SalesPad Mobile Release Notes

Cavallo Support - 2026-07-31 - Release Notes

CLICK BELOW TO FIND RELEASE NOTES BY VERSION

Select a Version Number:

- Version 1.6.2
- Version 1.6.1
- Version 1.6.0
- Version 1.5.0
- Version 1.4.1
- Version 1.4.0
- Version 1.3.47.9
- Version 1.3.47.8
- Version 1.3.47.7
- Version 1.3.47.6
- Version 1.3.47.5
- Version 1.3.47.3
- Version 1.3.47.2
- Version 1.3.47.1
- Version 1.3.46.1

Version 1.6.2

Release Date 7/30/26

iOS/Android/Server

ADDED: Setting: General: Default Phone Format Country Code - The country code to use for phone formatting when an address does not have a country code or country. This should be a 2 letter ISO country code. If this setting does not have a value, the app will use the device's region from Language & Region settings.

iOS/Android

FIXED: App: Phone number formatting now properly handles most phone number formats and regions.

Android

FIXED: Sales Documents: Add Multiple Items: The search bar will not be hidden on devices running Android 15 or higher. (Introduced: 1.6.1)

FIXED: Sales Documents: Add Recent: The top of the grid will not be cut off on devices running Android 15 or higher. (Introduced: 1.6.1)

FIXED: Sales Documents: Add Catalog Items: The top of the grid will not be cut off on devices running Android 15 or higher. (Introduced: 1.6.1)

FIXED: Sales Documents: Quick Pick: The top of the grid will not be cut off on devices running Android 15 or higher. (Introduced: 1.6.1)

Server

FIXED: Application: The application will always appear in the Windows taskbar as soon as it opens.

Version 1.6.1

Release Date 3/28/26

iOS/Android

UPDATED: Accessories: Square Reader: Updated Square's Mobile Payments SDK to version 2.4.0.

UPDATED: Application: Updated the app's framework to .NET 9.

FIXED: Sales Documents: Payments: Square: Crediting a Square transaction will not fail with a "This version [...] does not support CardControl transactions" error when the Available Transaction Types security has exactly one of Authorization, Charge, or Manual enabled.

iOS

BREAKING CHANGE: Application: The minimum iOS version is now 17.0. Devices running iOS versions prior to 17.0 can no longer install or run the app.

UPDATED: Application: Increased the iOS SDK version to 26 in order to optimize compatibility for devices running iOS 26.

FIXED: Application: The app will not crash on launch on devices running iOS 26.4 or iOS 18.7.7. (Introduced: 1.4.0)

Android

BREAKING CHANGE: Accessories: Square Reader: Square Readers now require Android 9.0 or higher. Devices running older Android versions will no longer have access to Square Reader functionality.

UPDATED: Application: Increased the target Android version to Android 15 in order to improve compatibility with devices running Android 15 or higher.

Server

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

BREAKING CHANGE: Application: The Winforms server, Windows service, and IIS service are now 64-bit applications instead of 32-bit.

BREAKING CHANGE: IIS: The default Web.Config file has an updated binding redirect for System.Collections.Immutable and new binding redirects for Microsoft.Dynamics.GP.eConnect.Serialization, System.Diagnostics.DiagnosticSource, and Microsoft.IdentityModel.Abstractions. These binding redirects are in the runtime section of the Web.Config file. Replacing the default Web.Config file with a copy from an older version without preserving the default Web.Config file's runtime section may cause errors around those assemblies.

BREAKING CHANGE: IIS: The application pool setting Enable 32-Bit Applications must now be set to False instead of True. It will be set to False when installing this version. If set to True, the service will fail to start and will give an error stating "Could not load file or assembly 'Apollo' or one of its dependencies. An attempt was made to load a program with an incorrect format."

UPDATED: Application: The SalesPad DLLs, which the server uses for loading and saving various entities and running workflow plugins, have been updated to version 5.7.0.

UPDATED: Application: DevExpress has been updated to version 25.1.7.

UPDATED: Installer: Updated the license agreement.

FIXED: Sales Documents: When transferring an order to an invoice and the SalesPad setting 'Use Logged In User As Created By Invoice Transferring' is set to 'True', the invoice's Created By will be the mobile user instead of the service user.

FIXED: Sales Documents: When transferring a quote to an order and the SalesPad setting 'Use Logged In User As Created By Order Transferring' is set to 'True', the order's Created By will be the mobile user instead of the service user.

