

Previous Releases: 2024 - 2025

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This article provides access to previous 1place releases from **2024 – 2025**. It includes historical version changes, enhancements, bug fixes, and other updates released during those versions.

For the latest 1place releases and current version changes, see the **2026 1place Master Version Changes Log**.

2025 Q3 & Q4 Version Changes Log

Version #	QA Tested	Module	Description	Support Request #
25.1231	YES	AR Receive Payments	UPDATE: AR > Receive Payments > Import Payments : Added support to include Unapplied Credits in the import file. Uploaded credits can now be applied toward Unapplied Payments during the import process, allowing payments and credits to be handled together in a single upload.	SR-1533
25.1231	YES	Import Wizard	BUG FIX: Item Import Wizard - Fixed an issue where updates appeared to import successfully but were not actually applied to item records . This affected fields such as BIN Location , where the import completed with a success message but no data was saved, leaving the import log blank and the item unchanged. The update process now correctly applies and persists changes to existing items.	SR-1446
25.1230	YES	AR Aging Summary	UPDATE: Added Customer Payment Terms column to the right of the Customer Name, so users can see each customer's payment terms directly on the Aging Summary screen.	SR-1515
25.1230	YES	Invoice	BUG FIX: Fixed an issue where deleting an invoice had a 4–5 second delay before the delete confirmation appeared and briefly showed a background progress bar.	SR-145
25.1230	YES	Invoice	BUG FIX: Fixed an issue where the same invoice number could be created for two different customers, preventing duplicate invoices across customers.	SR-1563
25.1230	YES	Reports	UPDATE: Added a new report called Invoices / Credits by Customer (Ship To), Item Totals (Best to Worst) that groups results by Customer (Ship To) and sorts items by total sales within the selected date range, from highest to lowest. Only items with sales activity in the date range are included, making it easy to identify top-selling items per customer.	SR-335
25.1230	YES	Reports	BUG FIX: Sales Tax Liability : Fixed the gross amount calculation so it now excludes tax , ensuring the report reflects taxable sales only and not tax collected.	SR-1560
25.1229	YES	AR Customer Statements	UPDATE: When Distribution Method is set to Email, the system now displays sub-options to choose the format (PDF or Excel) before sending the statement.	SR-1517
25.1229	YES	AR Receive Payments	BUG FIX: Importing payments now validates amounts using the InvoicePaymentLineItems table instead of the Invoice table, ensuring that balances and applied payments are accurate. Overpayment during import is prevented. The invoice revert batch size has been reduced from 100 to 50 to improve reliability	SR-1535
25.1229	YES	Login Page	UPDATE: Moved the "Forgot password?" link to directly under the Password field , aligned to the right. Simplified login error handling by replacing multiple messages with a single red message: "Invalid Email or Password."	SR-1496

25.1229	YES	User Security	BUG FIX: User Security - Fixed an issue where removing a user's assigned version (to sync with the general population) could result in an error.	SR-1546
25.1228	YES	Credit Memo	UPDATE: Updated Credit Memo creation from an Invoice so the Created By value from the Invoice is automatically copied to the Credit Memo, ensuring consistent reporting and commission tracking.	SR-1340
25.1228	YES	Reports	UPDATE: Added a new report, " Invoices & Credit by Created By Person (Totals) ", created by duplicating the existing Invoices & Credit by Entered By Person (Totals) report and changing the grouping to use the Created By field.	SR-1340
25.1223	YES	Vendor	BUG FIX: Resolved an issue where vendor information was not saving after edits were made.	SR-75
25.1223	YES	User Security	UPDATE: User Security - Improved performance by moving the version update check to run only when the Modules tab is opened, instead of when the User Security screen loads.	SR-1498
25.1223	YES	User Security	BUG FIX: Fixed an issue where a null error could occur when adding users.	SR-1507
25.1222	YES	Import Wizard	UPDATE: Sales Orders > Import Wizard > Sales Order – Header + Lines (1 File) . The Sales Order Import Wizard has been updated to use a Sales Order – Header + Lines (1 File) format . The Excel import template has been revised accordingly, with the marketplace column replaced by OrderSource .	SR-1043
25.1222	YES	Integrations	UPDATE: Settings > Integrations > Ecom Imports (Generic) . The marketplace-to-customer mapping logic has been updated to improve flexibility and scalability. A new Ecom Imports (Generic) integration tab has been added, allowing Order Sources (such as eBay, Amazon , etc.) to be mapped to a Default Bill To / Ship To customer using an editable table. For imported orders, sales tax is now handled using the Tax Code assigned to the mapped default customer. Since taxes are collected by the marketplace, imported orders will reflect a \$0 tax amount while maintaining proper tax code assignment.	SR-1043
25.1222	YES	Invoice	BUG FIX: Fixed an issue where the progress bar remained open after reaching 100% when creating an invoice from a Sales Order . The process now completes automatically without requiring the user to manually close the progress bar, and the invoiced Sales Order opens in a new tab as expected.	SR-1398
25.1219	YES	Scanner	BUG FIX: The Count by Bin workflow has been corrected and validated to ensure inventory adjustments are fully and accurately recorded. Missing item adjustments are now properly created and reflected in Step 3 of 3. Bins with both extra and missing items now correctly record both the increase and the shortage. Missing items are now correctly removed from inventory when the count is finalized.	SR-1443
25.1219	YES	1place Version	UPDATE: Moved the " Current 1place Version " drop-down to appear above the list of users for improved visibility and easier access.	SR-1447
25.1218	YES	AR Payments History	UPDATE: The Payment Details popup now supports column sorting . Users can click on any column header to sort the payment line items, making it easier to review and analyze payment details quickly.	SR-1433
25.1218	YES	AR Receive Payments	UPDATE: Updated how Batches are saved and selected to streamline payment processing. The Batch field now includes a drop-down list showing batches created by the logged-in user, sorted in descending order for quick re-selection. The New Batch button has been removed and replaced with a "+" icon beside the drop-down.	SR-1205

25.1218	YES	Credit Memo	BUG FIX: Fixed an issue where creating a Credit Memo from the “+” menu or directly from an Invoice resulted in a blank screen in versions 1215 and 1216. Credit Memos can now be created normally from both entry points.	SR-1435
25.1218	YES	Reports	BUG FIX: Fixed the calculation of Profit Margin % and Credit % in the report totals. The totals now reflect the correct overall percentages instead of simply summing the individual line values.	SR-1426
25.1218	YES	Sage Integration	UPDATE: Improved Sage settings management by sorting the Warehouse dropdown alphabetically and adding the ability to easily copy all Sage settings from one warehouse to another. This simplifies setup and testing across multiple warehouses.	SR-1229
25.1218	YES	Sales Order	UPDATE: Added a Duplicate Sales Order option under More button on the Sales Order screen. Selecting it creates a new sales order by duplicating the currently open order.	SR-1409
25.1218	YES	Scanner	BUG FIX: The Count by Bin scanner workflow was enhanced to provide better visibility and usability during bin counts. Users can now view current inventory in the bin, items that are sold or shipped on Sales Orders but still in “Pick to Cart” status, and other items previously scanned within the same bin, giving a more complete picture during counting. An issue identified during testing was resolved where items existed in the bin but were not appearing in Step 2 of the process. Row color display inconsistencies specific to KSI TX were also fixed to ensure consistent behavior across all environments. For improved usability, a new locked Bin field was added and aligned with the Quantity column, with a clear “Bin:” label. The Scan Item field was moved directly below the Bin field and labeled accordingly. When an item is scanned, the item number is now displayed and highlighted, making it easy to overwrite and scan the next item quickly.	SR-1256
25.1217	YES	AR Receive Payments	BUG FIX: An issue was found where a payment could be created incorrectly, causing invoices or credits to be applied with wrong amounts or duplicated. Reverting the incorrect receipt resolves the issue. To prevent this, additional validations were added to Receive Payments . The system now verifies both the number of invoices/credits selected and the total payment amount against the database. If anything does not match, the payment is stopped and the user is prompted to Revert and Try Again . This ensures payments are applied correctly and prevents balance issues.	SR-1343
25.1216	YES	Scanner	UPDATE: Updated the AP Bill creation process to improve verification after all line items are received. Status messages now clearly indicate completion: Receive PO Completed (updated text) AP Bill Created (green if successfully created) AP Bill NOT Created (red if creation failed) This ensures users can easily confirm whether both processes have completed successfully.	SR-1413
25.1216	YES	Sales Order	BUG FIX: Fixed an issue where keyboard tabbing would loop back to the Bill To field after entering the Bill To / Ship To name . Users can now tab normally into the Customer PO# field without needing to click it manually, allowing for smooth and uninterrupted data entry.	SR-1389
25.1216	YES	Scanner	BUG FIX: An issue was fixed where Check Stock by Bin did not return results when a bin contained only a single item. The scanner now correctly displays stock even when there is just one item in the selected bin, ensuring accurate results in all cases.	SR-241

			bin, ensuring accurate results in all cases.	
25.1216	YES	System Tools	UPDATE: Updated alert color from Orange to Yellow and sorted certificate list by Expiration Date (DESC). Added login validation to check the SecurityCerts table on each Admin login. Users are now prompted with a warning if any certificates are expiring within 30 days or have missing expiration dates, displaying relevant certificate details.	SR-1324
25.1215	YES	AR & GL	UPDATE: Settings > AR is now Settings > AR & GL. A new GL Settings option prevents changes to prices, costs, and totals on invoices and credit memos dated before the transaction date, regardless of user rights. Exception: Credit Memos with Qty Returned = 0 can still be updated without affecting original totals.	SR-1302
25.1215	YES	Scanner	UPDATE: When scanning items to Receive PO > Dock, the Reserved Notes now clearly record the action with the message: "Batch scanned to 'On Dock' from PO Receipt by [User]."	SR-1356
25.1215	YES	Scanner	BUG FIX: PO Receive to Dock / Sage Integration. Fixed an issue where AP Bills could appear as successfully sent with a Draft status, but were not actually created in Sage or visible on the Sage Integration AP Bills screen.	SR-1358
25.1215	YES	User Settings	UPDATE: Added the ability to remove a user's assigned version and reset it back to No Version from the Users settings screen. This allows administrators to easily clear a user's version when needed.	SR-59
25.1212	YES	Credit Memo	BUG FIX: Resolved an issue where certain credit memos were off by one cent.	SR-1246
25.1212	YES	Credit Memo	UPDATE: A new Fulfillment Info tab has been added to the Credit Memo screen, providing a full log of status changes with timestamps, user information, and editable notes.	SR-1174
25.1212	YES	Descartes	UPDATE: Descartes Integration - Enhanced the integration to automatically send deliveries to Descartes when Invoices and Credit Memos are created, including support for Requested Pickup Dates on Return Authorizations. Updates to estimated delivery dates now sync to Descartes, and the Credit Memo "Delivery Date" field has been relabeled to "Pick Up Date" for clarity.	SR-1177
25.1212	YES	Error Message Logs	BUG FIX: Fixed an issue where the Error Log did not display the most recent errors upon opening.	SR-40
25.1212	YES	Item Picture	NEW FEATURE: Added a new bulk Picture URL upload feature that makes it easy to upload and manage multiple image URLs at once. The process is now more streamlined and user-friendly for faster setup and maintenance.	SR-1210
25.1211	YES	Bin Management	UPDATE: Add Bin Location Form Fixes & Enhancements Save Button Update: Changed the button to Save & Close. If Zone is missing when saving, focus is automatically set to the Zone field and it is highlighted in red. Added necessary validation classes to Bin and Zone fields to ensure proper validation and focus behavior.	SR-1309
25.1211	YES	Purchase Order	BUG FIX: Updated the Refresh function so it no longer creates a new PO and instead refreshes the current PO correctly.	SR-82
25.1211	YES	Reports	BUG FIX: Modified the "Invoices / Credits by Customer" report to use Customer ID instead of Customer Name for fetching and exporting data. This fixes the Date Range issue and ensures all transactions are correctly included, even if the company name has changed.	SR-1249
			BUG FIX: The issue where some items (some with manually added costs) were not being set to Reserved when received via the scanner has been	

25.1211	YES	Scanner	fixed. All items are now correctly marked as Reserved upon receipt. The scanner prevents items from being received twice.	SR-1269
25.1211	YES	Scanner	BUG FIX: An issue where transfer picks remained in the scanner after being marked as completed in 1place has been fixed . The problem was caused by large data volumes during the cart-to-staging finish process. The API code has been updated to handle large transfers properly. Picks now correctly clear from the scanner once marked complete in 1place.	SR-1297
25.1210	YES	AR Debit Memo	BUG FIX: Fixed an issue where Debit Memos were not correctly refunding unapplied amounts that were returned to customers by check. Refunds now process and clear the unapplied balance as expected.	SR-1255
25.1210	YES	AR Receive Payments	BUG FIX: Resolved an issue where payments combining credit memos and received amounts did not correctly record all applied payments on invoices . Fixed an issue where payments could be applied to invoices with insufficient balance, resulting in zero-amount applied lines. The system now restricts selections when the amount exceeds the Received From Customer plus Credit/Unapplied amounts .	SR-1274
25.1210	YES	AR Receive Payments	UPDATE & BUG FIX: Added Total Received and Total Count at the bottom of the line items in the payment detail popup on AR Receive Payment History for better visibility of the payment summary. Implemented an additional Amount Applied validation to cross-check that the sum of applied amounts matches the total payment. Any mismatch now triggers a “validation failed” popup, helping users identify and correct issues immediately. Existing line-item count validation remains in place.	
25.1210	YES	Credit Memo	BUG FIX: Resolved an issue where duplicate payment lines appeared on Credit Memos . Applied and unapplied amounts now display correctly, and deleting/reapplying payments updates the balances properly.	SR-1273
25.1210	YES	Integrations	UPDATE: CAR-PARTS.com Integration Updates Removed the legacy Car-Parts table and deleted the old Enable setting. The system no longer requires stored data for activation—users can now simply export data on demand. A new Download All button has been added to replace the previous workflow.	SR-167
25.1210	YES	Item Picture	UPDATE: Fixed and enabled Item Picture URLs for use in OPSTrax and the Customer Portal .	SR-1193
25.1209	YES	Integrations	BUG FIX: The Default User dropdown list in the CCC, PT, and OPS integration sections has been updated to sort alphabetically , making it easier to locate and select users.	SR-1238
25.1209	YES	Printer Connect	BUG FIX: Resolved an issue where users would receive an error when logging in on the first or second attempt. Fixed in version 25.1209.01 .	
25.1208	YES	Customers	BUG FIX: Customer Record Number - Increased the field width to display at least 4 characters and updated all prefixes to behave consistently. Previously, only the “C” prefix could be entered or displayed.	SR-1267
25.1208	YES	Invoices and Sales Order	BUG FIX: Fixed an issue where invoices and sales orders were incorrectly showing “Created By: 1placeRachelle” regardless of the actual user who created them.	SR-1218
25.1208	YES	Purchase Order	BUG FIX: All newly added PO Container Date fields have been updated so they now default to NULL , ensuring they appear blank—consistent with the Date Received into Stock field. This behavior is now fixed and	SR-91

			functioning as expected.	
25.1208	YES	<u>Sales Order</u>	BUG FIX: Fixed issues with sorting and filtering where some orders appeared out of order by Created Date, and sales orders created from the Find Parts screen were not appearing in the list.	SR-1266
25.1208	YES	<u>Sales Order</u>	BUG FIX: Updated invoice creation so the “ Changed By ” field now correctly reflects the logged-in user (Entered By).	SR-1228
25.1208	YES	Shipping and Receiving	BUG FIX: The issue where Ship & Receiving > To Pick > Show All triggered a popup error has been resolved. The Show All function now loads properly without any errors.	SR-1183
25.1205	YES	PO Added Costs	UPDATE & BUG FIX: The PO Added Costs functionality has been updated and improved. The “Distribute Cost to PO Line” checkbox was removed, and the system now relies solely on the Distribution Method where it is not null. The IsCopiedFromAnotherPO field has been removed from all relevant databases. The Distribute Costs button has been moved to the top of the Added Cost table, and the Make Sage AP Bill button has been relocated from the PO footer to the right of the Distribute Costs button. The calculation of added costs has been fixed: each Added Cost now has its own Calc Method (Cubic Square Feet or Item Cost), and the Distribute Costs button sums and distributes costs by each Calc Method separately. This ensures the total of each item’s Qty × Added Costs equals the overall total. The button re-calculates all costs each time it is clicked, but once the PO is received, the Distribute Costs button is disabled.	SR-90
25.1205	YES	Sage Integration	UPDATE: A new enhancement has been added to Integrations > SAGE > PO/AP Bills, offering improved filtering and reporting tools. Users can now select ALL warehouses, and the warehouse is now shown as its own column for better visibility. A new Filter drop-down has been added with options for By Month and Custom; selecting Custom will display From/To date fields so users can define an exact date range. The Export feature has been updated as well and will now export exactly what is shown on the screen.	SR-1206
25.1204	YES	Purchase Order	UPDATE: Layout adjustment was added to improve the positioning of the Added Cost table and its related buttons by shifting them slightly to the right to match the spacing used above the line items. As part of this fix, both Added Cost buttons were updated to use a white style for consistency. In addition, the More... button was repositioned to the right of the Receive PO button, and the functions Copy to Another PO, Back Order PO, and Auto Link Sales Orders were moved into the More... popup menu as part of the enhancement.	SR-1211
25.1204	YES	Purchase Order	UPDATE: A new Copy to Another PO button was added next to Back Order PO under More.... Clicking it opens a Merge PO With Another PO popup, allowing users to copy all line items from one PO to another. The popup displays pre-copy totals for each PO and updates totals after the copy. Users can choose to delete the source PO after copying. Validation now prevents moving POs or line items that have already been received. Additionally, the Save button on the PO no longer requires line items to validate, and the Cancel button on the popup has been changed to Close after the copy process completes.	SR-1212
25.1204		<u>Sales Order</u>	UPDATE: The behavior of the Created By , Entered By , and Sales Rep fields has been reinforced for clarity and consistency	
25.1204	YES	Shipping and	BUG FIX: A critical bug in Shipping & Receiving > Batch Invoice (versions 1202–1203.2) has been resolved. When Auto Create Invoice was selected, the system created the invoice but froze and prevented	SR-1215

25.1204	YES	Receiving	was selected, the system created the invoices but froze and prevented users from clicking Print and Update. This is now fixed, and batch invoicing works normally again.	SR-1215
25.1203		Descartes	BUG FIX: Changing the Expected Delivery Date on the Sales Order now updates the Delivery Date on the Invoice and in Descartes , and vice versa when changed from the Invoice.	251201-08
25.1203		Distributed Landed Cost	UPDATE: Adjusted the Distribution Method drop-down width for better display Removed any blank/empty entries from the list	
25.1203		Invoice and Credit Memo	UPDATE: Moved the Sync / Re-Sync fields from the Other table to the Other Info tab (2nd column) on both Invoices and Credit Memos for cleaner layout and consistency.	251201-04
25.1203		Item Catalog	BUG FIX: Fixed the screen freezing when changing the Catalog Source between Partslink and Customer .	
25.1203		Purchase Order	UPDATE: Added a "Copy to Another PO" button next to Back Order PO Allows copying all line items from one PO to another with a confirmation preview of totals. Includes validation to block moving POs or line items that are already received. Provides clear options to confirm, cancel, or delete the source PO after copy.	
25.1203	YES	Transaction Lists	UPDATE: Invoices & Credit Memos, Credit Memos, Quotes, and POs now all default to: Date (DESC) → CreateDateTime (DESC) for consistent, newest-first sorting.	SR-1209
25.1203	YES	User Settings	UPDATE: In the Settings > Users screen, an X icon has been added next to each user's Version #. Clicking this icon will reset the Version # back to null, effectively removing the assigned version.	251124-08
25.1202		Descartes	BUG FIX: Fixed the export of Invoices and Credit Memos to DesCartes to correctly populate the Expected Delivery Date using the DeliveryDate field. Now, exported orders will reflect the proper delivery date on the map instead of defaulting to the invoice date.	251201-05
25.1202	YES	Invoice & Credit Memo	UPDATE: Updated Layout -Moved To Sync, Resync Flag, Last Synced, and Sync/Resync link to the Other Info tab. -Invoice: Added Expected Delivery Date (DeliveryDate) under Warehouse , and moved Tax Exempt below it. -Credit Memo: Added Expected Pickup Date (DeliveryDate) under Return to Warehouse , and moved Tax Exempt below it.	251201-04
25.1202	YES	Invoice	UPDATE: The Expected Delivery Date from the Sales Order is now automatically copied to the Invoice > Delivery Date when an invoice is created (from Sales Order or Ship/Rec → To Dispatch).	251201-02
25.1202		Sales Order	BUG FIX: The Expected Delivery Date now saves correctly. An additional issue was fixed where converting items from Find Parts to a Sales Order was resetting the date (e.g., 12/3 changing to 12/2). The original Expected Delivery Date is now preserved.	251201-03
			UPDATE: Container Details Tab : Added a new Container Details tab on the PO with the following fields, including hover-info (i) icons for user guidance: Container # – Existing field ContainerNum Container BOL # – New field ContainerBOL (i) Container Bill of Lading # Container Carrier – New field ContainerCarrier Vessel Name – New field ContainerVesselName Country of Origin – Existing field CountryOfOrigin Cut-off Date – New field ContainerCutoffDate (i) Deadline for shipment	

25.1201	YES	Purchase Order	delivery to port or carrier In-Transit Date – New field ContainerInTransitDate (i) Date container departed from Port of Origin ETD Port of Origin – New field ETDPortOfOrigin (i) Estimated Time of Departure ETA Port of Destination – New field ContainerETA (i) Estimated Time of Arrival Prepull Date – New field ContainerPrePullDate (i) Date container picked up from port/terminal and staged separately) ETA Our Facility – New field ContainerE (i) Estimated arrival date at our facility) Date Arrived – Needs clarification: existing or new? On Dock Date – Needs clarification: existing or new? Date Received into Stock – Needs clarification: existing or new? (i) Date container unloaded to dock) Invoice Date – Needs clarification: existing or new?	
25.1201		Sage Integration	BUG FIX: AP Bills : Fixed the process to combine multiple PO added cost lines for the same vendor and invoice into a single Sage AP Bill . Added a progress bar to track updates on distributed landed cost items , improving performance for large POs with many line items.	251024-09
25.1128	YES	AR Aging Summary	BUG FIX: Fixed the issue where selecting a customer and clicking Recalc would clear the customer filter . Now the selected customer remains visible, and clicking the X resets to “ All Customers ” and recalculates automatically. Also fixed on the Receive Payments History & Refunds .	
25.1128	YES	Bin Management	BUG FIX: Default Bins per Warehouse : Removed the dot from the button name and fixed the issue where saving default bins wasn’t working. Also improved the dropdown search so users can type a bin number (e.g., AB001) without using the mouse.	251126-05
25.1128	YES	Shipping and Receiving	UPDATE: Apply Button Update : The “ Show ” buttons have been renamed to “ Apply ,” and radio buttons have been added next to it on the Route for additional selection options.	251118-08
25.1128	YES	Shipping and Receiving	BUG FIX: Closed (Delivered) Pagination : The Closed (Delivered) screen is now paginated to 25 records per page, with paging optimized for fast navigation. The checkbox and “ Show All ” option have been removed, and the screen is read-only to improve performance.	251124-05
25.1127	Yes	Reports	BUG FIX: Inventory Valuation (Current) : Fixed the totals for Category/SubCategory views. Now, the report correctly matches the ItemStock table totals, including (QtyInStock × Cost) + (QtyInStock × AdditionalCost) , for any selection of warehouse, category, or all warehouses/categories .	251124-13
25.1127	YES	Reports	BUG FIX: The Invoice by Category (Summary) report has been updated to display one total per Item Category for the selected criteria instead of listing thousands of individual line items. It now shows: Columns: Item Category, Total Sales for Category A grand total at the bottom A condensed layout that fits on 1–2 pages	251124-11
25.1127		Sage Integration	UPDATE: Added Export to Excel functionality for AP Bills, Sales Revenue, Inventory Transfers, and Adjustments .	251118-05
25.1127		Sage Integration	UPDATE: AP Bills : Enabled column sorting for easier data management.	251118-04
25.1127		Sage Integration	BUG FIX: AP Bills : Tested the auto-creation of Sage AP Bills when a PO is received. The process works correctly when the GL Account and Vendor are properly mapped. If posting fails, an email notification will now be sent to alert the user.	

25.1127		Scanner	BUG FIX: Item Adjustments Report : Fixed the Count by Bin process so the report now generates correctly. API call updated and verified in scan version 25.1127 .	251126-03
25.1127	YES	Scanner	BUG FIX: Bin Picking : Fixed the issue where scanned items remained stuck in "To Pick" even after being scanned. Items now correctly update status after scanning.	251126-02
25.1127	YES	Shipping and Receiving	BUG FIX: To Dispatch : When Manifest is selected and both checkboxes are unselected, the system now automatically sets Transaction to Print to Manifest instead of Invoice.	251124-03
25.1126	YES	AR Receive Payments	BUG FIX: Fixed an issue where changing the "Search By" dropdown would trigger an unexpected error popup . The dropdown now updates properly without errors.	251125-01
25.1126	YES	AR Receive Payments	UPDATE: The Credit Memo Refund tab in AR Receive Payments now supports exporting to Excel , allowing users to easily download and review refund data.	
25.1126		AR Receive Payments	BUG FIX: Fixed an issue where clicking between tabs was not retaining or displaying the correct default values .	
25.1126		AR Customer Statements	BUG FIX: Fixed issues in the Detailed Statement view where some invoices were not displaying and multiple payments were not properly reflected. The statement now shows all relevant invoices and correctly summarizes multiple payments .	251029-02
25.1126	YES	Scanner	BUG FIX: Fixed the Step 2.5 PO selection behavior so that the PO popup only appears when necessary. If the user selects "ALL" in Step 2 or there is only one PO on the dock, the popup is skipped. Step 3 now only handles scanning the item, and the PO table has been removed from this step. Verified fixed in the latest scan publish.	251124-01
25.1126	YES	Shipping and Receiving	UPDATE: The Closed (Delivered) screen has been updated to include pagination , displaying 25 records per page for smoother loading, faster navigation, and improved usability. Suggestion: include the number of pages so user can jump into a specific page.	251124-05
25.1126		Shipping and Receiving	BUG FIX: Resolved an issue where, after final dispatch of an order containing a stock transfer , manually changing the status to Closed (Delivered) caused the transferred line item on the Sales Order to incorrectly remain in In Route status. The system now correctly updates the transferred line item to Closed , ensuring status consistency across both warehouses and preventing it from appearing in the In Route list.	251124-06
25.1125		Reports	BUG FIX: The Inventory Count Sheet was updated to correctly display quantities based on the selected bin , not the total item quantity . Now, when generating the report, the Quantity column shows how many units exist in that specific bin, ensuring accurate counting and reporting.	251124-14
25.1125	YES	Shipping and Receiving	BUG FIX: Updated the filtering logic so the screen now correctly shows records that match the selected Zones and Routes as intended , instead of previously requiring both or either conditions to match simultaneously.	251118-08
25.1125	YES	Shipping and Receiving	UPDATE: IN ROUTE : The "Move to Status" drop-down list now displays statuses in the user-defined order as intended.	251124-04
25.1124	YES	AR Aging Summary	UPDATES: Memorized the Start Date and End Date between sessions. Fixed Excel export to use the correct date range . Corrected the Click to Show Detail functionality when changing date ranges. Added a Ship To Company Name column in the detail view. Enabled export to Excel for both summary and detail.	

			Added spacing between Invoice # and Mag button for better readability.	
25.1124	YES	AR Receive Payments	UPDATE: Updated the search for customers with large numbers of invoices and credits . Now a single progress bar displays overall progress (e.g., 500 of X, 1000 of X) until completion. Removed the multiple looping progress bars that appeared every 500 records.	
25.1124	Yes	Item Detail	UPDATE: Updated the STOCK tab to improve warehouse bin management : -Removed the Add / Manage Warehouses button. -Renamed View Item by Warehouse to View Qty's by Warehouse . -Added a new button View Default Bins by Warehouse next to Transfer Inventory . -Clicking the new button opens a Default Bins by Warehouse popup, using the ItemAdditionalLocations table, allowing users to: --View and manage default bins per warehouse. --Add multiple warehouse/bin combinations . --Sort by warehouse code and bin location . On the Scanning App , the reference to Item.BinLocation has been removed. Users now see the default bin locations for the warehouse they are working in, ensuring accurate item placement per warehouse. Unable to enter Bin or no bins to choose from in the Default Bins by Warehouse.	251106-05
25.1124		Item Pricing	BUG FIX: Fixed the Average Cost calculation on the Find Parts screen when FIFO Costing is selected. It now correctly shows the calculated average cost for the first-in, first-out quantity instead of the overall stock average .	T251016-01
25.1124		Shipping and Receiving	BUG FIX: Resolved an issue where tickets were ending up in the wrong status . Statuses now update correctly based on the workflow.	
25.1124	Yes	Shipping and Receiving	BUG FIX: Fixed the Zones and Routes dropdowns to support single and multi-select . Selected values now display correctly, filter counts are accurate, and orders are properly filtered by both zones and routes . Header layout has also been shortened for clarity.	
25.1124	Yes	Shipping and Receiving	BUG FIX: When selecting multiple warehouse zones , the Zone column was disappearing from the SHIP/REC screen. This issue has been corrected so the Zone column remains visible, even when multiple zones are selected.	251118-09
25.1121		Bin Transfer	BUG FIX: Resolved an issue where some items on the list could not be scanned, causing a popup error stating the item was not found—even though it was present. This issue began appearing around version 1119 and was related to how partially stocked items were being validated. The scanning logic has now been updated to correctly recognize all listed items , allowing the user to continue the process without interruption.	
25.1121		Item Pricing	BUG FIX: The markup pricing based on average cost on the Find Parts screen was not functioning as expected. This has now been fixed so the MU% calculation works properly and returns the correct selling price.	T251016-01
25.1121		Login	BUG FIX: The extra "Please contact support." line on the login screen has been removed so only one message now displays.	
25.1121	YES	Record Numbering	BUG FIX: Resolved an issue where new customers were not receiving the prefix when Multi-Warehouse Prefixing was turned off.	
			BUG FIX: Resolved an issue where the Summary report incorrectly showed no Pick to Cart – Order Transfer entries.	

25.1121	ISSUE	Scanning Report	This has been fixed in scanbeta version 25.1121, and the report now displays accurate totals. Report has incorrect totals	
25.1121	YES	Shipping and Receiving	UPDATE: Updated the Print & Pick screen to support easier filtering: Routes and Zones are now single or multi-select dropdowns. Label " Filter By... " changed to " Select Route(s) ". Label " Select Warehouse Zone " changed to " Select Warehouse Zone(s) ". Header layout shortened where possible for a cleaner UI.	251118-08
25.1120		AR Aging Summary Exports	BUG FIX: Verified the report's start date behavior. While entering 1/1/2024 previously displayed 12/31/2023, testing with multiple dates confirms the report is now functioning correctly.	
25.1120		AR Aging Summary	Update: Finished the AR Aging Summary Detail screen.	251117-01
25.1120		AR Aging Summary	UPDATE: Created a new controller and folder structure for the AR Aging Summary screen in User Security . This replaces the previous setup that used the Customer Statement controller and folders , ensuring a clean and dedicated structure for this report.	
25.1120		AR Receive Payments	BUG FIX: Updated the Payment History to display Credit Card refund activity. Refunds now appear with a Batch Number labeled " Refund ", although the amounts currently show as zero. This allows users to track refund transactions separately from Debit Memos .	251119-05 251119-03
25.1120		AR Receive Payments	BUG FIX: Resolved a rounding issue that caused invoices to be 1 cent off in version 1119 . The fix has been tested across multiple scenarios and now ensures all payments and balances calculate correctly.	251118-16
25.1120	YES	AR Receive Payments	BUG FIX: Fixed an issue where searching for certain invoices appeared to cause an infinite loop. The search now correctly loads data in batches. To locate records deep in the dataset, users can click " All " to load the full dataset, after which the search will work immediately. Note that loading all records at once may cause some screen lag due to the large volume of data.	251118-05
25.1120		AR Receive Payments	BUG FIX: Fixed issues where some invoices showed payments but were not reflected correctly in the system. The update now: Corrects invoices that had payments recorded but no payment entries in the system by creating the missing payment records and updating the Paid Amount and Balance Due . Fixes invoices where partial payments were recorded incorrectly by reconciling the InvoicePayments table with the invoice totals so the Paid Amount and Balance Due are now accurate. These changes ensure all invoices display correct payment and balance information for users.	251118-15
25.1120		Sales Tax Rate	UPDATE: Updated the California sales tax rates on the server. The table now reflects the correct rates , and the Last Updated date has been updated accordingly.	IP- N251103- 01
25.1120	Yes	Settings	UPDATE: Customer and transaction numbers now correctly apply the warehouse prefix every time. Changing the warehouse updates the prefix but no longer generates a new number . Invoice numbering now works properly even when " Use Sales Order # " is turned off. The same behavior is now applied across all related transaction screens.	251023-06
25.1119		AR Receive Payments	BUG FIX: Fixed a rounding issue that caused numbers not to balance in certain scenarios. The issue is now resolved in the latest version.	251118-16

25.1119	YES	Data	UPDATE: Updated the Parts Link data for November 2025.	
25.1119		Scanning Report	BUG FIX: Corrected an issue where some Pick to Cart – Order Transfers were not receiving the proper SubType in the Scanning Report. The SubTypes are now assigned correctly and the totals reflect accurate values.	
25.1119		Settings	UPDATE: Several updates were made to improve how document numbering prefixes function across the system starting from version 25.1119 and higher: Customer & Vendor Records -Added new prefix settings for Customer and Vendor in the main numbering configuration area. -When creating a new Customer, after selecting a warehouse, the system automatically applies that warehouse's prefix to the new customer number. -When creating a new Vendor, the default warehouse prefix is applied. Quotes, Sales Orders, Invoices & Credit Memos -When selecting a Customer, the system uses the warehouse assigned to that customer to apply the correct prefix: --New Quotes --New Sales Orders --Invoices --Credit Memos -If the Invoice is set to "Use SO #", the Sales Order number and its prefix will be honored. Purchase Orders -Defaults to the standard prefix. -If the Ship To Warehouse is changed before the record is saved, the prefix will update at that moment only (not after saving). API Integration -API-generated records now follow the same prefix logic as the UI. Important: This change affects how all record numbering works for version 25.1119 and later.	251023-06
25.1118	YES	AR Customer Statements	UPDATE: Added two new versions of Statement Detailed: Payments Summarized and Payments Allocated. In the Summary version, the Payment # is now displayed.	251029-02
25.1118	YES	Scanner	UPDATE: Move Dock Items to Bins Updates: Renamed Order # to PO #. Reordered the columns to: Bin, Qty, PO #, Res. Updated the layout so the Qty to move for each PO appears on the same line.	
25.1117		AR Receive Payments	BUG FIX: Fixed an issue in version . 1114 where payments could not be imported due to a missing stored procedure. The import process now also validates duplicate invoices to prevent errors, as updated in version .1117.	251115-05
25.1117	YES	AR Receive Payment History	BUG FIX: Added a Delete button in the payment popup screen to allow users to remove all payment details at once, revert the related GL transaction from, and clear the paid invoices without visiting each invoice individually.	
25.1117	YES	Shipping and Receiving	BUG FIX: Updated the process for moving batches of Stock Transfer invoices to To Dispatch . It now runs in a loop with a per-invoice progress bar , preventing system freezes and timeouts while showing users real-time progress as each invoice status is updated.	251113-03
			UPDATE: A new Statement Type called "Detailed" has been added to the Statements screen. It is similar in layout to the Open Items statement, but with the following enhancements: Balance Forward Calculation	

25.1114		AR Statements	-The selected Start Date is still used. -Any Invoices, Credits, Debit Memos, or Unapplied Payments dated before the Start Date are combined into a single Balance Forward amount. -This Balance Forward value appears at the top of the transaction table. Running Balance Logic -The running balance begins with: Balance Forward + Remaining Due of the first line item -Each transaction in the statement continues updating the running balance. Included Transactions (Within Date Range) -The new Detailed statement shows ALL of the following, whether open or paid, as long as they fall within the selected date range: --Invoices --Credits --Payments --Debit Memos --Unapplied Payments	251029-01
25.1114	ISSUE	Pricing Templates	BUG FIX: Fixed an issue where updates to the pricing template table (price levels, discounts, etc.) were not saving. All changes now save correctly. When I enter several pricing template (like 5 different pricing template) and then decides to delete one of the lines, it deletes the whole list I just created.	25113-03
25.1114		Scanner	BUG FIX: Fixed an issue where transfers were not moving correctly from Pick to Cart and Cart to Staging , ensuring proper workflow updates in the scanning process.	
25.1114	YES	User Settings	BUG FIX: Fixed an issue where opening the User Settings screen produced an “ undefined ” error caused by a missing stored procedure. The stored procedure has been added/updated, and the screen now loads without errors.	25113-03
25.1113		API	BUG FIX: Fixed the issue in FetchItemsToPickForPickingOrders_2025_08_29 that caused the Scanning App to malfunction.	
25.1113		Debit Memo	UPDATE: Completed the Debit Memo edit functionality and implemented the Sage update process .	
25.1113	YES	Scanner	UPDATE: Implemented item search functionality based on the OEM number across all applicable cases where items are scanned, including Check Item Stock, Bin Transfer, and View Dock Items .	
25.1113		Shipping and Receiving	BUG FIX: Investigated the system freezing issue that occurs when selecting large or small groups of stock transfers for dispatch. The freeze was traced to the process that updates stock transfer statuses — changing them to En Route from the shipping warehouse and En Route To on the receiving warehouse. Reviewed and optimized these related processes to prevent delays and ensure smoother batch transfers.	
25.1112	YES	AR Receive Payments	UPDATE: Enabled editing and saving of the Batch # within the payment details popup accessed via the Mag button .	251111-05
25.1112	YES	AR Receive Payments	UPDATE: Updated the display so that Credits and Unapplied Amounts now appear as negative numbers for clarity.	251111-03
25.1112	YES	AR Receive Payments History	UPDATE: Added the Batch # field to the export data for better tracking and reporting.	251111-06
25.1112		Debit Memo	UPDATE: Added the ability to revert journal entries posted to Sage	
25.1112		Debit Memo	BUG FIX: Fixed the common error that occurred when deleting debit	

25.1112		Debit Memo	memos, ensuring the system no longer displays errors after deletion.	
25.1112	ISSUE	Scanning Report	BUG FIX: Fixed an error in the Scanning Reports summary where the totals for "Pick to Cart – Orders" and "Pick to Cart – Order Transfers" were reversed. Aggregation logic has been corrected so the summary counts now match the underlying detail. TOTAL summary seems incorrect	251111-07
25.1112		Shipping and Receiving	UPDATE: Enhanced the Zone filter functionality so that when a user clicks on Zone , they can now select one or more Shipped Via Routes to further filter the list of labels to print.	251111-08
25.1111		1place Version	BUG FIX: Updated the system to prevent the Version # field from ever being blank or NULL . When a Version # is changed, the previous value is remembered, and if the field is cleared , it automatically resets to the prior value . This applies to Settings > Global , the Admin tool , and ensures users cannot accidentally lock out access by leaving the field empty.	251110-02
25.1111		AR Receive Payment	BUG FIX: Fixed an issue where overpayments were not posting correctly. The system now handles overpayments properly without affecting the full payment balance .	251110-05
25.1111	YES	AR Receive Payments History	UPDATE: Renamed the Version # column to Batch # and adjusted its width for better visibility. Updated the Grouping dropdown with new options: -Added Batch # under Received By -Added Received By & Batch # under Payment Method Added a global search field next to the Received By dropdown , allowing users to search across Customer Name, Entered By, Amount, Batch # , and more, regardless of date range . Moved the Green Search button to the right of the Customer dropdown and adjusted the header layout for a cleaner interface.	251110-08
25.1111		Debit Memo	BUG FIX: Fixed an issue where entering decimal values in the Amount field caused an error: <i>"Total applied amount would exceed debit memo amount. Please reduce the amount."</i> Resolved a problem preventing Debit Memo creation when QBO integration was enabled or disabled. It now works correctly for both QBO and Sage users. Corrected the "Select All" checkbox functionality in the Unapplied Amount Details section. Updated the delete function so that when a Debit Memo is deleted, any unapplied payments remain visible on the screen.	Mu251111-01
25.1111		Integrations	UPDATE: Updated the Estimated Delivery Date calculation to properly account for weekends and the company's delivery schedule . The system now uses the "We make Deliveries On: X days per week" setting to add extra days as needed. For example, orders received on Friday after 5 PM are now scheduled for delivery on the following Tuesday when a 5-day delivery schedule is configured.	
25.1111	YES	Reports	BUG FIX: Fixed an issue in versions 25.1023 and 25.1007 where the Invoice/Credit Report could not be printed or downloaded as a PDF . The issue has been resolved in the latest update.	
25.1110		Debit Memo	UPDATE: Added a search function in the Debit Memo list for easier lookup. Also completed Sage posting integration for Debit Memos.	
25.1110		Debit Memo	UPDATE: Completed the Debit Memo functionality to allow adding new debit memos and offsetting unapplied payments directly from the list.	
25.1110	YES	Purchase Order List	BUG FIX: Updated the Records Per Page dropdown by removing the 500 option and ensuring the selection is saved per company. Also restored the navigation buttons for paging through records (e.g.,	251104-06

			next page of 100, etc.).	
25.1107		AR Receive Payments	BUG FIX: Fixed issue where some past paid Invoices and Credits were incorrectly appearing on the combined screen.	251106-04
25.1107	YES	Bin Management	BUG FIX: Removed all extra security restrictions from popup forms within Bin Management . Users with VIEW rights can now access and view the Warehouse Management form and any related popup forms . Users with EDIT rights can continue to make changes as expected.	251106-01
25.1107	YES	Find Parts	BUG FIX: Fixed issue where the correct Custom Price displayed when clicking the item description but reverted to the Default Price upon selection. Now, the selected item consistently retains and applies the correct Custom Price .	251106-02
25.1107		Invoice/Credit Memo	UPDATE: Payment Info Tab - Moved the Allocate popup to the Receipt # popup (mag icon next to Rec Amount). Simplified the payments table by: -Removing: Payment #, Acct, Amt Paid, Amt Received, Alloc -Renaming: Ck/Card #/CM → Pmt # Restored the Invoice Totals section to its original location.	25.1107
25.1107	YES	Portal Return Part	BUG FIX: Fixed issue with duplicate return parts showing zero quantity. Added validations to ensure users cannot return parts without selecting an item , entering a quantity and return reason , or when the return quantity exceeds the ordered quantity .	251107-01
25.1107	YES	Purchase Order	UPDATE: Updated the Records Per Page dropdown under the PO Line Items section. Options are now limited to 20, 50, and 100 records.	251104-06
25.1107	YES	Purchase Order List	UPDATE: (ALL TAB) Added a Records Per Page dropdown with options 20, 50, and 100. The system remembers the user's last selection and displays that number of records when reopening the PO List .	251104-06
25.1107	ISSUE	Reports	BUG FIX: Inventory Valuation (Historical) - Fixed an issue in version .1106 where the report failed to download to Excel , showing a " Bad Request " error. The report now downloads correctly without errors. Undefined error when opening the report.	
25.1107	YES	Reports	BUG FIX: Inventory Valuation (Current) - Fixed an issue that prevented the report from downloading properly. The filter " Valuation as of Date " has been removed for simplicity. The report now displays all items from the ItemStock table where the quantity in stock (QIS) is greater than zero, showing real-time inventory data as of when the report is generated.	
25.1106		AR Receive Payments	BUG FIX: Fixed issue with discount amount update when QBO is ON.	
25.1106	YES	Customer Detail	UPDATE: Portal Tab - Improved handling for duplicate email errors. When an email is already in use, a new input box appears with the message: Title: Cannot Save Message: User cannot be added because this email is already in use. If you would like to replace the existing Portal account associated with this email, please type REPLACE USER in the field below and click OK . Typing REPLACE USER will replace or relink the existing account, followed by a confirmation popup: " User Successfully Added. "	251105-02
25.1106	YES	Invoice / Credit Memo	UPDATE: Payment Tab - Adjusted the layout to stretch the payments table, making columns and headers wider and easier to read.	
25.1106	YES	Invoice / Credit Memo	BUG FIX: Implemented an automatic refresh after making a payment so the Magnifier icon appears immediately without requiring manual page refresh. Fixed the Sales Order # column issue	251023-07

25.1106	YES	Purchase Order	UPDATE: Added a Records Per Page dropdown under the PO Line Items section with options: 20, 50, 100, 500, 1000, ALL. The system now remembers the user's last selection and automatically displays that number of records when reopening the PO screen.	251104-06
25.1106	ISSUE	Reports	UPDATE: Fixed issue where the Historical Report would not download to Excel . Updated the Historical Report to match the layout of the Current Report, while pulling data historically from the ItemTransactionLog . Undefined error when opening the report.	
25.1106	ISSUE	Scanning Report	UPDATE: Updated labels as follows: PO Items change to: Put Away - PO Items Returned Items change to: Put Away - Returned Items Count by Bin change to: Inventory - Count by Bin Count by Item change to: Inventory - Count by Item Completed functionality for Inventory Count by Bin and Count by Item , logging details in ScanLog and displaying them in the Scanning Report . Sum total needs to be fixed.	
25.1105		AR Receive Payments	UPDATE: Tested and updated the Post button behavior for both scenarios — when QBO (QuickBooks Online) is ON and when both QBO and Sage are OFF. Ensured the button functions correctly in each case and renamed it appropriately based on the active integration setting.	
25.1105	YES	Find Parts (Non-Auto Version)	BUG FIX: The Deep Search logic has been updated to locate items matching any portion of the item name or number — including numeric or text fragments at the end — so users no longer need to enter the full item name to find results.	N251031-01
25.1105	YES	Find Parts (Non-Auto Version)	BUG FIX: When the Automated Tax option is enabled, the Sales Tax was not being calculated automatically on the Find Parts (Non-Auto Version) screen. This functionality has been updated so it now works the same way as the Auto Parts version — automatically calculating tax when items are added. Additionally, a "Calc Tax" button has been added next to the tax field, allowing users to manually recalculate tax when needed.	N251103-01
25.1105	YES	Invoice/Credit Memo	UPDATE: Payments Info : Added a new Allocation column with a Magnifier icon. Clicking the icon opens a popup displaying Payment Details , including the related Credit Memo number and associated payment information. Functionality for Unapplied Payments will be added later once the Debit Memo feature is completed.	
25.1105	YES	Invoice/Credit Memo	BUG FIX: When the magnifying glass button is clicked on a Receipt ID within a payment line item, a popup will now appear showing detailed payment information including Payment Date , Payment # , Payment Amount , and a breakdown of the Invoices and Credits applied to that payment. This functionality now mirrors the behavior found in AR > Receive Payments > Payment History when clicking the magnifying glass next to a Receipt ID .	251023-07
25.1105	ISSUE	Scanning Report	UPDATE: Updated the report to display detailed information based on PO Items and Returned Items . Changes were implemented in both the ScanBeta module and the Scanning Report , including corresponding updates to the Excel export to reflect the new details accurately. But it is not adding up correctly.	
25.1104	YES	AR Receive Payment	BUG FIX: Fixed an issue where changing the "Amount Applied" for Credit Memo payments on the Receive Payments screen did not correctly update the total Amount Applied displayed at the top of the screen.	

