount and Markdown Percent are now available.

ADDED: Purchase Order Line Items: Added a copy function which temporarily stores line items from a purchase order.

ADDED: Purchase Order Line Items: Added a paste function which adds all currently copied line items to any purchase order.

ADDED: Sales Promotions: Promotion Type: A Promotion Type called Spend X Get Up To Y Freight Off was added.

ADDED: Sales Promotions: There is now a Field and Field Values option that can be used to determine if a promotion is available. This can be used to limit promotions based on specific values of a field. For example, it can be limited to specific warehouse codes.

ADDED: Security: Customer PayFabric Transactions: Show Only SalesPad Transactions - When false, transactions made outside of SalesPad will be visible. (Default: True)

ADDED: Security: Sales Promotions: Can Only Use Coupon Generation Script - When enabled, users can only generate coupons via scripting. Requires a script that is not disabled. (Default: False)

ADDED: Settings: ShipCenter: Update Document Shipping Method - This setting controls whether or not the document level Shipping Method should be updated when selecting a rate. Note: The Update Shipping Method functionality requires that the selected shipping service be mapped to a GP Shipping Method in ShipCenter's setup. (Default: True) (Extended Module)

ADDED: Settings: ShipCenter: Update Line Item Shipping Method - This setting controls whether or not the line item Shipping Methods should be updated when selecting a rate. Note: The Update Shipping Method functionality requires that the selected shipping service be mapped to a GP Shipping Method in ShipCenter's setup. (Default: Prompt) (Extended Module)

UPDATED: PayLink: This integration is now compatible with PayLink version 3.

UPDATED: Sales Promotions: Promotions can be set to a $0 sales document total, which allows for "up to" amounts off. For example, if you have a promotion for $5 off and the customer only spends $2, they will only get a $2 discount, unless they spend more.

UPDATED: Sales Promotions: Promotions that would apply a percentage will now use an equivalent discount amount. This is done because of the potential for Exclude From Sales Promotions items.

FIXED: Auto Glass Inventory Search: Security - 'Get Pricing On Row Focus' will consistently pull the price for the highlighted row. (Extended Module)

FIXED: CRM Task Entry: The Schedule Again button, which duplicates a task and allows the date/time to be rescheduled, was added to the Task Entry window.

FIXED: CRM Task Entry: The ability to make a recurring schedule for a new task, rather than only being able to create a recurring schedule for existing tasks, was added.

FIXED: CRM Task Entry: The ability to reschedule a new task, rather than only being able to reschedule existing tasks, was added.

FIXED: Cash Receipts: Users will no longer receive an "Apply From Document (APFRDCNM) is missing" error when attempting to apply a Return type document.

FIXED: DataCollection Allocation: Allocation was optimized, and redundant database entries were cleaned up.

FIXED: EDI Mapping: Script parameters for EDI 850 transactions will now include the OrderType object. (Extended Module)

FIXED: Inventory Allocations: In-Transit Transfers: Users will no longer receive an "Invalid object name 'spvServiceTransferLineSearch'" error when attempting to view this tab. This was a SQL view change.

FIXED: Purchasing Advisor: Users will no longer sometimes see a reorder point line for items in warehouses that do not have reorder points created.

FIXED: Sales Document: When switching between originating and functional currency, the Payment field will now be properly disabled based on the value of the 'Can Edit Functional Currency' security.

FIXED: Sales Document: When switching between originating and functional currency, the Payment field will now be properly updated to match the view the user is using.

FIXED: ShipCenter Shipping Calculator: Closing a sales document after saving will no longer prompt the user to save packages. (Extended Module)

FIXED: ShipCenter Shipping Calculator: Entering the Payment window from the ShipCenter tab without saving a new sales document will no longer result in an error. (Extended Module)

Version 4.6.1.13

Release Date 2/9/18

ADDED: Security: Purchase Order Generation: Allowed Document IDs - Allows users specify which sales document IDs are allowed to have purchase orders generated. (Default: *)

UPDATED: Purchasing Advisor: The Purchase button will now delay slightly if the unit cost calculation process for each row has not completed. This will prevent incorrect zero cost rows in the Choose Purchase Plan window.

UPDATED: Sales Document Entry: Address validation is now audited.

FIXED: Create Assembly: The sales document will now be properly saved when attempting to use this plugin.

FIXED: Create MO: If the 'Autosave' security is set to False, the Create MO plugin will now process each line item on the sales document, instead of only the first line.

FIXED: Create Return: If required UDFs aren't set before creating a return, an error message will now appear.

FIXED: Equipment Search: Non-inventory equipment will now show as not in stock. The same goes for non-serial tracked equipment and serial-tracked equipment that have serial numbers that do not exist in the system.