FIXED: Scripts: When clicking the Compile button on a script that has errors, the errors won't appear twice.

Version 1.6.0

Release Date 8/11/25

iOS/Android/Server

BREAKING CHANGE: Security: Access Security: Documents: Can Sign Documents - This security now only controls whether users can enter new signatures. The new Can Edit Signatures security controls whether users can edit existing signatures. NOTE: This security will still be respected for existing signatures if the security group has not been saved since the Can Edit Signatures security was added.

BREAKING CHANGE: Security: Access Security: Documents: Signature Required Document IDs - This security now requires that a sales document has at least one signature before it can be saved. Previously, it would ask the user to enter or edit a signature every time a sales document is edited.

ADDED: Sales Documents: Sales documents now have a signatures tab. Users can use the tab to view the document's current signatures, create new signatures, and edit signatures.

ADDED: Security: Access Security: Documents: Can Edit Signatures - If set to 'True', users can edit existing sales document signatures. (Default: False)

ADDED: Setting: Sales: Preload Sales Document Signatures - If set to 'True', the app will start loading sales document signatures as soon as the sales document is opened. If set to 'False', the app won't load the full signatures until they're needed, but will still preload some signature information ahead of time such as whether or not the sales document has any signatures. (Default: True)

UPDATED: Sales Documents: If a sales document's Doc ID has signature reasons, the sales document can have one signature per signature reason. This means that Sign Document and Edit Signature can appear in the slide menu at the same time if the sales document has at least one signature but not a signature for every reason.

UPDATED: Sales Documents: Sign Document: If a sales document's Doc ID has signature reasons, the app will ask for which signature reason to use when creating a new signature.

UPDATED: Sales Documents: Edit Signature: If a sales document has multiple signatures, the app will ask for which signature to edit.

UPDATED: Security: Access Security: Customers: Viewable Customer Columns In Properties - ABCD Score, Churn Risk Score, Lifetime Sales, Lifetime Margin, and Lifetime Margin Pct are now available columns. They are not enabled by default. NOTE: Requires Profit Max Platform.

FIXED: Sales Documents: Saving a signature will not overwrite other signatures on the same sales document which have a different signature reason.

Version 1.5.0

Release Date 5/5/25

iOS/Android/Server

ADDED: Security: Documents: Access Security: Can Transfer Orders - This setting determines whether or not orders can be transferred to invoices. (Default: False)

ADDED: Setting: Sales - Transfer Order To Invoice: Allow Partial Shipping When Ship Complete - If set to TRUE, users will only be able to ship fully fulfilled orders when a document is marked Ship Complete. (Default: False)

ADDED: Setting: Sales - Transfer Order To Invoice: Use Order Number As Invoice Number - If set to TRUE, the order number will be used as the invoice number. (Default: False)

ADDED: Setting: Sales - Transfer Order To Invoice: Add Comment To Line Item That Is Being Shipped - Set to TRUE to update the sales line item comment being shipped. Example: [10 moved to STDINV2383] (Default: False)

ADDED: Setting: Sales - Transfer Order To Invoice: Remove Fully Shipped Line Items - If set to TRUE, a line item will be removed from the sales order when it has been completely shipped. If set to FALSE, the line will

stay on the order and the quantity will be 0. (Default: True)

ADDED: Setting: Sales - Transfer Order To Invoice: Transfer Freight To Invoice - If set to TRUE, freight will be transferred from the order to the invoice. (Default: True)

ADDED: Setting: Prospects: Prospect Pre Save Script - C# script that executes before saving a prospect.

ADDED: Setting: Prospects: Prospect Post Save Script - C# script that executes after saving a prospect.

UPDATED: Security: Access Security: Document Entry: Available Sales Document Columns For Edit: Sub_Total and Total are now selectable options for this security. If selected, users can view Subtotal and Total on the Totals page. These fields are not directly editable but they will update as other sales document and line item fields change.