25.1104	YES	Credit Memo	UPDATE: Improved the Credit Memo deletion process to make it faster and added a loading spinner to inform users that the deletion is in progress.	251029-04
25.1104	YES	Credit Memo	BUG FIX: Fixed an issue where partial Credit Memo payments were not appearing on the Credit Memo payment popup screen . Partial payments now display correctly.	T251103-01
25.1104	YES	Debit Memo	UPDATE: Added a new "Add/View Debit Memos" button to both the Receive Payments screen and the Invoice Payment popup form . Clicking the button opens a Debit Memos list screen , similar to the Invoices/Credits list (but without Custom tabs or upload/download options). A "New" button has been added at the bottom left of this screen to allow users to create a new Debit Memo directly.	
25.1104		Descartes Integration	UPDATE: Completed analysis of the Descartes developer documentation and reviewed requirements for implementing invoice creation within the OSO app . This groundwork supports upcoming development for seamless Descartes-1place integration . Developed functionality to create invoices by calling the Descartes API using an XML body format. The API call is now integrated into the invoice creation process to streamline communication between 1place and Descartes .	
25.1104	YES	Sales Order	BUG FIX: Updated the Sales Order screen so that when the Delivery Date is changed, the Save button now visibly turns red, indicating that the record has been modified and needs to be saved. The button remains red until the changes are saved.	251029-03
25.1104	YES	Shipping and Receiving	BUG FIX: Fixed an issue where the Reprint Manifest function could hang for certain manifests. Updated the process so that when a Manifest or Printing Batch name is created, any spaces in the username are automatically replaced with hyphens ("-") to prevent errors.	251028-03
25.1103	YES	AR Receive Payments	UPDATE: Enhanced the AR Receive Payments screen to improve usability and workflow: -Automatically creates a New Batch Number when a Payment Method is selected. -Selecting an Invoice or Credit Memo no longer refreshes (requeries) the list, allowing users to verify their selection in place. -Added a new "Move Selected to Top" button (next to the Import button) to requery and bring all selected items to the top of the list. -Pressing Enter after typing a Search value now automatically finds, selects, and highlights the matching record.	
25.1103	YES	AR Receive Payments	UPDATE: Updated the AR Receive Payment History screen to remove dynamic scrolling and improve filtering behavior: -Displays all requested records up to 2,000. -If more than 2,000 records are selected, a popup appears: Title: Cannot Display All Records -When a Customer is removed from the filter , the dropdown automatically resets to All Customers . -If the date range is changed manually, the selection now auto-sets to Custom Dates , and the Customer filter continues to work properly.	251028-01
25.1103	YES	Purchase Order	BUG FIX: Fixed an issue where the PO Line Total was being rounded to a whole number. The Line Total now correctly displays decimal values for accurate pricing.	S251030-03
25.1103	YES	Reports	UPDATE: Updated all relevant reports to ensure the Warehouse information is displayed for every item on both reports.	
25.1103		Reports	BUG FIX: Fixed an issue on Inventory Valuation Report where second-level sorting was not functioning correctly. Also updated report	

			calculations to ensure totals match the actual inventory value based on: (Stock.Cost + Stock.AdditionalCost) × Stock.QtyInStock for each item.	
25.1103		Scanner	BUG FIX: Fixed an issue where a Credit Memo could be created with the same number as its originating Invoice , sometimes resulting in multiple duplicates (e.g., Invoice 123 and two Credit Memos also numbered 123). Updated the logic to prevent duplicate numbering, ensuring each Invoice and Credit Memo is assigned a unique number.	
25.1103	ISSUE	Scanning Report	UPDATE: Renamed the UserProductivity table to ScanLog and enhanced related reports: -Updated the Summary Report to display accurate totals by Task and SubTask . -Revised the Detail Report to include comprehensive information by user, bin, and item. -Made all totals on the Summary Report clickable, opening the corresponding Detailed Report in a new tab filtered to that specific user and task type. Summary Report does not display the proper count per user.	
25.1031		AR Customer Statements	UPDATE: Updated Customer Statements so that when the Type = Unapplied , the Number column now displays the corresponding Receipt # for clearer reference.	251029-05
25.1031	YES	Invoice	BUG FIX: Fixed an issue where the Authorization # field under Payments was always disabled in multiple versions (25.1030, 25.1023, 25.1007, etc.). The field is now editable as intended.	M251030-02
25.1031	YES	Invoice	BUG FIX: Fixed an issue where returning an item from an Invoice could trigger an incorrect message that it had already been returned, due to the item being linked to a different customer's Credit Memo . Updated the logic to handle cases where the Invoice item is not properly linked to the related Sales Order , preventing the error and allowing the return to process correctly.	S251030-02
25.1031	ISSUE	Invoice and Credit List	BUG FIX: Fixed an issue where selecting " All Records " on a custom list displayed a limited number of records (e.g., 1,800) but downloaded far more (e.g., 500,000+). The Download All function now correctly limits the export to only the records shown in the current custom list. Can't download to excel customer list (SO) Undefined Error when creating a custom list. (Invoice and Credits)	
25.1031	YES	Receive Payments	UPDATE: Updated the Receive Payments screen to allow users to select Credits first when applying payments, improving flexibility and workflow efficiency.	251022-09
25.1031		Reports	BUG FIX: Updated the Inventory Valuation Report to automatically download to Excel when record count exceeds 10,000. Fixed an issue where the Credit Memos - New tab was not functioning properly.	
25.1031	YES	Sales Order (Shipping & Receiving)	BUG FIX: Resolved an issue where items transferred between warehouses (e.g., from San Antonio to Houston) could get stuck in " NEW " status. The system now correctly updates item statuses in both the Stock Transfer and Sales Order Line Item tables to ensure consistency after a transfer.	251023-08
25.1031	YES	Scanning Report	UPDATE: Added a new Picking & Put Away (Summary) report in Scanning Reports, designed as a Crosstab/Pivot-style layout. Displays key pick types as rows: Picking - Pick to Cart - Orders Picking - Pick to Cart - Order Transfers Picking - Cart to Staging - Orders Picking - Cart to Staging - Order Transfers	

			Put Away – PO Items Put Away – Item Returns Each picker is shown in a separate column with row and column totals included. Added an Export button for easy data download.	
25.1031	YES	Scanner	BUG FIX: Addressed an issue where some Invoice numbers were being duplicated, typically for the same customer. Updated the logic to prevent duplicate invoice creation, ensuring new Credit Memos are only generated when a valid existing record exists.	
25.1030		Credit Memo	UPDATE: Expanded functionality for Credit Memos and item returns: -Added a new setting under Settings > Sales > Invoices & Credit Memos: “When returning items back to stock (on the Credit Memo screen) automatically reserve the item and place it in a bin called ‘ReturnsArea’.” When enabled, returned items are automatically reserved and moved to the ReturnsArea bin. -Updated info message to clarify how changing Credit Memo quantities affects locked daily sales figures. Added smart date-handling and back order prompts: -If a \$0 Credit Memo older than today’s date is changed, the date will automatically update to today. -If a non-\$0 Credit Memo older than today’s date is changed, the system now prompts users to create a Credit Memo Back Order instead, ensuring past sales figures remain accurate. -No prompt appears when changes are made on same-day Credit Memos.	
25.1030		Reports	BUG FIX: Fixed an issue with running Current and Historical Inventory Valuation Reports . These reports will now automatically download to Excel when the number of records exceeds the system limit defined in GlobalAdminSettings!MaxRecordsInReportBeforeRequireDownload.	251027-01
25.1030		Sales Order	BUG FIX: Resolved an issue where some Sales Orders were showing the same Creation Date and Expected Delivery Date , despite settings that calculate delivery dates based on cutoff times , zip codes , and other rules.	251028-06
25.1030	YES	Sales Order (Invoice/CM)	BUG FIX: Fixed issues with the Download icon to ensure users can now download either a single page or all selected records correctly. Resolved an issue where sort orders were not being saved.	
25.1030		Scanner	BUG FIX: Adjusted the Stock Picker behavior to better fit common warehouse setups. The system will now automatically ship from one or more shipments within the same warehouse if the required quantity is available locally. The Stock Picker will only appear when the quantity cannot be fulfilled from the local warehouse , allowing users to select stock from another location when necessary.	
25.1030	YES	Scanner	UPDATE: Updated the Check Stock button on the home screen to display the two available options for checking stock	
25.1029		AR Customer Statements	BUG FIX: Fixed an issue where Unapplied Amounts were included in the running balance but did not display their individual values. These amounts now appear correctly on statements.	
25.1029	YES	Credit Memo	UPDATE: Auto Date Change and Back Ordering . Added an (i) info icon to Credit Memos explaining how changing returned quantities can affect locked daily sales figures. This update provides a way to adjust \$0 Credit Memos or move unreturned items without altering past sales data. Returned items placed back into stock through a Credit Memo are now automatically reserved, matching the behavior used when items are returned via the scanner .	251023-05/ 251023-05a
			UPDATE: Added table creation and backend functionality for driver	

25.1029		Descartes Integration	mapping between 1place and Descartes . Designed the table structure and implemented methods to create, update, and delete driver mappings within Descartes.	
25.1029		Descartes Integration	UPDATE: Added table creation and backend updates for Descartes settings. Changes made in the UI for Production, Pre-Production, and Endpoints settings now properly save and update in the backend.	
25.1029	YES	Item Detail	BUG FIX: Fixed an issue where the values for Qty on Sales Back Order and Qty on Purchase Order were swapped. The fields now display correctly.	251028-04
25.1029	YES	Receive Payment History	BUG FIX: Fixed the Date Range and Export filters to display results correctly for larger date ranges. Added a new Customer Name filter for easier searching. Improved Excel exports to include column headers, column totals, and a grand total .	
25.1029	ISSUE	Sales Order (Invoices/Credits)	UPDATE: Improved functionality for Custom Tabs in the Invoice and Credit Memo lists: -Added the Select All on Page, Select All, and Unselect All options to all custom tabs (previously only available on the "ALL" tab). -Fixed an issue where selected sort orders in custom lists were not being saved. -Enabled column sorting on all custom list headers. Gets an undefined error when setting the sorting settings.	251023-10
25.1029		Sales Order	BUG FIX: Fixed and refined logic for the Created By, Entered By, and Sales Rep fields. -When a new Quote, Sales Order, Invoice, or Credit Memo is created, both Created By and Entered By are now set to the logged-in user (or the default integration/portal user). The Sales Rep is pulled from the Customer record , if available. -When creating a new record from another (e.g., Quote to SO, SO to Invoice, Invoice to CM), the Created By now carries over from the original record, while Entered By updates to the current user and Sales Rep copies from the source record.	251028-05
25.1028		AR Receive Payments	BUG FIX: Resolved validation errors that were preventing unapplied payments from being processed. Additionally, added the LinkedInvoicePaymentID field to the InvoicePaymentLineItems table to properly reference and track unapplied payments.	
25.1028		AR Receive Payments	UPDATE: Posting Validation Popup Form Updates Removed the "Retry 1 of 3" line. Added Auth # to the header tab order. Adjusted the user message formatting so the text wraps to a second line instead of running off the form.	
25.1028	YES	Credit Memo	UPDATE: Added new Credit Memo Auto Date Change and Back Order settings under Sales > Invoice/CM Options > Misc Settings . If a \$0 Credit Memo is edited and older than the current date, the system now auto-updates its date to today's date . If a Credit Memo > \$0 is edited and older than today, users are prompted to create a Back Order Credit Memo instead, ensuring historical sales data remains accurate.	251023-05
25.1028		Integration	BUG FIX: Resolved issue where creating a new order that triggers a stock transfer was incorrectly splitting the receipt even though it was unnecessary. Now, when a transfer is created (e.g., stock moved from one warehouse to another), the system correctly reduces QIS without duplicating or splitting the original receipt . The redundant "split" process has been removed to prevent stock misrepresentation.	251027-05

25.1028		Invoice/Credits (Sales Orders)	UPDATE: Updated the Custom tab to display both Invoices and Credit Memos , matching the behavior of the ALL tab. Now, all Custom tabs will show both record types by default unless a filter is applied to view only Invoices .	
25.1028	YES	Item Detail	BUG FIX: Fixed stock adjustment issues on the Item Detail screen: The Warehouse dropdown is now locked when editing a receipt to prevent accidental changes. If a different warehouse is required, users must delete and re-enter the receipt or split the receipt and create the new receipt in the correct warehouse. Renamed " Split Receipt Bin Location " to " Split Receipt " for clarity.	251027-04
25.1028	YES	Scanning Report	BUG FIX: Fixed the Scanning Report (Detailed) to correctly display distinct start and end times. Moved the Total Minutes column to the right of Start/Stop times and relabeled it as Total Time (min:sec) .	
25.1027		API	BUG FIX: Fixed issue where Markup Pricing Templates were not being applied correctly in the API > Item endpoint , causing items to show List Price instead of the correct calculated price.	251024-05
25.1027		AR Receive Payments	UPDATE: Added a validation to compare the count of invoices and credit memos linked to a payment. If counts match, " Post to Sage " appears; if not, only " Revert " and " Go Back " are shown to let the user fix and retry.	
25.1027		AR Receive Payments	UPDATE: Added a Batch Wise Report under the Group By option	
25.1027		AR Receive Payments	UPDATE: Added Batch visibility on the payment details popup (accessible via the magnifying glass icon). Updated filter section to a two-column layout: -Column 1: Date Range, From Date, To Date -Column 2: Group By, Received By Updated Display Records (green) button to recalculate data only when clicked, not while changing filters. Removed Export to Excel when using new Group By options. Removed non-functional Group By options. Fixed and verified Date Range filtering for all Group By selections (e.g., Entered By).	
25.1027		AR Receive Payments	BUG FIX: Fixed tab/enter order when entering payment information. Updated GL Transaction Line Items section to match the Receive Payment header style (same font, size, color) and removed colons (:). Cleaned up layout by removing extra spacing below totals. Updated label from " All Warehouse " to " All Warehouses. " Modified Batch field behavior: -Removed drop-down list. -Batch now remains active until the screen is closed or a new batch is created.	
25.1027		Purchase Order	BUG FIX: Resolved issue where the Date Received was being auto-filled with the PO Date. The field now remains null until the PO is received. Updated to ensure the Date Received field (date only, not date/time) is populated when: -Receiving via API (scanner receive options) -Using the PO screen receive button -When the last PO line item is received All existing records were set to null, and for completed POs , the first received line item date is now used to populate the PO Received date.	251023-04
25.1027		Reports	BUG FIX: Fixed issue where Quotation by Date and Quotation Report Excel downloads were failing with a "Site can't be reached" error.	

25.1027		Scanner	UPDATE: Added the option to display the PO # column and group quantities by individual PO .	
25.1027		Scanning Report	UPDATE: Updated the Warehouse User dropdown to show only users with WarehouseWorker = True . Fixed issue where Start Time and End Time were displaying the same values for each bin pick. Corrected Cart to Staging scan counts to ensure accurate reporting across all users.	
25.1027		Statements	BUG FIX: Fixed the Statements Bill To / Ship To address formatting issue across all servers	
25.1024		Customer Portal	BUG FIX: When a user linked to a Ship To account creates a Sales Order , the system now automatically determines and assigns the correct Bill To account using the same logic as the Find Parts and Sales Order screens in 1place .	251023-09
25.1024		Customer Portal	BUG FIX: Fixed issues logging in to the customer portal with the error message "There is a problem with your login. Please contact.....".	T251023-01
25.1024		Customer Statements	BUG FIX: Fixed Ship To and Bill To address formatting issues on servers 001 and 003, consistent with the previous fix.	T251023-02
25.1024		Item Pricing	BUG FIX: Fixed an issue where the Markup Percentage (MU%) on the Find Parts screen was not calculating correctly when using Markup Pricing based on Average Cost . The MU% now displays and calculates as expected.	T251016-01
25.1024		Receive Payments	UPDATE: Added " GL Transaction Line Items " title above the grid. Moved Add New Row and Recalc buttons beside the Combine Similar Journal Entries checkbox; renamed the red Recalculate button to " Recalc GL Totals " (white). Replaced Search by radio buttons with a dropdown list , defaulting to " All Customers ." Added a Batch # dropdown filtered to batches for the logged-in user (sorted descending). Added a New Batch button that auto-generates batch names using the format: UserFirstName-YYMMDD-HHMM-PaymentMethod Adjusted tab order (focus starts on Customer , then Payment Date → Payment Method → Batch # → Received From). Moved Export to Excel button to footer and renamed it Export . Repositioned the TOTAL label above the search area for a cleaner layout.	
25.1024		Shipping and Receiving	UPDATE: Updated the Manifest Print/Reprint dropdown to display distinct values from the DispatchOrTrackingNumber field in Sales Orders . Verified that the Export feature searches using the same field.	251023-02
25.1023		Import Integration	BUG FIX: Fixed a conversion error that occurred when running the Import Integration Line tool on delivery area mapping.	
25.1023		Receive Payment	UPDATE: Added a new popup message to assist users during posting. Trigger: When the user clicks Post and the payment is an Overpayment (Amount Unapplied > \$0). Popup Details: Title : Out of Balance Message : "It appears that the Payment amount is greater than the amount of the selected Invoices and Credits. Please click the 'Add New Row' button to make the GL transaction balance."	
25.1023		Receive Payment	BUG FIX: Enhanced the posting process with updated button functionality: Cancel (Go Back) : Deletes the payment and all associated line items, then reopens the screen showing all payment details and previous selections retained. Try to Fix Errors (renamed from Proceed) : Attempts to reprocess and	

			post any transactions that previously failed. -If all transactions post successfully, the button label automatically changes to Post to Sage. -If errors remain, the button retains the same label, allowing users to retry as needed.	
25.1023		Replenish Stock	BUG FIX: Fixed an issue causing execution timeouts during the Replenish Stock process.	
25.1023		Reports	BUG FIX: Quotations / Quotations by Customer: Fixed stored procedure issue where WarehouseId was being passed as null. Updated Excel export to correctly handle index changes. Quotations by Date: Corrected mismatched result count (limited to 10,000 records) and improved performance to prevent excessive load time. Quotations Line Items: Fixed issue where descending sorting was not working. Sales Reports: Verified functionality and data accuracy with KSI data.	
25.1023		Shipping and Receiving	UPDATE: Updated the value inserted into the InvoicePrintBatchNumber field to follow the new format: YY-MMDD-HHMM-LoggedInUserName-QTYINBATCH	
25.1023		User Security	UPDATE: Added a Global Search in the top-right corner of the User Security header. This search allows users to quickly locate records by any of the following fields: UserID, User Name, Email, Version #, Security Type, Copy User Settings, Default Warehouse	
25.1022		Customer Portal	BUG FIX: Removed Help Buttons that redirected portal users to the internal Help system. When opening User Security, the assigned User Versions now refresh automatically. Moved the Company Version dropdown list to the top of the screen for better visibility.	251015-06
25.1022		Customer Statements	BUG FIX: Updated the Statement Email process to use the Company's default email settings when a user does not have individual email settings configured, ensuring statements can always be sent successfully.	251013-06
25.1022		Financial Periods	BUG FIX: Fixed issue preventing Invoice Printing when the Financial Period was closed. Users can now click the magnifying (mag) buttons and successfully Print Invoices even if the associated Financial Period is closed.	
25.1022		Payments	BUG FIX: Fixed issue preventing entry of the Total Payment amount when the Payment Type is already selected, and ensured Payments can still be accessed even if the related Invoice or Credit Memo is in a closed financial period.	251016-03
25.1022	YES	Purchase Order	BUG FIX: Fixed issue where the Purchase Order Received Date was being automatically populated at creation instead of upon actual receipt.	251016-01
	YES	Receive Payments History	UPDATE: Added a Total Amount display in the top-right corner of the screen. Styled the total in a large, prominent font, consistent with the Statements screen design for better visibility.	251015-02
25.1022	YES	Receive Payments History	BUG FIX: Updated popup display logic so Credit Memos now appear as negative values.	251015-02
25.1022	YES	Receive Payments History	BUG FIX: Modified the Import functionality to ensure the process does not overwrite or change the Amount Received entered by the user.	251015-01
			UPDATE: Implemented Deep Scan functionality to improve item lookup	

25.1022		Scanning Report	OF THE implemented deep scan functionality to improve item lookup accuracy. When an item is scanned and not found, the system now automatically performs an extended search across multiple fields, including OEM #, Alt1 #, Alt2 #, SKU #, Vendor Item #s, and the Cross Reference table to locate and match the correct item.	
25.1022	YES	Scanning Report	BUG FIX: Improved and tested the Excel export functionality for the Scanning User Report to ensure accurate and complete data output.	
25.1022			UPDATE: Added a collapsible design for the multi-select dropdown on the Transactions screen to improve layout and usability.	
25.1017	YES	AR Statement	BUG FIX: Fixed issue where Bill To and Ship To addresses were missing the correct city line format. Both sections now display City, State, and ZIP on the bottom line as intended.	251016-02
25.1017		Data	UPDATE: Added option to display the PO # column and group quantities by each individual purchase order. Also updated button labels to: Check Stock by Item and Check Stock by Bin	251017-01
25.1017	ISSUE	Reports	BUG FIX: Quotations and Quotations by Date - Excel download issues resolved. Not Working Quotations by Customer - Total calculation issue corrected. Quotations Line Items - Excel export issue fixed.	
25.1016	YES	Customer Portal	BUG FIX: Fixed major security issues allowing portal users to access restricted 1place pages -New portal users now default to zero access (no View/Add/Edit/Print/Delete rights) in SystemUserObjectSecurity. -Portal users are restricted to portal-specific screens only. -Updated security logic to enforce access control - users can only access screens they have explicit rights for.	
25.1016		Financial Periods	BUG FIX: Fixed issue where Invoices and Credit Memos in a closed financial period could not be printed or emailed. Now printing and emailing are fully allowed for locked records.	151014-04
		Find Parts	Fixed issue where Custom Pricing with Price Level (for group of parts with the same Pricing Category) did not properly override the Default Pricing method.	
25.1016		Reports	BUG FIX: By Sales Rep (Details) - Corrected condition checks so data now filters properly by Sales Rep instead of invoice/credit table values. Fixed top-right Excel export issue caused by the same condition error. By Item - Corrected Total Cost calculation (was incorrectly using Invoice Line Total due to a field name change). By Sales Rep (By Order) - Fixed condition mismatch so report now displays correctly by Sales Rep. Also resolved the top-right Excel export issue.	
Scan 25.1016	YES	Scanner	UPDATE: Added a new feature called " Check Stock by Bin " to allow users to verify inventory levels directly within the scanner app.	
25.1015		API/Financial Periods	BUG FIX: Implemented validation to ensure that Invoices, Invoice Payments, and Credit Memos cannot be modified through any API if they belong to a closed Financial Period (as defined in AR > Financial Periods). Additionally, the Scanner module was updated to prevent changes during the Inspect Items step when a Credit Memo with a value greater than \$0 exists in a closed period. The system now returns the message: "Cannot modify this Credit Memo because it is in a Financial Period that is CLOSED."	151014-07
25.1015	YES	Invoices	BUG FIX: Resolved an issue where locked Invoices and Credit Memos could not be printed or emailed. Users can now print and email even when these documents are in a locked state.	151014-04

			when these documents are in a locked state.	
25.1015	ISSUE	Reports	BUG FIX: Invoices / Credits by Item (with Item Quantities): Corrected mismatched TotalNetPrice values to ensure accurate report totals. Invoices / Credits by Item Vendor and Customer: Fixed incorrect record display, a condition spelling error and resolved the Excel download issue. Invoices / Credits by Month (Totals): Corrected the month column to display accurate and properly aligned date values. Report not generating	
25.1015	YES	Scanning Reports	UPDATE: Updated the Scanning Report to display the OneSource username instead of the scanner username for all user-related fields.	
25.1015	YES	Scanning Reports	UPDATE: Updated End of Day Report and related Scanning Reports features: -Renamed Left Nav Bar and screen title to Scanning Reports. -Renamed report All to Picking & Put Away (Detail). -Removed reports Picking Summary and Put Away Summary. -Added new report Picking & Put Away (Summary)	
25.1015		User Security	BUG FIX: Adjusted the logic so that when a 'Custom' user updates Modules, Allow, or Do Not Allow settings, the system no longer updates any linked 'CopyDesignatedUser' fields on the Other Settings tab. Ensured that each user retains their own independent settings Only Module Security, Allow/Do Not Allow, and Report Security are auto-updated from the Custom user. Prevented automatic overwriting of warehouse or department assignments for users linked via CopyDesignatedUser	
25.1014		Receive Payments	BUG FIX: Resolved issue where certain payments showed a \$2 out-of-balance error despite GL lines being in perfect balance.	251013-04
25.1014	YES	Reports	BUG FIX: Resolved an issue affecting the Excel download from the top-right corner of the Invoices / Credits reports . The export now functions correctly.	
25.1014	YES	Reports	BUG FIX: Resolved an issue where exporting detailed data from the Invoices / Credits report only exported summary data and switched the screen to summary view. The export now correctly downloads the detailed data without changing the current view.	
25.1014		Scanner	UPDATE: Updated the Inventory Count Bin process to retrieve details from the bin count and correctly display both discrepancy and non-discrepancy item details in the output.	
25.1013		Customer Portal - Users	BUG FIX: Fixed issue where newly approved portal users without a valid CustomerID were gaining full 1place access. Now, the system verifies that each user has a valid CustomerID before activation. If missing, the account is disabled and a login error message is displayed prompting the user to contact support.	251010-05
25.1013		Customer Pricing	BUG FIX: Fixed an issue where pricing templates and custom pricing by category were not applying the correct price-level discounts . Custom pricing that uses a price level now correctly overrides default pricing for the specified categories, while items not in a custom pricing group continue to use their original/default pricing.	251008-03
25.1013	YES	Receive Payments	BUG FIX: Resolved an issue where Credit Memo payments and Credit Refund payments were not properly offsetting each other, ensuring both now correctly cancel out to maintain accurate account balances.	
25.1013	YES	Reports	UPDATE: Set a consistent default sort order across all Invoices/Credits reports , including both Summary and Detailed versions.	
25.1013	YES	Sales Order	UPDATE: Added new "Re-Import Line Item(s) from Integration Log" option under More Options in the Sales Order footer. This tool allows users to reconnect to the integration database and re-	251008-01

			import missing line items from the integration log if a Sales Order header was created but items failed to import due to server resource issues, ensuring complete and accurate order recovery.	
25.1010		Reports	BUG FIX: Fixed download and total calculation issues across multiple reports - including Invoice/Credits by Item Vendor and Customer , Invoice/Credits Line Item by Vendor , and Year Comparison by Item (Alpha) - ensuring accurate totals and successful Excel exports.	
25.1010	YES	Sales Order	UPDATE: Added the CreatedDate field to both Sales Order and Invoice Lists for better tracking and visibility of record creation dates.	
25.1010	YES	Scanner	BUG FIX: Fixed the issue where the scanner would not allow scanning duplicate items for credit memos - now all remaining quantities of the same item can be properly converted to credit memos after partial returns.	
25.1010		User Security	BUG FIX: Fixed the user security issue on both Live and S3 servers	
25.1009	YES	Reports	UPDATE: AR Aging Report: Added a magnifying glass (view) button to quickly open and view the related Invoice or Credit Memo directly from the report.	
25.1009		Reports	BUG FIX: Reverted the 100,000 record limit restriction and updated the reports to retrieve records dynamically, consistent with other reports. Verified that all Invoices/Credits reports export to Excel properly.	
Scan 25.1009	YES	Scanner	UPDATE: Updated the End of Day Report to display only these columns: -Total Items Picked -Total Items Put Away -Total Scans Removed unnecessary columns such as Total Diff Bin and Total Can't Find , and added a totals row at the bottom for summary values. Additionally, implemented an API controller in the Scan app and integrated it with 1place to retrieve report data through the API instead of directly accessing the Scan database, improving performance and data security.	
25.1009	YES	Shipping and Receiving	UPDATE: Added a new export feature in SHIP/REC > To Dispatch > Edit/Reprint Batch - users can now select the new " Export all Dispatches that start with _____ " option to export all dispatches for a given day to Excel , enabling easier daily delivery reconciliation for the accounting department.	251008-02
25.1008	YES	Customer Statements	UPDATE: When the user changes the date range , the Preview button now turns blue and changes its label to Recalculate Totals . Clicking Recalculate Totals refreshes and redisplay the statement totals for each company and updates the top-right summary. After recalculation, the button returns to green and the label reverts to Preview Statements . The From/To dates and other settings now remain unchanged while the screen is in use (no auto-reset).	
25.1008		Purchase Order	BUG FIX: Resolved an issue in Purchase Orders where auto-shipping more than 50 line items caused the page to hang and display an invalid pop-up message.	M250917-01
25.1008	YES	Reports	BUG FIX: AR Aging Reports - Updated the screen layout and functionality: Limited the screen height to a maximum of 80% of the display, ensuring the header and footer remain visible Added a universal search feature allowing users to search for any value. Add a white Export to Excel button on bottom left of footer	
25.1008		SOPO	BUG FIX: Fixed an issue in SO - SOPO where the system failed to auto-select the appropriate vendor on the Vendors page.	M250917-03
25.1007		Admin	UPDATE: Added functionality to set the 1place version for a Company	251008-04

25.1007		Admin	and/or its Users when operating in Parent Company mode.	251002-01
25.1007	YES	Purchase Order	UPDATE: Added " Date Received " as an optional column available for display in the PO list views.	251004-06
25.1007		Receive Payments	UPDATE: Updated Receive Payments so that when a payment is entered, the ModifiedBy and ModifiedDate fields remain null.	
25.1007	YES	Receive Payments	UPDATE: Updated Receive Payment History to include sorting by Received By, applied date format and currency formatting, and enabled sorting by Date and Receipt Number.	
25.1007	YES	Receive Payments	BUG FIX: Updated Receive Payments to include all customers with an outstanding balance, regardless of their active/inactive status.	251004-04
25.1007		Reports	UPDATE: Updated Invoices/Credits reporting so that any report with a Show Detail option uses a separate Summary report with its own optimized record source. This prevents performance issues when running large date-range reports (e.g., full-month sales) and removes the need for Excel downloads.	
25.1007		Reports	UPDATE: Added a clickable popup feature for each line item on the AR Aging Summary to display detailed supporting information. The popup shows the breakdown of transactions behind the summary line, including: -Date -Invoice/Credit Memo # -Invoice Type -Total Amount -Total Payments -Total Balance Due Each entry is listed individually, followed by summary totals at the bottom for easy verification. This allows users to quickly prove or disprove the summarized AR Aging data.	
25.1007		Reports	BUG FIX: Resolved multiple issues in Invoice/Credit reports to ensure accurate data and consistent totals: -Fixed Sales History – 2 Year Comparison by Item (Best to Worst) to correctly calculate totals based on the selected report period. -Corrected an issue where sales transactions on specific dates were showing a Total of 0. -Updated Invoices/Credits Line Items by Vendor and Invoice Item reports to properly display Credit Memo totals as negative values (e.g., -\$100) for accurate summation. -Fixed Invoices/Credits by Item, Vendor, and Customer to display values correctly based on Item Vendor and Customer , instead of pulling directly from the Invoice/Credit tables .	M250919-01
Scan 25.1007		Scanner	BUG FIX: Fixed an issue where simultaneous credit authorizations from multiple warehouses could cause cross-linking of warehouse IDs , resulting in Credit Memos being created under the wrong warehouse. Now, credit requests can only be authorized in the same warehouse where they were created, ensuring Credit Memos are always generated in the correct warehouse.	
25.1006	YES	Customer Detail	UPDATE: Adjusted field layout for better alignment and spacing. In the Settings Tab, Federal Tax ID and W-9 Last Updated fields are now grouped together. Shipped Via and Delivery Fee were moved under Payment Terms with no vertical spacing between related fields. Credit Limit, Credit Days, and Current Balance were repositioned directly below. Added new fields— Date Added, Added By, Date Last Edited, and Edited By —where Credit Limit was previously located.	251004-02
			UPDATE: Added a " Download to Excel " link for each section of the Data	

25.1006	YES	Data	Integrity report to allow users to export records with detected issues. The exported data includes relevant identifying and related fields for each category.	
25.1006		Integrations	BUG FIX: Added an additional check to ensure that when a customer is taxable, the system also verifies that the item itself is marked as taxable before applying tax . This ensures taxable customers only get charged tax on taxable items.	250926-02
Scan 25.1006	YES	Scanner	BUG FIX: Updated the PO receiving process to ensure PO Line Items are not marked as received until their corresponding ItemStock records are successfully created and verified. If an ItemStock entry cannot be found, an error is logged, and the system skips to the next PO line , leaving the affected line marked as unreceived. Implemented an optimized fallback to maintain performance while preserving data accuracy.	251004-09
Scan 25.1006	ISSUE	Scanner	BUG FIX: Added a new PO # column to the Put Away screen to allow users to select the correct purchase order or lot when multiple shipments of the same item are on dock. This ensures items are accurately linked to the correct PO during put-away, preventing discrepancies in dock audits. PO# column added but no way to choose the PO# to be put away.	251004-09
25.1003		Customer Statements	BUG FIX: Fixed search functionality to work across all types. Updated labels: "To" - " Bill To ," with " Ship To " moved to the right and aligned with " Bill To ." Improved layout and spacing: adjusted row and footer alignment, reformatted Remit To , Bill To , Ship To sections, and cleaned up extra spacing for a more compact design. Clicking Statements History and then back to Customers now refreshes the screen properly. Removed the statement layout option; all statements are now grouped by default. All Invoices/Credits are always shown (removed option to only display debits). Statement History now displays one line per statement with pagination support.	
25.1003		Customer Statements	UPDATE: Updated the Display drop-down options to: -All Statements – With Debit (+) Balance -ALL Invoices, Credits, Unapplied where the TOTAL combined > 0 -All Statements – With Debit (+) or Credit (-) Balance -ALL Invoices, Credits, Unapplied where the TOTAL combined ≠ 0	
25.1003		Customer Statements	UPDATE: Updated filtering so that only Bill To or Both (Bill To & Ship To) customers display as rows. Ship To customers will no longer appear separately, preventing duplicate values in statements.	
25.1003	YES	Data	UPDATE: Added commas to counts (e.g., 100000 → 100,000), right-aligned counts, left-aligned descriptions, compacted spacing, and updated description text to: "# Customers with NO Tax Codes, where Tax Exempt is not true."	
Scan 25.1003	YES	Scanner	BUG FIX: Fixed an issue where Credit Memos could not be located during the Inspect Item step if processed from a different warehouse. Returns are now supported across all warehouses for the same company, while all other processes remain restricted to the logged-in warehouse.	
25.1001		Customer Statement	UPDATE: Added a new Statement Layout dropdown with two choices: Standard (current format) and Grouped by Ship To Address . When grouped, invoices and credit memos are organized under a header for each Ship To address with totals shown for that address.	
			UPDATE: Added a new dropdown option under Statement Type called	

25.1001		Customer Statement	UPDATE: Added a new Display drop-down option under Statement Type called Statement Layout with the following choices: -Standard: Displays the statement in the current layout (no grouping). -Grouped by Ship To Address: Groups invoices/credit memos by Ship To Company Name & Address, displayed as a one-line header in a shaded gray box. Added an option to group invoices and credit memos by Ship To Address, with headers and totals shown for each address to make statements easier to read.	
25.1001		Customer Statement	UPDATE: Added a new Display drop-down under Statement Type with options: ALL – Debit & Credit Balances and ALL – Debit Balances (With Positive Balance). The screen now defaults to ALL – Debit Balances, with totals showing only positive balances under the title Total Debit Balance. If the user selects ALL – Debit & Credit Balances, the record source refreshes to show both, and totals update accordingly with the title Total Debit & Credit Balance. The new statement screen and print layout have been redesigned to better match the old statement's style while ensuring a clean, professional look.	
25.1001	YES	Purchase Order	BUG FIX: Verified and fixed all scenarios where a lot was being replaced with an existing one during PO receiving, ensuring proper handling and resolution.	
25.1001	YES	Reports	UPDATE: Added a new Data Integrity Report under the Exception Reports category to help identify and monitor inconsistencies or data issues across the system.	
Scan 25.1001	YES	Scanner	UPDATE: Built out the Settings Knowledge Base Article (KBA) to align with the sections displayed on the Company Settings screen, and completed the setup of email notifications by filling out the Subjects and Body text for each notification type.	
25.1001	Issue	User Security	BUG FIX: Updated printing settings to properly control access to Print and Email buttons. When a screen opens, the system now enables these buttons if the user has print rights, even if the restriction "User cannot make changes to Invoices & Credit Memos after printed" is enabled. Implemented on Invoices, Sales Orders, and Credit Memos, with rollout to other screens in progress. Still not working.	
25.0930		Customer Statements	UPDATE: Customer Statements – Updated to remove invoices and line items with \$0 balances , ensuring cleaner and more accurate statements.	250925-01
25.0930	YES	General	UPDATE: Performance Optimization – Improved screen load speed by ensuring no calculations are performed when it first opens. The Show All function was taking too long, so performance tuning and indexing optimizations will be applied. Totals will only refresh when the user clicks Refresh Totals, with further improvements guided by indexing best practices for faster processing.	
Scan 25.0930	YES	Scanner	UPDATE: PO Receipts will now insert "Scanner" into the CreatedByProcess field when receiving a PO, and the Put Away process will correctly create a new ItemStock row. Additionally, email notifications have been enabled to trigger when a PO is received (either incomplete or complete).	
Scan 25.0930	YES	Scanner	UPDATE: When users select Not Good for Stock, Yes Refund, the system will now follow the Good for Stock process (bringing in cost, recalculating totals, and updating records) to ensure all calculations are correct. At the end of this process, the system will then adjust the item back out	

			of stock and update the Credit Memo line item ReturnStatus to NotReturned . This ensures accurate totals while properly handling items not returned to stock.	
25.0930	YES	Shipping and Receiving	UPDATE: To Print and Pick - When assigning items to a picker the system now creates a row in the Order Fulfillment table and sets the Additional Notes to "PickerX STARTED PICKING Order". If the order is a transfer the note reads "PickerX STARTED PICKING Order Transfer"	250925-11
25.0930	ISSUE	Shipping and Receiving	UPDATE: Updated the Order search so that if the Order # cannot be found in the current on-screen list, the system will no longer search beyond it. Instead, it will play a negative sound and display a popup: Title: CANNOT FIND ORDER Message: This search process only looks in the list of Sales Orders on your screen right now. Still searches through the whole list.	250926-05
25.0930		User Security	UPDATE: Added a feature to allow users to view company-wide security rights for any selected screen. By right-clicking or using a hyperlink , a popup will display titled: "Company Wide Security Rights for %X% screen." This view is read-only and cannot be edited.	250929-01
25.0929	YES	About	BUG FIX: Updated the Help > About screen to correctly display the current system version instead of showing the default company name .	
25.0929		Customer Statements	UPDATE: Updated logic to display unpaid invoices using the calculation Total Invoice - (Total Payments + Open Credits + Unapplied Payments) instead of relying on the " Invoice Paid = False " status.	
25.0929		Integrations	BUG FIX: Resolved a critical issue where Sales Orders created through integrations were not correctly setting the TAXABLE = TRUE flag when Customer Tax Exempt = FALSE and Item Taxable = TRUE . This caused invoices converted from these sales orders to not apply taxes properly, leading to significant discrepancies.	
25.0929		Item Price Level	BUG FIX: Implemented validation to prevent duplicate Price Levels and enforced the use of a user-friendly Price Level drop-down list throughout the system, including Pricing Templates, Item Price Levels, Customer Pricing Table, and Customer Default Pricing . Users can no longer manually type values not in the list. All tables now store and calculate pricing based on the user-friendly price levels for consistency and accuracy.	
25.0929	ISSUE	Quick Search	BUG FIX: Added a column to display the Credit Memo # (CM #) to the left of the Company Name when searching by date and removed the Sales Order (SO #) column for a cleaner view. Rename the invoice number column into credit memo number	250926-06
25.0929	YES	Quick Search	BUG FIX: Improved performance for invoice searches to reduce delays when opening results and loading invoice details.	250926-04
25.0929		Receive Payments (& Customer Statements)	BUG FIX: Modified the stored procedures for Customer Statements and AR Aging reports to accurately calculate and display totals.	
25.0929		Receive Payments	UPDATE: Adjusted logic to display unpaid invoices based on the calculation: Total Invoice - (Total Payments + Open Credits + Unapplied Payments) instead of relying solely on the " Invoice Paid = False " status.	
Scan			BUG FIX: Removed the " Set Picking Order " button and related user security option. Updated " Manage Bins " to " Manage Bins & Zones ."	

25.0929	YES	Scanner	When selected, it now displays a message directing users to manage all item picking bins and zones in 1place via Warehouse > Bin Management , with only a "Go Back" button available.	
Scan 25.0929	YES	Scanner	BUG FIX: Improved layout and usability of the Scanner Settings by streamlining sections, adding clear headings and notes , aligning checkboxes for consistency, disabling non-functional options, and reorganizing settings for better clarity and flow.	
Scan 25.0929	ISSUE	Scanner	BUG FIX: Resolved an issue where a Credit Memo could not be created if an invoice had previously been converted to a CM and then deleted. The system was leaving residual data that blocked creating a new CM during the Return Items process. CM created is not linked to the invoice and no line items on it.	
Scan 25.0929		Scanner	BUG FIX: Resolved an issue where returned items marked as " Good for Stock " were not being properly restocked when the return occurred at a different warehouse than where the item was originally shipped.	250926-08
25.0929	YES	User Security	BUG FIX: Reviewed and fixed permissions for Credit Memos and Invoices to ensure proper control over View, Add, Edit, and Delete rights.	
25.0929	YES	User Security	BUG FIX: Updated the "Do Not Allow" setting to prevent users from modifying Sales Order, Invoice, and Credit Memo dates. This restriction now overrides both Module Edit rights and Status Edit rights for these records	
25.0929	YES	User Security	BUG FIX: Resolved issues where users were unable to create invoices without having Delete rights, and where Item Adjustments could not be added or edited due to incorrect permission handling.	250926-01
25.0926	YES	Audit Logs	BUG FIX: Resolved an issue where the audit log was freezing on load by preventing it from automatically displaying data until the user selects specific criteria to filter and display.	250917-03
25.0926		Item Price Level	BUG FIX: Updated the system so that the Price Level field in Item Details is restricted to predefined price levels in settings and ensured consistent functionality across all related modules.	
25.0926	YES	Reports	BUG FIX: AR Aging Summary - Fixed an issue where certain invoices were not appearing and ensured the Customer filter now functions correctly.	
Scan 25.0926		Scanner	UPDATE: Updated the scanner to use an internal, non-editable " Ready to Receive " status instead of relying on the user-defined " On Dock " status to ensure consistency and prevent configuration issues.	
Scan 25.0926		Scanner	BUG FIX: Retested AP Bill triggering upon PO completion to ensure proper functionality.	
Scan 25.0926	YES	Scanner	UPDATE: Updated email notifications to use the warehouse-specific email settings based on the user's assigned warehouse. Emails are now sent using the configurations set under 1place Settings > System > Email Settings .	
Scan 25.0926	YES	Scanner	UPDATE: Company Settings - Added a warehouse drop-down at the top of the settings form. When a different warehouse is selected, the fields will clear and allow the user to enter and save settings specific to that warehouse.	
25.0926	YES	Shipping and Receiving	BUG FIX: Updated the Find Order search field behavior on the To Dispatch screen so that when a user types or scans an order number, the focus stays in the Find Order field and the item is highlighted , instead of moving to the next field. Added success and failure sound cues to confirm if the order was found or not, improving speed and reducing the need for extra clicks.	
			BUG FIX: Resolved multiple issues with Item Price Levels. Dropdown	

25.0925	YES	Item Price Level	Lists now correctly display available price levels on Pricing Templates and Item Price Levels (Customer Details > Custom Pricing > Custom Pricing table (Price Level column)) Saving New Price Levels in Settings > Items > Item Price Levels now works without errors.	250924-02
25.0925		Integrations	BUG FIX: Update the integration to detect and correct invalid dates before saving them, ensuring proper delivery dates are recorded.	250924-05
25.0925	YES	Receive Payments	BUG FIX: Payment History - Fixed minimize and maximize functionality for group headers and added a Grand Total display at the bottom of the report.	
25.0925	YES	Receive Payments	UPDATE: Updated the layout and filtering options for the Payment History screen to improve usability and reporting flexibility: -Moved Received By and Group By filters to the right side, with Group By aligned to the far right. -Adjusted the Date Range dropdown to be slightly narrower for better layout balance. -Added From Date and To Date fields (defaulting to Today) to allow custom date filtering. -Introduced Custom Dates option in the Date Range dropdown , which sets focus on the From Date field when selected. -Updated the grouping header style to use the standard light green background with black text for consistency across reports.	
25.0925	YES	Reports	UPDATE: The AR Aging Summary Report now includes a new filter option, Show Unapplied Amounts (Yes/No), located above the Customer selection. The default setting is Yes.	
25.0925	ISSUE	Reports	BUG FIX: The AR Aging report is displaying incorrect totals in the Current column, causing discrepancies when compared to other reports. While the AR Received Payments and Statements reports match exactly to the penny, the Aging report does not align. The issue appears to be with the Current balance calculation, which should display the correct positive amount. Undefined error message when user fails to select the end date filter. It should give a prompt to select the end date.	
25.0925	YES	Sales	UPDATE: Updated the system to standardize date handling across all transaction types (Q, SO, I, CM, PO). Short Date Format: Transaction date will now be saved in short date format (e.g., 9/15/2025). Long Date Format: Added fields (DateAdded, DateEdited) to capture full date and time (e.g., 9/15/2025 2:24 PM). Applies to all sources, including Find Parts, Integration API, and Portal .	250915-17
25.0925	ISSUE	Sales	UPDATE: Updated Field Population Logic for Created By, Entered By, and Sales Rep New Record Creation (Q, SO, Inv, CM): - Created By and Entered By now default to the logged-in user (or the default user for Integration/Portal entries). - Sales Rep will auto-fill from the Customer record, or remain blank if no Sales Rep is set. Records Created from Another Record (e.g., Quote → SO, SO → Invoice, Invoice → CM): - Created By remains the logged-in user (or default user for Integration/Portal). - Entered By and Sales Rep are now copied from the source record for accurate tracking. Sales Rep field not working properly	250924-03
Scan			BUG FIX: Adjusted the logic for handling inspected items: Good for Stock sets InvoiceLineItems.ItemStockStatus to Returned .	