FIXED: Equipment Search: The last document associated with the equipment will now always appear in the Sales Doc Num column.

FIXED: Purchase Order Generation: The Purchases tab on the sales document will now be properly refreshed if it was open when a purchase order was generated.

FIXED: Purchase Order Generation: The sales document will now be properly saved when attempting to use this plugin.

FIXED: Quick Report Browser: Creating a new quick report and editing it with the Quick Report Editor will no longer create duplicates of the quick report.

FIXED: Receipt Entry: Certain buttons will now be properly disabled when a receipt is historical or voided.

FIXED: Receipt Transaction Fulfillment: Certain buttons and grids will now be properly disabled when a receipt is historical or voided.

FIXED: Receipt Transaction Fulfillment: Inventory will no longer be incorrect when unfulfilling or re-fulfilling lot tracked items when the same lot is listed more than once in the Available Lots window.

FIXED: Receipt Transaction Line Selector: Users will no longer receive a "No inventory available" message when attempting to add returned items to a sales inventory return transaction.

FIXED: Receipt Transaction Line Selector: Users will no longer receive a sub-query error when attempting to fulfill a lot tracked item that has more than one lot with the same name.

FIXED: Recurring Sales: Sales Rep and Price Level fields will now be populated properly when creating new sales documents from a recurring sales definition that was not created from an existing sales document.

FIXED: Sales Batch Processing: The Sales Batch dropdown now only contains batches specified in the 'Sales Batches Allowed' security.

FIXED: Sales Document GP Attachments: Resources will no longer be created incorrectly in SalesPad if the flow is turned off in GP. Previously, this could cause an "Illegal address for field Origin" error when posting the document.

FIXED: Sales Document Line Item: The On Row Change script will now properly run if the 'Removed Default Items to Non-Inventory' setting is enable or the 'Non-Inventory On Quote' setting is disabled.

FIXED: Sales Document Mass Update: The Sales Batch dropdown now only contains batches specified in the 'Sales Batches Allowed' security.

FIXED: Sales Document Payment Plugin: The sales document will now be properly saved when attempting to use this plugin.

FIXED: Sales Document Payments: If the 'Split Manual Payments' setting is enabled, PayFabric and CardControl capture transactions will no longer be distributed across split or partially invoiced documents.

FIXED: Sales Document Quick Reports: A new sales document's quick report will now be updated when it is first saved.

FIXED: Sales Entry: The Address Validated checkbox now has the correct value if the sales document is saved with an invalid address.

FIXED: Sales Line Mass Update: The 'Sales Batches Allowed' security is now respected.

FIXED: Sales Line Mass Update: The Sales Batch dropdown now only contains batches specified in the 'Sales Batches Allowed' security.

Version 4.6.1.12

Release Date 2/2/18

BREAKING CHANGE: EDI Business Object Mappings: Mappings have been updated to require fewer core mappings, allowing more fields to be modified. To get the updated mappings, enable the 'Can Update Mappings' security under EDI Business Object Mapping Transactions. Then go into the Business Object Mapping screen and select the Update All Mappings button. (Extended Module)

ADDED: Settings: EDI Processing Maximum Retry Attempts - This setting determines the number of times processing will restart after failing without a successful attempt. (Default: 5) (Extended Module)

UPDATED: CRM: NOLOCKS were added to many CRM procedures and views.

UPDATED: EDI Processing: When inbound processing runs into an error, it will restart up to a set number of times. (Extended Module)

UPDATED: EDI: Packages: Labels can now be updated based on the marked For Address for the package. (Extended Module)

UPDATED: EDI: Packages: The Shipping header now automatically marks when a shipment's status is Ship Complete. (Extended Module)

FIXED: EDI: Packages: Creating new packages will automatically increment the package number past 10. (Extended Module)

FIXED: EDI: Sales Document: Packages containing kit items will no longer prevent the order from moving to invoice. (Extended Module)

FIXED: Equipment Maintenance: A spelling error on the banner has been corrected.

FIXED: Purchase Order: Payment Terms will no longer clear out when switching between two terms with different discount percent amounts and saving the document.

FIXED: Sales Document Line Items: In some situations, users in a non-multi currency environment were not able to change Unit Cost on Service or Misc Charge items. This has been corrected.

FIXED: Sales Document Payments: SalesPad will no longer freeze when opening the Sales Document Payments window from an invoice or return, if the 'Allowed Payment Options' security is set to Deposit. (Introduced: 4.6.1.9)

FIXED: Sales Person Card: The Dashboard data is now filtered down to the specific Sales Person.

FIXED: Sales Shipment: Users will no longer receive more than one prompt to save when opening this screen. These extra saves could cause fulfillment to be lost for Lot Tracked items, when transferring to invoice.