UPDATED: App: Changed the application icon.

iOS

FIXED: Dispatch: Tapping the location button on a route stop will open Apple Maps on devices running iOS 18. (Introduced: 1.4.1)

FIXED: Sales Documents: Tapping a sales document's Bill To or Ship To address while not editing a sales document will open Apple Maps on devices running iOS 18. (Introduced: 1.4.1)

FIXED: Customers: Tapping a customer's Bill To or Ship To address while not editing a customer will open Apple Maps on devices running iOS 18. (Introduced: 1.4.1)

FIXED: Prospects: Tapping a prospect's Bill To or Ship To address while not editing a prospect will open Apple Maps on devices running iOS 18. (Introduced: 1.4.1)

FIXED: Prospects: The 'Go To Website' slide menu option now works on devices running iOS 18. (Introduced: 1.4.1)

FIXED: Contacts: Tapping the address section on the Contact tab while not editing a contact will open Apple Maps on devices running iOS 18. (Introduced: 1.4.1)

FIXED: Contacts: The 'Go To Website' slide menu option now works on devices running iOS 18. (Introduced: 1.4.1)

FIXED: Sales Documents: Tapping the Cancel button while the Doc tab is unavailable will no longer crash the app. (Introduced: 1.3.28.1)

FIXED: Date Fields: Tapping on a date field such as Doc Date will directly open a date picker.

Android

FIXED: App: The app is less likely to randomly crash while interacting with a card or transaction.

FIXED: Create Sales Document: Messages returned from the Sales Document Pre Save Script and Sales Document Post Save Script will be displayed after creating a sales document.

FIXED: Create Opportunity: Messages returned from the Opportunity Pre Save Script and Opportunity Post Save Script will be displayed after creating an opportunity.

Server

UPDATED: Grids: Users can now adjust the width of date columns.

FIXED: Sales Documents: Payments: PayFabric: When creating a PayFabric transaction, the Created By and Updated By fields will be set to the mobile user instead of the user who is running the service.

FIXED: Prospects: Trying to save a prospect which became historical between after the user opened the prospect card and before the user tries to save the prospect will give an error.

FIXED: Installer: Trying to install the server on certain computers will no longer give a "SalesPad GP Mobile Server requires that the .NET Framework 2.0 is installed" error.

Version 1.4.1

Release Date 10/7/24

iOS/Android

FIXED: App: The app now uses the server's decimal separator character for numeric values in order to prevent errors such as "ConvertInvalidPrimitive" when looking up or saving entities.

iOS

UPDATED: App: Increased the iOS SDK version in order to optimize compatibility for devices running iOS 18.

Version 1.4.0

Release Date 9/30/24

iOS/Android/Server

ADDED: Square: There is now a Square integration for payment processing using Square credit card readers. This integration is licensed, and most of its functionality will only appear for users who have a valid license.

ADDED: Sales Documents: Payment Entry: Users can now make credit card authorizations and charges using a Square Reader.

ADDED: Sales Documents: Payments Tab: Square transactions will now appear on the Payments tab.

ADDED: Sales Documents: Payments Tab: Users can now capture and void Square authorizations.

ADDED: Sales Documents: Payments Tab: Users can now credit Square payments and deposits.

ADDED: Accessories: Square Reader Settings: The Accessories page now has a subpage for configuring Square Readers.

ADDED: Setting: Square: Currency Denomination Offset - The difference between your Square currency's normal denomination (e.g. dollars) and its smallest denomination (e.g. cents). For United States Dollars and many other currencies, this would be 100. Defaults to '100'.

ADDED: Setting: Square: Default Square Location - The default location to use for Square payments. If a user has a Square location assigned via Extended User Information or Square Reader Settings, the app will use that location instead of this setting's location.

ADDED: Setting: Square: Include Authorizations When Calculating Default Amount - If set to 'True', the app will include existing authorizations when calculating the default amount for new Square transactions. Defaults to 'True'.

ADDED: Setting: Square: Soft Delete Captured Authorizations - If set to 'True', captured authorizations will stay in the database and be hidden from payment lists. This setting's value should generally match SalesPad's Enable Multiple Capture setting. Defaults to 'False'.

ADDED: Setting: Square: Square Credit Card Type Mappings - Mapping of Credit Card Types to Dynamics GP.

UPDATED: Security: Access Security: Available Payment Methods On Orders - Square Reader is now an option for this security.

UPDATED: Security: Access Security: Available Payment Methods On Invoices - Square Reader is now an option for this security.

iOS/Android

BREAKING CHANGE: Offline: There are a large number of changes around how offline databases work. They should generally not be noticeable, but it is recommended to not update the app while it is in offline mode as this may lose any changes which have not been synced to the server.

BREAKING CHANGE: ID Tech Shuttles: ID Tech Shuttle credit card readers are no longer supported.

UPDATED: App: Various error messages in the app around failing to communicate with the service are now slightly different.