25.0926		Scanner	Not Good for Stock - Give Refund and Not Good for Stock - Do Not Give Refund both set <code>InvoiceLineItems.ItemStockStatus</code> to <code>NotReturned</code> .	
Scan 25.0926	YES	Scanner	BUG FIX: Cart to Staging : Updated the process to correctly display the equivalent 1place user in the Changed By User field when items are scanned to staging.	
25.0925	YES	Shipping and Receiving	BUG FIX: When dispatching only one driver, the Update button will now be displayed even if both Invoice and Manifest are selected.	250924-01
25.0925		System Time	BUG FIX: Resolved an issue where timestamps were displaying 6 hours ahead in various modules and logs. This update ensures all times now correctly reflect the warehouse's time zone . Areas updated are Item Transaction Log, ItemStock table, Stock Transfer, Shipping and Receiving modules .	250923-01
25.0924	YES	Bin Management	BUG FIX: Resolved an issue where bin locations were not opening properly for certain warehouses .	
25.0924	YES	Credit Memo (& Invoices)	BUG FIX: Resolved an issue where users were still able to edit Invoices and Credit Memos even when the setting to block edits after printing was enabled. The restriction now works as intended.	250915-15
25.0924	ISSUE	Credit Memo	BUG FIX: Resolved an issue where a payment was being automatically created and applied to a Credit Memo when it included additional charges, such as delivery fees , without any actual payment being made. CM carried over the freight even if payment is not complete and items are not yet returned.	
25.0924	YES	Email	UPDATE: The email screen layout was updated so the PDF preview now appears at the top right, next to the "To" email field, making it easier to review before sending.	
25.0924	YES	Receive Payments	UPDATE: AR Payments Received Report Enhancements Removed all Credit Memos that are not actual monetary receipts. The Date Range filter is now positioned on the left and defaults to Last 7 Days when the form opens. A Group By dropdown was added with the following options: None, Received By, Payment Method, Received By & Payment Method Totals are now displayed under each group when grouping is applied, as well as an overall total when no grouping is selected.	
25.0924	YES	Reports	BUG FIX: The From Date in the AR Aging Summary report now defaults to 01/01/2000. Additionally, issues with exporting the report to Excel were identified and resolved.	
Scan 25.0924	YES	Scanner	BUG FIX: The scan app now prevents receiving already received line items on a purchase order. This ensures that once an item has been received, it cannot be received again, preventing duplicate entries and over-receipts.	
Scan 25.0924		Scanner	BUG FIX: Updated the Sales Order fulfillment info to display timestamps based on the warehouse location's time zone instead of the user's local time .	250923-01
Scan 25.0924	YES	Scanner	BUG FIX: Improved performance of the Cart to Staging screen to reduce load times. Corrected the Date Received field when returning items to stock to ensure accurate tracking.	
Scan 25.0924	YES	Scanner	BUG FIX: Inspect Item to Return . Updated Step 1 of 2 to display the associated Invoice # , ensuring users can verify and track returns accurately.	
Scan			BUG FIX: Resolved multiple issues with the Inspect Parts process where items marked as Good for Stock were being returned with incorrect data including zero quantity and missing bin information	

Scan 25.0924	YES	Scanner	data, including zero quantity, and missing bin information. The system now correctly updates inventory, assigns the proper bin location (ReturnsArea), and ensures reservation details are properly logged.	
25.0924	YES	Shipping and Receiving	BUG FIX: Resolved an issue where searching by Sales Order # in the To Print screen was not functioning properly.	
25.0923		Email	BUG FIX: Updated email functionality for Quotes, Sales Orders, Invoices, Credit Memos, and Purchase Orders to first use user-specific email settings. If these are not configured, the system will fall back to global email settings. Fixed an issue where Credit Memos were not sending properly when relying on global settings .	250922-03
25.0923		Integrations	BUG FIX: Ensured that all QUOTE and SALES ORDER totals, including Taxes, Other, SubTotal, Grand Total, Total Paid, and Balance Due , are rounded to two decimal places to prevent discrepancies caused by extended decimal values.	250922-02
25.0923		Integrations	UPDATE: Updated the priority order for determining Ship To Address, Pricing, and Tax Codes to follow this sequence: -Supplier 3rd Party ID linked to a Customer -Default Fallback Customer -Zip Code	250922-01
25.0923	YES	Receive Payments	UPDATE: Added an X icon in the Action column, allowing users to easily delete GL rows and re-enter them if needed.	250922-05
25.0923	YES	Receive Payments	UPDATE: Payment History - Added filtering options for easier reporting: -Received By: Drop-down list of users who received payments. -Date Range: Quick-select options including Today, Yesterday, Last 7 Days, Last 30 Days, Last 365 Days, and ALL .	250918-08
25.0923	YES	Reports	UPDATE: AR Aging Summary Report - Replaced As of Date with Starting Date and Ending Date fields for date range filtering.	250922-06
25.0923	ISSUES	Reports	UPDATE: New Report Added: Invoices / Credits by Item Category (Summary) Features: Filter by Warehouse for targeted reporting. Displays data with columns: Category (alphabetical order), # invoice, # credits, \$ Invoices (total sales), \$ Credits (total credits), \$ Net Sales (Invoices minus Credits) Error when running report.	
25.0923	ISSUES	Reports	UPDATE: Renamed Invoice / Credit Payment Details to Invoices / Credits Payment Details . Renamed Invoices / Credits by Category to Invoices / Credits by Item Category . Removed Show Detail dropdown - report now always displays details by default. Fixed issue where running the report cleared all settings/criteria. Updated export behavior so Summary view will no longer automatically download to Excel unless there are more than 10,000 categories. Needs to update header name and fix report criteria	
25.0923	YES	Reports	BUG FIX: Resolved issues with Invoice/Credit reports , including: - Report Period dropdown now correctly updates the from and to dates. -Fixed an undefined error that appeared when running the Invoice/Credit by Date (Totals) report.	M250919-01
Scan 25.0923	YES	Scanner	UPDATE: ItemStock Table Enhancements: -Added a PurchaseOrderNumber field to the ItemStock table and related SQL tables. -Automatically insert the PO number when a PO is received. -Set the CreatedByProcess field to Scanner for items received via the	

			scanner. -Updated ReserveNotes format to: On Dock from PO Receipt - [PO Number] - Scanner.	
25.0923		System Time	BUG FIX: The Fulfillment Info tab now correctly records the date and time whenever a status is changed	250902-33
25.0922	YES	Credit Memo	BUG FIX: Resolved an issue where emailing Credit Memos —whether using a template or sending manually—was failing.	
25.0922	YES	Customer Lists	BUG FIX: Resolved an issue where exporting the Customer List displayed an incorrect message: "Do you want to export NaN records?"	250919-02
25.0922		Invoices	BUG FIX: Fixed an issue where invoices created from integrations were sometimes showing \$0 tax due to the use of TaxCode2 . The system was updated to stop using TaxCode2 for tax calculations and ensure consistent handling across all order types.	250919-02
25.0922	YES	Reports	BUG FIX: The summary view of the report, Invoices/Credits By Category , was cleaned up for professional formatting. When " Show Detail " is set to No , only columns that contain data are displayed, and empty columns (like Item, Description, etc.) are hidden. Added a Summary/Detail option. When " Show Detail = No ," the report shows only one line per payment. In Summary mode, the report does not prompt for Excel download.	250903-33
25.0922	ISSUE	Reports	UPDATE: A new report, AR Aging Summary Report , was added to show each customer with aging columns: Current, 1–30 Days, 31–60 Days, 61–90 Days, and 90+ Days. The report can be exported to Excel and is modeled after standard Accounts Receivable Aging reports. Fix range of time period, including the header.	250903-32
25.0922	YES	Reports	BUG FIX: Resolved an issue where the Invoices/Credit By Customer (Open) report was showing incorrect totals , displaying an extremely inflated value. The report now correctly calculates and displays totals , including proper handling of credits.	250918-06
25.0922		Sales Order	BUG FIX: Fixed an issue where Sales Orders and Invoices were not rounding totals and line item amounts to two decimal places, causing mismatches in payments . The system now properly rounds all currency values to the nearest cent to ensure accurate financial calculations.	250919-01
Scan 25.0922	ISSUE	Scanner	UPDATE: PO Receive - Final Screen : Updated the final receipt process to show a verification message and perform automatic checks before confirming success or failure. Successful receipts display a green checkmark and details; mismatches are rechecked up to three times before the final status is shown. No message shown while verifying and no green checkmark displayed.	
Scan 25.0922	YES	Scanner	UPDATE: Invoices / Credit Memo's Settings - Credit Memo Next Statuses for Scanner Returns: Added a new section for Scanner > Return Items > Inspect Part to allow setting optional "Next" credit memo statuses based on return type: Good for Stock, Not Good for Stock (Do Not Refund), or Not Good for Stock (Give Customer Refund). Statuses can be selected from a dropdown sorted in user-defined order.	
Scan 25.0922	YES	Scanner	UPDATE: Invoices / Credit Memo's Settings - Updated the Credit Memo Statuses section to hide the " Next Status " column and remove the delete (X) icon, preventing users from accidentally deleting statuses.	
Scan 25.0922	YES	Scanner	BUG FIX: Fixed an issue where credit memo amounts were not rounding correctly.	250919-05
			BUG FIX: Resolved PO: Fixed an issue where items were not	

Scan 25.0922	YES	Scanner	BUG FIX: Receive PO : Fixed an issue where items were not automatically assigned to the “ On Dock ” location when received. Items now correctly default to “ On Dock ” if no bin is specified.	250919-04
25.0922	YES	User Security	BUG FIX: Fixed an issue where changes were not being saved for users with “ Copy Designated User ” type. Now, the correct “ Copy User Settings ” user is pre-filled, and edits properly save.	
25.0919		Customer Portal	BUG FIX: Resolved an issue where the portal showed as disabled when accessing xxx.1place.cloud, even though it was enabled. The portal now correctly recognizes its enabled status and functions as expected.	
25.0919	YES	Receive Payments	UPDATE: Added pagination to the GL Cash Receipts and GL Cash Deposits summary screens with a default limit of 500 records per page, along with an option to view ALL records.	
Scan 25.0919	ISSUE	Scanner	UPDATE: Added functionality to set the CreatedByProcess field to “ Scanner ” whenever a Credit Memo is created through the Scanner , ensuring clear tracking of how the Credit Memo was generated. Created By has the username of the 1place user instead of Scanner	250918-02
Scan 25.0919	YES	Scanner	BUG FIX: Updated the Inspect Parts process to ensure that when an item is returned to stock, it is placed in the warehouse associated with the logged-in scan user , maintaining proper inventory tracking and location accuracy.	
Scan 25.0919		Scanner	BUG FIX: Added validation to prevent creating multiple Credit Memos for the same item(s). If a return request is already created through the Portal , the scanner will now detect and link to that existing Credit Memo instead of generating a duplicate.	
Scan 25.0919	YES	Scanner	BUG FIX: Enhanced the final validation for PO receiving . When the percentage received reaches 100%, the system now performs an additional check to ensure the stored procedure has had enough time to update and return accurate final totals.	
25.0919		Shipping and Receiving	UPDATE: All labels now dynamically use the SHIP/REC warehouse in their queries, ensuring labels are printed and sorted based on the specific warehouse’s BinPickingOrder and BinLocations .	
25.0918	YES	Receive Payments	UPDATE: A new checkbox option has been added under the GL Line Items : “Combine similar Journal Entries into 1 Journal Entry.” When enabled, the system will automatically merge identical entries (based on Location , Department , and Debit/Credit GL Accounts) into a single journal entry, simplifying posting and reporting. Posting functionality has been updated and tested to ensure accurate results.	
	YES	Reports	BUG FIX: Fixed an issue where downloading the AR Received Payment Report Summary generated an Excel file containing only the report header with no data. The export now correctly includes all report details.	
25.0918	ISSUE	Reports	BUG FIX: Resolved an issue where clicking on a transaction in the AR Payments Received (Detailed or Summary) report opened a blank tab instead of displaying the transaction details in a popup. Empty tab when transaction are clicked.	
25.0918	YES	Reports	BUG FIX: AR - Payments Received Report . All Grouping options are now fully functional. Sorting logic updated to prioritize grouping type , then date , and finally transaction number for better organization. Number formatting standardized for clarity, e.g., \$12,345.00 instead of \$12345.00.	
Scan 25.0918	YES	Scanner	UPDATE: At the end of the process, additional totals are now displayed, including Units on PO, Units Reserved, PO Total, and In Stock Total. Totals are shown in green when values match. If any values do not match, the mismatched lines will turn red for quick	

			identification.	
Scan 25.0918	YES	Scanner	BUG FIX: Resolved an issue where POs were being imported with duplicate line items. Added a Line Items count displayed above the total units .	
25.0917	YES	Receive Payments	BUG FIX: Resolved an issue where Credit Memos and Unapplied amounts were not being fetched correctly in the Receive Payments screen.	
25.0917	YES	Receive Payments	BUG FIX: Resolved an issue where applied credits were displaying an incorrect payment amount. The system now accurately shows the correct applied amounts for all credits.	
25.0917	YES	Receive Payments	BUG FIX: Resolved an issue where overpayments from imported ACH files were not generating corresponding credit memos . The system now correctly creates a credit memo for any overpaid amount during the import process.	
25.0917	ISSUE	Reports	BUG FIX: Added functionality to download the AR Received Payment Report (Summary) in Excel format, enabling users to easily export and analyze payment data. Downloaded excel file is empty. Only the header was downloaded	
25.0917	ISSUE	Reports	BUG FIX: Resolved errors preventing the Sales Tax Liability Report (Detail and Summary) from running and exporting to Excel with groupings. Corrected incorrect bottom totals to ensure accurate reporting. Corrupted file error when excel file is downloaded.	250915-02
Scan 25.0917	YES	Scanner	UPDATE: The PO Reconcile screen now updates in real-time, showing live progress of received lines and units. It highlights completion status in green when fully matched or red if mismatched and alerts the user if progress stalls for over 30 seconds.	
Scan 25.0917	YES	Scanner	UPDATE: Receive PO to Dock (Screens 1-3). The screen flow was updated to improve usability by placing the primary action buttons at the bottom of each screen, making them the most prominent and easy to access. Secondary actions like Go Back or Finish Later were de-emphasized with lighter styling to clearly guide users toward the main workflow.	
25.0916	YES	Credit Memo	UPDATE: Implemented a new restriction where users without edit permissions can still open and view Credit Memos but cannot make any edits, preventing changes to finalized financial records.	250915-15
25.0916	YES	Integrations	UPDATE: Added a new setting for each of the three integrations called "Created / Added By User" . This setting provides a drop-down list of users, allowing admins to specify which user should be automatically assigned to the Created By and Entered By fields when a new Quote or <u>Sales Order</u> is generated through integrations.	250915-09
25.0916		Receive Payments	BUG FIX: Resolved an issue where the import summary displayed red lines even when there were zero records. Updated the instructional message to correctly state "to the left" instead of "to the right."	250915-12
25.0916	YES	Receive Payments	UPDATE: When changing the customer , all fields on the screen now clear automatically. The Received from Customer field remains static and will not be altered by other actions. Added a new total field in the top-right corner to track running totals of applied discounts. Updated the Amount Paid column header to Amount Applied for clarity. Revamped GL totals to align with KBA titles and definitions, making it easier for users to verify correct GL entries.	

25.0916		Receive Payments	BUG FIX: Resolved multiple issues with the payment import process, including overpayments not generating credit memos, incorrect small amounts appearing on applied credits, and invoices being incorrectly flagged as paid or failed. Validation and reconciliation logic were improved to ensure accurate application and tracking of imported payments.	
25.0916	YES	Reports	BUG FIX: Group By now works correctly on Summary view, showing payments summarized and totaled by Received By . Detail view has been fixed to display accurate data. Clicking a transaction opens a popup with payment details directly on the report screen, instead of redirecting to the AR Receive Payments History tab.	
25.0916	YES	Reports	BUG FIX: Resolved an issue causing both the Detail and Summary versions of the Sales Tax Liability Report to fail when running for the date range 8/1/25 to 8/31/25.	250915-02
25.0916	YES	Sales	BUG FIX: Updated the system to ensure that status changes throughout the sales process correctly display the actual user who initiated the change, rather than defaulting to one of our support's username.	250915-10
Scan 25.0916	YES	Scanner	UPDATE: On Picking > Assigned to Me > Cart to Staging: Added validation to compare records with 1place. If the record does not exist in 1place, it will not be shown. If the status does not match the required Picking status, it will not be shown.	
25.0915	YES	Invoices	UPDATE: Added a clickable link on line 2 of the Invoice screen to open the related Credit Memo directly.	250912-04
25.0915		Receive Payments	UPDATE: When the Delete icon is clicked, the system checks if the Cash Receipt is linked to a Cash Deposit . If linked to a deposit : A popup alerts the user that the deposit must be deleted first. If not linked: A confirmation popup appears, requiring the user to type YES to permanently delete the payment . The message changes based on integration: Sage Intacct, QuickBooks Online, or no integration . When the Magnifying Glass icon is clicked, a popup shows a summary of the payment header and related invoices or credits , including amounts paid, discounted, and applied .	
25.0915	YES	Receive Payments	UPDATE: Updated the layout by removing the magnifying glass icon next to the Receipt ID . Added a new Actions column on the far left, containing both an X icon and a Magnifying Glass icon , spaced at least half an inch apart for better usability.	
25.0915	YES	Receive Payments	UPDATES: Clearing discounts when an invoice is unchecked. Updated GL totals layout with new labels: -GL Total Received -GL Total Sales Discounts -GL Amount Out of Balance (yellow background when out of balance) -GL Amount Applied to Invoices & Credits (green background when balanced) Recalc button now turns red when recalculation is needed. Added auto-fill for Unapplied Amount when adding a new GL row. Moved Notes to the far left and added a delete column for GL rows. Adjusted spacing for buttons in header, details, footer, and form footer for a cleaner layout.	
Scan 25.0915	YES	Scanner	BUG FIX: Ensured that every scan process is strictly filtered by the CompanyID tied to the logged-in company account. This prevents data from one company from being viewed or accessed by another, ensuring accurate data for both end users.	250912-03

			another, ensuring proper data isolation and security.	
Scan 25.0915	YES	Scanner	UPDATE: When creating a Credit Memo from the scanner, the Entered By field will now display the name of the logged-in 1place user linked to the scanner user , ensuring accurate tracking of who created the Credit Memo .	250912-01
Scan 25.0915		Scanner	BUG FIX: Resolved an issue where Credit Memos were being created with headers but no line items due to errors during the integration process using the createCreditMemo API . The system now detects and prevents incomplete Credit Memo creation, and automatically cleans up orphaned CM headers to maintain data integrity.	250912-02
25.0915		Shipping and Receiving	UPDATE: A new DispatchOrTrackingNumber column has been added to the SOLineItems table to replace reliance on the WarehouseBatches table. The system now updates this field with the Dispatch # for backward compatibility. Reprint Dispatch functionality has been updated to no longer depend on WarehouseBatches , and all related dependencies, including those for In Route to Warehouse , have been reviewed and updated accordingly.	250912-05
25.0915	YES	Shipping and Receiving	UPDATE: Enhanced search functionality now allows users to search across all screens using keywords for Item #, Order #, or Company Name for faster and more accurate results.	
25.0915	ISSUE	Shipping and Receiving	BUG FIX: Fixed issue with 4x6 labels not sorting correctly by BinPickingOrder and BinLocation Still not working	250912-05
25.0912	YES	Customer Search Field	UPDATE: The customer search functionality has been improved to resolve recent issues while maintaining compatibility with older versions. All customer search fields now work as follows: Search by Company Name (wide), Phone # (narrow), Address (wide: Street, City, State, Zip), Customer #, Address Type, and Warehouse . Contact Name search is not included. The " Search by Drop Down List for Finding a Company " setting has been moved to: Settings > Sales > Find Parts > Other Settings (above the other two drop-down settings). On the Find Parts screen, a new left/right arrows toggle button has been added next to the search drop-down. Clicking this button cycles the search priority through these options: - Company Name - Phone # - Address -Back to Company Name	
25.0912	YES	Item Details	BUG FIX: Resolved a critical issue where updating a Net Price and clicking Save caused all price levels to duplicate. This fix also includes verification to ensure List Price saves and updates correctly without duplication.	250910.09
25.0912	YES	Receive Payments	BUG FIX: When applying a payment with a discount , the system now correctly generates two separate GL entries . Example: If a \$100 payment is applied to a \$101 invoice with a \$1 discount, the correct entries will be: -Debit Cash in Transit \$100 / Credit AR \$100 -Debit Sales Discounts \$1 / Credit AR \$1	
25.0912	YES	Receive Payments	BUG FIX: When selecting an invoice , the system now auto-fills the Amount Paid field: If the invoice Total Balance Due is less than the Net Applied , it fills with the Balance Due .	

			If the invoice Total Balance Due is greater than the Net Applied , it fills with the Net Applied .	
25.0912	YES	Receive Payments	UPDATE: Added an uneditable SUM TOTAL beneath the Amount column in the GL lines section. This makes it easier to verify that the GL lines are balanced.	
25.0912	YES	Receive Payments	BUG FIX: Fixed an issue where GL Account balances could easily become incorrect when selecting or deselecting invoices during payment application. The system now recalculates GL balances automatically after each click. If recalculation is not possible in real time, a Recalc button has been added: Next to the Add New Row button above the GL rows. Below the Net Unapplied field when the Received from Customer amount differs from the total GL lines.	
25.0912	YES	Reports	BUG FIX: Resolved an issue where stock quantities in the Total Sales by Item report did not match the actual quantities shown in 1place. The report now accurately reflects current inventory levels.	250911-04
Scan 25.0912	YES	Scanner	BUG FIX: Resolved an issue where the Go Back and Request Authorization buttons were floating over the item list when the list was long. The buttons now stay properly positioned at the bottom of the screen.	
Scan 25.0912	YES	Scanner	UPDATE: UI Adjustments for Returns Put Away : All of NEXT and Save & Reconcile button were placed at the bottom of the page. Go Back button was placed above it and change its color to white.	
Scan 25.0912	YES	Scanner	BUG FIX: When inspecting and returning items to stock, the User Name now correctly appears in the <u>Item Transaction Log</u> .	
25.0912		Shipping and Receiving	BUG FIX: Resolved an issue where Zone buttons with item quantities were not appearing in the To Print and Pick screen, while they displayed correctly for other warehouses. Zone buttons now appear properly for all warehouses.	250911-07
25.0912	YES	Shipping and Receiving	BUG FIX: The Reprint Dispatch dropdown is now sorted in descending order, ensuring the most recent dispatches appear at the top. This fix also resolves the issue where certain dispatches were not showing in the list.	250912-01
25.0911	YES	Customer Portal	BUG FIX: In Settings > Customer Portal > Manage Users > Customer Portal New Sign Ups to Link & Approve , the Select Company Name dropdown has been fixed to search by Company name (not phone) and return the full customer list. Also fixed the issue with NONE of the customer drop Down lists work after the top line.	250910.05
25.0911	YES	Receive Payments	BUG FIX: Resolved an issue where receiving payments for invoices across multiple warehouses caused GL Out of Balance errors .	250910.07
25.0911	YES	Reports	UPDATE: Added new reporting features for AR - Payments Received - Filter by Received By to view specific user activity. - Group by Received By for organized reporting. - Include Received By in Excel exports for comprehensive data tracking.	250903-29
Scan 25.0911	YES	Scanner	BUG FIX: Credit Memos now always use the current date when created or when items are returned to stock using the scanner . The date is based on the warehouse time zone , or the local system/browser date if no warehouse time zone is set.	250911.04
Scan 25.0911	YES	Scanner	BUG FIX: In Return Items > Inspect Return , the issue where items could not be selected and the button failed to turn green has been resolved. Users can now properly select items and proceed without interruption.	250910.03
		Shipping and	BUG FIX: The Dispatch All Drivers screen in To Dispatch now functions	

25.0911	YES	Shipping and Receiving	BUG FIX: The Dispatch All Drivers screen in To Dispatch now functions correctly	250903-07
25.0911	ISSUE	Shipping and Receiving	UPDATE: Added a new Label Designer field called U/T with the description “ # Units / Transfers on Order. ” Value format: Units/Transfers (example values: 5/2 or 5/0) Example: Order has 2×Item A, 1×Item B, 2×Item C and Item C is a transfer. U/T = 5/2 . If Item C is not a transfer. U/T = 5/0 Need to fix the term as it should be U/T (with slash). Issue with the printed number of transfers.	250910.02
25.0911	YES	Shipping and Receiving	BUG FIX: Resolved an issue where Dispatches created in version .0909 were not appearing in the Reprint drop-down list. Dispatches now display correctly for reprinting, consistent with those created in earlier versions.	250910.01
25.0910		Reports	BUG FIX: All Invoice and Credit Memo reports will be reviewed to identify reports with incorrect totals. Any discrepancies found will be corrected to ensure accurate reporting.	250909-18
25.0910	YES	Reports	BUG FIX: Resolved an issue where the Customer drop-down list in various Invoice and Credit Memo reports was not displaying all customers. It now shows the full customer list as expected.	250909-17
25.0910	YES	Reports	BUG FIX: Resolved issues with the Sales Orders by Date report where the Tax column was incorrectly showing \$0 and totals were incorrect for orders with two or more line items.	250909-16
25.0910	YES	Shipping and Receiving	UPDATE: Added navigation controls (Next, Show All, etc.) to the top of the To Print and Pick sections, and to the bottom of To Print and Pick for easier access and improved usability.	250903-09
25.0910	YES	Shipping and Receiving	BUG FIX: In SHIP/REC: To Dispatch , the Records per Page setting at the bottom was not saving or triggering a search. This has been corrected, and the setting now works as intended.	250909-15
25.0910	YES	Shipping and Receiving	BUG FIX: Resolved an issue in To Print, Picking, and To Dispatch where typing a Sales Order # (or part of it) and pressing Enter would not trigger a search. The system now correctly searches immediately upon pressing Enter, without requiring an extra click on the screen.	250909-14
25.0910	YES	Shipping and Receiving	BUG FIX: Improved the Select Dispatch Number dropdown in SHIP/REC: In Route to be wider and display up to 50 results. Resolved an issue where manually typing a dispatch number would not display the associated batch of orders, even though they existed in the system.	250909-13
25.0910	YES	Shipping and Receiving	BUG FIX: Resolved an issue where assigned picks disappeared from the To Print list but weren't visible on the Picking list. Added a Records per Page dropdown to both the top and bottom of the page, with the system remembering the user's selection to ensure all records are displayed correctly.	250909-12
25.0910		System Time	UPDATE: System time is now displayed accurately across key screens by following this priority order: 1. Customer Warehouse Time – Uses the selected customer warehouse time. 2. User Default Warehouse Time – If no customer warehouse is selected. 3. Default Warehouse Time – If the user has no default warehouse set. 4. Browser Time – Used as a fallback when no warehouse time zone is configured.	
25.0910	YES	Cash	UPDATE: When saving , the system now verifies that the Received From Customer amount matches the GL journal entry total. If they do not match, a message will appear: THE GL JOURNAL TOTAL DOES NOT MATCH THE RECEIVED FROM CUSTOMER AMOUNT.	

25.0909	YES	Management	Title: GL Entries Out of Balance Message: The Total Received from Customer does NOT equal the Journal Entry amount. Please select one or more additional invoices or add journal entry lines to balance the amounts.	
25.0909	YES	Cash Management	UPDATE: In AR - Cash Deposits, deposits are now grouped across the entire database, similar to AR - Receive Payments. -A single deposit (e.g., \$10,000) will create separate lines for each Warehouse, Debit Account, Credit Account, Location, and Department. -Added a new Source Entity column for improved tracking. -The Employee field now displays the username of the person who made the deposit and is locked to prevent changes.	250903-27
25.0909		Cash Management	UPDATE: In AR - Cash Deposits, the blue group headers have been updated to display Journal Entry Header and Journal Entry Line Items instead of just showing the total amount (e.g., \$1000).	250903-28.1
25.0909	YES	Receive Payments	UPDATE: The system now allows users to save a payment without selecting any invoices. This enables the creation of an unapplied credit directly, without requiring at least one invoice to be selected.	
25.0909		Receive Payments	UPDATE: On the final screen, if the Unapplied Amount is greater than zero, a red warning message will appear instructing the user to either select invoices to fix the balance or click Save to create an Unapplied Credit.	
25.0909	YES	Receive Payments	UPDATE: The green "Proceed (and make Credit if necessary)" button is now disabled if the Total Difference is negative or if credits in the file are over-applied.	
25.0909	YES	Receive Payments	UPDATE: At the end of the payment import process, the system will now: -Display the pre-selected, pre-matched list of green Invoices and Credits. -Show a popup summary screen providing an overview of the file, including matched, unmatched, and failed records.	
25.0909	YES	Receive Payments	UPDATE: The final Excel export for payment import results now uses clearer Status field values: Paid = FAILED: Not applied, paid previously Valid = SUCCESS: Match found, payment applied Not Found (in 1place) = FAILED: Not found in 1place Not Found (for selected customer) = FAILED: Found in 1place, but linked to a different Bill To Customer	
25.0909		Reports	UPDATE: The Invoices/Credits By Category summary has been reformatted for a professional layout. When Show Detail = No, the report now displays only the column headings and values that contain data; empty columns (like Item, Description, etc.) are hidden with no headers shown. The overall styling, alignment, and spacing have been cleaned up so the summary looks polished and easy to read.	
25.0909	YES	Sales Order	UPDATE: When a user manually changes the Sales Order status, the system will now update the Fulfillment Info automatically to reflect the change. Adds an entry to the Additional Notes field with the following format: Status manually changed by [UserName]	
Scan			UPDATE: The Inspect Items workflow has been updated to include an additional step when a user selects Not Good for Stock on Screen 2 of 2. A new Screen 3 of 3 now appears, asking: "Do you want to give the Customer a Refund?" Options: Go Back (white button), No, Do Not Refund, Yes, Give Customer Refund	

25.0909	YES	Scanner	If there is only one line item, the system will: -Change the Credit Memo Status to RA Denied. -Add a comment to the line item: <i>"Return Authorization Denied by %User% on %Date%."</i> -Log the return by placing the item back into stock, then immediately adjust it back out, recording both transactions for audit purposes.	
Scan 25.0909	YES	Scanner	BUG FIX: We addressed an issue where the Authorization process could create two Credit Memos for the same Invoice within seconds. The system now includes additional checks to confirm that a Credit Memo hasn't already been created before generating a new one. This update also ensures that if a Return Authorization was created through the Customer Portal, the scanner will not create another duplicate Credit Memo. Thorough testing was performed using portal-based returns to verify this behavior.	
Scan 25.0909	YES	Scanner	UPDATE: During the Credit Authorization step, newly created Credit Memos will now use the current date instead of defaulting to the Invoice date .	250908-02
Scan 25.0909	YES	Scanner	UPDATE: The Proceed, Done, and Finish buttons are now consistently placed at the bottom of the screen for all steps in the return process for better usability.	
Scan 25.0909	YES	Scanner	UPDATE: Standardized button placement and styling across the Return Item Screen for a cleaner, more consistent, and user-friendly experience. The Next buttons(such as Proceed, Done, etc.) are now consistently placed at the bottom where applicable, with Go Back buttons updated to a white button with blue text to de-emphasized them.	
25.0909	YES	Shipping and Receiving	UPDATE: When the In Route to Warehouse screen opens, the Status field will now auto-fill to "To Dispatch" by default. If a user clears the Status field and attempts to transfer without selecting a status, A warning message will appear: Title: Status Missing; Message: Please select a Status before proceeding.	
25.0909	ISSUES	Shipping and Receiving	UPDATE: The Stock Selector has replaced the old Stock Transfer screen, making it easier to choose and manage inventory for sales orders. -Items are now shown in FIFO order with clear visibility of Reserved stock. -Reserved stock cannot be selected or shipped, ensuring accurate allocation. -If an order cannot be fully fulfilled from the order's warehouse, the Stock Selector automatically pulls available stock from other warehouses in priority order. When shipping from multiple warehouses: -The system creates separate Sales Order line items for each warehouse fulfilling part of the order. -It also generates separate Stock Transfers to move inventory from those warehouses to the order's warehouse, ensuring accurate tracking and fulfillment. FIFO sorting issue	
25.0909	YES	Warehouse	UPDATE: Enhanced warehouse calculations and validations to ensure data accuracy and consistency across inventory processes, including stock levels, reservations, and item availability.	
Scan 25.0908	YES	Scanner	BUG FIX: Receive PO , items now lock correctly after receiving.	
Scan 25.0908	YES	Scanner	UPDATE: The Scanner now displays the current version number immediately after login, allowing users to quickly confirm the version	250903-23

			they are using.	
Scan 25.0908	YES	Scanner	UPDATE: Put Away Items, when moving items from one receipt to a new receipt (e.g., moving part of the quantity from On Dock), the Inventory Transaction Log will now display the original bin location in the Transaction Number field using the format: Moved from Bin: X	250903-20
Scan 25.0905	YES	Scanner	BUG FIX: Put Away (5-step process), when partially putting away items, the new receipt now correctly sets the Cost, Added Cost, and PO #	
Scan 25.0905	YES	Scanner	UPDATE: Return Items > Inspect Items , when the Qty Returned is changed from 0 to a value greater than 0 , the Credit Memo date now automatically updates to the current date. The date is based on the Warehouse Time Zone setting . If no time zone is set, the system date will be used by default.	
Scan 25.0905	YES	Scanner	BUG FIX: Inspect > Good for Stock . Footer totals (Tax and Total fields) now update and refresh correctly after inspection. Credit Memo now properly links to the related Invoice . Sales tax is now calculated correctly for non-tax-exempt customers when items are marked as <i>Good for Stock</i> , using the same calculation process as line item price changes.	50903-18
Scan 25.0905	YES	Scanner	BUG FIX: Put Away Partial Receipt from On Dock where, when moving the remaining quantity (X) of an item to a new bin, the system would not properly update the Reserved status or Reserved Notes . The system now keeps the same receipt while correctly setting Reserved to FALSE and clearing the notes.	250903-13
25.0905	YES	Shipping and Receiving	UPDATED: The Search Field in Ship/Rec: To Dispatch has been updated to allow searching by both Order # and Customer Name .	
25.0905	YES	Shipping and Receiving	BUG FIX: Resolved an issue in Ship/Rec: To Print & Pick where Zone buttons were displaying duplicate zone names with different counts. Zones now display correctly without duplicates.	250904-01
25.0905	YES	Shipping and Receiving	UPDATE: The Edit/Reprint Manifest feature has been updated and renamed to Edit/Reprint Manifest or Invoices to better reflect its functionality.	
25.0905		System Time	UPDATE: Adjusted all timestamps across the system for Quotes (Q) , Sales Orders (SO) , Invoices (I) , Credit Memos (CM) , Purchase Orders (PO) , Customers (C) , Vendors (V) , and Items (I) to use the Warehouse Time Zone set in the WarehouseLocations table.	
25.0904	YES	Credit Memo	BUG FIX: Resolved an issue where Credit Memo status changes were not being saved correctly. The status will now update and remain accurate after any changes are made.	
25.0904	YES	Invoices	BUG FIX: Resolved an issue where partial or duplicate invoices were being generated with totals but not fully completed.	
25.0904	YES	Item Detail	BUG FIX: Resolved an issue where the Item Transaction Log was not displaying the User and other relevant fields for certain actions, such as Scanning Transfer In and Recalc Benchmark . These details now display correctly.	
25.0904	YES	Item Detail	UPDATE: Item Detail > Stock > Adjust Quantities in Stock > Edit Receipt . The RESERVED checkbox now appears in Edit Receipt when the actual receipt has Reserved = True .	250903-01
25.0904	YES	Receive Payments	UPDATE: The Receive Payments screen now supports viewing and applying payments to invoices and credits across all warehouses in one place. Key Changes: All Warehouses View : Added an "ALL Warehouses" option to the warehouse dropdown. By default, this option is selected to display all invoices and credits in the system. Updated Journal Entry Layout : Moved journal entry fields into a table	

			format with columns for: Warehouse (WH), Debit (DR), Credit (CR), Location, and Department	
Scan 25.0904	YES	Scanner	UPDATE: When approving an authorization on the scanner, the message now displays: "Return Authorization # _____ was created."	250903-16
Scan 25.0904	YES	Scanner	UPDATE: During the Put Away process (5 steps for POs and item returns), every screen/step that displays an item and its location now shows an Rvd (Reserved) column. The column displays a checkmark when the item is reserved.	250903-15
Scan 25.0904	YES	Scanner	BUG FIX: When receiving a PO using the scanner , the system now correctly records the 1place user in the Item History for the received items.	250903-14
25.0904	YES	Shipping and Receiving	BUG FIX: Resolved an issue where selecting a Driver Dispatch # from the dropdown list in Ship/Rec: In Route would unexpectedly log the user out and return them to the login screen. Users can now scroll through and select delivery batches without being logged out.	
25.0904	ISSUES	Shipping and Receiving	NEW FEATURE: To simplify and improve batch handling, two new fields have been added to the SalesOrder table: - InvoiceCreatedDateTime - InvoicePrintBatchNumber Key Changes: When creating invoices from selected Sales Orders , the system now updates: - InvoiceNumber - InvoiceCreatedDateTime - InvoicePrintBatchNumber (format: YY-MMDD-HHMMSS-UserID) These new fields are now visible on the To Dispatch screen for easier tracking. Added a Reprint Invoice Batch option to the Edit/Reprint Manifest popup. -Displays a dropdown of the last 1,000 print batch numbers , sorted in descending order. -Selecting a batch generates a PDF print preview for quick reprinting. This update begins the process of phasing out the WarehouseBatch table and streamlining invoice batch management. The column Invoice Batch Print is not visible on the To Dispatch screen.	
25.0904		Shipping and Receiving	BUG FIX: The system now correctly displays the quantities shown next to each status in Shipping & Receiving Screen.	
25.0904	YES	Shipping and Receiving	UPDATE: In the To Dispatch screen, the checkbox label in the popup form has been updated from " Auto Create related Invoices... " to " Auto create Invoices... ".	250903-04
25.0904	YES	Shipping and Receiving	BUG FIX: When selecting a User on PICKING , the system now automatically applies Show All so their assigned orders are visible without needing to click it manually. The same applies when assigning more orders to a user — the system now automatically sets Show All so previously assigned orders remain visible and are not filtered out.	250903-03
25.0903	YES	Credit Memo	BUG FIX: When updating Returned to > 0 , the Line Item Total and Credit Memo Total now save correctly and no longer reset to 0 after closing and reopening the Credit Memo .	
25.0903	YES	Customer Portal	BUG FIX: The Customer Portal no longer allows ordering items that are not available because they are reserved .	
25.0903	YES	Integrations	BUG FIX: Items marked as RESERVED are no longer counted as available. If all stock is reserved, the ITEM API now sends QTY AVAILABLE = 0 .	250902-1

25.0903	YES	Sage Integration	BUG FIX: The Warehouse Bank Account Mapping list is now sorted for easier navigation and quicker account selection.	
25.0903	YES	Sage Integration	NEW FEATURE: Added and enabled the Make Sage AP Bill button at the bottom of the Purchase Order(PO) screen allowing users to create a bill in Sage directly from the PO .	
Scan 25.0903	YES	Scanner	UPDATE: On Settings > User, the User ID is now displayed in light grey next to the User Name for easier identification.	
Scan 25.0903	YES	Scanner	UPDATE: When a Credit Memo is created, the screen now displays both the Credit Memo # and the Invoice # so users can easily see which credit memo is linked to which invoice.	
Scan 25.0903	YES	Scanner	BUG FIX: After completing the Receive PO process on the scanner, the system now correctly reserves items . Previously, large POs were received properly but the items were not being reserved.	250902-14
25.0903	YES	Shipping and Receiving	UPDATE: In Ship/Rec: To Dispatch , the # Records per Page , Prev , Next , and Show All controls have been duplicated at the top of the list, placed to the left of the Gear button , for easier navigation.	250902-3
25.0903	YES	Shipping and Receiving	UPDATE: When using the Invoice Selected Orders option and clicking Proceed, the system now automatically selects the Auto create Invoices for Sales Orders in this Dispatch checkbox.	250902-12
25.0903	YES	Shipping and Receiving	UPDATE: When creating a new dispatch for a driver, the system now automatically assigns the next sequential number . Example: If the last dispatch was 250830-DriverX-01, the next one will be 250830-DriverX-02.	250902-11
25.0903	YES	Shipping and Receiving	UPDATE: Users can no longer be assigned additional pick tickets until they complete their current batch. Attempting to assign more will route the user back to the picking screen to continue their existing picks.	250902-9
25.0903	YES	Shipping and Receiving	BUG FIX: The system now correctly saves and remembers the user-defined # of Records to display in Ship/Rec screen.	250902-9
25.0903	YES	Shipping and Receiving	BUG FIX: At 100% resolution, the Records per Page, Prev, Next, Show All buttons, and scroll bars now display correctly without needing to zoom out.	250902-9
25.0902	YES	Credit Memo	BUG FIX: After marking an item as Good for Stock on the scanner, the Line Total , Subtotal , Total , Amount Applied , and Unapplied Amount now recalculate correctly on the Credit Memo .	
25.0902	YES	Customers	BUG FIX: The Company Name column now displays left-aligned, matching the alignment of other search methods.	
25.0902	YES	Reports	UPDATE: A new report, Invoices/Credits by Category , has been added to track invoices and credits grouped by category.	
Scan 25.0902	YES	Scanner	BUG FIX: When clicking DONE during credit authorization, the popup message now correctly says " Return Authorization Created " instead of "Items Returned to Stock."	
Scan 25.0902	YES	Scanner	BUG FIX: During credit authorization , when trying to go back to verify the return credit amount , clicking Go Back now correctly returns to the previous step instead of jumping two steps back to the Returns Menu .	
Scan 25.0902	YES	Scanner	BUG FIX: In Step 2 (Authorize Returns) , the item list now displays the correct amount, fixing an issue where it was showing double the actual value.	
Scan 25.0902	YES	Scanner	BUG FIX: When scanning an item for a Request Credit , if the Return Qty is set to 0 , all field background colors now correctly reset to white.	
Scan 25.0902	YES	Scanner	BUG FIX: When requesting credit, clicking Request Authorization now prevents moving to the next step if Return Qty = 0 and displays a popup message: " Please select Qty to Return. "	
		Shipping and	UPDATE: The Shipped Via dropdown filter and Select All checkbox	

25.0902	YES	Shipping and Receiving	have been improved to ensure they work correctly, providing accurate filtering and selection of records.	
25.0902	YES	Shipping and Receiving	UPDATE: Added a Records Per Page dropdown to To Print & Pick and To Dispatch screens, with options: 20, 50, 100, 500, 1000, and ALL. The system now remembers each user's selection for future sessions.	
25.0901	YES	Credit Memo	BUG FIX: The Refund option on Credit Memo Payments now allows users to enter an amount.	
25.0901	YES	Credit Memo	UPDATE: When updating a line item on a Credit Memo , the system will now adjust the document title automatically based on the subtotal: -If the Subtotal = 0 , the title will display as " Credit Authorization # " with a yellow background . -If the Subtotal > 0 , the title will display as " Credit Memo # " with a white background .	
25.0901	YES	Credit Memo	UPDATE: Printed Credit Memo document have been updated for clearer wording: - " Amount Received " is now labeled " Credit Applied/Used " - " Balance Due " is now labeled " Credit Available "	
25.0901	YES	Credit Memo	UPDATE: When a Credit Memo is created from an invoice , the system will now automatically record the logged-in user in both the Created By and Entered By fields.	
25.0901	YES	Customers Detail	BUG FIX: Customer Detail - Sales History : Loading Invoices/Credits in Sales History is now faster and more responsive.	
Portal 25.0901	YES	Customer Portal	BUG FIX: When a new order from the Customer Portal requires a stock transfer, the line item status no longer comes in blank. It now auto-ships and appears in the To Print & Pick of the transfer-from warehouse.	
Portal 25.0901	YES	Customer Portal	UPDATE: For orders placed through the Customer Portal , the system now adds the following details to the Comments section of the Sales Order in 1 place: -Line 1: Ordered on Customer Portal login: (shows the email address used to log in) -Line 2: Searched For: (shows the search terms entered, e.g., "08 Honda Accord" or "HO1000254")	
25.0901	YES	Quick Search	BUG FIX: Invoice search results by date now correctly sort by Date (descending) and then by Invoice # (descending) to ensure the most recent invoices are displayed. Searching credit memos by Date now works correctly and sorts by Date (descending) . On Customers search, the Company Name column is now left-aligned, consistent with other search results.	
25.0901	YES	Reports	BUG FIX: The Sales Tax Report now correctly displays gross sales, taxable sales, and non-taxable sales grouped by invoice.	
25.0901	YES	Reports	BUG FIX: The Total Adjustment column in the Item Adjustments Report now correctly displays negative values when items are removed from stock. The bottom total has also been updated to accurately reflect these negative adjustments.	
25.0901	YES	Reports	UPDATE: The Invoice/Credit Memo (Detail) Report now includes Total Cost alongside revenue and discount percentage, providing a full view of revenue, cost, and margins per invoice/credit memo.	
25.0901	YES	Reports	BUG FIX: The Invoices/Credits by Customer (Open) report now opens correctly.	
25.0901	YES	Sales Order Lists	BUG FIX: The Shipped Via column in Sales Order Lists now always displays correctly, matching the value shown on the order.	
25.0901	YES	Sales Order Lists	BUG FIX: Clicking a Sales Order in the Back Orders tab now correctly opens the order.	