FIXED: SalesPad Today: The selected Interaction(s) are now properly deleted upon clicking Delete. Previously, only the top Interaction would be deleted.

Version 4.6.1.11

Release Date 1/26/18

ADDED: Settings: Inventory Transfer Batch Posts To GL - When enabled, inventory transfers that are created in SalesPad will be put in a batch that is automatically set to post to the general ledger. (Default: False)

UPDATED: EDI Transactions: Long document numbers are now saved correctly.

FIXED: AutoGlass: The complimentary items search is now faster. This was a SQL stored procedure update.

FIXED: Customer Card: The Sales Territory field can no longer be deleted when the 'Can Change Sales Territory' security is set to False.

Version 4.6.1.10

Release Date 1/19/18

UPDATED: Backordered Items Report: The Allocate and Release button has been renamed to Release and Allocate in order to more accurately describe its functionality.

FIXED: Application: The System Administrator password is now encrypted after initial installation.

FIXED: Configurator: When attempting to save, users will no longer receive an "Out of Memory" error after creating restrictions on configured items that have a large amount of options and attributes. (Extended Module)

FIXED: Counter Sales: If a sales document is split when being forwarded through workflow, the split sales documents will now correctly move to the next batch.

FIXED: Customer Card: The "Customer is on Hold" banner now appears at the correct times, if the customer card is refreshed before saving a change to the On Hold status.

FIXED: Customer: When updating the Shipping Method or Tax Schedule ID fields on the primary address of a customer, the corresponding fields in the RM00101 table will now properly reflect those changes upon saving.

FIXED: Interactions: If the 'Can Edit' security is set to False, it is no longer possible to edit an interaction by double-clicking it.

FIXED: Item Analysis: When navigating to the Inventory Lookup, there will no longer be an "A column named 'ITEMDESC2' already belongs to this DataTable" error if the last tab the user selected was Item Analysis.

FIXED: Item Restrictions: Deleting a parent node no longer causes an object reference error.

FIXED: Manufacturing: The Route Search pop-up window can now be opened when the Route Search window is already tabbed.

FIXED: Quick Reports: Opening the designer while filtering a numeric grid column will no longer cause a "Cannot perform 'Like' operation on System.Decimal and System.String" error.

FIXED: Receiving: Clicking the ellipses on the Serial/Lot field no longer disables the controls on the main form.

FIXED: Recurring Sales Definition: An object reference error that occurred when users did not select a document to add has been resolved.

FIXED: Sales Document Payment: Cash/Check: The Checkbook dropdown will now be enabled when the user switches to Deposit on an order.

FIXED: Sales Document Payment: Cash/Check: The Checkbook dropdown will now populate properly if the 'Default Checkbook' security is set to a checkbook that is not in the 'Payment Check Book' setting.

FIXED: Sales Entry: Freight is now properly distributed when sales documents are split.

FIXED: Sales Entry: The margin calculation has been corrected on line items with a non-base UofM.

FIXED: SalesPad Today: The Task List dropdown on the Task Entry window now populates with all incomplete Task Lists.

FIXED: Settings: The 'Universal Script' setting can now be disabled without resulting in compilation errors.

Version 4.6.1.9

Release Date 1/12/18

ADDED: Group Pricing: Customer Name has been added to the list of exported columns.

ADDED: Security: PayFabric Batch Charge: Create Credit Card Deposits - When enabled, credit card deposits will be created for orders. When disabled, credit card payments will be created for orders. (Default: False)

UPDATED: Customer Card: Contact Addresses: Address Line 2 and Address Line 3 columns were added.

UPDATED: Customer Contact Address Card: The Location dropdown now displays Description and Inactive columns.

FIXED: Configurator: The 'Configuration Summary Sales Line Item Field' setting was not being properly respected in some scenarios. This has been corrected.

FIXED: Group Pricing: Warehouse Code will now be exported and imported properly.

FIXED: Inventory Lookup: The Find panel visibility now persists. (Introduced 4.6.0.11)

FIXED: Item Restrictions: Deleting a parent node no longer causes an object reference error.

FIXED: Sales Batch Processing: It's now possible to perform a "like" search when batches are specified in the 'Sales Batches Allowed' security.

FIXED: Sales Document Entry: Equipment: The Serial Number dropdown will now populate properly if the equipment item is a non-inventory or non-serial tracked item.

FIXED: Sales Entry: Pasted sales line items no longer retain fulfillment date.

FIXED: SalesPad Today: The Task List dropdown on the Task Entry window now populates with all incomplete Task Lists.

FIXED: Security: The asterisk has been removed from the 'Blanket Order Invoicing' security.

FIXED: User Fields: Quick Report popups will be resized to fit their contents properly.