UPDATED: Sales Documents: Payment Entry: When selecting Credit Card, Nodus PayFabric, or Square Reader as the payment method, the app will automatically select the transaction type if the user only has access to one transaction type for that payment method.

UPDATED: Sales Documents: Payments Tab: Authorizations now display in a different color than other credit card transactions.

UPDATED: Sales Documents: Payments Tab: When selecting a PayFabric or Square transaction, the prompt will mention the transaction's type and amount.

UPDATED: Sales Documents: Payments Tab: When selecting a PayFabric or Square transaction and selecting a follow-up transaction type such as Void, the app will ask to confirm the new transaction.

iOS

BREAKING CHANGE: App: The minimum iOS version is now 15.0. Devices running iOS versions prior to 15.0 can no longer install or run the app.

UPDATED: App: Increased the iOS SDK version in order to optimize compatibility for devices running iOS 17.

UPDATED: App: The app now uses Microsoft.iOS as its framework instead of Xamarin.iOS.

UPDATED: Infinite Peripherals: Infinite Peripherals scanners now use the Quantum SDK.

UPDATED: Socket Mobile: The Socket Mobile Capture iOS SDK is updated to version 1.2.3.15.

UPDATED: Zebra Printers: Zebra printers now use version 1.6.1130 of the iOS SDK instead of the Link-OS Xamarin SDK.

Android

BREAKING CHANGE: App: The minimum Android version is now 7.1. Devices running Android versions prior to 7.1 can no longer install or run the app.

UPDATED: App: Increased the target Android version to Android 14 in order to optimize compatibility for devices running Android 14.

UPDATED: App: The app now uses Microsoft.Android as its framework instead of Xamarin.Android.

UPDATED: Socket Mobile: The Socket Mobile Capture SDK is updated to version 1.3.77.946.

UPDATED: Zebra Printers: Zebra printers now use version 3.0.3271 of the Zebra Printer SDK instead of the Link-OS Xamarin SDK.

Server

BREAKING CHANGE: PayFabric: PayFabric is now licensed. The new license will only be enforced when updating the server. Note that versions 1.3.47.8 and 1.3.47.9 of the server had a bug where licenses it doesn't recognize such as the new PayFabric and Square licenses would cause an "Value cannot be null" error when logging in, so obtaining the PayFabric license will have to be handled as part of the server upgrade process.

ADDED: Access Token Maintenance: Added a screen which can be used for generating, revoking, and viewing information for access tokens. Currently this screen only manages access tokens from Square.

UPDATED: Sales Documents: Payments Tab: PayFabric transactions will now appear on the Payments tab even if PayFabric is not currently set up.

UPDATED: Extended User Information: Each user can now be assigned to a Square location.

UPDATED: Application: The ApplicationName that shows in a SQL trace will now use curly brackets “{}” around the username so that filtering on ApplicationName is possible. The previously-used left bracket “[“ is a SQL special character and could not be used for filtering.

UPDATED: SalesPad: The SalesPad DLLs, which the server uses for loading and saving various entities and running workflow plugins, have been updated to version 5.5.1.

UPDATED: DevExpress: DevExpress has been updated to version 24.1.5.

FIXED: Licensing: The SalesPad Concurrent license is now fully supported. Previously, having this license instead of an older concurrent user license would result in "Unknown subscription type" errors when trying to close or log out of the server.

FIXED: Licensing: Logging in will no longer give a "Value cannot be null" error when having a mobile license which the server does not explicitly recognize. (Introduced: 1.3.47.8)

FIXED: Smart Printing: Reports which reference SignaturePad will no longer give "Parameter is not valid" errors. (Introduced: 1.3.47.6)

FIXED: Extended User Information: Prompts stating "A user can only be associated with either a Dispatch Driver or a Dispatch Vehicle" will not appear when selecting system users.

FIXED: Extended User Information: User information will no longer silently fail to load or save in some situations.

Version 1.3.47.9

Release Date 5/7/24

Server

Fixed: Service: Trying to log in with the app while the service is running as a Windows service or an IIS service will no longer give an object reference error. (Introduced: 1.3.47.8)

Version 1.3.47.8

Release Date 4/2/24

BREAKING CHANGE: IIS: The Newtonsoft version has been updated to version 13, when using an old Web.Config file, it will need updated from 12 to 13 during an upgrade.
Example:

iOS/Android/Server

UPDATED: Security: Contacts: Available Customer Contact Columns For Edit - Web Site is now an editable column.