25.0901	YES	Shipping and Receiving	BUG FIX: Dispatch #s created on the scanner now appear in 1place > Shipping/Receiving > To Dispatch > Edit/Reprint Manifest dropdown , allowing users to print Delivery Manifests .	
25.0901	YES	Shipping and Receiving	BUG FIX: PO Lines Removed from To Print & Pick List . Items from Purchase Orders (with no Sales Order #) will no longer appear in the To Print & Pick list .	
25.0901	YES	Shipping and Receiving	UPDATE: To Dispatch or Ship Screen - Shipped Via Filter The Filter by Shipped Via buttons have been replaced with a new Shipped Via dropdown list . -The dropdown displays all available shipping methods in alphabetical order . -Each option shows the total number of records for that method.	
25.0901	YES	Shipping and Receiving	BUG FIX: The Show All option now works seamlessly with sorting and other selections: -If a user sorts first and then clicks Show All , the sort will be retained. -If a user clicks Show All first and then applies a sort, the Show All view will remain active. -All settings, selections, and sorts are now preserved whenever Show All is used.	

25.0212 (released 02/12/2025)

Date	Task #	===== Type =====	Screen (or Report Name)	Description	Requested by Customer	Links to Additional Info
02/21/25	32192	Bug	Purchase Order	PURCHASE ORDER: When user click Recalculate button weight is not calculated.		
02/21/25	30808	Bug	Reports	Exception Report - Sales Order Item Price Changes: Shows error while running.	Quality	
02/21/25	32197	New	Printing	Add the time when a document was printed on All Document Print outs.	APS	
02/20/25	32193	Bug	Shipping and Receiving	Not showing the correct values based on the status.	Quickfit	
02/20/25	32191	Bug	Purchase Order List	PO List - When sorting the column for the Vendor Number an undefined error pops up. PO List - Vendor Number Column should be named as Vendor Name. Vendor number is different.	Quickfit	
02/19/25	32062	New	Sales Order	When the Qty Shipped is changed, check to see if the Lot Tracking true/false option on item is checked. If so, then POPUP a screen showing the Receipts in stock and allow the user to select WHICH receipt will be taken out of stock, rather than just taking First In First Out.		
2/18/25	32227	Bug	Reports	When reports module is clicked , the sales order module is duplicated in the list. Similar issue occurred in other companies in other modules.		

2/18/25	31873	Bug	Credit Memo	Credit Memo > Payment Info > Give Cash Back or Apply Credit: --Even when the date chosen is greater than the Invoice date, it still gives the date validation error. Example: The Invoice was created on 10/14/2024. Date on the payment date is 10/15/2024. --If the payment date was changed to 10/16/2024, the date on the "Date Paid" field still shows as 10/15/2024. --"Last Synced" field is not showing properly on the Payments Screen --"Give Refund" button is still working even without choosing any Payment Type of Refund. Also, I can still process a refund even after giving a full refund to the order. --Action(x) is not functioning	Quickfit	
2/18/25	32224	Bug	Import Wizard	Customer List > Update Wizard > The file was imported successfully, but some data (City) were not updated based on the file.	Express NH	
2/18/25	32194	Bug	Settings	User Settings > Edit User > Module Security: Look for Invoices and uncheck the Edit box. > It restricts the user to access the Invoice screen. This should only restrict user to edit any info on the invoice and still show the invoice form. (Same applied to all Edit checkbox settings)	Orlando	
02/17/25	32218	Update	Invoice Detail	Receive/Edit Payments > Add new Card Instead of a pop up message, the system should highlight the missing field so the user will know they forgot one of the details and they can properly store and save the credit card on file.		
02/17/25	32217	Update	Customer Detail	CREDIT CARD TAB When you add a new credit card and click the SAVE and SYNC button, it makes a copy of the other cards on file. Which shouldn't be happening. Also, remove the space on "Master Card" should be "Mastercard". Automatically add a / symbol when a user types the expiration date on the field. Also, do not allow the user to save the credit card if it is missing any details, I tried adding a card with just 6 digits and it was still saved instead of prompting the user to enter the whole credit card number. (most credit cards has 15-19 digits number)		

02/17/25	32216	Bug	Customer Detail	CREDIT CARD TAB and Invoice Screen > PAYMENT SCREEN When I use an existing card added thru the credit card tab on the customer detail screen to pay for an invoice, it does not work and error says invalid card number. Tried adding the same card thru the ADD NEW CARD button on edit/receive payment screen and it worked fine.		
02/17/25	32198	Bug	Reports	INVOICES/CREDITS PAYMENT DETAILS --Allow user to Group by = None --Sort by Invoice Number --After report is generated, when user clicks the Invoice Number header, it does not sort the records. Pls fix --Please put in newest branch version 25.0212	APS	
02/17/25	32150	Update	Reports	Invoice/CM --Group by = None --Cannot Download to Excel File --Cannot Print when clicking the Print button --Must correctly show all the fields/columns from the report --Must be sorted according to the sort option selected before generating the report. --When user downloads to PDF, the sorting is default to Customer name. Please sort according to the sort option selected before generating the report.	APS	
02/17/25	32220	Bug	Import Wizard	Encountered errors uploading files for Item stocks, item vendors and catalog.	Proparts	
02/17/25	32192	Bug	Purchase Order	The Recalculate button is not saving the values on the PO even when clicking save. Once the page is refreshed, the values are removed. (WE DID NOT MAKE ANY SAVE FUNCTION RELATED ON THIS.) When the CuSqFeet is selected to show on Line 2, it does not show the correct CuSqFeet based on the Vendor Item #. It only shows 0. If a PO has a lot of line items, the page loads, and will not work properly even when opening a new tab.	Quickfit	
02/17/25	32188	Update	Item Catalog	1d. DEFINE how the Item Description will be created. - When choosing option 1: Make Model Year Range - Partslink Description (Name) (Partslink Variables), it still shows the description based on option 2 format. Example: AC1000101 - Front bumper cover (LS; prime) 1993-1994 ACURA VIGOR Some Partslink Items are showing the wrong year range. Instead of 12-17, it shows as 12-14.		
02/17/25	32179	Bug	Customer List	Exported file for customers (Express), the discount percentage shows more than 2 decimals	Express NH	
02/14/25	32102	Update	Printing	Printing Options: Need to disable Printing Option settings to all transaction forms.		

02/14/25	32202	Update	Customer Portal	Customer Portal users should not be able to edit the Transaction info on Quotation Example: Date, Entered By, Payment Terms, Sales Rep, Order Source, Shipped Via and Job ID. Except for Customer PO #, Contact and Email fields. On the Line items table, these fields should also not be editable by users: Expiration Date Warehouse Description Discount		
02/14/25	32175	Bug	Reports	Invoices/Credits The following Reports have issues where once you download the file either to PDF/Excel, the webpage would either freeze or send you to a different web page where it will have a webpage error message: INVOICES / CREDITS BY CUSTOMER AND ITEM VENDOR (Excel) INVOICES / CREDITS BY MONTH (TOTALS) (Excel) INVOICES / CREDITS BY TYPE (Excel) SALES HISTORY - 2 YEAR COMPARISON BY ITEM (ALPHA) (Excel) SALES HISTORY - 2 YEAR COMPARISON BY ITEM (BEST TO WORST) (PDF)		
02/13/25	32201	Bug	Customer Portal	Customer Portal > Find Parts: After adding an item you want to add to your shopping cart using the right arrow button, and then when the user reduce the quantity to buy using the left arrow button to Zero, the shopping cart keeps the item with quantity of 1, even though it should be removed already since the Qty to buy is 0 already.		
02/13/25	32122	Bug	Credit Memo	ADDITIONAL COST FOR RETURNED PARTS FROM CREDIT MEMOS >When returning parts from the Credit memo to stocks, the additional costs for the returned part gets wiped out/zeroes out. REPORTS >INVOICE/CREDITS REPORT >When running the report with a CM with unreturned parts, it shows the amount for the additional cost and when the item is returned to stock, the additional cost gets wiped out. Need to double check and update the Returned CM that have additional cost wiped out from Jan 1, 2025 till present date to correct the error.	Orlando	
02/13/25	32204	Bug	Shipping and Receiving	PENDING/ FUTURE DELIVERY: The Future delivery screen should have the features we used to have for Quality. We need to restore it back.	Quality	
02/13/25	32206	Bug	Sales Order PO	SOPO>PO: When creating PO from the SOPO screen, it only opens a blank tab. When opening POs, it directs to blank tabs.	TipTop	
02/12/25	32226	Bug	Receive Payments	Worked in the issue where the Customers are not shown when the open invoices customer is selected.		

02/12/25	32225	Update	Settings	In Sales > General Sales Settings > Payment Terms table -only the Payment Term Name, # of Days, # Days for Discount, Discount percent is shown and updated.		
02/12/25	32196	Bug	Manifest	Showing duplicate orders on the list.		
02/12/25	32187	Update	Receive Payments	--Change the title Payment Reference # to CK#/CC# --Add a new field below called Authorization # this is the same Authorization # field in the Payments Info tab on the Invoice/CM detail screen.		

25.0212 Version Releases History

Version #	Date Released
25.0212.09	6/11/2025
25.0212.08	05/13/2025
25.0212.07	05/07/2025
25.0212.06	04/24/2025
25.0212.05	04/22/2025
25.0212.04	04/11/2025
25.0212.03	03/18/2025
25.0212.02	02/26/2025
25.0212.01	02/19/2025

25.0212 (Known Issues Fixed in this Version)

Fixed in Version #	Date	Task #	===== Type =====	Screen (or Report Name)	Description
					Invoice Printing Issues (on Ship/Rec > To Dispatch) --Sometimes 'Preview' Freezes --Every time SOME Invoices (on PDF Preview) has NO INVOICE # TO, NO BILL TO, but DOES have Customer PO #, Shipped Via, and Line items. --MOST URGENT: Fix the issue above. --MOST URGENT 2: (IF YOU CALL ME I CAN CREATE THE BATC INVOICES...) Create Batches of PDF Invoices (25-100 each) for H (ones that are 100% ready to Go), so HOUSTON can PRINT those f Invoices to give to drivers to deliver parts to customers. --(SEE EMAIL for ISSUE 1 from Steve) --When this is DONE and PDFS sent to me...CALL ME ON MY TEA CELL PHONE (+1 801 209-2190) --When OPS, probably CCC, and maybe PartsTrader when Orders RANDOMLY it takes ITEMS out of stock from the wrong warehou (without making a Stock Transfer) and without making the pick tur

25.0212.10	08/28/25	32694	Bug	Shipping and Receiving	(without making a STOCK TRANSFER) and without making the pick type & Ship Order). ---SEE EMAIL FOR ISSUE 2 from Steve) --BROKEN SHIP TO BILL TO ON INTEGRATIONS: When OPS, (pr CCC, and maybe PartsTrader when Orders come in) it was putting To Customer in the BILL TO field and leaving the Ship To Customer blank. (So Julian made it so if there is no Bill To or SHIP To he duplicated the field) --INTEGRATIONS (OPS, and CCC? Maybe PT?) Not inserting the Estimated Delivery Date --INTEGRATIONS ? API-SALES ORDER: When Customer is NOT TAX EXEMPT it is not auto filling/inserting the Tax Code from the Tax Code table --DOUBLE CHECK sending OPS the proper Estimated Delivery Date when Order comes in AFTER the Cutoff Time (usually 5pm). --Order before Est Del Date tomorrow, Order after 500 Est Del Date 2 days later.. --SHIP/REC > TO DISPATCH: Each time select SHOW ALL make sure to RETAIN the settings for Driver, Dispatch Day, Dispatch # so user can have to start over again.. --For OPS they will only pass in 1 THIRD PARTY ID. We need to talk to OPS and compare to third party IDs for OPS. Then when we find we get customer id related to it. Then we make a sales order with that customer id and put it as the ship to customer #. Then we look at the address type that customer # to determine which bill to Customer in 1 place to use.
25.0212.10	08/26/25	32694	New	Integrations	NEED OPTION Added to AUTO SHIP new PartsTrader and OPS C (Like they you added for CCC a few weeks ago). SHIP/REC: To Dispatch > on the [] Select ALL checkbox add another option called 'Select ALL Order Transfer's Ready to 'Transfer' Example: If I have 10 new Orders for parts for Customers in the 92 warehouse that each have items that need to be 'Transferred' to 93 (Houston) FROM 93TX (San Antonio), after the items have been picked and marked 'To Dispatch' in 93TX, we need a simple way to auto select those 10 Items, in the 93TX to be Dispatched--with 1 clicks by selecting a new option called 'Select ALL Order Transfer's Ready to 'Transfer' they are selected, then the user can quickly Dispatch them which will move them in the IN ROUTE (in the 93TX) and In Route to Warehouse in the 92 (Without this option they will have to manually find 300-400 transactions every day and click on each one of them). ITEM DETAIL: Stock tab. When press the Recalculate Qty in Stock (for just 1 item) recalculating the Quantity Available, Qty on PO, and maybe other: the QTY on PO, and Qty ON BO), also make sure the Recalculate C Stock ALL does the same thing. ITEM DETAIL: Adjust Qty in Stock. When trying to EDIT a RECEIPT where the Re TRUE gives an error. API-Item: Quality Indicator settings for SWAGGER Item XML. The SWAGGER ITEM XML should return the Item.QualityIndicator element. HO1202108C is returning CAPA rather than think it has to do with the Part Type / Code Mapping table in the C Integration settings. Please CHANGE the NAME of the SWAGGER ELEMENT called: "OneSourcePartTypeQualityCode" To "ThirdPartyPartTypeQualityCode" Settings > Sales: Invoices/Credit Memo. When ADDING or EDITING a RETURN RECEIPT wont SAVE properly.

					--ADJUST ITEM: Changed or SPLIT Item and then set the Reserve NOT update the QTY Available. --RETEST - CALC ALL ITEM QTYs button, does it reset the Average Cost field, based on ALL Receipts for each item? IP--ITEM DROP DOWN LISTS: Add a another column called: Qty to the right of the Qty in Stock column.
25.0212.10	08/22/25	32694	Update	Find Parts	--(REDO) UNDO YOUR CHANGES. Make it work exactly like it worked before, when press ENTER (ONE TIME) on a line (where the cursor check the line, auto calc price, and auto change Qty = 1, and auto select/highlight the Qty field. --(REDO) ALSO, to prevent the user from having to DO all of what described above to GET a price...when the user clicks on the line (but doesn't press enter and doesn't click the checkbox) STILL auto calc Price, but do not move the cursor. (IF IT IS EASY, when a price is changed change the background color of the net price field to light green, the color if the QTY in ALL Warehouses > 0...) SHIP/REC: --Its still making phantom lines on the To Print & Pick (with NO <u>SA</u> ORDER #) when I create an Order with items local and to transfer. --Selected a Picker, then searched for part #, picker got cleared out --SHOW ALL Picker gets cleared out.. --SHIP/REC: When we have an item that is a STOCK Transfer, that transferred from WH A to WH B, and is now showing in the IN ROUTE WAREHOUSE (in WH B), if we select it and select To Dispatch in the Status, it is NOT appearing in the To Dispatch of WH B (maybe it's getting put in the To Dispatch back in WH A where it came from?). to fix that... --SHIP/REC: IN ROUTE, when select a Dispatch Number (to filter the Dispatch #) do not ERASE the Dispatch # from the Drop down the items are displayed. --SHIP/REC: IN ROUTE TO WAREHOUSE: Add a new (optional) column (under/right of the Document # field) called Dispatch # (which will use the Dispatch # that item is assigned to... CREDIT MEMO: --When the Credit Memo screen is opened, if the SubTotal = \$0 (nothing has been returned yet) change the LABEL for Credit Memo Return Authorization # and change the background of the label field Yellow (to highlight the fact that this is a Return Authorization, not Yet. --CREDIT MEMO: When a Credit Memo is PRINTED, if the SubTotal then change the label from Credit Memo to Return Authorization API: --Check All Qty In stock method to use Qty Available instead of At column.
					X--TO DISPATCH: Select 'Dispatch 1 Driver'. Create a Dispatch #. Proceed button. A popup appears to print. (At this point for KSI they already created Invoices in batches throughout the day...so they don't to select the Create Invoices checkbox. So next they click the PRO button and it says to select a Dispatch. But the Dispatch drop down is locked. I suggest we UNLOCK it and also just AUTO FILL the Dispatch #s for them. X--When I tested making a 'Dispatch' on the scanner and then going to the To Print screen and 'Reprinting' the MANIFEST is still showing AMOUNT = \$0. Also, there were 4 parts on the manifest. Each of the

25.0212.10	08/22/25	32694	Update	Shipping and Receiving	says there are 4 parts, and the total parts is showing as 16. X- On the TO DISPATCH screen we made a new option (on the ch drop down menu) called 'Select ALL Order 100% Ready to Ship'. U option lets make a new option called: 'Select ALL Orders (with Tra 100% Ready to Ship'. (This will just select ORDERS where the Transfer From is NOT NULL, the Ship From is the warehouse they are in, the ReceivedFromTransfer = 1, the TransferComplete = 1, and the Entire Order is ready to Ship... Not already Invoiced (This will help them quickly select all Transfers that just came in ar Invoices for them. X-SETTINGS: > Sales > Invoices/Credits > Return reasons table. H in version .0819. Then PK (i think) fixed it in version .0820. Then tc version .0821 it is not saving correctly again. X-(REDO) FIND PARTS: Click to calc Price, just like it does now w selecting the row and pressing enter, or clicking the selection chec But, do not select the checkbox and do not change the qty to 1. UNDO YOUR CHANGES. Make it work exactly like it worked befc press ENTER on a line where the cursor is, auto check the line, auto price, and auto change Qty = 1, and auto select/highlight the Qty f ALSO, to prevent the user from having to DO all of what i describe to GET a price...when the user clicks on the line (but doesn't press doesn't click the checkbox) STILL auto calc the Price, and do not m cursor The light green background color on the Qty ALL Warehouses field the Qty in MY warehouse = 0 and ALL warehouses > 0) is no longe
25.0212.10	08/20/25	32684	Update	Settings	"X-A1 API-FETCH SHIPPING FROM LOCATION: When Julians webservice makes a call to: FetchShippingFromLocation he passes ThirdPartyType (like CCC, etc) then a ThirdPartyCustomerID. If th customer ID cannot be found we need to look for a 'Fall Back' (Def Customer in whichever Third Party settings that send the request. trax is failing to do that. Not sure if it works already for CCC and PartsTrader, but they need to work too). X-A1 SHIP/REC > TO DISPATCH, Needs to show Amount Due on Manifest. Plus, some items selected were not showing up on the M Doubt-A1 SHIP/REC > To Dispatch. Do NOT make an Invoice if S Order = 0. (PLAN B move to Pending). X-A1 SHIP/REC > To Dispatch. When Reprint Dispatch, make the down list GROUP by the Dispatch #. X-A1 SHIP/REC (TEST make sure what is selected is what gets pri X-A1 SHIP/REC > IN ROUTE TO WAREHOUSE: The Group by Sa Order # is NOT grouping the lines by Sales Order #. X-A1 SHIP/REC > IN ROUTE, do NOT make the user select a User not give a popup enforcing it. Doubt-A1 FIND PARTS: Click to calc Price X-A1 FIND PARTS: After the hidden YELLOW notes field gets dis then it doesn't become un-displayed with clicking on an item that c have any item notes. X-A1 FIND PARTS: Lock Description. X-A1 FIND PARTS: Auto Populate Delivery Date with the Deliver selected for the first item. Copy this over to the Sales Order > Deli field (the one displayed in the SO Header). X-A1 32553 QUICK FIX for NORTHLAND GO LIVE. There is a 'va on the Customer PO# field (in the header area) on the Sales Order maybe Q, Inv, CM) that give this popup if the same customer tries same Customer PO# ' , ""This customer PO # already exists"" (Will

					please remove that validation?) Thanks. "
25.0212.10	08/18/25	32684	Update	Settings	--Settings > Customer Auto Fill profiles...add 2 drop down lists and alignment --Fix alignment for Country on Customer Details
25.0212.10	08/18/25	32684	Update	API	INTEGRATIONS - ITEM API: --When testing the ITEM API, on KSI data, zTestHou customer, the EstimatedDeliveryDate = "0001-01-01T00:00:00", --You added some new logic to calculate the EstimatedDeliveryDate FIND PARTS screen called: 'Cut off time for new Orders to add an ADDITIONAL DAY to deliver the parts'. FOR CCC, OPS, and Parts (UNDER THE setting called: SAME DAY Delivery Cutoff Time) will please add 'Cut off time for new Orders to add an ADDITIONAL DAY to deliver the parts' to the UI screen and also make the ITEM API calculate cut off time as well. (Please note the 'i' popup explanation of the fix settings for the Find Parts and put that same 'i' information popup explain what it is and how it work.
25.0212.10	08/18/25	32684	Bug	Customer	--Settings > Customers > Auto Fill Customer Profile. When click New freezes. Please fix that and then test it thoroughly as they plan to update daily. -- Add new Customer, if the Address Type = Both, then we need to add the LINK to field below it.
25.0212.10	08/18/25	32684	Update	Shipping and Receiving	--Increase the width of To Print and Pick buttons to be wide enough "Zone 10 (100)" To Print and Pick: --Scenario: Select Zone 5 (4), which selects 4 items, then click the Select All button then click to De-Select All (basically the user changed their mind for Zone 5). Then clicks Zone 3 (6). This makes ALL 10 of the items to get selected. When you UNSELECT it is still retaining some type of selection in the table or the table for the items unselected...
25.0212.10	08/14/25	32684	Bug	Settings	X--A1 L250813-3 Bin Management > Define Zones popup form giving permanent spinner. Tamil needs this done to move forward on his side... X-LABEL 4x6 will not work. X-Not showing the Zones buttons (with counts like this: Zone 01 (1), Zone 02 (3)) X-When click PICKER NAME, check to see if already picking another item (like it does when we click the PRINT button). X-Can we make the LABELS print faster? (When select 19, which is very common, it takes a long time). Ship/Rec > To Dispatch > Invoice Selected option > Print invoices X-When all the 1st popup form is still showing. Needs to auto close after first clicked). X-(URGENT) The CHECKBOX that shows 'selected invoice' option 'Select All Orders 100% ready to ship' needs to NOT select any Order already have an Invoice #. X--A1 L250811-1 - Add Est Del Date column (and calculation) on the Find Parts Auto screen. See KBA 02426 section called Calculating the Estimated Delivery Date for detailed instructions.
25.0212.10	08/13/25	32699	Bug	Reports	INVOICES/CREDITS MONTH (TOTALS) REPORT: After downloading report the year under the month column shows 2025 even though report is for years 2022-2024.
25.0212.10	08/13/25	32698	Bug	Replenish Stock	IMPORT FROM EXCEL: When importing files, it only imports part from the excel file.
25.0212.10	08/13/25	32697	Bug	Purchase Order	P1196 - Line items were duplicated. Delete all duplicate line items \$0.00 cost.

25.0212.10	08/12/25	32694	Bug	Import Wizard	IMPORT WIZARD (IMPORT PAYMENT) >Not importing
25.0212.10	08/11/25	32684	Update	Admin Portal	--Admin.1place.cloud admin portal > users > trying to change the v for an individual user is showing a popup box on TOP of the field (t what we type) and also is NOT showing any versions to select. --Update the Label option 'label' to this: Use Conditional Shading: When the Transfer From WH field has a AND is on the label, SHADE the background of the Transfer From Otherwise leave the background white when it is empty. (please m the line 2 of the label is under the line 1, left justified.
25.0212.10	08/11/25	32684	Bug	Settings	--LABELS: Labels freeze if user puts the Transfer From WH or Ship WH fields on the label. We need to be able to put those fields on th We also need to add a new section UNDER the field options (on th Designer) called: Special Options: Then add this new option: [] Use Conditional Shading: When the Transfer From WH field has AND is on the label SHADE the background of the Transfer from fi Otherwise leave the background white when it is empty. --The other labels have the same hanging issue with those 2 fields. --Changing the Ship/Rec print reports isn't getting saved/memoriz --On the 4x6 label (and others when you get time) if the Transferr field is VISIBLE AND Has a Value, print the background shaded an outline around the field. Otherwise do NOT show it at all. (This wil warehouse inventory pickers know if the Item is Transfer or not. --When DELETE memorized Reports on SO printing, and others, n they stay deleted. They keep re-appearing.
25.0212.10	08/06/25	32691	Bug	Invoice	Payment > When deleting the payment for Invoice# I46697, error with this message:
25.0212.10	08/06/25	32684	Bug	Settings	When DELETE memorized Reports on SO printing, and others, ma they stay deleted. They keep re-appearing.
25.0212.10	08/06/25	32684	Update	Credit Memo	On the Credit Memo, move the Invoice # from Line 2 to Line 1, aft Reason drop down list.
25.0212.10	08/05/25	32618	Update	Settings	Grant tried to setup a 'global email' (Settings > System > Global Se found these issues: X-It needs to have a drop down list at the top to help auto fill the s X-Lets remove 'POP3' from both field labels. X-The settings are NOT getting saved. X-There was a bug when clicking the Test Email Connection that v encountered when using the exact same settings on an individual t account. X-When a user sends an email, or a Portal Invitation request, if the Email settings are blank then it needs to use this Global Email as a email.
25.0212.10	08/05/25	32680	Bug	Sales Order	-Tamil has completed the Signature capture for Order delivery. W on the button it should show the Signature, Person's name who sig date/time. Please use Order# 250731-0006 as an example. --On the shipping receiving to dispatch screen when a user prints, invoices please make it so that it does not go to the next status sin not actually dispatched. --How does the audit log work for Turn off all? Vs unchecking all? / any other things that get audited like POs? Items? -Ship/Rec, when JUST print the invoices, it needs to NOT move to status, but needs to stay in the Same status until dispatched.
25.0212.10	08/05/25	32684	Bug	Settings	-Settings > new setting for warehouse, fix ICON to delete. --Adding a new Customer, when select Price Level type and Price I is NOT getting saved to the New Customer record.

25.0212.10	08/04/25	32684	Update	Settings	--Lets move the System Audit Logs SECTION from Sales > General System > Audit Logs (which will be a new Nav option/screen.
25.0212.10	08/04/25	32683		Import Wizard	Item List > The progress bar remains stuck at 1% and fails to complete file import. Troubleshooting steps taken: >Tried using different versions – issue not fixed >Created and used a new Excel file for the data – no change. >Checked the file information and overall data – still unsuccessful
25.0212.10	08/04/25	32678	Update	Find Parts	Find Parts --When selecting an item that is in another warehouse, and the pop screen appears to transfer the part, we need to determine the BES warehouse to ship it from (that has enough inventory) and then add Order QTY to THAT warehouse. (Talk to Thiru about how he did the Portal settings with a table structure...).
25.0212.10	08/01/25	32680	Update	Sales Order	SalesOrder: Table: Signatures Fields: ID, CompanyID, TransType (Sales Order, Invoice, etc), TransID (user Trans Type), TransNumber (user friendly Trans #, such as 2507310), DeliveredToName DeliveredToSignature (needs to hold a signature...), DeliveredDate On the Sales Order Print Date needs to show the Print Date. Printed By needs to show who printed it. REMOVE: Auto Calc Net Available, Line Type drop down list. And it shows Product Detail, Quick Display Move the Back Order checkbox up under the Tab All fields. Add Delivered To _____ Add Delivered Date/Time _____ Signature (picture) (Then just make the whole area look nice...and
25.0212.10	08/01/25	32676	Bug	Item Detail	(REDO) FINANCIAL TAB, Price levels If List price is entered, and a Discount exists, recalc the NET Price (on Price Level) If a Discount is entered, and a List price exists, recalc the NET Price (on Price Level) If a line level List price is \$0 then use the List price for the item record (REDO) Adjust QTY in STOCK (Add, Remove, Adjust...), if only have Receipt lets auto select the receipt and then set the focus on the next When removing, set the focus on the Quantity Then when tab or enter set focus on User Notes (and make sure the blank by default).
25.0212.10	08/01/25	32667	Update	Customer Detail	Pricing>Make the Pricing Templates Columns sortable with a click
					For the Integrations on all 4 CCC, OPS, PartsTrader, and APU.. General Tab: Change the General Settings from 4 columns into 3 columns (move column 2 under column 1). Also put spaces in between the words on Column 1. Example: OurContactFirstName = Our Contact First Name Also make the fields on column 1 2x wider. Move the 'settings' into 1 single 2nd column with more room for the descriptions Change these labels for the next column 2 Change the label: Delivery Cutoff Time to: 'SAME DAY Delivery Cutoff Time' Change label: #Days Stock Temporarily #ADDITIONAL DAYS

25.0212.10	08/01/25	32679	Update	Integration	Change label: # Days Stock Transfer to: # ADDITIONAL DAYS to Stock Transfer Use Supplier Qty change to: Use Vendor Qty (+ add this 'i' message) This will check to see if you have any Vendors on the Item Detail screen if the Vendor Qty in Stock (Ven QIS) > 0 and if the Qty in Stock Last Updated (QIS Last Updated) has a date within 24 hours. Add a new option called: # DAYS TO ADD if Sale is from Vendor Qty (NOTE: DONT TAKE THE TIME TO MAKE THIS WORK YET...I will make this as a task for later...) Zip Codes tab: there is a Delivery Area Zip Codes, on all 4 CCC, OF PartsTrader, APU lets change the LABEL over the NumDaysToDeliver to 'Extra' Days to Deliver 'i' " When the user hovers over the i (meaning information) it will have a tooltip. This is the # of 'extra' days to add to deliver the item, in addition to the Delivery Cutoff Time and ADDITIONAL DAYS added for items requiring a stock transfer. Example 1: If an Order comes at 10am, for an item not in stock, for Zip Code 12345 (which requires 1 extra day to deliver) and the SAME DAY Delivery Cutoff Time is 12noon, the Estimated Delivery will be 1 day. Example 2: If an Order comes at 2pm, (for an item not in stock in another warehouse), for Zip Code 12346 (which requires 2 days to deliver), and the SAME DAY Delivery Cutoff Time is 12noon, the ADDITIONAL DAYS for a Stock Transfer is 1, then the Estimated Delivery Days will be 4. (1 day for after cutoff time, 1 day to transfer item, and 2 extra days because its in a very remote zip code).
25.0212.10	07/31/25	32676	Update	Item Detail	--FINANCIAL TAB, Price levels, when enter a Price Level, and a List price for the Price Level and then enter a discount it needs to USE the Discount on the PRICE LEVEL Line, IF one exists. If a line level List price is \$0 then use the List price for the item record. --Also if the PRICE LEVEL LIST price is changed and a Discount exists, it will auto update the Net Price for the Price level. Same if Discount is changed and a List price exists, update the Net Price on the Price Level. --Click Catalog tab, click Add a New Row button, it took FOREVER to load (v 0730). When adding fields to add a new Catalog entry, we need to Auto fill the Catalog source = Customer Tabbing from Catalog to Sub category skips the field. --Adjust QTY in STOCK (Add, Remove, Adjust...), if only have 1 Record, it will auto select the receipt and then set the focus on the next
25.0212.10	07/31/25	32647	Update	Shipping and Receiving	Ship/Rec, To Dispatch, Invoice Selected Orders (do not require a Catalog for printing Invoices).
25.0212.10	07/30/25	32667	Update	Pricing Template	X--Add a PROGRESS BAR to the process when click the UPDATE / CUSTOMERS button on the Pricing Templates screen. X--Make the Columns sortable with a click. Join issue popup errors when sorting by Disc %, etc... X--On the CUSTOMER > CUSTOM PRICING, add an X to the right of the Template NAME, in the Template Column. When clicked prompt: Do you want to DELETE ALL Price Settings for this customer for this select Pricing Template?
25.0212.10	07/30/25	32675	Update	Pricing	Revamp the Pricing using the logic defined in KBA.
25.0212.10	07/30/25	32630	Bug	API	MAKE SURE UNIT COST IS CALCULATED PROPERLY.
25.0212.10	07/29/25	32668	Bug	Item Detail	Backorder field on Item detail screen > Example: 910-0108, Items invoiced sales orders still shows total backorders on the item detail screen
25.0212.10	07/29/25	32672	Bug	Find Parts	--Check net price calculation for zTest- NoCostWithPOList, zTest- NoCostWithVendorCost and zTest-WithCost with customer name zTest-Steve.
25.0212.10	07/29/25	32673	Bug	Portal	Check customer portal with Thiru when create SO from portal site create Unit cost and also it did not make changes on ItemStock.

25.0212.10	07/28/25	32671	Bug	Invoice	Invoice: --Whenever I click the Save Layout Changes for All Users button, an error popup appears.
25.0212.10	07/28/25	32667	Update	Customer	--PRICING TEMPLATES: Remove the Pagination on Pricing Template screen. (They will never have more than 50-100 pricing categories) --CUSTOMER DETAIL > PRICING Templates. Sort by Pricing Category default. Also be able to click these columns to sort: Pricing Category Level, Discount, Markup, Multiplier, Specific Price --Show the COUNT of records on the Customer Details > Pricing Templates --FIND PARTS SCREEN: Add Part# search to the TAB or ENTER CATEGORY after the Description field. Then when Tab or Enter set next focus to Search Button.
25.0212.10	07/24/25	32667	Bug	Pricing Template	CUSTOM PRICING TEMPLATE ISSUES: --On ABC Company (and Houston Auto Parts - 4388 company) the Customer Details > Pricing and Add Custom Pricing Template fields are locked. We need to unlock them. --Also on the Custom Pricing Template SCREEN there is a button in the footer called: Update ALL Customers using this Template. When that button is clicked it is supposed to UPDATE all Customers where their CustomerID=DefaultCustomPricingTemplate = to the Template ID on the Custom Pricing template screen where the button is... This was when we assigned Template X to 1000 Customers and then go to Template X and click that button and push ALL of the Pricing Template Rows out all all customers.. --Also on the Custom Pricing Template screen we need to display Custom Pricing Template ID (for the selected Template) in a grey bar about an inch to the left of the User Name / Gear icon in the Pricing Templates 'Title' bar. --When opening the Custom Pricing Templates they need to sort by the Pricing Group Name (alpha) --Make the Columns sortable with a click.
25.0212.10	07/24/25	32647	Update	Shipping and Receiving	To Dispatch: Print Invoices option. (FOR ALL invoices) Find a slanted, black, Paid icon to display on the Invoice, on the first page to the left of the Footer Totals (above the payment details).  (260x260px) Remove the paid that is forcing the Invoice to have a 2nd page. When the Invoice requires more than 1 page, have the additional pages start to display about 1 inch down the page on the additional page: have a header on the additional pages, in the top right corner, that says: Invoice # XXXX-XXX (Page 2 of x)
25.0212.10	07/23/25	32664	Bug	Printer Connect	1placePrinter Connect X--Put the Latest version in whatever folder the LINK in the option Settings > Print Settings > Advanced option in that folder, zipped 1 (not zipped 2 times with a .rar file as well, and not in a Debug folder) --Try downloading and testing, with Advanced printing turned on, printing a few 4x2 labels on the To Print & Pick screen.
25.0212.10	07/22/25	32663	Update	Find Parts	Make the NOTES box look better, but resizing it to be smaller? REMOVE the RED when out of stock, and show a light green background for in Stock (>0) if the Qty in Stock for 'local' warehouse = 0.
					Items in route, from a Stock Transfer, are NOT appearing on the Shipping & Receiving > In Route to Warehouse screen. They need to make sure they appear and can all be selected, by filtering the Dispatch #, and then updating the Status.... X--Unlock the Warehouse Worker and Driver drop down lists on the Shipping & Receiving screens.

25.0212.10	07/22/25	32647	Bug	Shipping and Receiving	X--Opening the Ship/Rec is now VERY slow.. X--Ship/Rec > To Dispatch, when select "Invoice Selected Orders" select x (maybe 2 invoices) and press Proceed, and then select opti print Invoices and print preview it seems to create more than x inv Need to make sure it only prints the exact invoices selected. X--Lets MOVE the Filter By Shipped Via section to the left of the C Information. X--Lets remove the '...' after the Select an Option, and Dispatch Inf (Tamil)--If earlier versions (i think as recent as 25.0717 version, wl Dispatch ALL drivers, and then press Proceed, it would display a p form showing every driver that had at least 1 Sales Order selected dispatch) and the COUNT of how many ORDERS were assigned to Driver... X--When the Warehouse worker is selected AND the option to au all zones assigned to the user = True, then when the Worker butto clicked, auto SHOW ALL, and the select all that match. X--Make the mouse over on the buttons show the counts. (Doubt)On In Route, the Group By defaults to Sales Order # but it really group by Sales Order # unless your re-select Sales Order # f X--On In Route, change 'Select Your Name...' to: Select Driver Nan X--On In Route (and actually most other Ship/Rec screens, select a then do something else, like Show All records, or select something the User gets erased, and then gives a popup error when trying to Other values in drop down lists get erased as well... X--On In Route, selected a few items and Driver and tried to move Closed, got this error: Permission denied (password). Renci.SshNet.Common.SshAuthenticationException at Renci.SshNet.ClientAuthentication.Authenticate(IConnectionInfo connectionInfo, ISession session) at Renci.SshNet.ConnectionInfo.Authenticate(ISession session, IServiceFactory serviceFactory) at Renci.SshNet.Session.Connect Renci.SshNet.BaseClient.Connect() at OSO.Controllers.ShippingReceivingController.UpdateInRouteSta Type, String Action, String User, String BatchID, String SOLInelten String Module, String NextStatus) in D:\OSO\OSO\Controllers\ShippingReceivingController.cs:line 1C
25.0212.10	07/17/25	32642	Update	Statements	CUSTOMER STATEMENTS: The statements need to be GROUPEI 'Both' or 'Bill To' -- NOT BY SHIP TO. In other words, the LIST of c that have unpaid invoices should NOT show any Companies that a to' location. THEN, when the statement is printed it needs to have GROUPING by Locations where the the Address Type = Both or S Here are some scenarios: 1--Customer Address Type = Both (Bill To & Ship To). They have 2 Invoices and 1 unapplied Credit Memo. Then they will appear on tl and the 'statement' will have their address in the Header of the sta and also their Company Name as a Grouping name, above the actu Invoices/Credits. 2--Customer Address Type = Bill To AND there is another 2 comp: are 'linked' to them which both have an Address Type = 'Ship To' (l the Bill To company). Then the Bill To company will appear on the l the 2 Ship to's would NOT). The statement would have the Bill To i Header area (so it could be mailed to the Bill To company. Then all Invoices and Credits for Both companies would appear on the Stat BUT, they would be GROUPED by Ship To Address. Each grouping have the Ship To Address Name (in a grouping title), then all of the and Credits, and then a SubTotal. Then the statement would have . BOTTOM line for all Invoices and Credits and the AGING at the bc would show the aging for Both companies combined.

					3--Same as scenario 2, but instead of having 1 Bill To and 2 Ship To would be 1 Both (Bill To & Ship To) and 2 Ship To's linked to the 'Both' company. In this case if the Both location had any unpaid invoices it would show them as a group. In other words, if all 3 companies had unpaid Invoices or Credits it would have a grouping for all 3, and then for all 3 combined on the bottom. --IN SUMMARY: If the Address Type starts with a B, and the company has open transactions it should appear on the list of Companies (on the statement screen) and should have a statement. Also, if there are 2 Bill To companies that are 'linked' to the Bill To, or Both... companies, then they should be included on the same statement, but grouped / displayed / summed for each company on the statement. If there is only 1 company, if it exists we can still show the grouping name and sub totals.
25.0212.10	07/16/25	32647	Update	Shipping and Receiving	Misc Changes. X--On the To Print & Pick, after I select a Warehouse worker, if I click the Show All button (in bottom left) it clears out my warehouse worker selection. --On the To Dispatch screen, When the user clicks the CHECKBOX for the Line Item checkboxes, Display this little drop down list of selection options (like on the Customer List screen): Select ALL Orders, Select Orders 100% Ready to Ship, Un-select All Orders When the user clicks the 'Select all Orders 100% Ready to Ship' or the Orders where the # Items on Order = # Items Prev Ship + # Items (which you will see these #s as columns. Basically the user is trying to select ALL Orders that are NOT YELLOW. --When the screen opens HIDE the Dispatch Information... section and the Filter by Shipped Via section shift over to the left. (the Fields in the right corner should say where they are if that is easy to do). --Make these CHANGES to the 'Select Driver' section. ----Rename the section from 'Select Driver' to: Select an Option... ----REMOVE the DRIVER buttons. ----Add these radio button options: ☐ Dispatch 1 Driver ☐ Dispatch All Drivers ☐ Invoice Selected Orders IF THE USER CLICKS 'Dispatch 1 Driver' --UN-HIDE the Dispatch Information section. --Insert a new drop down list in the top left of the Dispatch Information section called: Select Driver --Remove the 4 Radio buttons Today, Tomorrow, etc... and make a Drop Down list with those same 4 values with a label: Select Day --Reformat the Dispatch # and # Orders selected so it looks nice, with 4 fields left aligned properly. Move the Create Dispatch # down below the 4 fields and make it vertical (1/2 as tall). IF THE USER CLICKS 'Dispatch all Drivers' then it will operate the very same, but it will REMOVE the 'Select Driver' drop down list (since ALL drivers will be displayed on the next screen). IF THE USER CLICKS 'Invoice Selected Orders' DO NOT display the Dispatch Information section, and do not require a Dispatch number. Proceed to Print the selected Invoices CHANGE the GREEN Print button (and remove the up arrow that was there) to a Green button. Change the name of the Green button to Dispatch

					creating above. Change the name of the Green button to Proceed The ultimate goal is to use the To Dispatch screen to make a simple (and easy to understand) process for different companies who want to use it to 1 of the 3 processes. (KSI needs to just select Orders (that are 100 to Invoice) and then batch create the Invoices.
25.0212.10	07/15/25	32644	New	Shipping and Receiving	ADD ZONE SELECTION option and Label Printing by BinPickingC then BinLocation (on the To Print & Pick screen) . X--Add new tables Warehouse Bins, Warehouse Zones, and Warehouse Zone Assignments. See KBA for TABLE DESIGN Ideas. (IN THE INTERMEDIATE TIME...HOLD on making the BIN Management screens. JUST, TABLES). X--On the To Print & Pick screen, REMOVE the 'Select Orders' section X--Make the Select Your Name section wider so the Drivers will not go out of the Box. X--MOVE the Filter By... over to the right (where you removed the Orders section). X--Where the Filter by was...add a new section called: Select Warehouse Zone... X--When the To Print and Pick screen opens (or refreshes) show the list of zones (for the selected warehouse) which are entered in the Warehouse Bin Locations table, in alpha Order, with the COUNT of # items in each zone. Example: Zone A (15), Zone B (12), etc... X--Make the ZONE buttons 'Toggle' buttons, so they can be selected/unselected. (Doubt)--In Settings > Warehouse > Shipping/Receiving screen add a section at the top of the screen called: Options X--On the Shipping/Receiving screen, when a ZONE is clicked, select the filter, but just select all items that are in that zone. (Cross reference the Item BIN (from the SalesOrderLineItemBins table) with the WarehouseBinLocations table (where the Warehouse = WarehouseBinLocations) on the Shipping/Receiving screen. If the user clicks another Zone button, select those items as well. If the user UNSELECTS a Zone then unselect the items for that zone. X--Change the SORTING on ALL Labels (on Sales Order, Invoice, and Ship/Rec screen to sort by BinPickingOrder (in the WarehouseBinLocations) then by BinLocations (in the SalesOrderLineItemBins) table.
25.0212.10	07/11/25	32640	Bug	Customer	Add new-->unable to add Customer via Credit memo (Bill to & ship dropdown), it shows Undefined Error.
25.0212.10	07/11/25	32628	Bug	Shipping and Receiving	On To Dispatch (ABC Company) Search for: S250422-0003 it gives error. Also on To Pick & Print, select Driver then select ALL record removes the selected driver. Also, after selecting 2 orders to Pick & Print to 'test' print the 2 labels, the print dialog would not appear.
25.0212.10	07/11/25	32625	Bug	Task	ADDING NEW TASK (Bugs): --When ON Date, cannot Shift+Tab up. (Trying to reverse tab up to Company field). --When on Date, cannot click on any other field without it setting the Type field. --When on Company field cannot tab OFF of the field.
25.0212.10	07/11/25	32639	Bug	API	When we import integration orders, after you finish the 'Auto Ship' please make sure the SO Status, and LINE ITEM SO Status get pushed to 'Next' Status after new
					Find Parts Screen > Ship to Search Field The primary search (which searches only the Company Name field) returns fewer results than expected. For example, searching for the term "ABC" only returns 2 companies.

25.0212.10	07/09/25	32599	Bug	Find Parts	However, when the expanded search is triggered—after accepting prompt "Cannot find value. Do you want to search in other fields a more companies containing "auto" are shown. This suggests that some companies with "auto" in their Company Name not being included in the initial primary search. The expectation is companies with the search term in their Company Name should be during the primary search, without requiring expanded search.
25.0212.10	07/09/25	32607	Bug	Reports	REPORTS > Learning Services company has a custom report but not missing in any versions. Please make sure this custom report is added
25.0212.10	07/09/25	32610	Bug	API	API > Fix Create Sales Order with: Proper Warehouse for Order Proper Transfer From (in the line item) when the item is in another warehouse. Needs to create a proper Stock Transfer from that other warehouse (does on the Find Parts screen). API > Have the Create Sales Order API AUTO ship the Order when created (based on a new Integration setting we need to make called Ship New Sales Orders
25.0212.10	07/08/25	32612	Bug	Reports	INVOICES/CREDITS BY CUSTOMER (OPEN) - One of the users (I Bichun) is having an issue with the Reports. When trying to run a report will just load and then the page will freeze. Ensure the fix covers all functions for the user.
25.0212.10	07/08/25	32610	Bug	Find Parts	Item Catalog > Item Description - When searching a non-CAPA item description still shows (CAPA) at the end. Sample Item: HY124017 same issue is happening with Express North Hollywood.
25.0212.10	07/03/25	32596	Update	Item Pricing	Alter existing Markup calculation based on setting preference.
25.0212.10	07/03/25	32599	Bug	Find Parts	Ship to Search Field - The primary search (which searches only the Company Name field) returns fewer results than expected. For example, searching for the term "auto" only returns 2 companies. However, expanded search is triggered—after accepting the prompt "Cannot find value. Do you want to search in other fields as well?"—more companies containing "auto" are shown. This suggests that some companies with "auto" in their Company Name are not being included in the initial search. The expectation is that all companies with the search term Company Name should be returned during the primary search, without requiring expanded search.
25.0212.10	07/02/25	32547	Bug	Sales Order	SALES ORDER > Line 2 > Vendor column - Vendor related to the customer PO is not showing.
25.0212.10	07/01/25	32563	Bug	Item Catalog	AUTO GROUP SMART (25.0212.08) > ITEM CATALOG > When a CAPA items using the Item Catalog, it does not filter the CAPA items shows non-CAPA items, and the corresponding OEM # appears in the
25.0212.10	07/01/25	32595	Bug	Items	ITEM ADD NEW: Tab order skipping around..
25.0212.10	07/01/25	32596	New	Items	ITEM PRICING: Add a new option in settings > Sales > General > Cost Settings (section) under the Number of Decimal Places option How Additional Added Costs (for an Item) is used in Markup Calculation (Drop down list) Additional Cost added AFTER Markup Price is Calculated. (Default selected) Additional Cost added to the Actual Cost BEFORE the Markup Price Calculated.
25.0212.10	07/01/25	32592	Bug	API	--Make Qty =1 if they send Qty=0. --Set proper customer values on each customer objects --(Doubt)Did R&D about getting users date, But in sql and C# both can't get user date we will get server date only.
					Vendor List > Vendor Number - When sorting using the Vendor Number

25.0212.10	06/30/25	32517	Bug	Vendor	Vendor List - Vendor Number - When sorting using the Vendor Number column, the numbers are not sorting in sequential order (e.g., 1-10 also be fix in the master version. (Doubt) In sql Vendor number datatype is nvarchar. So it will sort 1,12,13,2,21 not 1 - 10.If they need to sort 1 - 10 we need to convert vendor number datatype to Int.
25.0212.10	06/30/25	32592	Bug	API	CCC API Bugs. We did a LIVE test with CCC today to check out the of them sending us some test quotes and orders. Most of it worked but we ran into these issues: The NET price was wrong. Also, the EstimatedDeliveryDate field (and the ExpectedDeliveryDate) were both 24 hours later, even if the item was out of stock or in an warehouse. I have updated the API ITEM in the kba. This is what we need: --Please re-Order all of the elements to the exact order shown on the Elements section of the Item API. --Please revise the code to basically look for Failure. First getting the QtyInStock. If we have none, we can fill in the simple fields like Item Description, and other values from the Item table. But NOT calculate things that take more effort like the Qty in Customers warehouse, Price, TaxAmount, and Estimated Delivery Date. You will see my logic you go down the fields. Any time it fails you fill in the easy stuff and rest. If there is qty in stock, move to Price, etc... --I have added some more NEW fields signified by GREEN (NEW) --I have noted a few elements to REMOVE in RED. in. --Lets add another option on the CCC, OPS, and PartsTrader UI (If OFF OF THE Setting called: Only Show Special Order) called: Do Not Calculate Quotes [] (you can leave the field in db and API alone, but just remove it from interface. --There is a setting called Hide Zero Price. If that is checked, then if price = 0 then you can ignore getting the QtyInStock, Net Price, etc.. --Julian is also expecting us to send him the proper EstimatedDeliveryDate. I've added some logic to help you come up with that date.
25.0212.10	06/26/25	32579	Bug	Sales Order PO	When creating PO line, Before starting NEXT loop make sure there is a line item ID before accidentally making it again
25.0212.10	06/26/25	32585	Bug	Receive Payments	Payment 'LOG' tab. When click on the tab (on Bichun data) it FREEZES the system for over 10 minutes.
25.0212.10	06/26/25	32589	Bug	Item Detail	taking 6-10 seconds to open up (even after initial caching).
25.0212.10	06/26/25	32587	Update	Receive Payments	Please make the HELP button link to the HELP table FromName: ReceivePayments (so we can link the proper help topic to that button)
25.0212.10	06/26/25	32498	Bug	Label Print	Getting random popup saving errors. "Please Design the Label for selected label Document."
25.0212.10	06/25/25	32583	Bug	Import Wizard	ITEM CATALOG IMPORT Function >User would get the dialog box to import, but no progress bar ever came up at all.
25.0212.10	06/25/25	32580	Bug	Reports	AR- PAYMENTS RECEIVED BUG: When downloading the report to excel file, the Sales Order deposits are becoming negative in values.
25.0212.10	06/25/25	32584	Bug	Sales Order and Purchase Order	SO Detail and PO Detail User cannot enter a specific/exact Net/Cost because the system is using a rounded number.
25.0212.10	06/24/25	32582	Bug	Replenish Stock	REPLENISH STOCK >Error occurs: String or binary data would be truncated. The statement has been terminated. Warning: Null value was eliminated by an aggregate or other SET operation.
25.0212.10	06/24/25	32579	Bug	Purchase Order	Line Items > When generating POs, it's duplicating or even quadrupling SO lines, and also creating multiple POs for the same SO.

25.0212.10	06/24/25	32566	Update	API	Use Vendor QIS, treat it like another warehouse to be transferred
25.0212.10	06/24/25	32581	Bug	Customer	Adding a new customer not setting it to Active.
25.0212.10	06/23/25	32467	Bug	Items	Item List Screen > Created a new Item Tab called "Item List for Exp Unable to select all the records on the entire list when checking th box.
25.0212.10	06/23/25	32578	Bug	Item Details	ITEM LIST: When opening an item to view the item details screen, bug where it will not load any information and will just be a blank s
25.0212.10	06/19/25	32577	Bug	Invoice	When PO is checked on the column filters, the line item columns g up. Discount column has line total. Unit Price has the discount %. etc.
25.0212.10	06/19/25	32566	Update	API	Make seperate function to calculate Vendor QIS if ItemStock is 0. (Doubt) When we assign vendor qty on QIS then there is no wareh linked to it. Then how to calculate estimate delivery date.
25.0212.10	06/19/25	32498	Update	Print Label	Printing: Duplicate 4x2,4x3,4x4 labels. We can rename the 1st of each size something like: 4x2 (1) and the 2nd one for each size 4x2 (2). This separate labels can be printed using the same labels in the printer. Add 'Transfer From WH' and 'Shipped From WH' as options as we
25.0212.10	06/18/25	32523	Bug	Quotation	QUOTATION TOTAL: When creating quote for large orders with 15-20 or more items, it up the last item which makes the total of the quote on the PDF inc They would notice the difference once they create a sales order fr quote. Example: Q57223.
?	06/17/25	32572	Bug	Items	CATALOG MANAGER - Having an issue with tool 3.3 Rebuild Cat function. Kept having undefined error when running tool. Tried to versions and even placed in Master but still getting same issue.
?	06/17/25	32570	Bug	Customer	Customer Details > Custom Pricing >After Selecting the Default Pricing Method - unable to edit the next field (MARkup %, Discoun and the Add customer pricing template field
25.0212.10	06/16/25	32566	Bug	API	Calculate Estimated Delivery Date based on Warehouse and QtyL
?	06/16/25	?	Bug	SAGE	Not syncing...to show drop down list Sage accounts, etc Checked on code, local and dev server all are working fine, added t identify the issue(Monitoring)
25.0212.10	06/12/25	32568	Bug	Find Parts	Bill to field: Address Type and Phone Number are mixed up. Phone has the address type and the address type has phone numbers.
25.0212.10	06/12/25	32567	Bug	Vendors	List > When putting a checkmark on the inactive checkbox, the ina vendors are not showing up on the list.
25.0212.10	06/11/25	32540	Bug	Invoice	Send Email > Preview Email Unable to send Email. Gets an error: An error has occurred but no explanation for the error is available at this time. If this error persi contact your onsite 1place administrator and ask him or her to ser support request to support@onesourcesoftware.com regarding er 2104608.
25.0212.10	06/11/25	32562	Bug	Item	ITEM LIST - Found an issue where Non Capa items have (CAPA) at and needs to be removed/updated.
25.0212.10	06/11/25	32529	Update	API	Unlike PT and CCC, OPS sends the 1place customer number acro: don't need to cross reference it. Due to this, I don't think it makes to require them to fill out that third party data on the API tab, as it redundant. Can you please make sure the Customer lookup that occurs on mo calls will try the customer number directly (if it does not already o if it doesn't find a matching customer via the Third Party Customer lookup?

25.0212.09	06/11/25	32529	Bug	API	There is an issue with the ITEM API, it is not returning all the parts to match everything for the OEM sent in. Add the Bin back to this call.
25.0212.09	06/09/25	32529	New	API	please make a NEW ITEM API called ItemDetail by DUPLICATING ITEM api. And then duplicate the Stored Procedure code as well to for the ItemDetail API. API: Item. 10x faster! SWITCH names of Item and ItemDetail so th the one with the shorter elements list. API: RequireValidCustomer (default to FALSE) API: Sort them by Alpha
25.0212.09	06/09/25	32535	Bug	Purchase Order	MISC Issues to fix: PO List price isnt using the Number of Dec plac Price fields.
25.0212.09	06/06/25	32545	Bug	Customer List	Download error: Conversion failed when converting the varchar v 'Brandi' to data type int. System.Data.SqlClient.SqlException at DataLayer.Customer.DAL_Customer.FetchCustomer(Int32 DisplayLength, Int32 start, String SortBy, String SortOrder, String SearchCondition) in D:\OSO\DataLayer\Customer\DAL_Customer.cs:line 133 at BusinessLayer.Customer.BAL_Customer.FetchCustomerList(Int32 DisplayLength, Int32 DisplayStart, String SortBy, String SortOrder, String SearchCondition) in D:\OSO\BusinessLayer\Customer\BAL_Customer.cs:line 214
25.0212.09	06/06/25	32549	Bug	Integrations	OPSTRAX, CCC, Partstrader> When I try opening the CCC, OPST screen on proparts, the screen won't stop from loading- v25.0212.
25.0212.09	06/03/25	32467	Bug	Item List	Item List Screen > Created a new Item Tab called "MAPP for Export" Unable to select all the records on the list when checking the check
25.0212.09	06/03/25	32529	Bug	API	Invalid Customer Lookup on Item call: Right now the Item call returns data even if it doesn't find a custom in the 3rd party data. This is fine and needed for some of the integr But I need a way to check a 3rd party id is valid or not as PartsTrac to be rejected in that case and notified. Please add an optional parameter to the Item call: "RequireValidCustomer": False Default to false, If that is passed in as True, return the same error y the calls that already throw an error response here. IE "Please Enter Third Party Type and Third Party CustomerID."
25.0212.09	06/03/25	32530	Update	Shipping and Receiving	Label Print: Need to add Labels on the dispatch screen.
25.0212.09	06/02/25	32529	Bug	API	SalesOrder: The sales orders come in with no warehouse, I do not know if that's or something is missing. They also have a status of "Waiting To Be Purchased". I am unable to turn them into invoices for further test FetchShippingFromLocation: Should return a default shipping location if it can't match up a cust This will happen sometimes for insurance quotes or other reasons would be best if this returns something that is probably correct in edge cases. The customer lookup fails such that it gives this current "Message": "Please Enter Valid Third Party Type and Third Party CustomerID." Please return the default shipping location information instead. Quotation: This seems to be missing some data when its entered. Specifically I By and Warehouse is blank. See the image here compared to other Here is an example api call Customer lookups for OPS Trax: I am not sure if this has been addressed before, as no one uses OPS currently.

					Unlike PT and CCC, OPS sends the 1place customer number across the API. We don't need to cross reference it. Due to this, I don't think it makes sense to require them to fill out that third party data on the API tab, as it is redundant. Can you please make sure the Customer lookup that occurs on mobile calls will try the customer number directly (if it does not already exist) if it doesn't find a matching customer via the Third Party Customer lookup?
25.0212.09	05/30/25	32311	Bug	Item Detail	>AUDIT LOG TAB >Whenever anything is changed on the Item Detail screen, the changes are not being recorded in the audit log. - We need to record any changes on the item detail screen on the audit log. >OBP has #HO1100291 whose List Price was updated to \$16 and to know who changed it or how it was changed, They are thinking it might be a bug in our system that updates their list price without their knowledge and we don't have an audit log for the Item detail screen.
25.0212.09	05/30/25	32520	Update	Invoice	(ANDREWS) INVOICE DETAIL>PRINT --Remove 4x5 LABEL and add 4x6 Label.
25.0212.09	05/29/25	32330	Bug	Credit Memo	CREDIT MEMO REFUND: The payment info is not showing on the Payment Info tab after issuing a refund. When deleting the refund the total fields shifts to the left. Then when we refresh the screen, the PAID mark still shows on the screen.
25.0212.09	05/29/25	32501	Update	Sales Order	SALES ORDER LABELS >Add barcode option for the Sales Order labels. >Make the barcode look similar to the OneSource barcode where the labels are not stretched out.
25.0212.09	05/29/25	32197	Update	Printing	Printing > Instead of server time it should be the time of the user who printed it.
25.0212.09	05/28/25	32505	Update	Reports	INVOICES/CREDITS > INVOICES/CREDITS BY CUSTOMER (Open) Remove date selection dropdown and make make a design look like the previous version.
25.0212.09	05/28/25	32520	New	Invoice	INVOICE DETAIL>PRINT --ADD a 4x2, 4x3, 4x5 LABEL
25.0212.09	05/27/25	32321	Bug	Invoice	PRINT > Invoice 3: The word INVOICE on the top right is missing, the same as the Cor Logo, even though it was enabled in the print settings. The Printer are not saving, you need to choose them again whenever you print an invoice.
25.0212.09	05/27/25	32515	New	Invoice	Print > Show in the Audit log which user printed an Invoice.
25.0212.09	05/27/25	32250	Bug	Shipping and Receiving	When clicking the Refresh button, an error message pops up - AJAX Error: parsererror. The same issue occurs when selecting the "Show All" button for the Closed status. If clicking the "Ok" button, the page becomes unresponsive.
25.0212.09	05/22/25	32463	Bug	Shipping and Receiving	WAREHOUSE - SHIPPING & RECEIVING - CLOSED Tab: Clicking the 'Show All' button does not work and will just load end of list.
25.0212.09	05/22/25	32323	Bug	Sales Order	Status: After the PO for the BO line item was received, the status did not automatically update from "Waiting to be Purchased" to "Closed." It was set to be moved to Closed status. If the USER tries to REMOVE the Status then give this popup: TITLE STATUS ERROR MSG: You cannot leave the Status field empty or lose visibility of the item on the Shipping & Receiving screen.
25.0212.09	05/22/25	32406	Bug	Reports	Items: Total Sales By Item (Best to Worst Qty), Total Sales By Item (Best to Worst Price) When running these reports, Search filters (Today, This month, This quarter-to-date, This Quarter, This Quarter-to-date, Yesterday) results in an error when running report.

25.0212.09	05/21/25	32471	Update	Interface	(KSI/PPC) Tab browser names should contain the sub tab name. E) On the Item List screen, when the Item Vendor tab is open, the brc should show Item Vendor tab. (Applies to all screens with Tabs) Do for ALL record types, including Custom Tabs, but change the T/ A5.
25.0212.09	05/21/25	32512	Update	Settings	Modules: 1PLACE > AR > Commissions - Remove all tabs related t Commissions, including the main Commission page from the navig panel as per Steve's instruction.
25.0212.09	05/20/25	32405	Bug	Reports	Items > Inventory Count Sheet (By Category / SubCategory with F Locations, Inventory Count Sheet (By Fixed Bin Locations), Invent Sheet (By Item Receipt Bin locations) - The reports always shows t prompt asking if you want to download even though the report do have any data beyond 5000 records or none at all.
25.0212.09	05/20/25	32510	Update	Import Wizard	ITEM IMPORT WIZARD: Add length, width, height on the import wizard's database column.
25.0212.09	05/20/25	32509	Bug	Reports	QUOTATION LINE ITEMS REPORT: Error occurs when download report for the month of May.
25.0212.09	05/19/25	32508	Bug	Item Details	25.0212 (PLASTIC) ITEM QTY IN BACKORDER > They have item: shows backorders even though there's no backorders for uninvoic orders or open sales orders. Clicked on recalculate all Quantities i button but it did not remove the backorders.
25.0212.09	05/19/25	32505	Bug	Reports	REPORTS > INVOICES/CREDITS > INVOICES/CREDITS BY CUST (Open): Custom date range is not working properly. Whether you select 30 previous year, it will not filter properly and will show results to the Invoice in 1place. Similar issue with AR Tab > Customer Statement to see if totals are correct as well.
25.0212.09	05/19/25	32470	Bug	Settings	User > Cloud Document: Error occurs when signing in to google dr account.
25.0212.09	05/19/25	32506	Bug	Import Wizard	25.0212.04 (Houston Auto) Imported PartsLink data to 1place. Ge stuck error when trying to import initially.
25.0212.09	05/15/25	32489	Bug	Reports	INVOICE/CREDITS VENDOR, ITEMS report: The report showing on plastic waterlines is different from the orig design created on the dev server.
25.0212.09	05/15/25	32502	Update	Tax	TAX drop down for all screens including Customer Portal> Need to tax codes on the drop down.
25.0212.09	05/14/25	31768	Update	Quotes, Sales Order	Add a new option to calculate the Sales Taxes based on Bill To Add (related to Task#31178) When user is entering the order on the Quote/Sales order and cha ship to a taxable customer, the Missing zip code is showing up.
25.0212.09	05/14/25	32491	New	Reports	ITEMS --Create a new release 24.0122.63 from 0122 --Add the fields QTY on PO and QTY on BO in the ITEMS Report a make sure it can be sorted by Item# --Update Vaillant company server so they can use it right away.
25.0212.09	05/14/25	32492	Bug	Reports	Items Doesnt work to download the report using ABC company. Please also add the 2 new column options on the Items report.
25.0212.08	05/13/25	32492	New	Reports	Items --Create a copy of the Items Report and call it "Items (Inventory)" --Add the fields QTY on PO and QTY on BO in the ITEMS Report a make sure it can be sorted by Item# --Only show items where the TYPE = Inventory --Add this new report on the new version release

25.0212.08	05/13/25	32494	Bug	Sales Order	25.0212.04 (KSI/PPC) Sales Order >Ship to field> When changing to address on the Sales order, it does not turn the Save button to on and is not saving the changes and reverts back to old Customer entered
25.0212.08	05/12/25	32488	Bug	Import Wizard	VENDOR ITEMS (1 vendor or all) > IMPORT WIZARD: The Update function is not working. It's not updating the QIS for V
25.0212.08	05/12/25	32473	Bug	Replenish Stock	ITEM STOCK >REPLENISH STOCK: OBP has an issue raised that the Qty fields on the item details won't update automatically if they have received or incoming stocks. They are working if it will affect the replenish stock calculation. QO on BO we use SC QIS, is ITEM fields only. LETS CHANGE the QTY in STOCK to be a ITEM Stock.
	05/12/25	32487	Bug	Item Detail	Qty in Stock, Qty in PO, Qty Backorder fields > Data synchronization issues/Out-of-sync.
25.0212.08	05/08/25	32415	Bug	Sales Order	SALES ORDER > ALL LINE ITEMS: Sales Date - Found an issue when you sort the data, it will just keep on loading and nothing happens.
25.0212.08	05/08/25	32433	Update	Reports	ITEMS: INVENTORY VALUATION - CURRENT (CATEGORY/SUB CATEGORY) When running the Report, Qty Received is inconsistent items shows zero even though there are item(s) in Stock. Also the label for Qty Received on the report is spelled incorrectly.
25.0212.08	05/08/25	32482	Update	Credit Memo	(UAB) CREDIT MEMOS >Close all credit memos that begins with (U) were old CMs that should be closed.
25.0212.08	05/07/25	32402	Bug	Reports	The Report for Items appears twice and the contents of Item Report section are all the same.
25.0212.08	05/07/25	32397	Update	Pricing Templates	PRICING TEMPLATES >Update all Customers Using This Template to be fixed. (IT WILL UPDATE THIS PRICING TEMPLATE, WHICH CUSTOMERS ALREADY HAVE A PRICING TEMPLATE)
25.0212.08	05/07/25	32481	Update	Item Details	(KSI/PPC) ITEM DETAIL > There's no option to show the Pictures
25.0212.08	05/07/25	32343	Bug	Reports	ITEM STOCK REPORT/INVENTORY VALUATION - HISTORICAL items are not showing on the reports. (WE WILL SHOW A RECORD ON NET DIFF > 0)
25.0212.07	05/06/27	32351	Bug	Reports	INVOICES / CREDITS BY DATE (TOTALS) and INVOICES / CREDITS MONTH (TOTALS): Same date range, showing the same # of Invoices and credits, but it shows different %Credits, Net of Invoices/Credits, Total Cost, Profit, and Margin.
25.0212.07	05/02/25	32472	Update	Settings	show report module like, Customers, Vendors, Items, Quotes, Sales Invoices/CM, AR / Collections, Sales Taxes, Purchase Orders, Jobs Exception Reports
25.0212.07	05/02/25	32233	New	Sales Order	Print > Picking Ticket(s) - With ALL Bin Locations, that will show ALL inventory Bin locations (from the ItemStock table for the item) UNLESS Item pick line,
25.0212.07	05/02/25	32461	Bug	Shipping and Receiving	25.0212.03 (BICHUN) WAREHOUSE - SHIPPING & RECEIVING - ROUTE tab: When doing batch action for the sales order on the In Route tab to close, not all on the list will be changed to closed. A few number will be left open have to Redo the step until 1 or 2 remains and it no longer lets you do the batch action and will need to manually change them.
25.0212.07	05/02/25	32468	Update	Item List	Item List screen > Change the header names in item list-> ALL-> Subcategory 3 and Subcategory 4 -> Change these names to Make Model and YearsListing and Year Range
25.0212.07	05/02/25	32465	Bug	Customer Statements	AR - CUSTOMER STATEMENTS: The data shown this tab is not matching with the information under Reports - Invoices/Credits - Invoices/Credits Customer (Open). There's a discrepancy with the totals shown due

					Customer (e.g., name, address, phone, email) and missing data from the Customer Statement under the AR tab.
25.0212.07	05/02/25	32466	Bug	Invoice	25.0212.03 (BICHUN) INVOICES: Reported a bug wherein invoice would show 0 totals both on the list and after opening the invoice, though there are item(s) on the invoices. PO # on the invoice also either blank or Null. Some samples are SS160867, SS160869, SS161343.
25.0212.07	04/30/25	32233	New	Sales Order	Print > Picking Ticket(s) - With ALL Bin Locations, that will show A inventory Bin locations (from the ItemStock table for the item) UN Item pick line,
25.0212.07	04/30/25	32448	Bug	Purchase Order	PO List - A lot of the POs that shows a negative values is incorrect. for reference. If the PO is opened, it will show the correct value of The amounts does not match either. Check all POs that shows neg values (enclosed in parenthesis) and correct the information show match what exactly is in the PO.
25.0212.07	04/29/25	32459	Bug	Item Catalog	I uploaded the Item Search Catalog but it doesn't work on Find Pair sure it doesn't work even though it was properly imported. (No bug user error).
25.0212.07	04/29/25	32443	Update	ALL Transactions	Need to restore POLineItems, SOLineItems, Invoice LineItems, ItemStock, Item catalog from dev backup server (This happened in middle of night, by accident, but restored before the next morning)
25.0212.07	04/29/25	32401	Bug	Purchase Order	User reported: When I receive an item and enter the bill, I must sign get out of the PO, then go back into the same PO and sync it. I can without getting out and back in again
25.0212.07	04/28/25	32336	Update	Settings	INVOICES/CMS > Custom terms and Conditions > Invoices > Design a huge space in between phrases but the design did not reflect on the invoice print preview. Please refer to the screenshot provided.
25.0212.07	04/28/25	32448	Bug	Purchase Order	PO List - A lot of the POs that shows a negative values is incorrect. for reference. If the PO is opened, it will show the correct value of The amounts does not match either. Check all POs that shows neg values (enclosed in parenthesis) and correct the information show match what exactly is in the PO.
25.0212.07	04/25/25	32455	Bug	Sales Order	SALES ORDER PURCHASE ORDER SCREEN > On the Summary PO window, the drop down for Existing POs are disabled, not showing down for existing POs.
25.0212.07	04/25/25	32449	Bug	Shipping and Receiving	WAREHOUSE - SHIPPING & RECEIVING - The In Route and Closed only shows (0) items even though there's orders processed.
25.0212.07	04/25/25	32448	Bug	Purchase Order	PO List - A lot of the POs that shows a negative values is incorrect. for reference. If the PO is opened, it will show the correct value of The amounts does not match either. Check all POs that shows neg values (enclosed in parenthesis) and correct the information show match what exactly is in the PO.
25.0212.07	04/25/25	32450	Bug	SO, Invoice	SALES ORDER and INVOICE - The tax and discount values are not correctly/automatically mostly on the recently imported invoices/ values were set to 0.4% which was meant to be 40%
25.0212.07	04/25/25	32454	Bug	Reports	ITEMS - ITEMS STOCK > Report loads for a long while then results: undefined error.
25.0212.06	04/24/25	32442	Bug	Sales Order	When a user generates a PO from an SO, the SOPO screen shows a line item, preventing the user from creating a PO.
25.0212.06	04/24/25	32440	Bug	Reports	ITEMS STOCK REPORT > Vendor Column: It does not show the vendors in the vendor column.
25.0212.06	04/24/25	32396	Update	Sales Order	SALES ORDER DATE > Need to lock the date/make it uneditable.
25.0212.06	04/24/25	32374	Bug	Purchase Order	Magnifying glass isn't working when looking up vendors

25.0212.06	04/23/25	32230	Bug	Shipping and Receiving	24.0122.62 (QUALITY) ITEMS TO RECEIVE > IN ROUTE/ TO DISPATCH (Multi-Drivers) Sales Orders > When orders are being transferred from the Items to Receive (In Route) to main warehouse Dispatch screen and printing and updating the status using the Dispatch (Multi-Drivers) Sales Orders, the orders that were transferred go to Items to Receive (In Route).
25.0212.06	04/23/25	32361	Update	Invoice	INVOICE 3 >> it does not have the Bill to and Ship to
25.0212.06	04/23/25	32432	Bug	Purchase Order	The Vendor name and Warehouse name are not showing on the PO preview.
25.0212.05	04/22/25	32353	Bug	Sales Order	SALES ORDER BACKORDER >When Invoicing sales orders with backorders linked to a PO, the PO is not transferred over to the new order. It causes duplicate ordering of the same backorder.
25.0212.05	04/22/25	32428	Bug	Import Wizard	SALES ORDERS (IMPORTED SOs) - There's an issue with the imported data where the recent open sales orders are not automatically updating customer info (Taxable/Tax Exempt) as well as the default Warehouse setting (Bichun) Actual customer profile shows correct settings and new Sales Orders in 1place does not have any issues aside from the imported ones from OneSource
25.0212.05	04/16/25	32428	Bug	Sales Order	Status > Imported SOs > Imported sales orders that have been fully invoiced and invoiced are not updating their status to "Closed." The status field remains empty. If all items in the sales order are shipped and the order is invoiced, then set the status to "Closed".
25.0212.05	04/16/25	32352	Bug	Purchase Order	AUTO LINK SALES ORDERS - When a PO is received, the Auto Link Order does not show the related SO back order line items. SOPO - Even when the PO was received, the Sales Order Back Order is not deleted, and the original SO was not changed.
25.0212.05	04/16/25	32239	Bug	Find Parts	FIND PARTS Standard screen bugs. --The Decimal field should default to x % (with no decimals). If the discount is 40% then it should show 40%. --Make the relationship between the List Price, Unit Price Discount, Net Price work the exact same way as the Find Parts (Auto Parts) screen, they all stay in sync with each other. For Example, if the Unit Price changed to \$80 and the Discount % field has X % discount then the Net Price field should get updated and the LINE TOTAL field should update the Qty x Net Price. Etc....
25.0212.05	04/16/25	32427	Bug	Purchase Order	SALES ORDER BACKORDER > When deleting Sales Order backorder items linked to a PO, the screen loads endlessly and lags the entire screen then creates a bad request screen for the SOBO. Please check: S210032-B1
25.0212.05	04/16/25	32416	Bug	Sales Order	Find parts --> Sales order: when the user creates a sales order from the Parts' screen; however, the line items are not retrieved.
25.0212.05	04/15/25	32409	Bug	Credit Memo	Give Cash back>Payment details Payment method is not showing on CM detail and CM Print
25.0212.05	04/15/25	32407	Bug	Reports	Sales Tax Liability - Detail > Jan 1, 25 - Jan 31, 25 ALL totals in 1place are incorrect because credit memos (negative) are getting deducted. When downloaded to excel file, ALL totals are incorrect because line items are getting duplicated, credit memos (negatives) are not getting deducted and some cells are in different format (have more than 2 decimals).
25.0212.05	04/14/25	32315	Update	All Transactions	Quote/SO/CM >Other Info tab >Created By etc. the same as the line item Other Info tab >QUOTE> Add the info tab after the Comments tab. >Sales Order >Add the info tab after the Payment Info Tab. Move the Custom Field at end, part after the Other tab. >Credit Memo >Add the Info tab after the AP Bill Info tab and move

					Custom Field tab at the end after the Other tab.
25.0212.04	04/14/25	32395	Bug	Catalog Management	CATALOG MANAGEMENT > It does not show the table for Part T Filter To Exclude From Find Parts Searches. When exporting the Ptypes, it downloads a file with 0 KB and has a message that the file format or extension is not valid. (Missing data on KSI c
25.0212.04	04/10/25	32398	Bug	Import Wizard	Encountered lots of issues when doing the import process in 1place importing data, either the progress bar will be stuck at a certain percentage or it will get completed but a lot of data would still be missing. Files requested to be imported were Item list, ItemQtyInStock, Invoice and Line items, and requested to delete duplicates and POs for reimportation for their GoLive.
25.0212.04	04/09/25	32327	Update	Printing	QUOTE, SALES ORDER, INVOICE, CREDIT MEMO> PRINT SETTINGS >Add Created By checkbox on the Customer Print Settings. >Also please add Created by on the Sales order list screen.
25.0212.04	04/09/25	32348	Update	Credit Memo	When user selects Credit Card for payment type of refund, the Give button disappears. Reference # update to Reference # (update spelling)
25.0212.04	04/08/25	32377	Update	Credit Memo	Please analyze the code of what the Refund screen does (as it pertains to Payments and QBO affect). --Add the same button to the Invoice screen and make it work the same way, but for the Invoice, rather than a Credit Memo payment/refund. --Let Steve, Sy, and Thiru know when you are done so Thiru and I can test the Credit Card refund process.
25.0212.04	04/08/25	32251	Update	Item Detail	Stock > Financial: Items in Stock with \$0 will be updated based on the 1st transaction (1st receipt). If there is no cost on the 1st transaction, please attach an Excel file to send to Waleed for checking.
25.0212.04	04/08/25	32381	Bug	Quotation	Total amount not calculating correctly. Q1962 was duplicated to Q1963 but showed a different Total. The quote was showing on the created quote was \$637.00, but when it was duplicated it showed the correct amount, which is \$293.00. When printing the quote, the Total shown is incorrect (\$637.00) instead of \$293.00. Even in the Quotation List, the total shown is incorrect.
25.0212.04	04/08/25	32288	Bug	Shipping and Receiving	SHIPPING AND RECEIVING > DISPATCH SCREEN > SHIPPED VIA > Change the buttons filters from auto SELECT. (4/1/25). Please make ALL of the columns sortable, by Ascending when clicked and desc if clicked again. Then ascending if clicked again, etc. (4/1/25--Undo some code completed below). When the user clicks Shipped Via FILTER just create a new Filtered recordset showing the Shipped Via selected. But do NO SELECT the select and do not change the Stop #. (If you find any code that tries to auto fill a Stop # please remove it, except where the user or scanner enters the Sales Order # in the order field. When the Refresh Sort Order button is clicked it should not require other actions by the user to select a Driver, etc but just refresh showing Orders by Stop # in ascending order. The # showing to the right of each Shipped via doesn't appear to be accurate. On ABC company when enter a Sales Order # in the Find Order field and press enter, getting a popup error.
25.0212.04	04/07/25	32382	Bug	Invoice	Invoice #134937-B1: The total amount on the invoice is incorrect. The items has a subtotal of \$38.00, no taxes. However the total amount is \$76.03.
25.0212.04	04/07/25	32384	Bug	Catalog Management	CATALOG MANAGER: Takes FOREVER to open.
25.0212.04	04/07/25	32383	Bug	Customer	Add New: Doesn't work in v 25.0327. Getting error.

25.0212.04	04/03/25	32370	Bug	Find Parts	GP field incorrect. Always shows 100%
25.0212.04	04/03/25	32368	Bug	Receive Payment	When user enters a CK/CC number and apply the payment to a cu when the user go to the Invoice Detail>Payment info, the CK/CC r not showing.
25.0212.04	04/03/25	32350	Bug	Reports	C15043049 appeard 2x on the report as Credit Refund and Credit (Credit Memo line is incorrect)
25.0212.04		32348	Update	Credit Memo Detail	Reference # update to Reference # (update spelling)
25.0212.04	04/02/25	32356	Bug	Import Wizard	BICHUN (25.0212.03) IMPORT WIZARD: Update wizard not working properly. The function is not reflecting updated information (Customer, Vendor list etc.) Needs to be fixed we aim to have them GoLive by April 4.
25.0212.04	04/02/25	32354	Bug	User Settings	Security Type > NO ACCESS: Users with No Access as security type have a full access to all setti they log in in 1place.
25.0212.04	04/01/25	32351	Bug	Reports	INVOICES / CREDITS BY DATE (TOTALS) and INVOICES / CREDI MONTH (TOTALS) Same date range, showing the same # of Invoice credits, but have different %Credits, Net of Invoices/Credits, Total Profit, and Profit Margin.
25.0212.04	04/01/25	32355	Bug	Settings	General Sales Settings: Undefined Error. Please check all settings if they are having the sa
25.0212.04	04/01/25	31861	Bug	Find Parts	When you search up HO1206100 on the find parts screen, HO120 comes up also which are 2 different parts.
25.0212.04	03/31/25	32335	Update	Invoice	INVOICE PRINT PREVIEW >Need to adjust the logo and the Bill to margin.
25.0212.04	03/31/25	32339	Bug	Find Parts	When applying a discount on this screen, the Net Price calculation incorrect. Pressing the ENTER key after entering the discount doe the value. However, clicking the mouse cursor elsewhere on the sc after entering the discount saves the value.
25.0212.04	03/31/25	32342	Bug	Customer Statements	AR > Customer Statements > Preview not working: Undefined Err
25.0212.04	03/28/25	32340	Bug	Item Detail	Item detail screen, we can't see the Item vendor tab
25.0212.04	03/28/25	32334	Bug	Customer Detail	Sales History > Not updated. Some deleted transactions are not sh
25.0212.04	03/28/25	32332	Bug	Quote	When deleting the SO from a quote, the SO number still shows eve refreshing the page. Clicking the SO # results in a bad request.
25.0212.04	03/28/25	32288	Update	Shipping and Receiving	Update on UI and function
25.0212.04	03/27/25	32331	Bug	Item Catalog	Add new items > The page is just loading, or leads to a bad request
25.0212.04	03/27/25	32333	Bug	AR	Customer Statements > Page not working.
25.0212.04	03/26/25	32328	Update	Item Catalog	Item Catalog Description - add another option for the description YY-Make-Model-Partslink Description, Partslink Variables. Exampl Partslink Item #: 1999-2000 HONDA CIVIC-Front bumper cover (coupe/2dr hatchback; prime)
25.0212.04	03/26/25	32274	Update	Reports	REPORTS screen changes: Update the report names for AR - Payments Received to Accounts Receivable - Payments Received. Update the report names for AR - Payments Received (End of Day Accounts Receivable - Payment Received (End of Day) In 1place report screen, PDF and Excel downloads. Report Criteria > Group By >Change the Type to Payment Type When invoicing Sales Order with prepayment, the Sales Order sh removed from the report and show the invoice instead. The report

					only show UNINVOICED Sales Order Payments
25.0212.04	03/25/25	32274	Update	Reports	REPORTS screen changes: Rename the Report called Invoices/Credits Payments Received to Payments Received (also make it also show the Sales Order depos report as well).
25.0212.04	03/19/25	32143	Bug	Import Wizard	File Validation: During the export process, rather than getting the specifically required for validation, the entire import file is exported
25.0212.04	03/19/25	32302	Bug	Import Wizard	Customers > Import not working, just stuck on the progress bar.
25.0212.04	03/19/25	32274	Update	Reports	REPORTS screen changes: Remove the Item Catalog Category and move the single report over to Items category. Make a new REPORT Category called AR / Collections - not updated Remove 50% of the VERTICAL SPACE between all of the Categories (make them more concise), including the All Reports, My Favorites, Frequently Run and Custom Reports. DELETE the new report you created for this task (below). Rename the Report called Invoices/Credits Payments Received to Payments Received (also make it also show the Sales Order depos report as well). - IP Move the report called: Invoices / Credits Payments Summary (End of reports and the actual report name to: AR - Payments Received Day) IP Move the report called Sales Exception: Items Not Sold to the Exceptions Reports report category. - IP
25.0212.03	03/18/25	32296	Update	Import Wizard	IMPORTING CREDIT MEMOS >when we import CMs to 1place, we don't have a field for Qty Returned the Returned field for these CMs are zero as for invoices we have Qty Ordered and Qty Shipped, the Qty Shipped column does not fill in the returned field. >When importing line items to the CM, it recalculates the total line payments and subtotal
25.0212.04	03/17/25	32298	Bug	Import Wizard	Found an issue wherein if you imported a file for ItemQtyInStock, the warehouse ID/Name does not autofill if you only have 1 Warehouse. Warehouse information will become blank instead once imported if
25.0212.04	03/17/25	32282	New	Reports	CREATE REPORT called 'Invoices / Credits Line Items by Vendor, Item' This report will look for the Invoice/CM line items. If the line item has no vendor, it will still show on the report (Custom to Filter), Report Period Filter The Item Vendor is the default Vendor of the item. If it has a specific will take the vendor where it was ordered.
25.0212.03	03/13/25	32290	Bug	Find Parts	Calculate (and maintain) Sales Taxes based on the 'Bill To Address of the (Default) Ship To Address. >When a Ship to customer is linked tax exempt Bill to, the Tax setting for the Bill to customer does not populate at the Fed Tax ID and Tax Exempt checkbox.
25.0212.03	03/12/25	32292	Bug	Invoice	Create Credit Memo: When clicking the create credit memo, it will ask for the reason, but the Invoice page is refreshed, the pop-up fails to reappear, and it prevents creating a credit memo without asking for a reason. Credit Memo - The system is generating duplicate credit memos that contain no line items.
25.0212.03	03/12/25	32291	Bug	Reports	User hirdemarp@orlandobp.com does not show any reports in her Tried all settings available.
					DISPATCH SCREEN - SUBPERS VIA FILTER

25.0212.03	03/12/25	32288	Update	Shipping and Receiving	DISPATCH SCREEN > SHIPPED VIA FILTER: Change the buttons filters from auto SELECTS all for whichever st is clicked to change that to give a popup that says: 'Do you want to Select all Sales Orders for Shipped Via [X]?' Then if the user clicks ' it can select them all and then put them all up on the top in green. If click NO then it can just FILTER for all of those and NOT select the
25.0212.03	03/12/25	32228	Update	Reports	(Branch/Master) Design a better way to keep ALL reports in sync, making a new master table of reports OR making the existing way stay in sync automatically.
25.0212.03	03/11/25	32197	Update	Printing	Redo: Time should show the USER'S Timezone and not server time
25.0212.03	03/11/25	32167	Bug	Reports	Reports>Invoice/Credit Received Payments Downloaded excel does not show the credit memo as negative.
25.0212.03	03/11/25	32146	Bug	Reports	Invoice/Credit Payment Details: DOWNLOADED EXCEL FILE DID HAVE ANY CONTENT
25.0212.03	03/11/25	32232	Update	Import Wizard	ITEM IMPORT WIZARD: On the option to Import Vendor Items N for 1 vendor, add the option to UPDATE any of the fields, so long a spreadsheet used has a matching Item # (and vendor selected).
25.0212.03	03/10/25	32256	Bug	Item Detail	REPLACING ITEM PICTURE: When replacing the picture for item GM1000907 and click on Save, an error message popup.
25.0212.03	03/10/25	32274	New	Reports	Create report called 'Sales - End of Day Reconciliation' >Group by: Payment Type, Sort by Payment Date, Sort it by Custo >Please refer to the sample format in the dev list spreadsheet. >Sc
25.0212.03	03/10/25	32277	Bug	Sales Order	Bill to dropdown: When opted to SEARCH IN OTHER FIELDS, the dropdown data gets mixed up where the address is displayed under Name column.
25.0212.03	03/10/25	32285	Update	ALL	HELP BUTTON POPUP Form. When clicking the HELP button, on it displays a popup screen. Please REMOVE the popup form and ju whatever the code would do when clicking View Knowledge Base. this screen. In other words, when the user clicks the Help button ju auto display the table drive help topic for that form. If none exists default it to http://kb.onesourcesoftware.com/support/kb
25.0212.03	03/06/25	32254	Update	Purchase Order	STATUSES: When all items are received for PO, the status should automatically change to Received Make the PO statuses name change based on the user defined
25.0212.03	03/06/25	32273	Bug	Sign Up	Clicking the 'Sign Up' button opens a new tab directing users to the OneSource website. However, selecting 'Buy Now' does not open up page. New customers should be able to open the sign-up page in 1Place, going to the website.
25.0212.03	03/05/25	32185	Update	Credit Memo	On Credit Memo Screen, Show the Credit memo applied amount in Invoice amount in Payment Info tab
25.0212.03	03/05/25	32278	Bug	Settings	Users: Alter email function to send an activated email when a new created.
25.0212.03	03/05/25	32272	Bug	Integrations	CCC True: Delivery Area Zip Codes, exporting the Zip Code Temp shows a blank file.
25.0212.03	03/05/25	32263	Bug	Integrations	CCC True: FTP Files, exporting FTP files using the Download (Default) option results in empty files.
25.0212.03	03/04/25	32185	Bug	Receive Payments	Receive payments --> SO-->When a user makes a payment on a sa the payment does not have a receipt number. Receive payments -->When the user checks and unchecks the open table, the Previous Amount Applied and Remaining Credit values are showing incorrectly. Receive payments -->When the user changes the payment terms from default option, the discount percentage and discount amount are r

					calculated or updated properly.
25.0212.03	03/04/25	32266	Bug	Reports	In Invoice payment details report ,when group by is set to none and are more than 5000 then excel is downloaded with zero rows.
25.0212.03	03/04/25	32249	Bug	Receive Payments	Even if all refunds are deleted, the cost will not revert to the unref cost or the original amount.
25.0212.03	03/04/25	32229	Bug	Sales Order List	When users void an order and zero out items, the sales order total update in the sales order screen.
25.0212.03	03/04/25	32264	Update	Quotation	Quotation: (24.0122.62) DUPLICATE QUOTE BUTTON >When user clicks or duplicate quote button, it updates the Entered By field with the user of the logged in user. We should retain the same information on the quote. Also, the Created By should be the same person who originally created the Quote.
25.0212.03		32259	Update	All Transactions	When using pricing levels on an item, the Discount % field does not update on the Find Parts screen, Quote line item, or Sales Order line item
25.0212.03	03/03/25	32250	Bug	Shipping and Receiving	When clicking the Refresh button, an error message pops up - AJAX Error: parsererror. The same issue occurs when selecting the "Show" button for the Closed status. If clicking the "Ok" button, the page becomes unresponsive. Remove the Moved to Back Order Status.
25.0212.02	02/28/25	32185	Bug	Receive Payments	* Issue : Remaining Credit Calculation * Issue : Amount Applied is accepting more than the Remaining Credit * Add / Remove the amount when changing the invoice amount from memo amount
25.0212.03	02/28/25	32255	Update	Reports	REPORTS LEFT PANEL MENU > Reduce the space between the report categories on the Reports screen and be equal with the MAIN left
25.0212.03	02/28/25	31377	Update	Shipping and Receiving	DISPATCH SCREEN > MANIFEST >Remove extra spaces in the box, or make the customer column wider we can maximize the space, and or make the font smaller? >Add a new column in between the Your Order # and Amount Received called Total # of Pieces.(The Total # of Pieces will be the Shipped per order, only the ready to be shipped) >At the bottom table, add Total # of Pieces after the Total No. of C and move the other 2 tables to the right. (The Total # of Pieces will be total Qty Shipped for the entire manifest, only the ready to be shipped) >Change the name Total No. of Orders to Total # Orders.
25.0212.02	02/27/25	32062	New	Sales Order	* Right Menu to Open Lot Tracking Screen
25.0212.03	02/27/25	32223	Bug	Reports	INVOICES/CREDITS BY SALES REP (TOTALS) >REPORT CRITERIA REP FILTER >When selecting names aside from Luis and Ana, the sales reps are not auto populating the report.
25.0212.03	02/27/25	32192	Bug	Purchase Order	The Recalculate button is grayed out for some POs.
25.0212.03	02/27/25	32253	Bug	All Transactions	Sales Tax Code - The sales tax code for the city of MARRERO is not calculating the correct tax.
25.0212.02	02/26/25	32062	New	Sales Order	* Lets add a button called: Ship from Different Lot or Bin to the popup to re-display the change options. * Make the Bin and Lot columns inherit the Label settings for those columns, like on the Item Detail screen. * The Qty will have a - button on the left of the QTY and a + button on the right of the Qty to allow the user to quickly change the Qty UP or DOWN * Don't allow the user to ship more or less than what is in the Qty Selected field. Display a standard, editable popup if they try to.
					Payment Info > Give Cash Back or Apply Credit: --When giving a refund it creates a duplicate transaction

25.0212.02	02/26/25	32249	Bug	Credit Memo	--when giving a refund, it creates a duplicate transaction. --If the duplicate is deleted, the refund info will not show in the Payments Info Tab even when the page is refreshed.
25.0212.02	02/26/25	32187	New	Receive Payments	--Change the title Payment Reference # to Check /CC# --Add a new field below called Authorization # this is the same Authorization # field in the Payments Info tab on the Invoice/Credit Memo screen --handled the tab function in the inputs.
25.0212.02	02/21/25	32192	Bug	Purchase Order	PURCHASE ORDER: When user click Recalculate button weight is calculated.
25.0212.02	02/21/25	30808	Bug	Reports	Exception Report - Sales Order Item Price Changes: Shows error when running.
25.0212.02	02/21/25	32197	New	Printing	Add the time when a document was printed on All Document Print screen
25.0212.01	02/20/25	32193	Bug	Shipping and Receiving	Not showing the correct values based on the status.
25.0212.01	02/20/25	32191	Bug	Purchase Order List	PO List - When sorting the column for the Vendor Number an und error pops up. PO List - Vendor Number Column should be named as Vendor Name Vendor number is different.