UPDATED: Security: Contacts: Viewable Contact Columns In Properties - Web Site is now a viewable column.

iOS/Android

UPDATED: Contacts: A contact's website can now be opened via selecting 'Go To Website' from the slide menu.

iOS

FIXED: Application: Tab bars and the home indicator bar will not overlap.

FIXED: Application: Longer tab names will properly truncate.

Android

UPDATED: Android 13: Increased the target Android version to Android 13 in order to optimize compatibility for devices running Android 13.

FIXED: Prospects: 'Go To Website' now works on devices running Android 11 and above. (Introduced: 1.3.47.1)

Server

UPDATED: SalesPad: The SalesPad DLLs, which the server uses for loading and saving various entities and running workflow plugins, have been updated to version 5.3.1.

UPDATED: DevExpress: DevExpress has been updated to version 22.2.5.

UPDATED: Licensing: Licenses now auto-update each day as part of the login process. This allows for new licenses and updated expiration dates to appear in the app without needing to manually click the Refresh

Licenses button in the Security Editor.

UPDATED: Mobile License Manager: Licenses now auto-refresh as needed. This makes it so that when Cavallo adds or updates licenses, users can see the updates in the Mobile License Manager without needing to manually refresh or reset their licenses.

UPDATED: Extended User Information: This module now remembers its splitter position.

FIXED: Sales Documents: Reports: Reports will not display their line items twice in situations where multiple sales documents have the same Sales Doc Num.

FIXED: Sales Documents: Reports: Emailing, printing, or downloading a report will not display data from the wrong sales document in situations where multiple sales documents have the same Sales Doc Num.

Version 1.3.47.7

Release Date 5/1/23

iOS/Android/Server

ADDED: Setting: Item Image Quality - When loading an image for item grids and lists such as Add Multiple Items and Quick Pick, if the image's height or width is greater than this setting's value, the server will resize the image to have a height and width less than or equal to this setting's value. Note that after this server-side resizing, the image may be resized again to fit into the UI, so large values for this setting have diminishing returns. Lower values for this setting will make loading item images faster, but may lead to lower quality images. Set to '0' to disable server-side resizing. Defaults to '500'.

UPDATED: Sales Documents: A 'Locked by [username]' banner will now be displayed when opening a sales document that is locked by another user.

iOS/Android

FIXED: Create Customer: Creating a new customer with an existing customer name no longer displays an 'A customer with the value chosen for Customer Name already exists' error message.

FIXED: Sales Documents: Quick Pick: The setting 'Should Sync UDFs' being set to 'False' will no longer result in 'No such table: spxItemMaster' errors in offline mode.

iOS

UPDATED: iOS 16: Optimized compatibility for devices running iOS 16.

UPDATED: Item Card: Item Tab: Item description is now displayed exactly how it appears in Dynamics GP instead of being shown in uppercase.

UPDATED: Item Card: Item Tab: Item type is now displayed exactly how it appears in Dynamics GP instead of being shown in uppercase.

FIXED: Item Card: Item Tab: Full item description is now displayed instead of being truncated.

FIXED: Sales Documents: Item Scanning: When there is an unrecognized item on the list of scanned items, adding the items will return to the sales document screen instead of remaining on the scanned items screen. (Introduced: 1.3.46.1)

Android

UPDATED: Sales Documents: Item images now load quicker in the 'Add Multiple Items', 'Add Recent', 'Add Catalog Items', and 'Quick Pick' screens.

Server

UPDATED: Database Update: SQL commands will not time out until 120 seconds have elapsed. This limit can be modified by changing the DatabaseUpdateCommandTimeout setting in the exe.config file.

UPDATED: Settings: Several settings are now in different categories than before. For example, 'Sales Document Pre Save Script' is now in a 'Sales - Scripts' category instead of 'General'.

UPDATED: Settings: The setting 'Item Master Image UDF' was renamed to 'Quick Pick Item Master Image UDF'

and now has a description which makes it clearer that the setting only applies to Quick Pick.

REMOVED: Settings: The settings 'Add Tax Correction Lines For Offline Docs' and 'Tax Correction Item Number' were removed because these settings did not actually do anything.

Version 1.3.47.6

Release Date 3/7/23

iOS

FIXED: Sales Documents: Manually forwarding a sales document several times without leaving the sales document will not bypass the 'Allowed Batches For Forwarding' security setting.