24.0731 (Bugs fixed and added features to this version prior to its release)

Fixed in Version #	Date	Task #	===== Type =====	Screen (or Report Name)	Description
			Bugs		This is a link to the list of bugs that were fixed on the 24.0122 version and before 24.0731 was released.
		31768	New	Find Parts	○ Add a new option to calculate the Sales Taxes based on Bill To Address. (related to Task#31178) ■ On the 24.0919, FIND PARTS > When entering the Ship To address and changing the Bill to address, the Sales Tax at the bottom should be set based on the Bill To address.
24.0122at	09/03/24	31174	Update	Invoice List	- Add a column for Contact field on the Invoice List screen. And the same column on the Show/Hide Setting and make them searchable and sortable. - Invoice/Credit Memo's Module Security. When the EDIT option (for a user) is enabled, AND IF the Invoice has already been paid, Keep ALL fields locked EXCEPT for certain fields.
24.0122at	08/30/24	31660	New Feature	Item Details	Item Pictures - Single Image upload irrespective of the version - Multi Image upload mapping with file name and Item Number
24.0122at	08/30/24	31332	New Feature	Payments	Testing all Calculations and Issue fixing - When deleting Credit memo payments in Invoice, credit memo amount will double up the amount - Apply the payment based on the existing un-applied payments.
24.0122at	08/28/24	31695	Update	CCC	CCC not importing List price on Quotes (and possibly Sales Orders?).
24.0122as	08/27/24	31694	Update	CCC	1.(ADS) Add 0 as prefix for Numberofdelivery field in CCC

24.0122ar	08/26/24	31609	New Feature	Find Parts	UPC code to be searchable in the F3 field.
24.0122ar	08/24/24	31332	New Feature	Payments	- Payment Term Missing on Open Invoices - Testing all Calculations - Credit Memo Check Calculations
24.0122ar	08/23/24	31332	New Feature	Payments	- Redirect to receive payment screen when clicking on the receipt id from payment info tab - DO NOT AUTO SELECT INVOICES after entering Amount Received From Customer value.
24.0122ar	08/22/24	31688	Update	API	CCC File Export & API > ITEM Export for CCC On the Sales > Integrations > Part Type / Code Mapping TAB, lets make these changes. - Move the column called: Your Equivalent Part Type Quality Code (see Quality Indicator Field on Item Detail screen) to the far left. - Rename the moved column to: 'If the 1place > Item Detail > Quality Indicator field is...' - Rename the column called: API Supplier Part Type Quality Code to 'Then Make the CCC PartType value...' (add another column with title) 'And Make the CCC Industry Certification value...' (FIELD NAME: APIIntegrationCodeMapping.SupplierIndustryCertificationCode - Then on the Sales > Integrations > CCC File Transfer (for Export File or FTP File or Email file) when making the file for Part.txt insert the PartType value into Column 5 and insert the Industry Certification value into Column 10. - On the API for Item, add a new tag called: IndustryCertification and insert the mapped value for the industry certification.
24.0122ar	08/22/24	31332	New Feature	Payments	- Amount Set Zero when editing Existing Receive payment line item - Payment terms not showing on Edit Screen. - Apply the Credit memo amount if partially applied when manually editing the amount paid on invoices - On the Rec Payments screen, when a value is selected, turn the entire row light green like on the Find Parts line items when they get selected. - Redirect to receive payment screen when clicking on the receipt id from payment info tab - DO NOT AUTO SELECT INVOICES after entering Amount Received From Customer value.
24.0122ap	08/20/24	31679	Update	Credit Memo	Remove the popup 'This Invoice has NOT been paid. Are you sure you want to create a Credit Memo for an Unpaid Invoice?'.
24.0122ap	08/19/24	31332	New Feature	Payments	- Change, when Apply SOME OR ALL of 1 Credit Memo to 1 Invoice, on the Invoice screen, CM screen, or Rec Payments screen--save the Invoice, CM #s in the payment detail. User will be able to go to Invoice and see the CM # that applied \$x to it. User will be able to go to CM and see the Invoice # that applied \$x to it. - When a Payment is made that combines 2 or more Credits to pay 1 or more Invoices then we will insert MULTIPLE as the Invoice # or CM# that appears on the Invoice Payments tab and the CM payments tab. Then on the CM Payments > Invoice # column, turn the Invoice # value (such as the Invoice # 1001, or the word MULTIPLE into a link that will open up the Receive Payment screen - RECEIPT if the value = MULTIPLE, or open up the Invoice

					screen to the Invoice it paid, if the value is NOT EQUAL to MULTIPLE. On the Rec Payments screen, when a value is selected, turn the entire row light green like on the Find Parts line items when they get selected.
24.0122an	08/15/24	31655	Update	API	API-Count by Bin, Count by Item - Be able to scan an item by the item OEM #, or Other Number, or SKU #, or Alt1, or Alt2 and then have it map to the item # (if found), or give message at end of scanning process if not found.
24.0122an	08/15/24	31332	New Feature	Payments	Show applied invoice number on Credit Memo Payment info tab
24.0122an	08/14/24	31656	New Feature	Item List	Make a way for user to see the items in 1 or more bins, to count or verify. - On Item List > Item Receipts screen by the Bin #.
24.0122an	08/13/24	31626	New Feature	Settings	USER SETTING >DO NOT ALLOW TAB > User Cannot reprint Quotes - User cannot reprint sales Orders - User cannot reprint Invoices - User cannot reprint Credit Memos
24.0122an	08/13/24	31653	Update	API	Alter FetchItem and Inventory Bin API to get a data based on OEM #,Other #,UPC Code,Alt #1,Alt #2 fields.
24.0122an	08/13/24	31332	New Feature	Payments	- (BUG) Place a small right hand arrow button to the LEFT of the Discount Amount. When clicked, auto calculated, and insert the DIFFERENCE between the Net Balance Due and then Amount Paid. The purpose is to help the user calculate and enter the 'Difference' paid and applied to the Invoice vs the Amount Due. In this case, for example, if the Amount STILL due after entering the Amount Paid was \$3.23 cents. When the button is clicked it will insert \$3.23 cents into the Discount Amount field and will change the Net Balance Due to \$0.00. - When user clicks CHECKBOX to apply a CREDIT, lets calculate the Amount to Apply (on the selected Credit) based on this logic: 1. If the REMAINING CREDIT < or = the NET UNAPPLIED, lets set the Amount Applied (on the Credit) to be = REMAINING CREDIT. 2. If the REMAINING CREDIT > the NET UNAPPLIED, lets set the Amount Applied (on the Credit) to be = NET UNAPPLIED.
24.0122an	08/12/24	31636	Update	Import Wizard	ITEM PRICE LEVEL >Import wizard: - Import New Records >When importing records that matches with the record in 1place, there should be a data validation to show the item prices that are already exist to avoid any duplication of data. - When updating records, it should only update those that matches the <u>item number</u> and the MatrixPriceCode and create a data validation for those that does not exist in yet in record.
24.0122an	08/12/24	31630	New	API	Item Count API: - Alter Bin count API to get a data based on OEM #,Other #,UPC Code,Alt #1,Alt #2 fields.
24.0122an	08/09/24	31332	New Feature	Payments	- Show receive payment on the invoice and Credit memo screen - Add receipt number when creating receive payments from invoice screen - Redirect to receive payment screen when clicking on the receipt id from payment info tab - Place a small right hand arrow button to the LEFT of the Discount Amount. When clicked, auto calculated, and insert the DIFFERENCE between the Net Balance Due and then Amount

					Paid. The purpose is to help the user calculate and enter the 'Difference' paid and applied to the Invoice vs the Amount Due. In this case, for example, if the Amount STILL due after entering the Amount Paid was \$3.23 cents. When the button is clicked it will insert \$3.23 cents into the Discount Amount field and will change the Net Balance Due to \$0.00.
24.0122am	08/09/24	31642	Update	API	Check Stocks API: Alter Check Stocks API to get a data based on OEM #,Other #,UPC Code,Alt #1,Alt #2 fields.
24.0122am	08/02/24	31332	New	Payments	◦ Add 2 quick calculation buttons: ■ Place a small right hand arrow button to the RIGHT of the Payment Terms. When clicked, regardless of # of days, if the Payment Terms 'could' have a discount, calculate it and insert the Discount Amount , % ■ Place a small right hand arrow button to the LEFT of the Discount Amount. When clicked, auto calculated and insert the DIFFERENCE between the Net Balance Due and then Amount Paid. The purpose is to help the user calculate and enter the 'Difference' paid and applied to the Invoice vs the Amount Due. In this case, for example, if the Amount STILL due after entering the Amount Paid was \$3.23 cents. When the button is clicked it will insert \$3.23 cents into the Discount Amount field and will change the Net Balance Due to \$0.00. ◦ In company field, typed zTest and then pressed TAB, then it sometimes hangs. When repeating the process again and again it hangs each time. But pressing ENTER does NOT seem to hang. ◦ We have a few invoices that appear that show \$0 due, for zTest (0602 McDonalds Anaheim). ◦ There is still an issue where the user tries to CHANGE the Discount Amt or % and is being prevented from doing that. We need to remove ALL controls and let the user make any changes to those 2 fields, before or after the eligible discount date.
24.0122am	08/01/24	31616	New	Integration	CCC - Made changes on the ftp files.
24.0122am	08/01/24	31615	New	Dispatch Screen	Show columns Elite Dispatch status and Elite manifested name
24.0122am	08/01/24	31208	New	Sales Order	Allow to add and save Qty Rtn. Before adding Qty order & qt ship enter on line items.
24.0122am	08/01/24	31614	New	Catalog Management	ITEM LIST AND ITEM CATALOG: - Download the following columns for item list: Item Number, year, make and model and description. - Download all columns for item catalog.
					- DO NOT AUTO SELECT INVOICES after entering Amount Received From Customer value. - When selecting a customer with an Invoice that is partially paid, AND has a discount payment term, AND is within the range to receive an early payment discount, then re-calculate the full % and discount and insert into the fields, even if there already is a partial payment applied. - Be able to Select or Unselect the CHECKBOX using the SPACE BAR OR ENTER keys.

24.0122am	08/01/24	31332	New	Payments	- After saving, when completely saved, clear screen, make a BEEP sound, and set focus on Company name, ready to enter the next Payment. - There is still an issue where the user tries to CHANGE the Discount Amt or % and is being prevented from doing that. We need to remove ALL controls and let the user make any changes to those 2 fields, before or after the eligible discount date. - So we had a \$200 Credit. We applied \$50 toward an Invoice to pay the Invoice in full. Then the Credit Memo no longer showed the remaining \$150 open.
24.0122am	07/31/24	31456	New	Integration	Change all CCC file name in Capital
24.0122am	07/31/24	31612	New	API	Alter Bin count API to get a data based on OEM #,Other #,UPC Code,Alt #1,Alt #2 fields.
24.0122am	07/31/24	31332	New	Payments	- When selecting a customer with an Invoice that is partially paid, AND has a discount payment term, AND is within the range to receive an early payment discount, then re-calculate the full % and discount and insert into the fields, even if there already is a partial payment applied. - When click CHECKBOX to apply a CREDIT, lets calculate the Amount to Apply (on the selected Credit) based on this logic: • If the REMAINING CREDIT < or = the NET UNAPPLIED, lets set the Amount Applied (on the Credit) to be = REMAINING CREDIT. • If the REMAINING CREDIT > the NET UNAPPLIED, lets set the Amount Applied (on the Credit) to be = NET UNAPPLIED. - In company field, typed zTEst and then pressed tab. It then gets hung. • After saving, when completely saved, clear screen, make a BEEP sound, and set focus on Company name, ready to enter the next Payment.
24.0122ak	07/29/24	31606	New	CCC Integration	Change CCC true FTP File name to capital letters.
24.0122ai	07/15/24	31332	New	Payments	List the Un applied Payment amount on the Credit Memo table, so that user can apply the over paid amount to the open invoices
24.0122ah	07/11/24	31151	New	Settings	SUBSCRIPTION INFO prices. - Please change the Pro from \$70 to \$65 and the Enterprise from \$90 to \$80 and all related calculations.
24.0122ah	07/11/24	31564	New	Server	0001 Server Auto Scale Up / Down
24.0122ag	07/04/24	31556	Update	Purchase Order	Purchase Order screen and print out - On the screen and print out, column indentation: 'Qty Ord', 'Qty Recd' and 'Sales Order#' should be right indented. - Print out: - Columns 'Qty Ord', 'Qty Rec'Shipped', and 'Line Total' should have a comma separator every 3rd digit from the right and right indented - Should be left indented: 'Vendor #' column
24.0122ag	07/04/24	31555	Update	Invoice	Invoice screen and print out - On the screen and print out, column indentations: 'Qty Ord', 'Qty Ship', 'Qty BO', 'Prev Shp', and 'Qty Rtn' should be right indented. - Print out: Columns 'Qty Ord', 'Qty Ship', 'Qty BO', 'Qty Prev Shipped', and 'Line Total' should have a comma separator every 3rd digit from the right.

					- Print out, payment section: - Columns should be right indented: 'Ck/Card #', 'Amt Paid', and 'Amt Applied'. - Should be left indented: 'How Paid' column - Columns should have a comma separator every 3rd digit from the right: 'Amt Paid' and 'Amt Applied'
24.0122ag	07/04/24	31554	Update	Sales Order	Sales Order screen and print out - On the screen and print out, column indentation: 'Qty Ord', 'Qty Ship', 'Qty BO', and 'Prev Shp' should be right indented. - Print out: Columns 'Qty Ord', 'Qty Ship', 'Qty BO', 'Qty Prev Shipped', and 'Line Total' should have a comma separator every 3rd digit from the right.
24.0122ag	06/17/24	29951	New Feature	Purchase Order	NEED A WAY TO DELETE UNRECEIVED INDIVIDUAL PO LINES. - Check the AP Bill status when edit Qty Received value - PO--> when user receive the item manually during that time received checkbox are not enabled automatically. as well sales order auto ship popup is not shown.
24.0122ac	05/29/24	31410	New Feature	Customer Portal	- Add a SORT ORDER field and icon for the Item Detail > Pictures tab (in the Item Images table). - Display the picture for the item, using the URL for the picture of the item (with the lowest sort order), usually the one with a 0. - MOVE the HORIZONTAL search fields from the top of the screen to the left side of the screen and make the search fields section movable by the use in case the area is too wide or not wide enough.
24.0122aa	05/22/24	31439	New Feature	Replenish Stock	- REP STOCK (for MIN/MAX SOBO Calculations). Programming Code for Min/Max Calculation Method - NEW ON 5/21/24: When we calculate the QBO we do NOT use the Item.QtyOnBO field. To Make it more accurate we recal the # on BO on Sales Orders where there is NO Invoice.
24.0122y	05/14/24	30893		Cash Management	- Will you please update the CASH MANAGEMENT screen 'data' to hide all unreconciled payments from 1/17/24 and back? - I am meeting with him on Friday at 11am MST. Can you join us to help us test/use it/train us. - Will you please DELETE the Default BIN LOCATION for ALL ITEMS in the ITEMS. - On the Cash Management screen, when the screen is first opened, please check to see what the OLDEST records are. Then pop this message to the use: 'You have [x] days of Cash Receipts to reconcile. Please type in the field below the # of days to KEEP to be reconciled. The rest will be removed from the reconciliation screen.' (Where X is the # of days of the oldest unreconciled payment from today). (When it hasn't been in use for weeks or months it usually freezes. - Please give Quality the very latest version on their server in preparation to run the Batch Printing test with Ray on Thurs 1/18 in afternoon, and Cash Management changes you make on 1/18 for meeting with Tom on 1/19.
24.0122w	05/10/24	31384	New Feature	Reports	INVOICE/CREDIT REPORT >Report Criteria - Add on the Group By: Entered By and Created By.
24.0122u	05/08/24	31375	New Feature	Purchase Order	Total Cubic Square Feet / Volume: - Should calculate the Qty x Volume for each part and show the total. - DO NOT SHOW the Volume of the Total Volume (the default)

			Feature	Order	- DO NOT SHOW the value of the Total Volume (by default), - then (2) add a small white button to the right of the field called Calculate. Then when pressed it could do the work to calculate it on the fly.
24.0122u	05/08/24	31393	New Feature	Item Detail	Add QPC SortOrder column on item list import.
24.0122t	04/25/24	31043	New Feature	Sales Order	Bill to and Ship to search field - Typing Core & Main maximize the search drop-down from A to Z. (all the list that begins with Core & Main)
24.0122r	04/22/24	31294	New Feature	Invoice	Payment > When changing the payment date to an older date, remove the popup that restricts the user to change the date.
24.0122r	04/18/24	30867	New Feature	Reports	Invoice/Credits by Payment Details. The Group by on the report criteria is locked. Lets REMOVE the GROUP BY criteria and just make it group by default on the report by Payment Type (Please remove the Date group by that is currently there). The goal of the report is to be able to run it for a date range of 1 day, or a few days, and to have it show each payment, by payment type, such as Cash, Check, Credit Card, etc with the detail of each receipt of that type below the grouping header, and the TOTAL of all payments for that payment type being in the header for the Payment type, over to the far right side. so it is easy to see the total and easy to see the smaller details of each payment of that type below it. Make sure it sorts by date in ascending order, then by Customer Name ascending.
24.0122q	04/16/24	31323	New Feature	AP Bill	AP Bill Vendor Invoice number validation with 21 Characters
24.0122p	04/12/24	31255	New Feature	Shipping and Receiving	Make a few changes to streamline how it works. - When the user is on the Ship/Rec > To Dispatch screen and clicks a DRIVER name, if the Sales > Integrations > Elite Extra IS NOT enabled, then do NOT do run any other code, except to COPY the driver name over to the field, like it does now. - Make sure the Drivers and Shipped Via buttons are displayed in Alphabetical Order. - In the top right corner there is a SEARCH field called Find Order. When the user types in an order # and then presses enter (or scans an Order barcode and the scanner makes a carriage return / Enter) have it run the code to find/select the order, and then set the focus BACK on the same search field and HIGHLIGHT the Order # entered BEFORE. - On the In Route screen make it sort, by default, the the Sales Order #. Make these columns sortable in ascending order (if clicked once time) and descending order if clicked again: Sales Order #, Dispatch #, Date, Delivery Date, Customer Name, Shipped Via. - On the Sales > Integrations, add a new integration on the list (at the top of the list) called '1place Warehouse Management (Scanning)'. Then add a single checkbox option that looks like this: ☐ Enable 1place integration with 1place Warehouse Management (WMS) - On the Ship/Rec > To Dispatch, change the Dispatch Selected button to a BUTTON (not a drop down list) that has options to select from in a short drop down list with these values: 'Dispatch Selected' and '1 Click Print' - Then have it remember which option was last selected so the next time the screen is opened it will auto select it.
24.0122p	04/12/24	30117	New Feature	Credit Memo	Make a way to give money back (cash, check, or credit memo).

			Feature		
24.0122n	04/09/24	31297	New Feature	Sales Order	To extend the 'Unit Price' and 'Net Price' to 6 decimals.
24.0122n	04/05/24	31292	New	Credit Memo	Customer wants to return an item for LESS than the amount paid on invoice, then we will allow the creation of the CM to proceed.
24.0122k	03/20/24	31230	New Feature	QBO Sync	When we are syncing Invoices into QBO that have items NOT in QBO and NOT allowed to be added to QBO for whatever reason, Add new Item called 'default' item to automatically create an Use that item for QBO Transactions.
24.0122j	03/16/24	31086	New Feature	QBO Sync	New Syncing buttons on PO and Payments forms. - On the Last Synced field for the PO AP Bill, Invoice, Invoice Payments, SO payment, Customer, Vendor, Item put a Sync/Resync 'link' on the far right side of the field that when pressed will sync/resync. Then if there is a problem re-syncing because the QBO record is no longer there, then we can just clear out the QBO ID and start over and sync it again like it was being synced for the very first time. - Note: If the SAVE button is RED or any other flag is in place to normally run the sync process, lets avoid syncing it again. - Invoice and Credit Memo (done)
24.0122i	03/12/24	31059	New Feature	QBO Sync Comparison	Make QBO Syncing Errors Log.
24.0122i	03/07/24	31059	New Feature	QBO Sync	QBO SYNC COMPARISON & LOGGING TOOLS. IMPROVE QBO SYNC COMPARISON screen. - Add Go-Live Date and functionalities - Combine the Sync Center, Sync Comparison, and Syncing Errors Log onto ONE tab with 3 sub tabs.
24.0122e	02/29/24	31130	New Feature	Purchase Order	- PRINTED PO Report on PO screen. Please REMOVE the SO# option from the optional settings for the HEADER. Then please ADD another line item option called SO#, TO THE LEFT of the QTY Ordered on the PO.
24.0122d	03/01/24	31059	New Feature	QBO Sync Comparison	- Lets add a SELECT column on the far left side. (Start with the Invoices/CMs and Invoice Payments lists). Then add a Batch Actions buttons (like on Customers list) with option called: Re-Sync Selected. (Also if any are selected that do NOT have the SYNC checkbox selected already, please update those first to True and then loop (with progress bar) and sync all selected. - Error Log Writing
24.0122c	02/16/24	31065	New	Sales Order	Sales Order Print Documents - Add the other print documents to the new server. Like Packing Slip (by Bin) and (by Item) to fix the issue on the duplicate line items.
24.0122c	02/14/24	31020	New Feature	QBO Sync	We need a way to Programically MASS DELETE ALL Invoices in IPCs QBO FROM 12/31/23 and BACKARDS (** WE MUST NOT DELETE ANY Invoices or Credits dated 1/1/24 or newer).
24.0122c	02/13/24	31045	Update	Credit Memo	Print out template (Credit Memo and Credit Memo 2): List Price, Net Price, Line Total, Amount (payment details) should have a \$ sign and a comma in every after 3 number.

24.0122c	01/22/24	30766	New Feature	Shipping and Receiving	SHIP/REC screen. ALL screens need a SHOW ALL option at bottom right corner. The Next and Record Totals on bottom right need to be visible when the screen view is 100% or more (right now we have to scroll a lot) WHEN THE PAGE IS STILL PAGINATED. When the Show ALL is clicked it needs to retain the SORT ORDER already applied by the user. Also When SHOW ALL is set and then user clicks a column to sort differently, it needs to NOT LOSE the Show All view		
24.0122	01/22/24	30621	New Feature	Month End	This screen will simplify the processes to: (1) Compare the SALES, AR, COGS and INVENTORY values in 1place and QuickBooks, month by month, (2) Create a journal entry to square QuickBooks with 1place, if differences in COGS exist, and (3) Allow Accounting and Admin users to Close (lock changes to) periods in 1place to prevent further changes to any related transactions related to Sales, AR, COGS, and Inventory values.	Impact	See kba: 02947
24.0122	01/19/24	30903	New Feature	Shipping and Receiving	Quality To dispatch driver name has value from Elite even if the Elite SO Status is on held.	Quality	
24.0122	01/18/24	30852	New Feature	Credit Memo	The details in the payment info tab should be printable. Reliable wants to print the information, where most of his advance payments are done via CM.	Reliable	
24.0122	01/16/24	30808	New Feature	Reports	Make a new Exception Report called: Exception Report - Sales Order Item Price Changes.	Quality	
24.0122	01/10/24	30784	New Feature	Catalog Manager	- Make option to change the way the ITEM DESCRIPTION is created on Catalog Manager (to allow for Part #, Cat, Sub, Y, Y, M) - Make a way to add exclusions based on the YEAR of the vehicle. By Make, Make/Model, Make/Model/YearRange - Make a way to add exclusions based on the YEAR of the vehicle. By Make, Make/Model, Make/Model/YearRange - DEFINE how the Item Description will be created - UPDATE all (PartsLink type) Items with No PType (where the Item # format = XX#####)	Quality	
24.0122	01/09/24	30650	New Feature	Invoice	On the Invoice screen, on the Printable invoice called Invoice 2, please make these changes to make the Invoice more condensed, so it can print multiple line items without having to print another page	Quality	
24.0122	01/05/24	30802	New	Picking Ticket	Add customer name to the Pick Ticket (ask Steve for the layout)	Alliance	
24.0122	01/05/24	30750	New Feature	1Place	We need to quickly design a way to allow customers to login to a version of 1place on Server X, without having to have a DNS Name, such as 1place.cloud. Rather something like: 123.123.123.123/12.1212/dashboard/login		
24.0122	01/02/24	30401	New	Shipping and Receiving	Design new Batch Dispatching & Invoice Printing for Elite Extra Orders on the Ship/Rec. To Dispatch screen	Elite	

24.0122	12/29/23	30785	New	Customer	update the tax rate for these customers on ORLANDO BODY PARTS account.	OBP	
24.0122	12/29/23	30778	New Feature	Find Parts	Ship to & bill to address dropdown. make that header background on blue color. It should disable to the user while selecting from dropdown. it shows undefined error.	ALL	

24.0731 Version Releases History

Version #	Date Released
24.0731.3	08/19/2024
24.0731.2	08/16/2024
24.0731.1	08/07/2024
24.0731	07/31/2024

24.0731 (Known Issues Fixed in this Version)

Fixed in Version #	Date	Task #	===== Type =====	Screen (or Report Name)	Description	Requested by Customer	Links to Additional Info
	08/21/24	31677	Bug	Credit Memo	When applying a CM partially on an invoice, the Total Unapplied/Applied amount is calculated incorrectly.	Quality	
	08/20/24	31680	Bug	Credit Memo	When user returns a part and typed in NO on the popup to ask to put back the item into stock, it still adds it in the record	Quality	

24.0304 (released 03/04/2024)

Date	Task #	===== Type =====	Screen (or Report Name)	Description	Request by Customer	Links to Additional Info
4/09/24	30998	Bug	QBO Sync	UNRETURNED CM SYNCED TO QBO >When unreturned item from the CM is synced over to QBO, it brings over the tax amount.	Impact	

04/08/24	29562	Bug	QBO Sync	INVOICE TAX on the QBO Sync Center >Right now it's not syncing the TAX to QBO when syncing using the QBO Sync center. It SHOULD ALSO SYNC THE INVOICE TAX.	Impact	
04/05/24	31292	New	Credit Memo	Customer wants to return an item for LESS than the amount paid on invoice, then we will allow the creation of the CM to proceed.		
04/03/24	30742	Bug	Sales Order PO	- When entering Vendor cost on the field, it auto round off the cost. It should not auto round off the decimals. The Decimal Price setting to whole number should not apply to Costs. - They set their Decimal settings for Prices to 0 in the Sales Settings. But on the PO settings, it's set up for 2 decimal places. However, whenever they try to input costs in the Sales Order Purchase Order screen, it auto round off to whole numbers.	TipTop	
04/01/24	31205	Bug		- sp's update (Fixed) - 1Place Printer connect app updated.(Fixed) - Status Not Updating properly. (Fixed) (Requested Sikkandar to share his code knowledge on how he is updating the status) - Disable the Print Button. - Even after the 1Place Printer connect app is running it shows PRINTER ERROR to connect. - Already the application is running popup. - (QUALITY) ELITE BATCH-PRINTING ERROR	Quality	
04/01/24	31104	Bug	Item Details	The "Item Price Level + Discount" is not working.	Quality	
	31250		Invoice	OTHER INFO TAB > CREATED BY field: The Created By Field will be filled out by the user who invoiced the Sales Order, whether it be from the SO Screen or the Dispatching screen.	Orlando	
03/21/24	31233	New	Replenish Stock	REVISE THE WAY Qty On BO is calculated on Rep Stock. - When we calculate the QtyOnBO we do NOT use the Item.QtyOnBO field. To Make is more accurate we need to recalc the # on BO on Sales Orders where there is NO Invoice #.	Fitz	
03/21/24	30788	Bug	QBO Sync	Purchase Order --> when the user create an PO(QBO) and bill as Paid. after syncing with OneSource those bills and Qty received are not update properly.		
03/21/24	31180	Bug	QBO Sync Center	Customer Checkbox > When checking the Customer sync, undefined error occurs.	Impact	
03/14/24	31205	Bug	Shipping and Receiving	If you log into the TEST version of Quality > Ship/Rec > To Dispatch > Dispatch Elite Extra Orders (button). Click checkbox next to 1st driver. Click the 2 checkboxes on bottom left. Click Print ALL Selected Driver Orders (and make sure the 1placePrinterConnect is already installed and logged in on your PC). I tried to demo this process to Tom and it gave me an error.	Quality	
03/12/24	31193	New Feature	Catalog Manager	Catalog Manager refinements.		

03/12/24	30408	Bug	Items	Add new-->Item price level are not saving properly.		
03/12/24	31205	Bug	Shipping and Receiving	ELITE BATCH-PRINTING ERROR. If you log into the TEST version of Quality > Ship/Rec > To Dispatch > Dispatch Elite Extra Orders (button). Click checkbox next to 1st driver. Click the 2 checkboxes on bottom left. Click Print ALL Selected Driver Orders (and make sure the 1placePrinterConnect is already installed and logged in on your PC).	Quality	
03/12/24	31027	New	Reports	Sales Orders> Sales Orders-Back Order> To add column for Qty BO value or amount.		
03/11/24	31198	Bug	Invoice / Credit Memo	Allow to creation of a credit memo for unshipped items from the invoice.		
03/11/24	31156	Bug	Find Parts / Sales Order	On version 24.0301 test adding parts to <u>Sales Order</u> (from Find Parts screen) and the items that did not have stock SHOULD have checked the PO checkbox, but they didn't get checked, which also cause a ripple affect in other areas.		
03/08/24	30867	Bug	Reports	- Invoice/Credits by Payment Details. The Group by on the report criteria is locked. Lets REMOVE the GROUP BY criteria and just make it group by default on the report by Payment Type. The goal of the report is to be able to run it for a date range of 1 day, or a few days, and to have it show each payment, by payment type, such as Cash, Check, Credit Card, etc with the detail of each receipt of that type below the grouping header, and the TOTAL of all payments for that payment type being in the header for the Payment type, over to the far right side. Make sure it sorts by date in ascending order, then by Customer Name ascending. -When run the report, on a customer date range, the presentation changes every time it is run. Either it is grouped by Customer or Payment Type, the sort order is changing, as well as the sort order of invoice/cm numbers of each group. The group name should be sorted alphabetically, and each group the invoice/cm number should also be sorted in ascending.	Alliance	
03/08/24	31191	Bug	Shipping ad Receiving	- Orders from M2121 shows duplicate on the to print and pick and the In Route screen - When dispatching from M2121, only 1 quantity of the order gets transferred to the Stock Transfer In Route screen.	Quality	
03/07/24	31128	Bug	<u>Sales Order</u>	Payment > When deleting a line item, the <u>Sales Order</u> Total fied on the Payments window won't refresh to the updated cost.	Orlando	
03/07/24	31162	Bug	OS Scan	When returning parts using the oSscan, the Net Price, Unit Price are all updated the first items Net Price.	TipTop	

03/06/24	31150	Bug	PO	RECEIVING PO via Auto-Ship - Orders that are updating the Qty Ship but not the status of the Order. - With multiple line items, it sometimes updates the status of another line item when one line item is received from the PO.	Orlando	
03/05/24	31147	Bug	Dispatch	SALES ORDER-INVOICES > We found that orders invoiced on the dispatch screen did not create actual invoices for the orders and did not update the status from Dispatch to In Route. It created the SOBO but not the invoice.	Orlando	
03/04/24	31132	Bug	invoice	Customer PO setting invoice not working on the invoices print preview for Invoice#2.	Orlando	
03/01/24	30803	New Feature	Picking Ticket	Add customer name to the Pick Ticket.	Alliance	
02/29/24	30831	Bug	User Security	Made some changes in the Module Security for a couple of users, but after the change, the Payment Info is missing for the following users: Paul Ngo, Wilder, and Walter Maradiaga	Alliance	
02/29/24	30996	Bug	Shipping and Receiving	Making a new run # does not change delivery number. 1 then 2, etc.... It always shows Run 1 in the new Dispatch #.	Alliance	

02/29/24	30876	Bug	Reports	- Reports> Invoice/Credits by Payment Details. Notes from Steve: The Group by on the report criteria is locked. - REMOVE the GROUP BY criteria and just make it group by default on the report by Payment Type (with the payment type being in a 14point bold font with a grey bar, with the total of the payments in the far right corner of the header (of the payment type). - Remove the Date group by that is currently there). - The goal of the report is to be able to run it for a date range of 1 day, or a few days, and to have it show each payment, by payment type, such as Cash, Check, Credit Card, etc with the detail of each receipt of that type - Below the grouping header, and the TOTAL of all payments for that payment type being in the header for the Payment type. Over to the far right side. so it is easy to see the total and easy to see the smaller details of each payment of that type below it. - Make sure it sorts by date in ascending order, then by Customer Name ascending. - When run the report, on a customer date range, the presentation changes every time it is run. Either it is grouped by Customer or Payment Type, the sort order is changing, as well as the sort order of invoice/cm numbers of each group. The group name should be sorted alphabetically, and each group the invoice/cm number should also be sorted in ascending - The print preview is showing the same sort order as seen on screen.	Alliance	
02/29/24	31135	New Feature	Qbo Sync Center	- On QBO Sync Center, under the Turn On QuickBooks Online (QBO) syncing checkbox, add a new field called: GoLive Date* - Under this new date field put this text: *Syncs All QuickBooks Online Invoices after this date, and ONLY OPEN (Unpaid) Invoices prior to this date.	ALL	
02/28/24	31122	Bug	Shipping ad Receiving	To Dispatch, trying to Print Invoice and manifest. After preview and click UPDATE STATUS getting an unknown error.	Alliance	

02/28/24	30997	New Feature	Sales Order and Invoice	- The Sales Order has a tab called Fulfillment Info. It needs to show the 'history' of the Order flow. Each time we change the Status it needs to track (and show this info) for each time the status is changed. - Add another column on fulfillment log called Additional Notes - When Picking Starts add this to the notes: x started picking this Sales Order. (where X is the name of the person picking the Order). - When the picking is completed add to note: X finished Picking the Order. - When changed to In Route add to notes: X has been assigned to deliver the parts on this Order. - When an Invoice is created lets add a status change called--Status: Invoice Created. Notes will have: Invoice # x was created. - When an invoice is created if there are any that are Waiting to be Purchased then add to notes: X items are waiting to be purchased. - When an invoice is created if there are any that are Waiting to be Delivered or Picked Up then add to notes: X item(s) are waiting to be Delivered by or Picked up from x (vendor) on PO x. - Each time a special order item is added to the PO and the PO is saved, then we need to create a separate new status called: Item Added to PO with notes: Item x added to PO # to X (vendor). - Each time a special order item is received on a PO then we need to create a separate new status called: Item Received on PO with notes: Item x received on PO # from X (vendor).	Alliance	
02/27/24	31117	Bug	Sales Order PO	- Checkbox selection should be unchecked by default. - After entering the vendor cost and pressing enter key, the order line should get checked. - Put a dollar sign on the vendor cost after input.	Impact	
02/27/24	31123	Bug	Sales Order	New button click on the so screen is not working.	Orlando	
02/27/24	31121	Bug	Manifest	Export Manifest > Redirects to a 404 screen	Orlando	
02/23/24	31095	New Feature	Quotes List	Be able to search customer PO#.	Quality	
02/23/24	31107	Bug	Sales Order List	The company name is not showing on the sales order list table.	Orlando	
02/20/24	30964	Bug	Invoice & Credit Memo List	Created a customized tab, when a credit memo is click to view the transaction, it will redirect to a new window but would show a pop-up message 'Record does not exist'	Reliable	

02/14/24	30994		Shipping and Receiving	In route to Customer. The Filter by Driver / Route # needs to group by the Route/Driver in the drop down list, rather than showing 1 per Order or item. Also need an option to display the rows grouped by Order# or the rows by Item # (sorted by Order and Item). Lets MOVE the SECTION called Select Dispatch # over on top of the Move to Status section. Make both of those sections 1/2 as tall so the combined height is equal the height of the other sections. Then where the Select Dispatch # section WAS put a new section there called: Group By: (this will have a dropdown list that shows: Item #, Sales Order #. Default to Sales Order #. When changed by user than auto apply the new filter. When displaying the rows by Order # than REMOVE any columns that are related to LINE ITEMS, such as Item #, etc...	Alliance	
02/07/24	30995	Bug	Find Parts	Cannot add enough parts. This is Pauls note on the issue. When selecting more than 15-18 parts on the Find Parts screen (to add to SO), Find Parts does not work properly. Cannot seem to add more parts. Max selectable Qty is a bit unpredictable.	Alliance	
02/08/24	31012	Bug	Item Detail	Catalog-->When the user clicks the Save button twice, duplicate values can be added to the catalog.		
02/08/24	31023	Bug	Purchase Order	Please check the limit of line items for PO, the PO line item limits to 55 items, and when you have more than that the remaining line items will be placed in the succeeding PO, Please refer to PO P261560- B1 and PO P261560-B2.	Reliable	
02/08/24	31024	New Feature	Import Wizard	When importing Invoices/Credits if the Amount DUE = 0 then we need to set the TO SYNC = FALSE (or whatever else we do to make sure that it does NOT get synced into QuickBooks). If the Amount Due is NOT = \$0 then the Invoice is still OPEN and DOES need to get flagged to Sync	IPC	
02/05/24	30705	Bug	Shipping and Receiving	Sorting Feature does not work on tabs within Warehouse. Either sort according to Sales Order number or date.	Alliance	
02/07/24	31018	New Feature	Item Stocks	Remove the Bin names - ReturnsArea and On Dock in their items stock. Don't delete the stock.	TipTop	
02/05/24	31002	Bug	Invoice	SALES REP > Update the blank sales rep for invoices with the customer's default sales rep.	Impact	

02/05/24	30999	Bug	Purchase Order	PURCHASE ORDER LABEL 4x6 The BIN is not showing the data on the label print preview. Add Location to the LABEL WINDOW When saving the label and another person opens it, the label design disappears. When entering the BIN on the Label field, and save it and you open the settings, the word entered disappears.	Orlando	
02/01/24	30479	Bug	PO	Date Expected to show on the PO tab on the Item Detail screen. Issue: The date from the PO's Date Expected is not showing up on the PO tab Date Expected on the Item detail screen.		
02/01/24	30916	Bug	Item Details	Service/Noninventory type--> Dashboard tab should be removed or hidden for Service and Non-Inventory type items.		
02/01/24	30990	Bug	Import Wizard	ORDER ENTRY/ SALES NOTES/ COMMENTS IMPORT WIZARD Tried updating the data using import wizard but it did not update the ORDER ENTRY/SALES NOTES field located on the Customer Detail.		
02/01/24	30920	Bug	Web Link	Get 1place.cloud working (with osqbo.com auto re-directing to it).		
01/30/24	30327	Bug	Security Settings	REPORTS. Be able to define which users can see which individual reports (if the user has access to the Report screen). 1 checkbox for each report for each user.		
01/30/24	30534	Bug	Delivery Date	If we change the shipped via, the delivery fee will be changed; after that, if we change the delivery date, the delivery fee will revert to its original value.	Quality	
01/30/24	30988	Bug	Invoice	Credit memo--> when user create CM from invoice calculation made based on TO RETURN field. as well Line total and unapplied amount also updated.		
01/30/24	30984	Bug	Credit Memo	Credit memo should not be applied more than the credit memo amount.	Alliance	
01/30/24	30621	New Feature	Month End	This screen will simplify the processes to: (1) Compare the SALES, AR, COGS and INVENTORY values in 1place and QuickBooks, month by month, (2) Create a journal entry to square QuickBooks with 1place, if differences in COGS exist, and (3) Allow Accounting and Admin users to Close (lock changes to) periods in 1place to prevent further changes to any related transactions related to Sales, AR, COGS, and Inventory values.	Impact	See kba: 02947
01/30/24	30955	Bug	QBO Sync	Sales order / Invoices AND SO / Invoice Payments could not get to sync. I tried to check and uncheck the Invoice sync or Payments but it could not sync. Example: I57958	IPC	

01/29/24	30966	New	Data	We are trying to update the Order Entry/Sales Notes on the Customer detail screen but it won't work using the import wizard.	Quality	
01/29/24	30967	Bug	Sales Order, invoice, Credit Memo	Line item2--> date delivered feild shown default date like 01/01/2001.	ALL	
01/29/24	27371	Bug	Reports	After adding a report to Add to Favorites, the report should appear on the My Favorites section.	ALL	
01/23/24	30924	Bug	Settings	TRIPLE CHECK TO MAKE ALL AREAS OF SYSTEM DOES NOT ALLOW INCORRECT PRICES AND/OR DISPAY COSTS IF USER DOES NOT HAVE PERMISSION.	Quality	
01/23/24	30925		Users	Please MANUALLY make sure user5@qualityparts.co USER has ALL 37 modules and has the same approximate rights as the other sales reps. Please email Steve and Rachelle when completed.	Quality	
01/23/24	30919	Bug	Items	When the "Price level" button is clicked, a screen pops up. During that time, the new screen background turns black.		
01/23/24	30907	Bug	Credit Memo	Unable to create a new credit memo. when the user selects a customer from the dropdown list. it shows an undefined error.	ALL	
01/23/24	30915	Bug	Sales Order	When the user selects "Bill to customer" from the dropdown list, an "undefined" error appears.	ALL	
01/23/24	30932	Bug	Quotation	1 Place shows correct amounts, but if I try to print or email, the sub-total shows \$243.50, however, the line items show correctly. Not calculating properly to be able to send the customer the quote. I tried logging out, refreshing, etc.	IPC	
01/23/24	30825	Bug	QBO Sync	After clicking the Customer Sync, almost all records are still in the "To Sync from 1place.	IPC	
01/23/24	30933	Bug	Customer and Purchase Order	Customer -->add new-->In one source, payment methods added by customers do not reflect in QBO after syncing. Purchase order-->QuickBooks --> when the user creates a PO(QBO) and bill as Paid. After syncing with OneSource those bills and Qty received not update properly	ALL	
01/22/24	30893	Bug	Cash Management	Update the CASH MANAGEMENT screen 'data' to hide all unreconciled payments from 1/17/24 and back	ALL	
01/22/24	30909		Security Settings	Make sure Quality db has all of the correct User Security Modules, so if a new user is added, or an existing user uses the option to COPY it will insert the correct amount of modules (37 as of now?)		

01/22/24	30766	New Feature	Shipping and Receiving	SHIP/REC screen. ALL screens need a SHOW ALL option at bottom right corner. The Next and Record Totals on bottom right need to be visible when the screen view is 100% or more (right now we have to scroll a lot) WHEN THE PAGE IS STILL PAGINATED. When the Show ALL is clicked it needs to retain the SORT ORDER already applied by the user. Also When SHOW ALL is set and then user clicks a column to sort differently, it needs to NOT LOSE the Show All view		
01/22/24	30912	Bug	Reports	The following report when generated gets 'Undefined Error' pop up: > Sales Orders- Back Order > Sales Orders By Customer > Sales Orders By Date > Sales Orders Line Item	Reliable	
01/22/24	30868	Bug	Invoice	Tried to add columns from the gear icon, when a couple of checkbox was ticked, it got messed up.	Alliance	
01/22/24	30898	Bug	Sales Order	Sales Order (S55480) and Invoice (I57952) both have the IDENTICAL LINE ITEM TOTALS, but the Sales Order SUBTOTAL (Which is Correct) is 648.01 and the Invoice has an INCORRECT SUBTOTAL at 1 penny LESS at \$640.00. It is my understanding that the way it is 'supposed' to work is to 'round' to 2 digits on the LINE TOTAL and then add that to whatever the SubTotal is... which will prevent any 'rounding' issues from Unit Prices that have 3 or more digits to the right of the decimal point. Will you please verify how the code works?	IPC	
01/22/24	30910	Bug	QBO Sync	Some Invoices were not synced. Example: I57899, I57751, and I57894.	IPC	
01/19/24	30903	New Feature	Shipping and Receiving	Quality To dispatch driver name has value from Elite even if the Elite SO Status is on held.	Quality	
01/19/24	30168	Bug	Reports	(Report and Labels need to PRINT IN EXACT SAME SORT ORDER: Bin, Item#, SO#) >The labels should be sorted in alphabetical order by bin.	Quality	
01/19/24	30900	Bug	Replensih Stock	Cannot import data into Replish Stock POs.	Quality	
01/19/24	30901	Bug	Quote / Sales Order	When editing line items such as quantity, net prices, and unit prices for an existing order, the changes are not saved and do not update the subtotal When the "Save" function is doesn't no turn "RED"	ALL	
01/19/24	30573	Bug	Find Parts	While transfer stock from 1 to another warehouse via Find parts screen. it update wrong receipt and warehouse code.	ALL	
01/19/24	30906	Bug	Invoice	Service and Non inventory shows Back order Quantity in Invoice.	ALL	
01/19/24	30870	Bug	QBO Sync	Errors when syncing all items to QBO.	IPC	
01/18/24	30896	Bug	Printer Connect App	After Printing cannot able to close the application (it got stuck)	ALL	

01/18/24	30833	Bug	Sales Order	When entering Qty Return - pop up - Do you want to return Item back to Stock? yes or no. if type no - system does not allow QTY Return	Alliance	
01/18/24	30891	Bug	Credit Memo	- Credit Memo- the values in the 'Amount Applied' field is not correct - CM C23530 the amount applied is \$1,059,812.22 but the total amount is only \$537,013.61	Reliable	
01/18/24	30895	Bug	Reports	Not able download the OPEN invoices report. for IPC Inc	ALL	
01/18/24	30882	Bug	Vendor and Item Details	- Vendor Details, after edit and save, the sync pop up freezes - Item Details, after editing the Min Max and save, the sync pop up freezes	IPC	
01/18/24	30880	Bug	OSScan	When returning item from the Inspect Returns as good for stock it does not add it to the inventory for Vivi, Carlos and Pan OSCAN users	TipTop	
01/18/24	30852	New Feature	Credit Memo	The details in the payment info tab should be printable. Reliable wants to print the information, where most of his advance payments are done via CM.	Reliable	
01/18/24	30890	Bug	Purchase Order	Created the succeeding PO from P261532-B10 to P261532-B11, but the items with BO Qty was not carried over in B-11. It only shows 1 line item, GC400 which is not in PO B-11 but in B10. (version used is 24.0109)		
01/18/24	30871	Bug	QBO Sync	1place is connected to QuickBooks but the GL account is not shown in the drop-down list for each field.	Alliance	
01/17/24	30888	Bug	Catalog Management	While Processing Large number of records bad request occurs.	ALL	
01/17/24	30881	Bug	Reports	INVOICES/CREDITS report >Last Year > Group by sales rep > An error occurs when downloading the report to excel.	Impact	
01/17/24	30878	Bug	Sales Order	Sales order print button >Updated their version to 23.1212 and reverted back Krystal's account to 23.0328 however the print button stopped working. Same with Pan's account (Tiptop)	Impact / TipTop	
01/17/24	30879	Bug	Sales Order	Please figure out why some users are not able to see the Sales Order screen but when using incognito mode, it works fine. This happened with IPC (users: Kevin and Danny) and International Diesel (user: Bridgette)	IPC	
01/16/24	30835	Bug	Find Parts	When selecting an item located in 2 different location, it creates multiple duplicate lines on the shipping and receiving screen.	Quality	
01/16/24	30808	New Feature	Reports	Make a new Exception Report called: Exception Report - Sales Order Item Price Changes.	Quality	
01/16/24	30875	Bug	Items	User searched for 'RACO' and the list showed 422 items. User downloads all these items and opened the Excel file. The data in the file is not correct.	IPC	

01/16/24	30872	Bug	Shipping and Receiving	Undefined error when accessing the Picking tab.	Alliance	
01/11/24	30864	Bug	Reports	Invoice Payments Summary and Invoice Payments Details not showing correct data.	IPC	
01/11/24	30863	Bug	OSScan	InspectReturnItem api call is not putting the item in the ReturnsArea location. It should put the item in question (gotten from the invoice line number that is passed in) into stock in the "ReturnsArea" bin/location.	Alliance	
01/11/24	30869	Bug	Sales Order and Invoice	A credit memo was created for a few line items, but the Qty Returned column in the Invoice and Sales Orders screen is not updated, still remained at zero.	Alliance	
01/11/24	30865	Bug	Credit Memo	- When trying to click the magnifying glass icon on the Invoice field, it is not redirecting to the invoice screen. - When trying to click the magnifying glass icon on the Item # field, it is not redirecting to the item detail screen.	Alliance	
01/10/24	30836	Bug	Replenish Stock	IMPORT FUNCTION >When importing a file after the popup 'Import completed' showed up and redirects to the replenish stock screen, the popup 'Calculating Qty In stock per items' window gets stuck and even clicking the close button, it won't allow the user to proceed	Quality	
01/10/24	30784	New Feature	Catalog Manager	- Make option to change the way the ITEM DESCRIPTION is created on Catalog Manager (to allow for Part #, Cat, Sub, Y, Y, M) - Make a way to add exclusions based on the YEAR of the vehicle. By Make, Make/Model, Make/Model/YearRange - Make a way to add exclusions based on the YEAR of the vehicle. By Make, Make/Model, Make/Model/YearRange - DEFINE how the Item Description will be created - UPDATE all (PartsLink type) Items with No PType (where the Item # format = XX#####)	Quality	
01/10/24	30823	Bug	Sales Order PO	There's a line item that appears on the SOPO screen, even though the PO checkbox is unchecked and the Qty Ordered is zero.	TipTop	
01/10/24	30842	Bug	Quotes	Entered data (comments, notes, tax) Does not save properly. After you save and close the Quote and open it again, it disappears.	IPC	
01/10/24	30849	Bug	Security Settings	Module Security is behaving erratically. When we remove Invoice Delete and Invoice Edit many sales people cannot access [Find Part],[Bill To].	Alliance	
01/10/24	30834	Bug	Sales Order	Sales Order> SO Amount is wrong.	Alliance	
01/10/24	30862	Bug	Quotes	Comments were not saving when Tax creation method is Manual.	IPC	

01/09/24	30650	New Feature	Invoice	On the Invoice screen, on the Printable invoice called Invoice 2, please make these changes to make the Invoice more condensed, so it can print multiple line items without having to print another page	Quality	
01/09/24	30850	Bug	Shipping and Receiving	In the Closed Tab: Should have a column that would show the driver's name who delivered the Sales Order.		
01/09/24	30848	Bug	Security Settings	Some user rights showing 2 lines for few module security screen category.	Alliance	
01/08/24	30821	Bug	Sales Order	SalesOrder BackOrder tab not populating data.	ABC	
01/08/24	30827	Bug	Sales Order	Sales Order print out: There is a certain line in the sales order print out that does not carry the amount, it shows a zero amount. Kindly refer to the scenario below - SO 1298 item HO1000322 (items was shipped) shows a 0.00 amount in the print out, but in the invoice print out it shows a correct amount.	Alliance	
01/08/24	30828	Bug	API	It seems the InspectReturnItem api call is not putting the item in the ReturnsArea location for Alliance	API	
01/05/24	30801	Bug	Invoice	0.01 Decimal issue.	Quality	
01/05/24	30809	Bug	Import Wizard	"Save Template" option not working properly	ALL	
01/05/24	30811	Bug	Cloud Document	Unable to Sign into cloud drive account. They are receiving an error message and cannot access their cloud documents.	ALL	
01/05/24	30802	New	Picking Ticket	Add customer name to the Pick Ticket (ask Steve for the layout)	Alliance	
01/05/24	30750	New Feature	1Place	We need to quickly design a way to allow customers to login to a version of 1place on Server X, without having to have a DNS Name, such as 1place.cloud. Rather something like: 123.123.123.123/12.1212/dashboard/login		
01/04/24	30800	Bug	Delivery Fee	Delivery Fee gets deleted when you change the delivery fee on the <u>sales order</u> and return back the date to today's date. - 15th then I want to go back to 12/3, it deletes the delivery fee. And then any other day I try to select it stays at "\$0" delivery fee	Quality	
01/04/24	30818	Bug	Quote Detail	IPC Quotes Total not calculating properly for Q2816	IPC Inc	
01/04/24	30789	Bug	New Record	After adding a new customer/vendor/Item, the page doesn't navigate to the detail screen and gets stuck.	ALL	
01/04/24	30760	Bug	Log Out	"Not Found. HTTP Error 404. The requested resource is not found".	ALL	
01/04/24	30775	Bug	QBO Sync	Invoices are not balanced.	Vaillant	

01/03/24	30799	Bug	Shipping and Receiving	- To Dispatch --> When Elite Sales Integration is off, Hide the Related columns and hide show settings - Eliminate Elite Manifest name and Elite Signed by Field	Elite	
01/03/24	30755	Bug	Catalog Management	Makes, Models, Year Ranges to Exclude from Searches is not functioning properly. After the user searches, the excluded makes and models still appear in the search results.	ALL	
01/03/24	30782	Bug	Sales Order	PO unit cost not updating correctly for SO Line item 2 due to a decimal point error(rounding issue).	ALL	
01/03/24	30768	Bug	Invoice List	Invoice/Credits List> Customized Tab - Tried to open an invoice from a customized tab, but once clicked it will redirect to a new window blank page. Custom tab: invoice-day.	Alliance	
01/03/24	30797	Bug	Reports	Invoices and Credits by Date. (Details) - When using version 0821d - if user tries to download the report, it says "This site cant be reached". - When using version 1212 - The data on the downloaded report are incorrect.	ABW	
01/03/24	30796	Bug	QBO Sync	Some items could not be synced.	International Diesel	
01/02/24	30401	New	Shipping and Receiving	Design new Batch Dispatching & Invoice Printing for Elite Extra Orders on the Ship/Rec. To Dispatch screen	Elite	
01/02/24	30794		Reports	INVOICES/CREDIT REPORT > Cannot download the report to excel	TipTop	
01/02/24	30793	Bug	Email		Quality	
01/02/24	30786	Bug	Import Wizard	Email not working for some users Fix issue on Invoice Line item import.	ALL	
01/02/24	30791	Bug	Invoice Payment	It's not allowing users to apply credit to an invoice when clicking the arrow. Not working on the 23.1212v.	Quality	
01/02/24	30787	Bug	Reports	User with report security to ALL but with Security type sales, but the account's report screen is empty.	Fender	
12/29/23	30785	New	Customer	update the tax rate for these customers on ORLANDO BODY PARTS account.	OBP	
12/29/23	30778	New Feature	Find Parts	Ship to & bill to address dropdown. make that header background on blue color. It should disable to the user while selecting from dropdown. it shows undefined error.	ALL	
12/29/23	30771	Bug	Find Parts	ADDRESS TYPE: SHIP TO, LINK TO: -- When searching for customers on the find parts screen with a customer and link to a bill to the customer, it does not auto-populate on the Bill to the field	Fender Bender	

24.0122 (released 01/22/2024)

Date	Task #	===== Type =====	Screen (or Report Name)	Description	Request by Customer	Links to Additional Info
01/22/24	30893	Bug	Cash Management	Update the CASH MANAGEMENT screen 'data' to hide all unreconciled payments from 1/17/24 and back	ALL	
01/22/24	30909		Security Settings	Make sure Quality db has all of the correct User Security Modules, so if a new user is added, or an existing user uses the option to COPY it will insert the correct amount of modules (37 as of now?)		
01/22/24	30766	New Feature	Shipping and Receiving	SHIP/REC screen. ALL screens need a SHOW ALL option at bottom right corner. The Next and Record Totals on bottom right need to be visible when the screen view is 100% or more (right now we have to scroll a lot) WHEN THE PAGE IS STILL PAGINATED. When the Show ALL is clicked it needs to retain the SORT ORDER already applied by the user. Also When SHOW ALL is set and then user clicks a column to sort differently, it needs to NOT LOSE the Show All view		
01/22/24	30912	Bug	Reports	The following report when generated gets 'Undefined Error' pop up: > Sales Orders- Back Order > Sales Orders By Customer > Sales Orders By Date > Sales Orders Line Item	Reliable	
01/22/24	30868	Bug	Invoice	Tried to add columns from the gear icon, when a couple of checkbox was ticked, it got messed up.	Alliance	
01/22/24	30898	Bug	Sales Order	Sales Order (S55480) and Invoice (I57952) both have the IDENTICAL LINE ITEM TOTALS, but the Sales Order SUBTOTAL (Which is Correct) is 648.01 and the Invoice has an INCORRECT SUBTOTAL at 1 penny LESS at \$640.00. It is my understanding that the way it is 'supposed' to work is to 'round' to 2 digits on the LINE TOTAL and then add that to whatever the SubTotal is... which will prevent any 'rounding' issues from Unit Prices that have 3 or more digits to the right of the decimal point. Will you please verify how the code works?	IPC	
01/22/24	30621	New Feature	Month End	This screen will simplify the processes to: (1) Compare the SALES, AR, COGS and INVENTORY values in 1place and QuickBooks, month by month, (2) Create a journal entry to square QuickBooks with 1place, if differences in COGS exist, and (3) Allow Accounting and Admin users to Close (lock changes to) periods in 1place to prevent further changes to any related transactions related to Sales, AR, COGS, and Inventory values.	Impact	See kba: 02947
01/22/24	30910	Bug	QBO Sync	Some Invoices were not synced. Example: I57899, I57751, and I57894.	IPC	

01/19/24	30903	New Feature	Shipping and Receiving	Quality To dispatch driver name has value from Elite even if the Elite SO Status is on held.	Quality	
01/19/24	30168	Bug	Reports	(Report and Labels need to PRINT IN EXACT SAME SORT ORDER: Bin, Item#, SO#) >The labels should be sorted in alphabetical order by bin.	Quality	
01/19/24	30900	Bug	Replensih Stock	Cannot import data into Replish Stock POs.	Quality	
01/19/24	30901	Bug	Quote / Sales Order	When editing line items such as quantity, net prices, and unit prices for an existing order, the changes are not saved and do not update the subtotal When the "Save" function is doesn't no turn "RED"	ALL	
01/19/24	30573	Bug	Find Parts	While transfer stock from 1 to another warehouse via Find parts screen. it update wrong receipt and warehouse code.	ALL	
01/19/24	30906	Bug	Invoice	Service and Non inventory shows Back order Quantity in Invoice.	ALL	
01/19/24	30870	Bug	QBO Sync	Errors when syncing all items to QBO.	IPC	
01/18/24	30896	Bug	Printer Connect App	After Printing cannot able to close the application (it got stuck)	ALL	
01/18/24	30833	Bug	Sales Order	When entering Qty Return - pop up - Do you want to return Item back to Stock? yes or no. if type no - system does not allow QTY Return	Alliance	
01/18/24	30891	Bug	Credit Memo	- Credit Memo- the values in the 'Amount Applied' field is not correct - CM C23530 the amount applied is \$1,059,812.22 but the total amount is only \$537,013.61	Reliable	
01/18/24	30895	Bug	Reports	Not able download the OPEN invoices report. for IPC Inc	ALL	
01/18/24	30882	Bug	Vendor and Item Details	- Vendor Details, after edit and save, the sync pop up freezes - Item Details, after editing the Min Max and save, the sync pop up freezes	IPC	
01/18/24	30880	Bug	OSScan	When returning item from the Inspect Returns as good for stock it does not add it to the inventory for Vivi, Carlos and Pan OSCAN users	TipTop	
01/18/24	30852	New Feature	Credit Memo	The details in the payment info tab should be printable. Reliable wants to print the information, where most of his advance payments are done via CM.	Reliable	
01/18/24	30890	Bug	Purchase Order	Created the succeeding PO from P261532-B10 to P261532-B11, but the items with BO Qty was not carried over in B-11. It only shows 1 line item, GC400 which is not in PO B-11 but in B10. (version used is 24.0109)		
01/18/24	30871	Bug	QBO Sync	1place is connected to QuickBooks but the GL account is not shown in the drop-down list for each field.	Alliance	
01/17/24	30888	Bug	Catalog Management	While Processing Large number of records bad request occurs.	ALL	

01/17/24	30881	Bug	Reports	INVOICES/CREDITS report >Last Year > Group by sales rep > An error occurs when downloading the report to excel.	Impact	
01/17/24	30878	Bug	Sales Order	Sales order print button >Updated their version to 23.1212 and reverted back Krystal's account to 23.0328 however the print button stopped working. Same with Pan's account (Tiptop)	Impact / TipTop	
01/17/24	30879	Bug	Sales Order	Please figure out why some users are not able to see the Sales Order screen but when using incognito mode, it works fine. This happened with IPC (users: Kevin and Danny) and International Diesel (user: Bridgette)	IPC	
01/16/24	30835	Bug	Find Parts	When selecting an item located in 2 different location, it creates multiple duplicate lines on the shipping and receiving screen.	Quality	
01/16/24	30808	New Feature	Reports	Make a new Exception Report called: Exception Report - Sales Order Item Price Changes.	Quality	
01/16/24	30875	Bug	Items	User searched for 'RACO' and the list showed 422 items. User downloads all these items and opened the Excel file. The data in the file is not correct.	IPC	
01/16/24	30831	Bug	User Security	Made some changes in the Module Security for a couple of users, but after the change, the Payment Info is missing for the following users: Paul Ngo, Wilder, and Walter Maradiaga	Alliance	
01/16/24	30872	Bug	Shipping and Receiving	Undefined error when accessing the Picking tab.	Alliance	
01/12/24	30867	Bug	Reports	When run the report, on a customer date range, the presentation changes every time it is run. Either it is grouped by Customer or Payment Type, the sort order is changing, as well as the sort order of invoice/cm numbers of each group. The group name should be sorted alphabetically, and each group the invoice/cm number should also be sorted in ascending.	Alliance	
01/11/24	30864	Bug	Reports	Invoice Payments Summary and Invoice Payments Details not showing correct data.	IPC	
01/11/24	30863	Bug	OSScan	InspectReturnItem api call is not putting the item in the ReturnsArea location. It should put the item in question (gotten from the invoice line number that is passed in) into stock in the "ReturnsArea" bin/location.	Alliance	
01/11/24	30869	Bug	Sales Order and Invoice	A credit memo was created for a few line items, but the Qty Returned column in the Invoice and Sales Orders screen is not updated, still remained at zero.	Alliance	
01/11/24	30865	Bug	Credit Memo	- When trying to click the magnifying glass icon on the Invoice field, it is not redirecting to the invoice screen. - When trying to click the magnifying glass icon on the Item # field, it is not redirecting to the item detail screen.	Alliance	

01/10/24	30836	Bug	Replenish Stock	IMPORT FUNCTION >When importing a file after the popup 'Import completed' showed up and redirects to the replenish stock screen, the popup 'Calculating Qty In stock per items' window gets stuck and even clicking the close button, it won't allow the user to proceed	Quality	
01/10/24	30784	New Feature	Catalog Manager	- Make option to change the way the ITEM DESCRIPTION is created on Catalog Manager (to allow for Part #, Cat, Sub, Y, Y, M) - Make a way to add exclusions based on the YEAR of the vehicle. By Make, Make/Model, Make/Model/YearRange - Make a way to add exclusions based on the YEAR of the vehicle. By Make, Make/Model, Make/Model/YearRange - DEFINE how the Item Description will be created - UPDATE all (PartsLink type) Items with No PType (where the Item # format = XX#####)	Quality	
01/10/24	30823	Bug	Sales Order PO	There's a line item that appears on the SOPO screen, even though the PO checkbox is unchecked and the Qty Ordered is zero.	TipTop	
01/10/24	30842	Bug	Quotes	Entered data (comments, notes, tax) Does not save properly. After you save and close the Quote and open it again, it disappears.	IPC	
01/10/24	30849	Bug	Security Settings	Module Security is behaving erratically. When we remove Invoice Delete and Invoice Edit many sales people cannot access [Find Part].[Bill To].	Alliance	
01/10/24	30834	Bug	Sales Order	Sales Order > SO Amount is wrong.	Alliance	
01/10/24	30862	Bug	Quotes	Comments were not saving when Tax creation method is Manual.	IPC	
01/09/24	30650	New Feature	Invoice	On the Invoice screen, on the Printable invoice called Invoice 2, please make these changes to make the Invoice more condensed, so it can print multiple line items without having to print another page	Quality	
01/09/24	30850	Bug	Shipping and Receiving	In the Closed Tab: Should have a column that would show the driver's name who delivered the Sales Order.		
01/09/24	30848	Bug	Security Settings	Some user rights showing 2 lines for few module security screen category.	Alliance	
01/08/24	30821	Bug	Sales Order	SalesOrder BackOrder tab not populating data.	ABC	
01/08/24	30827	Bug	Sales Order	Sales Order print out: There is a certain line in the sales order print out that does not carry the amount, it shows a zero amount. Kindly refer to the scenario below - SO 1298 item HO1000322 (items was shipped) shows a 0.00 amount in the print out, but in the invoice print out it shows a correct amount.	Alliance	
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01/04/24	30789	Bug	New Record	After adding a new customer/vendor/Item, the page doesn't navigate to the detail screen and gets stuck.	ALL	
01/04/24	30760	Bug	Log Out	"Not Found. HTTP Error 404. The requested resource is not found".	ALL	
01/04/24	30775	Bug	QBO Sync	Invoices are not balanced.	Vaillant	
01/03/24	30799	Bug	Shipping and Receiving	- To Dispatch --> When Elite Sales Integration is off, Hide the Related columns and hide show settings - Eliminate Elite Manifest name and Elite Signed by Field	Elite	
01/03/24	30755	Bug	Catalog Management	Makes, Models, Year Ranges to Exclude from Searches is not functioning properly. After the user searches, the excluded makes and models still appear in the search results.	ALL	
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01/03/24	30768	Bug	Invoice List	Invoice/Credits List> Customized Tab - Tried to open an invoice from a customized tab, but once clicked it will redirect to a new window blank page. Custom tab: invoice-day.	Alliance	
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01/03/24	30796	Bug	QBO Sync	Some items could not be synced.	International Diesel	
01/02/24	30401	New	Shipping and Receiving	Design new Batch Dispatching & Invoice Printing for Elite Extra Orders on the Ship/Rec. To Dispatch screen	Elite	

01/02/24	30794		Reports	INVOICES/CREDIT REPORT > Cannot download the report to excel	TipTop	
01/02/24	30793	Bug	Email	Email not working for some users	Quality	
01/02/24	30786	Bug	Import Wizard	Fix issue on Invoice Line item import.	ALL	
01/02/24	30791	Bug	Invoice Payment	It's not allowing users to apply credit to an invoice when clicking the arrow. Not working on the 23.1212v.	Quality	
01/02/24	30787	Bug	Reports	User with report security to ALL but with Security type sales, but the account's report screen is empty.	Fender	
12/29/23	30785	New	Customer	update the tax rate for these customers on ORLANDO BODY PARTS account.	OBP	
12/29/23	30778	New Feature	Find Parts	Ship to & bill to address dropdown. make that header background on blue color. It should disable to the user while selecting from dropdown. it shows undefined error.	ALL	
12/29/23	30771	Bug	Find Parts	ADDRESS TYPE: SHIP TO, LINK TO: -- When searching for customers on the find parts screen with a customer and link to a bill to the customer, it does not auto-populate on the Bill to the field	Fender Bender	
01/30/24	30534	Bug	Delivery Date	If we change the shipped via, the delivery fee will be changed; after that, if we change the delivery date, the delivery fee will revert to its original value.	Quality	

24.0122 Version Releases History

Version #	Date Released
24.0122.62	02/04/2025
24.0122.61	01/29/2025
24.0122.60	01/16/2025
24.0122.59	01/10/2025
24.0122.58	12/30/2024
24.0122.57	12/18/2024
24.0122.56	12/16/2024
24.0122.55	12/10/2024
24.0122.54	11/27/2024
24.0122.53	11/19/2024
24.0122.52	10/29/2024
24.0122.51	10/15/2024
24.0122.50	09/30/2024
24.0122aw	09/19/2024
24.0122av	09/16/2024
24.0122au	09/04/2024
24.0122at	08/28/2024
24.0122as	08/27/2024
24.0122ar	08/22/2024

24.0122aq	08/22/2024
24.0122ap	08/16/2024
24.0122an	08/06/2024
24.0122am	08/01/2024
24.0122al	07/30/2024
24.0122ak	07/26/2024
24.0122aj	07/24/2024
24.0122ai	07/15/2024
24.0122ah	07/03/2024
24.0122ag	06/17/2024
24.0122af	06/10/2024
24.0122ae	06/03/2024
24.0122ad	06/03/2024
24.0122ac	05/28/2024
24.0122ab	05/23/2024
24.0122aa	05/20/2024
24.0122z	05/16/2024
24.0122y	05/14/2024
24.0122x	05/11/2024
24.0122w	05/09/2024
24.0122v	05/09/2024
24.0122u	04/30/2024
24.0122t	04/25/2024
24.0122s	04/23/2024
24.0122r	04/18/2024
24.0122q	04/16/2024
24.0122p	04/11/2024
24.0122o	04/10/2024
24.0122n	04/04/2024
24.0122m	04/01/2024
24.0122l	03/21/2024
24.0122k	03/19/2024
24.0122j	03/15/2024
24.0122i	03/07/2024
24.0122h	03/06/2024
24.0122g	03/04/2024
24.0122f	03/01/2024
24.0122e	02/28/2024
24.0122d	02/22/2024
24.0122c	02/05/2024
24.0122b	01/29/2024
24.0122a	01/24/2024
24.0122	01/22/2024

24.0122 (Known Issues Fixed in this Version)

Fixed in Version #	Date	Task #	===== Type =====	Screen (or Report Name)	Description
25.0212.02	02/21/25	32192	Bug	Purchase Order	PURCHASE ORDER: When user click Recalculate button w is not calculated.
25.0212.02	02/21/25	30808	Bug	Reports	Exception Report - <u>Sales Order</u> Item Price Changes: Shows while running.
25.0212.02	02/21/25	32197	New	Printing	Add the time when a document was printed on All Document Print outs.
25.0212.01	02/20/25	32193	Bug	Shipping and Receiving	Not showing the correct values based on the status.
25.0212.01	02/20/25	32191	Bug	Purchase Order List	PO List - When sorting the column for the Vendor Number ; undefined error pops up. PO List - Vendor Number Column should be named as Vendor Name. Vendor number is different.
	02/19/25	32062	New	<u>Sales Order</u>	When the Qty Shipped is changed, check to see if the Lot Tracking true/false option on item is checked. If so, then PO a screen showing the Receipts in stock and allow the user to select WHICH receipt will be taken out of stock, rather than taking First In First Out.

25.0212	2/18/25	32227		Reports	When reports module is clicked , the sales order module is duplicated in the list. Similar issue occurred in other companion modules.
25.0212	2/18/25	31873	Bug	Credit Memo	Credit Memo > Payment Info > Give Cash Back or Apply Credit --Even when the date chosen is greater than the Invoice date still gives the date validation error. Example: The Invoice was created on 10/14/2024. Date on the payment date is 10/15/2024. --If the payment date was changed to 10/16/2024, the date the "Date Paid" field still shows as 10/15/2024. --"Last Synced" field is not showing properly on the Paymer Screen --"Give Refund" button is still working even without choosing any Payment Type of Refund. Also, I can still process a refund even after giving a full refund to the order. --Action(x) is not functioning
25.0212	2/18/25	32224	Bug	Import Wizard	Customer List > Update Wizard > The file was imported successfully, but some data (City) were not updated based on the file.
25.0212	2/18/25	32194	Bug	Settings	User Settings >Edit User >Module Security: Look for Invoices and uncheck the Edit box. >It restricts the user to access the Invoice screen. This should only restrict user to any info on the invoice and still show the invoice form. (Same applied to all Edit checkbox settings)
	02/17/25	32218	Update	Invoice Detail	Receive/Edit Payments > Add new Card Instead of a pop up message, the system should highlight the missing field so the user will know they forgot one of the details and they can properly store and save the credit card on file.
	02/17/25	32217	Update	Customer Detail	CREDIT CARD TAB When you add a new credit card and click the SAVE and SYNC button, it makes a copy of the other cards on file. Which shouldn't be happening. Also, remove the space on "Master Card" should be "Mastercard". Automatically add a / symbol when a user types the expiration date on the field. Also, do not allow the user to save the credit card if it is missing any details, I tried adding a card with just 6 digits and it was saved instead of prompting the user to enter the whole credit card number. (most credit cards has 15-19 digits number)
	02/17/25	32216	Bug	Customer Detail	CREDIT CARD TAB and Invoice Screen > PAYMENT SCREEN When I use an existing card added thru the credit card tab on customer detail screen to pay for an invoice, it does not work error says invalid card number. Tried adding the same card thru the ADD NEW CARD button edit/receive payment screen and it worked fine.
25.0212	02/17/25	32198	Bug	Reports	INVOICES/CREDITS PAYMENT DETAILS --Allow user to Group by = None --Sort by Invoice Number --After report is generated, when user clicks the Invoice Number header, it does not sort the records. Pls fix --Please put in newest branch version 25.0212
					Invoice/CM

25.0212	02/17/25	32150	Update	Reports	--Group by = None --Cannot Download to Excel File --Cannot Print when clicking the Print button --Must correctly show all the fields/columns from the report --Must be sorted according to the sort option selected before generating the report. --When user downloads to PDF, the sorting is default to Customer name. Please sort according to the sort option selected before generating the report.
25.0212	02/17/25	32220	Bug	Import Wizard	Encountered errors uploading files for Item stocks, item vendor and catalog.
25.0212	02/17/25	32192	Bug	Purchase Order	The Recalculate button is not saving the values on the PO entry when clicking save. Once the page is refreshed, the values are removed. (WE DID NOT MAKE ANY SAVE FUNCTION RELATED ON THIS.) When the CuSqFeet is selected to show on Line 2, it does not show the correct CuSqFeet based on the Vendor Item #. It only shows 0. If a PO has a lot of line items, the page loads, and will not work properly even when opening a new tab.
25.0212	02/17/25	32188	Update	Item Catalog	1d. DEFINE how the Item Description will be created. - When choosing option 1: Make Model Year Range - Partslink Description (Name) (Partslink Variables), it still shows the description based on option 2 format. Example: AC1000101 - Front bumper cover (LS; prime) 1993-1994 ACURA VIGOR Some Partslink Items are showing the wrong year range. Instead of 12-17, it shows as 12-14.
25.0212	02/17/25	32179	Bug	Customer List	Exported file for customers (Express), the discount percentage shows more than 2 decimals
	02/14/25	32102	Update	Printing	Printing Options: Need to disable Printing Option settings on all transaction forms.
	02/14/25	32202	Update	Customer Portal	Customer Portal users should not be able to edit the Transaction info on Quotation Example: Date, Entered In Payment Terms, Sales Rep, Order Source, Shipped Via and Job ID. Except for Customer PO #, Contact and Email fields. On the Line items table, these fields should also not be edited by users: Expiration Date Warehouse Description Discount
	02/14/25	32175	Bug	Reports	Invoices/Credits The following Reports have issues where when you download the file either to PDF/Excel, the webpage would either freeze or send you to a different web page where it would have a webpage error message: INVOICES / CREDITS BY CUSTOMER AND ITEM VENDOR (Excel) INVOICES / CREDITS BY MONTH (TOTALS) (Excel) INVOICES / CREDITS BY TYPE (Excel) SALES HISTORY - 2 YEAR COMPARISON BY ITEM (ALPHA) (Excel) SALES HISTORY - 2 YEAR COMPARISON BY ITEM (BEST TO WORST) (PDF)
					Customer Portal > Find Parts: After adding an item you want to add to your shopping cart using the right arrow button. and

	02/13/25	32201	Bug	Customer Portal	when the user reduce the quantity to buy using the left arrow button to Zero, the shopping cart keeps the item with quantity 1, even though it should be removed already since the Qty is 0 already.
25.0212	02/13/25	32122	Bug	Credit Memo	ADDITIONAL COST FOR RETURNED PARTS FROM CREDIT MEMOS >When returning parts from the Credit memo to stocks, the additional costs for the returned part gets wiped out/zeroes out. REPORTS >INVOICE/CREDITS REPORT >When running the report with a CM with unreturned parts, it shows the amount of the additional cost and when the item is returned to stock, the additional cost gets wiped out. Need to double check and update the Returned CM that has additional cost wiped out from Jan 1, 2025 till present date correct the error.
25.0212	02/13/25	32204	Bug	Shipping and Receiving	PENDING/ FUTURE DELIVERY: The Future delivery screen should have the features we used to have for Quality. We need to restore it back.
25.0212	02/13/25	32206	Bug	Sales Order PO	SOPO>PO: When creating PO from the SOPO screen, it only opens a blank tab. When opening POs, it directs to blank tabs.
25.0212	02/12/25	32226	Bug	Receive Payments	Worked in the issue where the Customers are not shown with the open invoices customer is selected.
25.0212	02/12/25	32225	Update	Settings	In Sales > General Sales Settings > Payment Terms table -or the Payment Term Name, # of Days, # Days for Discount, Discount percent is shown and updated.
25.0212	02/12/25	32196	Bug	Manifest	Showing duplicate orders on the list.
25.0212	02/12/25	32187	Update	Receive Payments	--Change the title Payment Reference # to CK#/CC# --Add a new field below called Authorization # this is the same as the Authorization # field in the Payments Info tab on the Invoice detail screen.
24.0122.63	02/12/25	32190	Bug	Item List	Item Vendors tab does not show any data or values.
24.0122.63	02/12/25	32182	Bug	Reports	QUOTATION LIST REPORT: Unable to download to PDF or Excel. after selecting all columns to display
24.0122.63	02/12/25	32146	Bug	Reports	Invoice/Credit Payment Details - Lets move the Invoice # over to the left of the Customer Name - Fix this on pdf and excel file functions.
	02/11/25	32185	New	Receive Payments	* Testing all scenarios * Applying the payments from Credit Memo to Invoice * Invoice Over payment Scenario * Syncing Payment from QBO to 1Place * Partial Credit memo payments * Syncing Payments to QBO * Restrict Invoice Customer Credit table when syncing from QBO * Whole Receive payment Screen
24.0122.63	02/11/25	32180	Update	Sales Order	Edit/Receive Payment > Payment Methods. When trying to apply a payment and need to select one of the payment method options, it needs to be shown alphabetically. Currently, it is random and not sorted alphabetically. --Changed in SO, Invoice, Receive Payments and Customer Fields screens
					Vendor Item Numbers (All Vendors): When importing the file from the Vendor Item Numbers (All Vendors) screen, the file should be sorted alphabetically by Vendor Item Number.

24.0122.63	02/11/25	32181	Bug	Import Wizard	gets stuck on the progress bar. After closing the page, 1Place not work properly or if opening a new dashboard, the page j keeps on loading.
24.0122.63	02/11/25	32179	Bug	Customer List	Discount % column - Showing more than 2 decimals. When exported, the & symbol shows on the Excel file as "&
24.0122.63	02/10/25	32169	Bug	Reports	EXCEPTION REPORT >INVENTORY LEVELS REPORT >No items that have stocks and transactions are showing in the l
24.0122.63	02/10/25	32178	Bug	Purchase Order	PURCHASE ORDER to SALES ORDER: Item#HO12101600 P1783 but it did not update the Qty on Sales S28595-B1.
24.0122.63	02/10/25	32167	Bug	Reports	Invoice/Credit Received Payments - There is a refund but is not showing negative. - Customer Name not showing.
24.0122.63	02/06/25	32166	Bug	API	1place cannot find the item sent by partstrader when the O number has more than 1 dash '- '.
24.0122.63	02/06/25	32164	Bug	Sales Order	SALES ORDER TO INVOICE: The line items on the Sales Order got duplicated on the Invoice. It was invoiced from th dispatch screen. Please check S250205-0035 and I250205-
24.0122.63	02/06/25	32162	Bug	Quotation	QUOTATIONS REPORT >Has duplicate Quotation on the reports screen. >The Quotation List Report also has duplicate quotes which duplicated based on the number of line items.
24.0122.63	02/05/25	32157	Bug	Quotation	List/Unit/Net - Prices are showing more than 2 decimals even when it was only set to 2.
24.0122.63		32146	Update	Reports	Lets standardize the 3 payments reports: Invoice / Credits Received Payments: Please change to: Invoice Credits Payments Received Invoice / Credits Payment Details (which is the one we are restoring in notes above) let change name to: Invoice / Credit Payments Detail Invoice / Credits Payments Summary: Please add '(End of D to the title on Menu and on report.
24.0122.63	02/04/25	32146	Bug	Reports	Invoice/Credit Payment Details - There is a refund but is not showing negative - Incorrect totals - Ck#/CC# not showing - Sort by Invoice#
24.0122.62	02/04/25	32153	Bug	ALL Transactions	SALES REP, ENTERED BY CREATED BY fields on Sales ord Invoices, CM > We need to update these fields with Quoted Created by for the month of January 2025. (Fixed version is .61)
24.0122.62	02/04/25	32093	Bug	Purchase Order	Bin: After moving the item using OS Scan from from Dock to it did not change the bin location on the PO. It stayed on Dock instead of displaying the Bin where it is located.
24.0122.62		32149	Bug	Reports	INVOICES/CREDITS: When running the report with a CM v unreturned parts, it still shows the amount for the additional cost. It should be zero since it is still unreturned.
24.0122.62	02/03/25	31489	Update	Find Parts	Check to see if the SHIP TO customer selected is LINKED to BILL TO Customer. If so, auto fill in the Bill To Customer and highlight the value. Otherwise, do not auto fill.
24.0122.62	02/03/25	32147	Bug	Reports	24.0122.61 (Rachelle autoparts warehouse) Reports > Item There are missing inventory reports in this version. >Inventory Count Sheet (By Category / SubCategory with Fixed Bin >Inventory Count Sheet (By Fixed Bin Locations) >Inventory Count Sheet (By Item Receipt Bin Locations)

					>Inventory Count Sheet (by item receipt bin locations) >Inventory Stock Transfers - Invoices >Inventory Valuation - Current (Category / Subcategory) >Inventory Valuation - Historical
24.0122.62	02/03/25	32152	Bug	OS Scan	When receiving the PO into Bin or Dock, the page leads to a server error in ' / ' application.
24.0122.62	02/03/25	32151	Bug	Item List	ALL Item on ENTIRE list: Error when trying to download.
24.0122.62	01/31/25	31777	New	Financial Periods	* Show Open invoice report balance for \$ AR * Calc Inventory for \$ Inventory
24.0122.62		32148	Bug	Invoice	CREATE CREDIT MEMO: When creating credit memo, a pop message would ask if user would like to automatically return the item back to stock when the credit memo is created, and when you respond with NO does not proceed in creating the credit memo. Note: the option to NOT return items back to stock when items are returned on a Credit Memo is allowed and checked on the settings.
24.0122.61	01/29/25	32121	Update	Import Wizard	ITEM LIST: Add back the QualityIndicator on the Database Columns
24.0122.61	01/29/25	32097	Bug	Sales Order	Bill to and Ship to Dropdown: The information displayed on dropdown is mixed up - the name column shows the address: phone number column shows the address type and so on.
24.0122.61	01/29/25	32140	Bug	Customer List	Download to Device/Export is having a bad request issue.
24.0122.61	01/23/25	32118	Bug	Reports	Please make these updates/Fix on the following Reports Update: Sales tax liability report, Group by = None / Allow user to change, Default sort by invoice number Fix: Invoice CM Payment details = Showing undefined error
24.0122.61	01/23/25	32119	Bug	Reports	INVENTORY VALUATION - HISTORICAL: Add header on the downloaded excel file. (missing on the .61 version)
24.0122.61	01/23/25	32072	Bug	All Transactions	QUOTES SALES REP field Right now, the Created By is updating based on who created Invoice instead of copying the original person who created the Quote or Sales Order. Should follow this conditions: (KBA: AA-02792) Created By, Entered By, and Sales Rep (fields) - This auto fill with the name of the user logged in when it is created or converted from a Quote. NOTE: For reporting and commission tracking purposes, there are 3 fields that are similar to each other: Created By: By default, this is filled in with the logged in user name. However, if you are creating a Sales Order from a Quote (or an Invoice from a Sales Order) the original Created By user value is retained and copied over. Entered By: This is auto filled in with the logged in user's name (Even if the Sales Order or Invoice is 'converted' from a Quote or Sales Order, this will auto fill in the logged in user's name) Sales Rep: By default this field remains empty. If the selected Customer has a Sales Rep saved on its record, then that Sales Rep will be auto filled. There is also an option in the settings to auto fill the Sales Rep field with the logged in user that is creating and/or entering the sales transaction.
24.0122.61	01/22/25	32127	Bug	Invoice	INVOICE SUBTOTALS/TAX: When invoicing tax exempt sales orders, the tax amount gets included in the Invoice total amount. Unchecked and checked the tax exempt box to refresh the total (CANNOT DUPLICATE THIS ISSUE)
					ITEM STOCK REPORT: On the downloaded PDF, it should be

24.0122.61	01/22/25	32066	Bug	Reports	ITEM STOCK REPORT: On the downloaded PDF, it should be 'of Month x, 202x'
24.0122.61		32121	Update	Import Wizard	ITEM LIST: Add back the FixedCostForMarkupPricing on the Database Columns
24.0122.61	01/22/25	32107	Bug	Shipping and Receiving	TO PRINT AND PICK SCREEN > FILTER BY: When selecting the orders by filter (shipped via) buttons and items are selected however when clicking the fifth filter but it kicks out the first selected items.
24.0122.61	01/21/25	32116	Bug	Item Detail	ALL Items WITH a Vendor Item #: Bin Location field will have the Vendor Item #/Sku, which was shown on the Stock Picking Ticket. If the Item has multiple Vendor Item #, use the one that ends with "A". Sample Item FO1230307, the Vendor Item # to be used is FDF101-15A.
24.0122.61	01/21/25	32120	Bug	Sales Order	LABELS > SHIPPED VIA > It does not show alphabet characters on the print preview for shipped via.
24.0122.61	01/21/25	32052	Bug	Credit Memo	Also, when the CMs are approved on the scanner, the Line item totals for the CMs should be zero because the line item is in unreturned.
24.0122.61	01/20/25	32115	Bug	Invoice Detail	Invoice: 2626: Not calculating the tax code resulting in not having the correct Total Price.
24.0122.61	01/20/25	32112	Bug	Customers	Some customers are showing in the search bar or Find Parts they are not under Quick Fit (Different State). Check the incorrect customers and delete them.
24.0122.61	01/20/25	32113	Bug	Item Details	STOCK TAB>ADJUST QUANTITY BUTTON > Users Marya User 1 and Alden are stuck on spinning screen whenever they click on the 'Adjust Quantities in Stock' button for item#GM1230443.
24.0122.61	01/20/25	32108	New	Credit Memo	Credit Memo Print: Please add credit card # and authorization on payment details add Paid Sticker
24.0122.60	01/16/25	32105	Bug	Sales Order	SALES ORDER > INVOICE: We can't recreate the invoice after deleting the invoice because of this popup: Sales Order back order already created. SO: S26285.
24.0122.60	01/16/25	32052	Bug	Credit Memo	When CMs are created using the scanner, when you try to modify anything on the CM, it marks itself as paid and zeroes the Unapplied amount. (REDO) Also, when the CMs are approved on the scanner, the Line item totals for the CMs should be zero because the line item is initially unreturned. Need to remove the PAID marks and lock on these CMs: C250113-0004 and C250113-0005
24.0122.60	01/13/25	32086	Bug	Shipping and Receiving	In Route Screen. Displays an undefined error when moving status from In route to another status for multiple orders.
24.0122.60	01/13/25	31132	Bug	Invoice	INVOICE 2 > Some of the Invoice headers are not appearing on the invoices print preview for Invoice#2, LOGO, Address, it should look the same as the Invoice 1
24.0122.60	01/13/25	32083	Bug	Quotation	LINE ITEMS > The quote order contains a total of 13 line items however on the Quotation screen, it only shows 6. Example Q38169
24.0122.59	01/10/25	32088	Bug	Reports	Invoice Credit Payment Received>ALL customers> Sort=Name When user clicks the Invoice # field header, the column does not sort. Pls make the sorting of Invoice # column work. Pls fix the Report Title.
24.0122.59	01/10/25	32014	New	Invoice	Invoice PRINT Show the Authorization # on the payment info

24.0122.59	01/10/25	32061	New	Invoice	- Show the Authorization # on the payment info - Can we add a 'Paid' sticker?
24.0122.59		32071	Bug	Credit Memo	B&G Electrics statement : Credit Memo C58483 not update QBO properly.
24.0122.59	01/09/25	32079	Bug	Quotation	Quote with 107 items times out. Need to convert to SO. Qu Q250107-0004
24.0122.59	01/08/25	32077	Bug	Reports	Invoice/CM: Reports not working. Just keeps on loading and nothing happens. Invoice/CM Payment Details Invoice/CM Received Payments
24.0122.59	01/08/25	28741	Update	Import Wizard	WHICH values, in all import types, need to be converted (or fly) because the code is Case Sensitive??? (MAKE LIST of which fields). Such as ItemType could = 'Inventory' or ItemType could = 'inventory'. In this case we need the code to look for both.
24.0122.59	01/08/25	32074	Bug	Reports	All reports are missing.
24.0122.59	01/08/25	32075	Update	Reports	Sales Orders>Sales Order Back Orders: Please do not show Orders that are marked as 'CLOSED' status sample: SO 1113 and 1197-B2
24.0122.59	01/07/25	32070	New	Import Wizard	Import custom Invoice payment for Quality from their own file
24.0122.59	01/07/25	32069	Bug	Sales Order	SALES ORDER STATUS: Line items without PO have 'Waiting for delivery from vendor status' tried manually updating the status back to 'Waiting to be Purchased status' but it just re back to the same status.
24.0122.59	01/07/25	32017	Bug	Sales Order	SALES ORDER STATUS >MOVED TO BACKORDER >We r to not show the status MOVED TO BACKORDER on the M: Status field.)
24.0122.59	01/06/25	32067	Bug	Sales Order	We get this error when trying to delete this SO #S25667 on
24.0122.59	01/06/25	32064	Bug	Shipping and Receiving	It loads too long when opening up the screen, searching par even invoicing 1 order including the process of dispatching orders and showing all list of orders. The DTU is already at 800.
24.0122.59	01/06/25	32063	Bug	Dispatch Screen	Find Order field not working. When pressing enter, the key moves to the next field. Not auto-selecting the orders when being searched.
	01/03/25	32054	Bug	QBO Sync	When user attempt to sync received payments in the Sync Center, it stays or gets stuck at 92%.
24.0122.59	01/03/25	31893	Bug	Credit Memo	- "Give Refund" button is still working even without choosing any Payment Type of Refund. - "Last Synced" field is not showing properly on the Payment Screen - After saving the payment created in the credit memo, it will show on the Payment info tab yet, you need to refresh the page for it to update - If you cancel the Payment in the Credit Memo pop-up, it will give you an error to choose a date first. Same goes with --When deleting a payment transaction on the Payments Pop-up screen it won't let you delete the payments unless you choose a payment date. So you can't cancel it without choosing a date - When deleting a credit memo with payments applied, it will give you a pop-up that you need to delete any related payment first but the screen just loads and won't go back to the previous screen. You need to refresh the page for the screen to work again.