Android

UPDATED: Android 12: Optimized compatibility for devices running Android 12.

FIXED: Accessories: Socket Mobile: Socket Mobile cordless hand scanners now work on devices running Android 11 and above. (Introduced: 1.3.47.1)

Server

BREAKING CHANGE: User Email Accounts: Updating to this version will impede using User Email Accounts in older versions of the server unless certain SQL changes are rolled back.

BREAKING CHANGE: User Email Accounts: There are several new security settings which default to 'False' and control access to functionality which already existed on the screen. The purpose of this change is to make it so users can manage their own email accounts without having access to other users' email accounts or the global email account.

BREAKING CHANGE: Dispatch: Sales Document Dispatch Schedule By Route: SalesPad.Module.Dispatch is no longer automatically included in the main install. Most of Dispatch does not require this DLL, but triggering the Schedule By Route plugin via forwarding a sales document does. You may continue using this workflow plugin by manually DLL dropping SalesPad.Module.Dispatch version 5.2.35 x86 into the main install folder for the service.

ADDED: User Email Accounts: There is now a Protocols field for choosing the authentication and communication protocols used for sending email. The supported authentication protocols are Basic Authentication, Microsoft OAuth, and Google OAuth. The supported communication protocols are SMTP, Exchange Web Services, and Gmail API. Only the 4 valid combinations of those protocols are selectable.

ADDED: User Email Accounts: There is now a Sign In button for signing into Google or Microsoft. Signing in will save the resulting access token to the database and update the Email, Protocols, and Email User Name fields.

ADDED: User Email Accounts: There is now a SSL/TLS Startup Method field. If Use SSL/TLS is checked and MailKit is being used as the SMTP client, this field determines how the client starts encryption.

ADDED: Security Setting: User Email Accounts: Can View Global Email Account - If set to 'True', the global email account will be visible. Defaults to 'False'.

ADDED: Security Setting: User Email Accounts: Can Create Email Accounts For Other Users - If set to 'True', the New button will open a modal prompt for selecting a user name for the new mail account. Defaults to 'False'.

ADDED: Security Setting: User Email Accounts: Can View Other Users' Email Accounts - If set to 'True', the System User Email grid will have an 'Only My Email' checkbox which can be unchecked to show email accounts assigned to other users. Defaults to 'False'.

ADDED: Setting: Sending Email: Basic Authentication SMTP Client Implementation - The library to use when sending email using basic authentication and SMTP. When sending email with OAuth, MailKit will be used regardless of this setting's value. Defaults to 'SystemNetMail'.

ADDED: Setting: Sending Email: Email Timeout - Specifies the amount of time (in milliseconds) after which sending an email will timeout. This setting only applies to SMTP and Exchange Web Services. Defaults to '100000'.

ADDED: Setting: Reporting: Show Hidden Report Datasets - If set to 'True', datasets outside of the main dataset will be visible again. The main use case is to more easily make changes to reports that may have mapped to fields from these datasets. Defaults to 'False'.

ADDED: Setting: Sales: Allow Background Smart Printing - If set to 'True', smart printing will occur in the background and will not slow down forwarding sales documents through workflow. Disabling this setting may help avoid potential SQL deadlock issues, but may cause the app to report successful forwards as timeouts when printing to an actual printer. Defaults to 'True'.

UPDATED: SalesPad: The SalesPad DLLs, which the server uses for loading and saving various entities and running workflow plugins, have been updated to version 5.2.35.

UPDATED: Sales Documents: Smart Printing: SMTP configurations which use OAuth will now work when forwarding sales documents through smart printing queues. Note that initially obtaining an access token must be done in SalesPad.

UPDATED: DevExpress: DevExpress has been updated to version 21.2.7.

UPDATED: Sales Documents: Reports: Sales document reports can now load data from the custom stored procedure spgpm.smcpSalesDocumentReport. The first result set maps to cSalesDocument under SalesDocument, the second result set maps to cSalesLineItems under SalesDocument -> SalesLineItems, and further result sets map to datasets starting with 'Table'. This functionality is meant to emulate the dbo.spcpSalesDocumentReport custom stored procedure, and implementations of spgpm.smcpSalesDocumentReport may simply execute dbo.spcpSalesDocumentReport.

UPDATED: Reports: Most reports will no longer show the sub-datasets as outer datasets. Example: SalesLineItems will only show as nested under the SalesDocument, instead of showing outside of the SalesDocument dataset. NOTE: Any mappings that would use the outer datasets will still populate with data, but changing/updating mappings may need to be re-mapped, or enable the new setting to show the outer mappings.

UPDATED: User Email Accounts: The Send Test Email buttons are now next to their relevant email accounts instead of being at the top of the screen.

UPDATED: User Email Accounts: The Email field is now editable for existing email accounts.

UPDATED: User Email Accounts: Whether the server uses SMTP or Exchange Web Services is now determined by the Protocols field instead of being based on whether the Exchange Version field has a value.

FIXED: User Email Accounts: Editing one or more user email accounts and the global email account at the same time will not result in the global email account failing to save.

FIXED: Sales Documents: Smart Printing: Reports which use DevExpress controls introduced between versions 19.2.4 and 21.2.7 will no longer cause errors.

FIXED: Sales Documents: Add Multiple Items: System filters on the Item Master system item will not cause adding line items to fail with a 'Must declare the scalar variable "@Item_Number1"' message.

FIXED: Sales Documents: PayFabric: PayFabric payments originating from workflow plugins will not appear twice on the Payments tab.

Version 1.3.47.5

Release Date 7/29/22

iOS/Android/Server

ADDED: Setting: Enable Timestamp Comment Field: If set to TRUE, a new field will be added to the Sales Document Comments screen that will allow users to enter a comment with the timestamp prepended to it. Defaults to 'False'.
ADDED: Setting: Timestamp For Predefined Comments: If set to TRUE, timestamps will be prepended when adding predefined comments to a sales document. Defaults to 'False'.

iOS/Android

FIXED: Application: Setting the device's language to English and region to Ireland will not cause corrupted strings with incorrect accent marks and excessive exclamation points to appear in the app.

Server

FIXED: Sales Document: Transferring quotes to orders will no longer miss copying the line items in some scenarios.

Version 1.3.47.4

Release Date 4/25/22

iOS/Android

FIXED: Dispatch: When the setting "Forward Linked Docs on Route Stop Checkin" is enabled, and a dispatch checkin is performed when the app is in offline mode, any sales documents linked to that route stop will now be forwarded when the app next syncs to online; note that forwarding the same document multiple times while offline is not allowed, and the user will be informed if a document will need manual review after the next sync to online.

FIXED: Dispatch: When the setting "Forward Linked Docs on Route Stop Checkout" is enabled, and a dispatch checkout is performed when the app is in offline mode, any sales documents linked to that route stop will now be forwarded when the app next syncs to online; note that forwarding the same document multiple times while offline is not allowed, and the user will be informed if a document will need manual review after the next sync to online.

FIXED: PayFabric: Cards which do not have a card type can now be used without causing object reference errors. These cards can be mapped to GP credit cards via the Credit Card Type Mappings setting by entering an empty string on the GP side of a mapping. For example, "VISA:VI; :Test Gift Card" maps the Visa card type from PayFabric to a credit card named VI in GP, and blank card types from PayFabric to a credit card named Test Gift Card in GP.

Android

FIXED: Cards: The app will not crash when navigating away from a card which has many UDF tabs.

FIXED: Dispatch: The map button now opens a map application on devices running Android 12.

FIXED: Cards: Clicking on a Bill To or Ship To address while not editing a card now opens a map application on devices running Android 12.

Server

UPDATED: Application: The digital signature certificate for the app's files is now valid until May 13, 2025.

Version 1.3.47.3

Release Date 2/17/22

iOS/Android

FIXED: Sales Documents: Posted invoices which have canceled line items will not display incorrect document and line totals.

UPDATED: Accessories: Zebra Printer: The Zebra SDK is updated to the latest version.
UPDATED: Accessories: Zebra Printer: iMZ series, QLn series, RW series, P4T series, RP4T series, ZQ500 series, and ZQ300 series Zebra printers are now supported for printing ZPL receipts.

Server

FIXED: Prospects: Creating a prospect with a contact will not give a "Value cannot be null" error. (Introduced: 1.3.47.1)

UPDATED: Items: Item Shipping Weight is now a column on the Item Master system item. It can be used for reports and filtering.
UPDATED: Sales Document Reports: Added the Item Master table to the sales document report data set.
UPDATED: Sales Document Reports: Added the Sales Fulfillment table to the sales document report data set.
UPDATED: IIS Installer: The Service Login field is now labeled Service System User.

Version 1.3.47.2

Release Date 12/9/21

iOS

FIXED: Sales Documents: Trying to save a sales document when no Sales Line Item UDF tabs have "Can View" selected in the Tab Manager will not fail with an "Object reference not set to an instance of an object" error. (Introduced: 1.3.47.1)
FIXED: Opportunities: Trying to save an opportunity when no Opportunity Line Item UDF tabs have "Can View" selected in the Tab Manager will not fail with an "Object reference not set to an instance of an object" error. (Introduced: 1.3.47.1)

Version 1.3.47.1

Release Date 12/6/21

iOS/Android/Server

ADDED: Interactions: Interactions now have tabs, which can be configured in the Tab Manager. When editing an Interaction, there are now tabs for Properties and Schedule, which allows for both sets of fields to be viewed and edited before saving.
ADDED: Interactions: Interaction UDFs can now be viewed and edited as configured in the Tab Manager.
ADDED: Security Setting: Access Security: Interactions: Can Create Interactions - If set to 'True', users can create interactions from Interaction tabs. Defaults to 'True'.
ADDED: Security Setting: Access Security: Interactions: Can Delete Interactions - If set to 'True', users can delete interactions. Defaults to 'True'.
ADDED: Security Setting: Access Security: Interactions: Can Edit Interactions - If set to 'True', users can edit interactions. Defaults to 'True'.
ADDED: Setting: Userfield Pre Save Script - A script that is run before saving UDFs for any business object. The parameters include Cancel Event Args, a mobile version of the business object, and any changed userfield values (existing userfield values are not included in the UDFs collection). If the script cancels the save, the UDF changes will not save to the database and the mobile user will see the script's returned message as an error message, but the business object itself will still be saved. When editing in offline mode, this script is not run until the next sync to online, and script cancellations will then be reported to the user for manual resolution. Defaults to nothing.
ADDED: Setting: Validate Sales Line UDFs Immediately - Enabling this setting will trigger a server call when accepting edits on an individual line item in order to run the Userfield Pre Save Script immediately for user feedback, instead of waiting until the full sales document save. Defaults to 'False'.
ADDED: Setting: Validate Opportunity Line UDFs Immediately - Enabling this setting will trigger a server call when accepting edits on an individual line item in order to run the Userfield Pre Save Script immediately for user feedback, instead of waiting until the full sales document save. Defaults to 'False'.

FIXED: Licensing: The "Workflow and Profit Engine Professional" license now grants access to modules that require the "Workflow and Profit Engine Essential" license.

Android

UPDATED: Android 11: Optimized compatibility for devices running Android 11.

Server

ADDED: Setting: Forward Linked Documents on Route Stop Checkin - If set to true, when a route stop is checked in, if it has one or more linked sales documents, those documents will be automatically forwarded in workflow. Defaults to 'False'.
ADDED: Setting: Forward Linked Documents on Route Stop Checkout - If set to true, when a route stop is checked out, if it has one or more linked sales documents, those documents will be automatically forwarded in workflow. Defaults to 'False'.

FIXED: IIS: The service will no longer give intermittent "The type initializer for 'Cols' threw an exception" errors.
FIXED: IIS: Emailing a sales document report will not fail due to TLS 1.2 related errors.
FIXED: Offline: When syncing data, there will not be a "There may be an issue with the following business objects: spUserField" or "table spUserField has no column named Description" error. (Introduced: SalesPad version 5.2.12)

UPDATED: Interactions: The security settings 'Available Interaction Columns For Edit', 'Can Select Contact Person For Interactions', 'Default Interaction Type', and 'Interaction Type List' are now in a new Interactions category instead of the CRM category.

Version 1.3.46.1

Release Date 10/4/21

iOS/Android/Server

ADDED: Security Setting: Access Security: Opportunities - Convert to Quote: Can Convert Opportunities To Quotes - If set to 'True', users can convert opportunities to quotes. Defaults to 'False'.
ADDED: Security Setting: Access Security: Opportunities - Convert to Quote: Convert Opportunity Status - Opportunities will be moved to this status when converted to a quote. If the status is a historical status then the opportunity will also be made historical. Defaults to nothing.
ADDED: Security Setting: Access Security: Opportunities - Convert to Quote: Opportunity Sales Doc ID - The sales doc ID assigned to quotes which are converted from opportunities. Defaults to nothing.
ADDED: Security Setting: Access Security: Opportuni