					- Receive Payments Screen > Open Credits > Not showing t correct amount values on the payments made in the Credit Memo
24.0122.59	01/03/25	32059	Bug	Invoice	Cannot print imported invoice with payments
	12/31/24	31190	Bug	Invoice/Credit Memo	Invoice --> When creating a credit memo from an invoice, tv invalid popups open up. This needs to be restricted to show correct popup Credit memo--> Unable to save the credit memo. The subto applied amount and unapplied amount are not showing corr (Not duplicated).
24.0122.61	12/31/24	32054	Bug	QBO Sync	-- When user attempt to sync received payments in the Syn Center, it stays or gets stuck at 92%. -- ProgressBar Percentage fixing.
24.0122.59	12/31/24	31778	Bug	Sales Order	LABEL STICKERS >When another user removes the sticker the Print Options, and put it back on the box, it removes the sticker design. (CANNOT DUPLICATE THIS ISSUE)
24.0122.59	12/31/24	31881	Bug	Dispatch	SCANNER >When user scans the SO on the scanner, it only allows user to scan up to 13 Sales Order and there will be a popup that tells user that the SO does not exist. They use th scanner delivery to lookup for the parts on the Dispatching screen.
24.0122.59	12/31/24	32052	Bug	Credit Memo	When you open up a Credit memo and make any modificati The system marks it as PAID and adds in on the payment tal payment with zero amount and it zeroes out the available credits. It could also be when applying credits on multiple invoices, t Total Amount tab does not show the total amount applied f the multiple invoices. Example: C241122-0011, C241220-0005.
	12/30/24	30445	Update	ALL	SHORT-CUT KEYS. There are issues with the F11 and F12 Please make them work this way: F11 = open a Quick Search to find tasks by Task # Ctrl + F11 = open a NEW TASK popup form. Shift + F11 = Open Task List. F12 = Open Quick Search for Job. Ctrl+F12 = Open Job Add New Shift + F12 = Open Job List. Please also update the shortcuts in the 3 green buttons in t left section of nav bar on left side. (added already)
	12/30/24	30495	Bug	Item Detail	--Made a change to the record. Red save button appeared. T to save item record get popup message: Please select Assen Type (even though an assembly type was already selected). --Vendor costs (on Vendors tab) should show 2 digit curren values. --When I first open up the form, on the Details tab, many fie are visible. When i open the gear to hide some fields they w already unchecked. So I checked/unchecked them and they away, but then when i close and reopen the same (unselecte fields still appear. --Assem tab. When adding Qty it is not centered. --When adding Price Levels (on Item Det) Be able to add lin without pressing save button over and over. BUG: Item Details pictures. Web URL path looks VERSION specific.
					Payments. Unable to apply partial amount of the credit me

24.0122.59	12/30/24	31163	Bug	Invoice	Payments > Unable to apply partial amount of the credit memo. It automatically applies the whole amount. All open credit memo for a particular customer is not showing the 'Apply Credits'.
24.0122.59	12/30/24	30926	Bug	Invoice	ALLIANCE: (Found in 24.0111). Trying to DELETE Invoice that has a payment (which payment rolled over from SO), gives prompt to delete Invoice Payment first, but then hangs.
24.0122.59	12/30/24	30374	Bug	Item Detail	Item detail —> View item by warehouse—>When the user attempts to transfer an item from main warehouse to another warehouse, those changes are not updated on Stock.
24.0122.58	12/30/24	32051	Bug	Settings	USERS > NEW > It won't let us add new users. When we click Save, nothing happens. The new user does not get added. Customer has existing 23 users and wants to add 2 users:
24.0122.58	12/30/24	31845	Bug	Settings	Users > User Full Name > When changing the User Full Name, the system will save it but if you log out and log back in, it will revert to the previous user full name. >It's not working on the Os User.
	12/27/24	31777	New	Financial Periods	* Create Journal Entry based on the QB and 1Place records
24.0122.58	12/27/24	30133	Bug	Integration	EBIZCharge Integration > Invoice>Receive/Edit Payment>Credit Card > Authorize Card and apply payment error popup because of the missing / on the expiry date.
24.0122.58	12/27/24	31935	Bug	Shipping and Receiving	There are orders that were previously closed and suddenly appeared on the dispatched status. (CANNOT DUPLICATE THIS ISSUE)
24.0122.58	12/27/24	32049	Bug	Credit Memo	Subtotal Table moves from the lower right to the center when you click on the different tabs below the line item such as the "comments" and "customer field" tabs.
	12/26/24	31947	Bug	Invoice	APPLYING CREDIT MEMO >When applying Credit memo on an invoice, and the screen hangs and user clicks the Apply twice records 2 CM payment on the invoice. >When applying partial Credit memo amount on an invoice, credit applied does not record on the payment info tab of the CM. It also did not deduct the partial amount applied on the invoice against the CM balance.
	12/26/24	32041	Update	Reports	Quotations > Settings > Shows very limited columns to select from and generate report for quotation list. Should have the same columns as Sales Order Report. Add the following on the List Settings: <u>Sales Order #</u> , <u>Payment Terms</u> , <u>Entered by</u> , <u>Salesperson</u> , <u>Vendor Name</u> , <u>Warehouse</u> , <u>Sub total</u> , <u>Total Payment</u> , <u>Freight or Other Charge Tax</u> .
24.0122.58	12/26/24	31946	Bug	API	API - Item Call ExpectedDeliveryDate on the Item api call is returning default dates either when there is no zip code or some other issue.
24.0122.58	12/24/24	32024	Bug	Find Parts	FIND PARTS > <u>SALES ORDER</u> : When creating orders from the Find Parts screen with some items in backorder, and the popup 'Split the line items' appears and click on Yes, the <u>Sales order</u> created does not show the and Submit button.
24.0122.58	12/24/24	32040	Bug	User Settings	Do not allow user to change Entered by AND Sales rep to another user. > User can still change the Entered by and Sales Rep on Quote screen.
	12/24/24	31777	New	Financial Periods	* Create Journal Entry based on the QB and 1Place records

	12/24/24	31992	Update	Credit Memo	SHOW/APPLY CREDIT MEMO >We need to clear out all Unapplied Amounts on OBP's show/apply credit window for their customers.
	12/24/24	32005	Bug	Invoice	APPLYING CREDIT MEMOS TO INVOICES -- Invoice I61006 >Payment info>shows unknown values as unapplied amount. -- User applied credit memo C59075 to I61013, and when it synced, it randomly messed with payments on other credit memos and invoices that are not even related. User tried to remove the unrelated invoices (I59103 and I59076) and credit memos (C59103), but 1place won't allow the user to do so.
	12/24/24	32042	Bug	Credit Memo	We need to run our tool to remove the PAID marks on unused CMs for TipTop.
	12/24/24	32016	Bug	Purchase Order	Delete button is not working if the PO was received. Enable DELETE the received PO if the setting in the PO Statuses (Can Delete Order) was checked.
24.0122.58	12/24/24	32015	Bug	Purchase Order	P1086 - When the PO was tagged as Received, it deleted the # for all items. (CANNOT DUPLICATE THIS ISSUE)
	12/23/24	31958	Bug	Item List	LISTS > Items > Item Sales Last 365. When click NEXT it loses the Sort order, based on Item Sales descending.(Not Duplicated)
24.0122.58	12/23/24	32039	Bug	Reports	Quote: Download quotation report file including Entered By Sales Rep and Created By columns for the month of December this year for OBP.
24.0122.58	12/23/24	32037	Bug	Import Wizard	Cannot import Item file.
24.0122.58	12/23/24	31991	Bug	Shipping and Receiving	EDIT or REPRINT MANIFEST BUG: >When downloading the manifest, it downloads a blank Excel file.
24.0122.58	12/23/24	32035	Bug	Settings	USERS > MODULE SECURITY When updating the module security for a user, when you click the 'check all' function for certain column, it checks all the unchecked boxes on the left column. So if you click on the checkbox for 'delete all' it then checks all the unchecked boxes for the Print column.
24.0122.58	12/23/24	32032	Bug	Settings	USERS When creating a new user, it does not let you save the record. The Save button does not work even after clicking the Activate user box and adding a password for it.
	12/20/24	30448	Bug	Item Details	Vendors tab issue. --On the Vendors tab, when added a vendor the RED save button will not turn off.(Not duplicated)
24.0122.58	12/20/24	31456	Update	Catalog Management	(Auto Door Tampa) 24.0122 Items > Catalog Management : FILTER (exclude) certain Makes, Models, and Year Ranges for the Catalog results. -- If a user enters a Make, automatically exclude all Models and Years for that Make.
24.0122.58	12/19/24	31145	Update	Reports	Sales Orders -Sales Orders by Date > Sub Total column: Add a comma separator after 3 digits (for thousands, hundred thousands, millions, hundred millions and on)
24.0122.57	12/19/24	32029	Update	Shipping and Receiving	DISPATCH SCREEN >SHIPPED VIA: Shows multiple filters that does not exist in the item table.

24.0122.58	12/19/24	32025	Bug	Purchase Order	PURCHASE ORDER > SALES ORDER: Whenever a user tries to unreceive a PO line item linked to the auto-ship pops up and when user clicks on Yes, it update status of the SO line item.
24.0122.58	12/19/24	31979	Bug	Purchase Order	When a PO was tagged as RECEIVED, the Columns were not showing properly. Unchecked boxes for the columns are still showing in the line item field. The columns always move even after being arranged. Make way to save the column arrangement for all the line item file
24.0122.58	12/19/24	32028	Update	Purchase Order	Margin field --Please replace calculation using this new formula: Margin = (List Price - Cost) / List Price -- Then show the result as a proper % number Example: Item abc LP = \$35, Cost = \$19.84, MARGIN = 43.31%
24.0122.58	12/18/24	31361	Update	Item Catalog	CATALOG MANAGER: Is there a way to make the NEXT page function faster? Lets also add a Show All option. Also, when deleting the Catalog (on Additional Function 3a) the progress jumps up each time the count is refreshed...That seems to be a bug.
24.0122.58	12/18/24	32008	Bug	Sales Order	SALES ORDER STATUS: When receiving parts from PO, the items are stuck on the WAITING FOR DELIVERY but the Quotes were updated.
24.0122.58	12/18/24	32013	Bug	Invoice	DELETING INVOICES: Whenever a user deletes an invoice, the Sales Order still has the invoice linked to and the status of the backordered items can't be manually changed from Moving to backorder to either Waiting to be purchased or Waiting for delivery from vendor.
24.0122.57	12/18/24	32004	Bug	Item Detail	Item Receipts > When sorting for Date Received, it will reset list to the first page and not the current list. When clicking the next button, the Date Received column will go back to not be sorted.
24.0122.57	12/18/24	32021	Bug	Sales Order	PACKING SLIP (1 line per item): When trying to print the packing slip, it does not show the line item table on the print preview.
	12/17/24	32009	Bug	Quotation	QUOTE > SALES ORDER > This Quote Q35315 have 2 sales orders S24085 and S24086
	12/17/24	32020	Bug	Invoice	Cannot send Invoice via email option.
	12/17/24	32010	Bug	Shipping and Receiving	DISPATCH SCREEN > DOWNLOAD MANIFEST for USER ISABEL OSPINA: When downloading manifest using user Isabel, it redirects to 'site cannot be reached screen'
	12/16/24	32012	Bug	Reports	Cannot open report Invoice/Credits by sales rep (by orders), version 0122.55.
	12/16/24	32010	Bug	Shipping and Receiving	DISPATCH SCREEN >MANIFEST >SO#S23230 shows twice OBP's manifest: Print Preview and Excel
24.0122.56	12/16/24	31991	Bug	Shipping and Receiving	24.0122.53 EDIT or REPRINT MANIFEST: Option 1. Reprint selected Dispatch >It does not show the count for the selected Dispatch number Option 2. Edit the selected Dispatch >Undefined error occurs
	12/16/24	31768	Update	Tax	Changed the Bill to a taxable customer, we should auto check tax checkboxes for the items.
24.0122.56	12/16/24	31946	Update	API	API - Item Call whatever # PartsTrader passed in—one or more parts on the

					request are not ones they have and its causing that error.
24.0122.56	12/13/24	31777	New	Financial Reports	- SQL Table Alteration - New Screen Design - Changing all naming from Month end to Financial periods
	12/13/24	30375	Update	Customer Portal	- Return a part--> Allow to create CM, without add a Qty Re & reason. After checking the Select all check box on table. - Return a part-->After creation of CM Qty return, Return Line Total field values are not update.
	12/12/24	32007	Bug	Customer Portal	- Send Invite options aren't working. - The customer portal tab's log tables aren't updating properly
	12/12/24	31974	Bug	Import Wizard	INVOICE/CM IMPORT WIZARD: User cannot import files bigger than 20mb so user split the 190k invoices into 3 excel files. The first file had about 60k invoice headers. Only 20,000 imported in (with no apparent errors).
		31777	New	Journal Entry	Issues : Journal Entry Creation Formatting all columns
		32001	New	Item List	- Need to download item list with no sales. - Download to excel file the new parts from the Add New item (From Catalog Items) screen.
24.0122.56	12/12/24	31965	New	Purchase Order	Be able to change a PO after it is received in full. When a PO is Opened, if the PO has been received in full, check the user security rights for the user. If have DELETE rights then enable the DELETE button on the PO AND enable the Delete ICON on the PO Line item. If the user has EDIT rights allow the PO to be edited, including the line item values. Then TEST the scenarios in section called: When PO is OPENED AND it is FULLY RECEIVED on KBA 02420. If there are any NEW BUGS send email to Steve and Rachelle and then stop making any additional changes.
24.0122.56	12/11/24	32002	Update	API	Need to change FetchPurchaseOrder and ReceivePurchaseOrder API call like Bin count to find a Item using other Item numbers like PartsLink, Ptype, UPC, etc.
	12/11/24	31999	New	Find Parts	Please add GP field to branch version and also update the screen for Autoparts Solutions so they can use the branch version.
24.0122.55	12/11/24	31993	Update	Item Detail	Recalculate Quantity in Stock - When clicked, it recalculates the correct Average cost of the item. Please do the same function for: Recalculate ALL Quantities in Stock to recalculate the correct average cost for all the items that are in Stock. Please recalculate the average cost for all the items under P1021.
24.0122.56	12/11/24	31895	Bug	QBO Sync	QBO Customer Sync: The Fed tax ID info is not syncing to Customer Exemption details (Resale#) field.
	12/10/24	31987	Bug	Reports	REPORTS > ITEMS > Total Sales By Item (Best to Worst \$) - Custom Date - Not showing the correct Total Sale by Item Count. Nov 22 - Dec. 31, 2024, only shows 7 for the total sales by item count. When checking the Sales Order Line Items for the same custom date, it shows Sales Order Line Item Count: 303.
	12/10/24	31923	Bug	QBO Sync	-- Lots of Invoices/CM and Payments are not synced. User tried to sync using QBO Sync Center but did not work. User used QBO Sync Comparison screen but did not work also.
	12/10/24	31994	Bug	Sales Order	QUICKFIT: SO # 1747 - When changing the status to pending won't save it. It would still go back to Closed. The same issue happens with the line items.

24.0122.55	12/10/24	31995	Update	Item Catalog	Update Partslink data for Nov 2024. Dev server S3 server Quality server Live server
24.0122.55	12/09/24	31993	Update	Item Detail	Recalculate Quantity in Stock - When clicked, it recalculate correct Average cost of the item. Please do the same function for: Recalculate ALL Quantities in Stock to recalculate the correct average cost for all the items that are in Stock. Please recalculate the average cost for all the items under P1021.
24.0122.55	12/09/24	31990	Bug	Shipping and Receiving	24.0122.53 DISPATCH SCREEN > DISPATCH PRINT SELECTION: Invoice 2 is not generating/showing up on the Print Preview
	12/05/24	31987	Bug	Reports	ITEMS > Total Sales By Item (Best to Worst \$) - Custom Date Not showing the correct Total Sale by Item Count. Nov 22 - Dec. 31, 2024, only shows 7 for the total sales by item count. When checking the Sales Order Line Items for the same custom date, it shows Sales Order Line Item Count: 303.
	12/04/24	31983	Bug	API	P1021 - It created the line items thrice after receiving the PO the OSScan. Delete all duplicate Items with a \$0.00 cost. Only the items have cost should be in this PO.
	12/03/24	31902	Bug	Item Catalog	Item List > Item Catalog - Cannot download entire list to excel file. Shows Bad Request Please make sure it downloads all columns/fields.
24.0122.55	12/03/24	28701	Update	Import Wizard	Item - Updated, simplified list. Please change the LIST of fields to be imported on the Import wizard screen, and on the downloadable Excel template (and remove any others that are no longer on this list)
	12/03/24	10852	New	Customer Detail	Please add these extra columns: On the Quotations form (on the Sales History tab) please add the Sales Order # field to the right of the Quotation # field. On the Sales Orders form (on the Sales History tab) please add the Quote # and the Invoice # as columns to the right of the Order #. On the Invoices form (on the Sales History tab) please add the Sales Order # as a new column to the right of the Invoice column.
24.0122.55	12/03/24	31946	New	API	API - Item Call whatever # PartsTrader passed in—please pass that same # But also add a new XML value called: TranslatedOEMNumber for the OEM # without any spaces or dashes.
	12/02/24	31962	Bug	Reports	REPORTS > ITEMS > Total Sales By Items (Best To Worst \$) Report Period > When changing to a custom date, (Nov. 14 - 30, 2024) it shows, "This report does not contain any data". --Report options were being shown twice. This is happening on all the reports. --Total Sales By Items (Best To Worst \$) and (Best To Worst Qty) not sorting properly when choosing a custom date.
					Fix UI issue. Where the popup appears with a message like "The lowest authorized price is 202.5% Please press Cancel to change the price. Or, ask your Manager to enter an Over-ride passcode below to proceed." Change it to look more like this: The lowest authorized price

24.0122.55	12/02/24	30732	Update	Price Controls	change it to look more like this. The lowest authorized price is \$2,202.00. Please press Cancel and change the price. Or, as your Manager to enter an Over-ride passcode below to proceed. --Cash Management --QuickPriceCheck --Quotation --SalesOrder
24.0122.55	12/02/24	31973	Bug	Purchase Order	QUICK FIT: PO Screen - When changing Column Filters, the settings did not apply to all the POs. Also, when I unchecked box for Duty %, it also unchecked the box for the Sales Order.
	11/29/24	31492	Update	Item Catalog	Show (and make editable) the ItemCatalog.CatalogSource field on the Item > Catalog tab, with a drop down list showing the Distinct values in that field for that Company. (This will allow user to change the value from PartsLink to Customer or something else to prevent that catalog entry from being deleted by the Catalog Manager Function 3a.)
	11/29/24	31934	Bug	Quote - Sales Order	QUOTE TO SALES ORDER - When converting a quote with more than 10 items, some items with available stocks are marked as backorder/waiting to be purchased. It's not taking the stock from the inventory. Those stocks that were not taken were returned parts from credit memo.
	11/29/24	31777	Bug	Purchase Order	When Un receive the items from PO checkbox not unchecked when creating BackOrder PO the actual PO page redirected to New PO page When receive all PO not marked as received
	11/28/24	30469	Bug	Reports	- Customer—> it fetches inactive customers while run customer report. - Customer—> when the user click on the Customize button setting preference. It shows undefined error. - Customer—> on report criteria group by option is not working
	11/28/24	30044	Update	User Setting	Users list Should be in alphabetical order based on user name --Add a way to see the # of Rows in the list.
	11/28/24	31777	New	Financial Periods	Sales, the NET value of the net Credits MINUS the net Debits x date range, for all accounts where the account 'detail' = Sales Product Income Accounts Receivable, the NET value of the net Debits MINUS net Credits, for x date range, for all accounts where the account 'detail' = Accounts Receivable (A/R) Cost of Goods Sold, the NET value of the net Debits MINUS net Credits, for x date range, for all accounts where the account 'detail' = Supplies & Materials - COGS
	11/28/24	31969	Bug	Item Detail	Average Cost Issue: Items w/out PO: Adjust the Average cost based on the Excel file. Items w/ PO: Adjust the average cost based on the latest PO
24.0122.54	11/28/24	11190	Bug	List Screens	LIST SCREENS. When press refresh make sure it doesn't refresh the tab the user is on.
24.0122.54	11/28/24	31976	Bug	Import Wizard	ITEM >UPDATE FUNCTION >Not working.
24.0122.54	11/27/24	31959	Bug	Credit Memo	Item#TO1230257-D was returned twice in stock from CM#C22192.
24.0122.54	11/27/24	31924	Bug	Sales Order, Purchase Order	Gross Margin% and SALES ORDER PURCHASE ORDER SCREEN > Margin% column. When manually entering the cost for the line item, the gross margin % is not auto calculating based on the inputted cost. same with the Margin% column on the Sales Order purchase

					same with the Margin % column on the Sales Order purchase order screen.
24.0122.54	11/26/24	31971	Bug	Purchase Order	When creating a PO, the user could not put the Bin # on the item but only on the Location field. Even after saving the PO user won't be able to put the Bin #. The user can only put the # after reopening the PO.
24.0122.53	11/26/24	31970	Bug	Shipping and Receiving	DISPATCHING SCREEN - The manifest is not showing any orders - Also, the update on S3 affects the Dispatching screen, the preview window is not showing the invoice generated on the screen on older branch versions.
	11/25/24	11831	Update	Sales Transaction	Ship To - Bill To. When a Ship To customer is linked to a Bill To customer, autofill the Bill To field when Ship To customer is selected on the Find Parts screen. Do the same on Sales Order and Quotes screen (that were not created thru Find Parts).
24.0122.54	11/25/24	31968	Bug	Settings	SETTINGS > Shipping/Receiving: Duplicate Statuses in the settings. Some functions are being duplicated. Please check everything.
24.0122.54	11/25/24	31967	Bug	Sales Order	SOPOs screen not working - having an error the same as the List screen.
	11/22/24	31957	Bug	Credit Memo	--User made credit memos and applied the payment later then user deleted the payment. When user tried to reapply the credit memo, it could not be applied and says the "payment already applied".
23.0122.54	11/22/24	31964	Bug	Purchase Order	Cannot create a Back Order PO.
24.0122.54	11/21/24	31916	Bug	Invoice	- When trying to add a column, it shows incorrect data. If user adds the QTY RTN column, the description data will show up in the QTY RTN field and a different data will appear under the description field. When user tries to show QTY SHIP field then refreshes the page, it will now save. OS ADMIN account works fine, but other accounts, have this issue.
24.0122.54	11/21/24	31951	Bug	Sales Order	Backorder issues > SO#21085, 21805-B1, 21805-B2 > The backordered items on the original sales order got duplicated when moved to the new SO B1, then it triplicate the items from B2 to B3. (COULD NOT DUPLICATE THE ISSUE).
24.0122.54	11/21/24	31953	Bug	Audit Log	The download to excel function is not working.
	11/21/24	31956	Bug	Find Parts	Add a new option to calculate the Sales Taxes based on Bill To Address. (related to Task#31178) BUG found: When entering a tax exempt Bill to Customer, the Fed Tax ID# is not populating on the Fed Tax ID field.
	11/20/24	31768	New	Sales Tax	Add a new option to calculate the Sales Taxes based on Bill To Address. (related to Task#31178) SALES ORDER, QUOTE, INVOICE, CREDIT MEMO >When change the ship to customer, the tax still updates based on the ship to. It should not change when the ship to address is shipped.
	11/20/24	31940	New	Find Parts	Develop GP field in the Find Parts Screen. Show correct computation.
	11/20/24	28257	Update	Purchase Order	PURCHASE ORDER: Auto fill Default Bin Location. On Settings > Purchase Orders, add a new option called: [] When PO is received, auto fill the 'Default' Bin Location on all PO Items where the Bin Location is empty. (Make the default value for this new option to be false). When the PO is received, check to see if this option is True.

					follow the logic above. Also, if there is no bin location insert Bin Location Make sure the Receive PO API is aware of this option as we
24.0122.53	11/18/24	31955	Bug	Item Catalog	--When adding Items from the Catalog it's saying "Bad Requ
24.0122.53	11/18/24	31954	Bug	Shipping and Receiving	TO DISPATCH >When the orders were updated, the orders not appear on the In Route status. The supposed Dispatch number is 24-1118 -GERARDO - ROUTE 3-01 Sample orders: I22177, I22138 and I22130
	11/18/24	28257	Update	Purchase Order	PURCHASE ORDER: Auto fill Default Bin Location. - On Settings > Purchase Orders, add a new option called: [] When PO is received, auto fill the 'Default' Bin Location on Line Items where the Bin Location is empty. (Make the default value for this new option to be false). - When the PO is received, check to see if this option is True follow the logic above. Also, if there is no bin location insert Bin Location - Make sure the Receive PO API is aware of this option as w
24.0122.53	11/18/24	31950	Update	Reports	24.0122.5x (ORLANDO) PACKING SLIP (1 line per line item item description is shifted on the Items column.
	11/15/24	30454	Update	Jobs	When adding a new job, if the Customer record has 1 contact and only 1 contact, please auto select that 1 contact for the
	11/15/24	30429	Bug	Customer Detail	CUSTOMER DETAIL SCREEN > audit log > old value & new value not showing
	11/14/24	31777	New	Financial Periods	A journal entry in QBO is being created but the #'s are NOT appearing and balancing out on the Fin Periods screen
	11/14/24	31777	New	Financial Periods	The #'s for Sales and COGS from QBO do not match with Q figures
	11/14/24	31872	New	Credit Memo	CREDIT MEMO REFUND > After applying the Give cash ba the customer, the system should automatically calculate the Amount Applied for the refund amount without refreshing t entire screen.
	11/14/24	31939	Update	Reports	ITEM REPORTS > TOTAL SALES BY ITEM (ASCENDING ORDER) - Should have the total of the "total amount" on the bottom part of the page. ITEM REPORTS > TOTAL SALES BY ITEM (All 3 Reports) -- Check ALL Figures from QIS, QBO, QPO, TotalQtySales, an Total Amount. Also, Warehouse info is not showing on the c 2 reports.
	11/14/24	31377	Update	Shipping and Receiving	(ORLANDO) DISPATCH SCREEN > MANIFEST >Remove extra spaces in the box, or make the customer col wider so we can maximize the space, and or make the font smaller? >Add a new column in between the Your Order # and Amount Previously Received called Total # of Pieces.(The Total # of Pieces will be the total Qty Shipped per order, only the ready to be shipped) >At the bottom table, add Total # of Pieces after the Total No Orders and move the other 2 tables to the right. (The Total # Pieces will be the total Qty Shipped for the entire manifest, the ready to be shipped) >Change the name Total No. of Orders to Total # Orders.
					SHIP/REC: Update Statuses for unused statuses. - On the Pending, To Cancel, To Pack, To Invoice, and To Load/Ship statuses lets remove the header sections, but the a BLUE header, like on the Waiting to be purchased that say

	11/14/24	31931	Update	Shipping and Receiving	'This is a user defined status. You can use it to store or group certain Sales Orders together using this status.' - On the Pending, To Cancel, To Pack, To Invoice, and To Load/Ship lets REMOVE the NEXT STATUS drop down list, there is no automated way to move them to the next status. - Lets remove the Move to Back Order from the Ship/Rec settings. (But make sure that SO line items still get set to the status when a Sales Order line item is copied to a Sales Order Back Order.
	11/14/24	31667	Bug	Import Wizard	Item Stock - ITEM-STOCK IMPORT Wizard: Problem exported items with error to Excel file. I imported 9,338 items. The import process showed 9,338 (which is exactly 2 # of records imported). That was the first error. Then the program could NOT import 72 of the items. The TAB that showed the items was called: ItemNumber-notFound # (72) but the file had 9,338 records. It should have had 72 records. (Problem is in Excel File).
24.0122.52	11/14/24	31845	Bug	Users Setting	User Full Name > When changing the User Full Name, the system will save it but if you log out and log back in, it will revert to the previous user full name.
	11/13/24	31918	Bug	User Settings	EMAIL SETTINGS: When deleting the email settings for the User, an error pops up and it won't let you save the settings. However, after refreshing the page, the email setting is deleted. (Tested on v. 24.1017 and 24.1024). Tried deleting the Outgoing Mail Server field first then last deleted the E-Mail Provider and it saved the changes without the error pop-up.
	11/13/24	31746	Bug	Invoice	When deleting invoices, the Invoice ID remains on the Sales Order that prevents it to get invoice again from the SO screen dispatch screen.
	11/13/24	31949	Bug	Item Detail	Transaction Log > Total in Stock not showing the correct value. The QTY Recvd was only 1 but the Total in Stock shows 2. Sample Items: AC1000195, AC1000185, AC1006149. Please check all items.
24.0122.53	11/13/24	31942	Bug	Sales Order	SALES ORDER STATUS > When manually changing the status to Print and pick to To Cancel/Restock, it goes back to its original status.
	11/12/24	31717	New	User Settings	DO NOT ALLOW > USER CANNOT VIEW COSTS, + Vendor POs. - New requirement: Need to hide the Line Total and the Totals on the Purchase order screen.
	11/12/24	31807	Bug	Reports	TotalQtySales not showing the correct number of sales.
24.0122.53	11/12/24	31901	Bug	Invoice	INVOICE PRINTING- It's still choosing Invoice 2 even when click Invoice 3. Invoice -Custom Terms & Conditions not showing the information correctly.
24.0122.53	11/12/24	31946	New	API	API - Item Call If no match is found, then it will look for any dashes or spaces in the item #. If the item being searched for has any dashes or spaces then the item api needs to further search, again, for the same item # without the spaces and dashes. This would prevent us from having to import and maintain the OEM # AND the LONG OEM #.
24.0122.53	11/11/24	31944	Update	Find Parts	User clicked the Show Sales history (F10) at the bottom. The History is spelled incorrectly. It shows Sales History.
				Financial	Update the Last Updated field whenever the Period is selected and recalculated. Add a TOTAL for each of the Fields that gets recalculated.

24.0122.53	11/11/24	31777	New	Periods	fly, each time we select 1 or more periods to be recalculated. On the Recalc Selected button click it shows 'selected year' (the progress bar. It needs to read: 'selected period(s)'
24.0122.53	11/11/24	31777	New	Financial Periods	Calculation: Qb Sales (JE) Total of all JE's in QBO for that Month, for all GL Accounts that are a SALES type Account.
24.0122.53	11/11/24	31945	Bug	Shipping and Receiving	DISPATCH SCREEN >Auto create related Invoices for Sales order in this Dispatch > Print Preview >It does not show inv for the Sales Order on the Print Preview.
24.0122.53	11/11/24	31943	Bug	Settings	USER SETTINGS > SECURITY TYPE >MODULE SECURITY >When picking the security type for a user, not all screen category is showing on the list. Example: The find parts or Price check is missing.
24.0122.53	11/11/24	31828	Bug	Find Parts	MODULE SECURITY > QUICK PRICE CHECK/FIND PARTS users were not able to access Find parts screen. Let's SET the Find Parts to be = TRUE for all users that are S. Manager, Accounting, Admin. It's currently auto setting Find Parts to FALSE when closing User Security screen. Let's fix that and also make the NOTICE the user about new screens being added something that gets checked BEFORE the screen is opened, not when the screen CLOSED.
24.0122.53	11/11/24	31927	Update	Purchase Order	(APS) URGENT NEW - PO Line Please fix Margin List field. Use the formula below to show correct computation. Data should be displayed in percentage %. This field should be in Line 1. Formula: $\text{Margin\%} = 1 - (\text{Cost} / \text{List Price})$
	11/08/24	31873	Bug	Credit Memo	Credit Memo > Payment Info > Give Cash Back or Apply Credit --Even when the date chosen is greater than the Invoice date still gives the date validation error. Example: The Invoice was created on 10/14/2024. Date on the payment date is 10/15/2024. --If the payment date was changed to 10/16/2024, the date the "Date Paid" field still shows as 10/15/2024. --"Last Synced" field is not showing properly on the Payment Screen --"Give Refund" button is still working even without choosing any Payment Type of Refund. Also, I can still process a refund even after giving a full refund to the order. --Action(x) is not functioning
24.0122.53	11/08/24	31777	Bug	Financial Periods	When trying to open the Financial Periods I did not have permission. The popup message to user is NOT connected to Error messages table and cannot be edited. When selecting ONE period and then clicking the Recalculate Selected Financial Periods is it calculating #s for ALL of the periods (for the QBO columns). Let's put a darker Vertical Border line to the left of: Column 5, 7, 11, 15
24.0122.53	11/07/24	31877	Update	Reports	Please look at the criteria for ALL reports and make all fields symmetrical where the left and right sides of the fields are equal AND where the labels fit properly.
					When 1 or more Periods are selected, and the Re-Calculate button is clicked, do all of the calculations by period, the old

24.0122.53	11/07/24	31777	New	Financial Periods	first. Check to see if there are any UN-SYNCD transactions. If so, TRY to sync all un-synced records that affect the GL, such as Customers related to any Invoices not synced. ALL Invoices/CMs not synced. (If the TO Sync checkbox is FALSE, auto update them to TRUE). ALL Invoice/CM payments not synced. (If the TO Sync checkbox is FALSE, auto update them to TRUE). ALL Inventory Adjustments not synced. (If the TO Sync checkbox is FALSE, auto update them to TRUE).
24.0122.53	11/06/24	31933	Bug	User Settings	When changing some settings, it erases all the module security making user locked out.
24.0122.53	11/06/24	31930	Bug	Invoices	Shipped via: There are some invoices created from the dispatch screen that lost the Shipped via value on the invoice.
24.0122.53	11/06/24	31652	Bug	Find Parts	FIND PARTS SCREEN > When searching between YMM searches and Part# searches, the Net Price and List Price columns disappear.
24.0122.52	11/05/24	31925	Bug	Reports	PO Line items Report >Date range: 10/1/24-10/31/24 >When load or export the report.
24.0122.52	11/05/24	31928	Bug	Invoice	PRINT --> When user clicks Print button, it just shows the loading spinner and does nothing.
	11/05/24	31774	Bug	Find Parts	- unable to add GP and MU% columns/fields. - cannot remove Tax field.
	11/04/24	31915	Update	Reports	The new report called: Invoices/Credits by Customer, Sales is missing.
	11/04/24	31920	Bug	Purchase Order	RECEIVING SPECIAL ORDERS ON PO: User received item on a PO, it updated the Qty Ship on the order however it did not mark the line item received on the
	11/04/24	31919	Bug	Sales Order	The linked Sales Order on the PO, did not update when B3 was created and updated the stock on the original Sales Order. S19562 was the original order it created a backorder up to and linked to P1237. On the PO, it is still linked to the original sales order and when they received it, it updated the Quantity shipped the original sales order S19562 and add it to S19562-B3.
	11/04/24	31921	Bug	Shipping and Receiving	TRANSFER AND SHIP: When picking items from the Other warehouse, the order disappears on the Shipping and receiving screen.
	10/30/24	21070	Bug	Import Wizard	Customer > Import and update issue.
	10/30/24	31913	Bug	Import Wizard	User attempted to import customers, it's stuck with the progress bar.
	10/30/24	31912	Bug	Sales Order	24.0122.51/52 SO Detail: If user clicks Save and submit button on an imported Invoice, it will not save.
	10/30/24	31911	Bug	Quotes	The company logo and customer details are printed 2x on the Please fix, need for goLive customer.
24.0122.52	10/29/24	31869	New	Ebiz	Ebiz payment: Close Email Popup and prompt user the email sent
24.0122.52	10/29/24	31907	Bug	Reports	QUOTATION LINE ITEMS REPORT > REPORT CRITERIA > CUSTOMER >When running the report for specific customer error occurs.
24.0122.52	10/28/24	31777	New	Financial Periods	We only update the Last Updated field whenever the Period selected and recalculated. Lets Re-Order the Columns based on the columns listed below by section.

					Break all of the process down into Progress Bar sections/tabs
24.0122.52	10/28/24	31777	New	Financial Periods	When the Financial Periods screen is opened it should remain the 1 periods and show them all as Open. ALL other columns should remain empty.
24.0122.52	10/28/24	31901	New	Invoice	Create an additional Invoice for Printing purposes. Currently have Invoice, and Invoice 2. Add Invoice 3 for an additional option for Invoice. Also, on the Settings, Add Invoice 3 on the Select Document Type to edit the Invoice - Custom Terms & Conditions (printed on bottom of Invoice).
24.0122.52	10/28/24	31904	Bug	Sales Order	When printed, it does not have the correct total amount because of the incorrect TAX. SO# 1745
24.0122.52	10/28/24	31900	Bug	Invoice, SO	Printing Options - When clicking the "Preview" button, the screen was just loading and not working even if you refresh page. It also happens with the Sales Order Print Preview.
24.0122.52	10/26/24	31777	New	Financial Periods	Validations - Checking all mismatching columns on table - checking all values has been calculated correctly - Error message when creating new record on Closed period status
24.0122.52	10/25/24	31893	Bug	Credit memo	Cash back feature bugs.
24.0122.52	10/25/24	31905	Bug	User Security	Copy User settings from another User.
24.0122.52	10/24/24	31894	Bug	PO, SO	When PO Receive, change the condition checking on Item Type with Upper Case.
24.0122.52	10/24/24	31869	New	Ebiz	Add Custom Email Template in Ebiz Payment
24.0122.52	10/24/24	31848	Bug	Email Services	Implementing the Same in OSO Application
24.0122.52	10/24/24	31051	Bug	Sales Order	SO --> SO PO --> When creating a purchase order from a sales order and receiving the entire order, select "no" on the auto item popup. If the user tries to ship the quantity partially but unable to ship while having stock.
24.0122.52	10/24/24	31805	New	Find Parts	Add SKU # to the Item # search field. (They can use the UPC Code on the Part # search field to find the Item.)
24.0122.52	10/23/24	31849	Bug	Invoice	INVOICE > Tax-exempt customers are suddenly getting charged of tax on the invoice. Example customer: 1811 Could be the item set to taxable be an issue?
24.0122.52	10/23/24	31888	Bug	Item Detail	An empty page with an error appears When the user navigates to the detail screen.
24.0122.52	10/23/24	31859	Bug	Purchase Order	Receiving Partial parts from PO: - User received 2 parts out of 5, one sold, 1 remaining. Then received another part on a different date. Today they attempt to receive another one by updating the Qty Received to 4 but did not add another stock in record.
24.0122.52	10/23/24	29726	Bug	Item Detail	STOCK TAB > ITEM SPLIT: The Date Received should not update based on the date it was split.
24.0122.52	10/23/24	29727	Bug	Sales Order	Sales Rep field: - When changing the Bill To/Ship To Address on the Sales Order the Sales Rep changes to the Sales Rep value of the Customer the setting (Auto fill the Sales Rep field with the currently logged-in user name) is enabled, it should retain the Sales Rep who is currently logged in even if the Bill To/Ship To address changed.
24.0122.52	10/23/24	31798	Bug	Reports	Invoices /Credits by Sales Rep (Details)NEW - Make it functional. - Remove the word NEW from the title of the report.

24.0122.52	10/22/24	31806	Bug	Reports	"SALES REPORTS BUGS (Please calculate the TOTAL Cost of ALL Invoices Line Item 9/1/24 to 9/27/24 to use as a Benchmark of TOTAL COSTS In ver 24.0122AW click Reports > Invoices / Credits. Getting error. (Cannot find Table 8) Invoices / Credits by Date (Totals) most of the dates show \$ cost. Should be showing costs. Total costs should equal the benchmark costs. Invoices / Credits by Month (Totals). Is the COST right? The Profit and Profit margin are showing 0. Many (maybe all) of the DETAILED Sales Reports that show Invoice have DUPLICATE invoices on the report. (See Invoice Credits as an example).
24.0122.52	10/22/24	31886	Bug	Invoice	Print > on the Invoice Print (and other transactions), the Net Price field shows 4 decimals. Now, it only shows 2. Please change it back to to show 4 decimals.
24.0122.52	10/22/24	31817	Bug	Customer Portal	24.0122AV >When creating quote from the Customer Portal the Quote created does not appear on the Quote List screen can be searched. >Order Source >When creating orders from the Customer Portal it should auto-fill in the Order Source as 'Customer P
24.0122.52	10/21/24	31857	Bug	Find Parts	GM1002142 - this part shows up on the find parts screen when searching 2019 Chevrolet Suburban- Quality parts
24.0122.52	10/21/24	31884	Bug	Replenish Stock	When running replenish stock for min/mx its shows error pop
24.0122.52	10/21/24	31882	Bug	Purchase Order	When creating PO from SOPO screen, the descriptions are empty on the PO line items.
24.0122.52	10/21/24	31883	Bug	Item Detail	VENDORS -- When adding or deleting a Vendor, it hides the You need to refresh the page again to show all the Vendor L
24.0122.52	10/18/24	31833	Bug	Shipping and Receiving	Stock Transfer In Route > Show all button does not work for more than 650 records.
24.0122.52	10/18/24	31861	Bug	Find Parts	Parts# field: when you search up HO1206100 on the find parts screen, HO1206101 comes up also which are 2 different pa
24.0122.52	10/18/24	31860	Bug	Find Parts	24.0122.50 >FP >View Selected > Undefined Error
24.0122.52	10/18/24	31874	Bug	Scanner	CREDIT MEMO: When using the scanner to return parts, it adds back the qty stock but on the CM, the quantity return is not getting auto in.
24.0122.52	10/18/24	31853	Bug	Find Parts	When a customer is selected to auto fill (from the Find Parts settings) auto fill the customer Bill To and Ship To but then it the focus on the Ship To field and Highlight the Ship To Customer Name so it can be easily changed without having use the mouse.
24.0122.52	10/17/24	31824	New	Shipping and Receiving	PENDING SCREEN > Add Invoice column after the Sales Order Column
24.0122.52	10/17/24	31852	Bug	Quote	When printing a quote on the Print Preview pop-up, it does show the correct total price from what was on the screen. If one item is added, it will have the correct price on the Print Preview If two or more, the total amount shown was the total before additional items were added.
24.0122.52	10/16/24	31777	New	Financial Periods	When the user tries to CREATE A NEW record (for the screen below) that are in a CLOSED Financial Period: Give this popup message: "Cannot create record because the related Financial Period is closed."

24.0122.52	10/16/24	31875	New	Invoice	Invoice Print - Please make the 'Note to Customer' appear on every page of the Invoice print. If the Invoice print is 3 pages, the note should show on every page. Please make the font small (but still readable when printed), maybe pt 5.
24.0122.52	10/16/24	31838	Bug	Item Detail	Item List Price issue.
24.0122.52	10/16/24	31738	Bug	Reports	Invoices/Credits by Customer & Sales Rep (Detailed) on 24.0122.50 - an error pops up when trying to run the report.
24.0122.51	10/15/24	31868	Bug	Replenish Stock	Import is not working properly. Its imports some records on (Altered the code to delete temp records before the loop).
24.0122.51	10/15/24	31863	New	Item List	Item Lists > Item Receipts tab. Be able to search for the Bin
24.0122.51	10/15/24	31867	Bug	Shipping and Receiving	Stock Transfers not showing up on Transfer FROM warehouse To Print & Pick.
24.0122.51	10/15/24	31864	Bug	Shipping and Receiving	Demo User cannot start to pick a new order. It says he is already picking an order but no orders appear. The COUNTS for most of the Statuses are incorrect. For example, Picking shows 15 but there are no orders that appear.
24.0122.51	10/14/24	31657	New	Reports	Add ability to filter by Bin # range on a Inventory report.
24.0122.51	10/14/24	31823x	New	Sales Order	- When a user manually changes the MAIN STATUS of the Sales Order with several line items in backorder with the PO checked (to True), should stay on the Status: Waiting To Be Purchased even after the screen is refreshed. This way we can prevent lose track of items that needs to be ordered. - When user manually changes the MAIN STATUS of a Sales Order with several line items in backorder with an updated PO#, it should stay on the Status: Waiting For Delivery From Vendor even after the screen is refreshed. This way we can prevent lose track of items that needs to be received.
24.0122.51	10/14/24	31851	Bug	Reports	24.0122AV Invoice/Credit line items: the entered by column is missing.
24.0122.51	10/14/24	31847	Bug	OS Scan	Count by Bin (or Count by Item) is putting the item in stock at cost = \$0. (There is a process of trying to get the cost from several sources. However, if it cannot find the cost from the recent item in stock, or a Vendor cost, or the most recent PO cost, it needs to get the cost from the Average Cost field.
24.0122.51	10/10/24	31835	New	User Security	Miscellaneous fixes and update.
24.0122.51	10/10/24	31844	New	Settings	PURCHASE ORDER Number of Decimal Places - for Cost fields can only do 4. Please update so it can do up to 6.
24.0122.51	10/10/24	31842	New	New Item Screen	When creating a new Item, the list price only allows 2 decimal places. When the decimal is set 5 or 6, decimals on the New Item Screen should be the same.
24.0122.51	10/10/24	31841	Bug	Import Wizard	Cannot UPDATE Item List Average Cost.
24.0122.51	10/10/24	31777	New	Financial Periods	Lock the financial records if the period has Closed Invoice, Credit Memo, Invoice Payments
24.0122.51	10/10/24	31807	Bug	Reports	ITEM REPORTS.Total Sales By Item (Best to Worst Qty) is showing some Qty's in Stock that are incorrect.
24.0122.51	10/09/24	31777	New	Financial Periods	Open and Closed Text and color Button : Close Selected Period(s) and Re-Open Selected Period(s) Change the Status when Button click
24.0122.51	10/09/24	31777	New	Month End	Financial Periods - When Recalculating financial records always creating 12 records - Insert the values atfirst when Recalculating new values
24.0122.51	10/08/24	31777	New	Month End	Update the Same Journal Entry using Period

24.0122.51	10/08/24	31777	New	Month End	Update the same Journal Entry using Period
24.0122.51	10/08/24	31831	Bug	Replenish Stock	MIN/MAX >When clicking the Show All button, the table disappears. The next button is not working. Exporting the file to excel, error popup
24.0122.51	10/08/24	31830	Bug	API	Item: Gets an empty JSON on the response body when search for some parts. Example: TO2502286. (Customer was using 0122W version. If use 24.0122AW or greater version it will fine.)
24.0122.51	10/08/24	31827	Bug	Purchase Order	PO LABEL: The Labels are not showing up on the Print Preview screen
24.0122.51	10/07/24	31777	New	Month End	Formatting all Decimal fields Update the period status Progress Message for JE Create
24.0122.51	10/07/24	31777	New	Month End	Creating Journal entries based on the new values
24.0122.51	10/07/24	31828	Bug	User Security	MODULE SECURITY > QUICK PRICE CHECK/FIND PARTS All users were not able to access Find parts screen.
24.0122.51	10/07/24	31825	Bug	Shipping and Receiving	To Print and Pick Screen: When you select lines or select filters, the selected lines should be pushed to the top of the list.
24.0122.51	10/07/24	31826	Bug	Import Wizard	Cannot UPDATE a list of Item List Prices.
24.0122.51	10/07/24	31820	Bug	Find Parts	Search Button is not clickable (by mouse). If the TAB/ENTER key is used to go to the Search button, it works.
24.0122.51	10/04/24	31777	New	Month End	Create Journal Entry based on the 1Place and QBO Total
24.0122.51	10/04/24	31807	Bug	Reports	Item > Total Sales By Item (Best to Worst Qty) is showing some Qty's in Stock that are incorrect.
24.0122.51	10/04/24	31822	Bug	Shipping and Receiving	Stop Number not getting imported
24.0122.51	10/03/24	31806	Bug	Reports	SALES REPORTS BUGS (Please calculate the TOTAL Cost of ALL Invoices Line Item 9/1/24 to 9/27/24 to use as a Benchmark of TOTAL COSTS In ver 24.0122AW click Reports > Invoices / Credits. Getting error. (Cannot find Table 8) Invoices / Credits by Date (Totals) most of the dates show \$ cost. Should be showing costs. Total costs should equal the benchmark costs. Invoices / Credits by Month (Totals). Is the COST right? The Profit and Profit margin are showing 0. Invoices / Credits by Sales Rep (Totals) Are the costs accurate? Many (maybe all) of the DETAILED Sales Reports that show Invoice have DUPLICATE invoices on the report. (See Invoices / Credits as an example).
24.0122.51	10/03/24	31738	New	Reports	Create a new report called: Invoices/Credits by Customer & Sales Rep (Detailed) - It is the same report as the Invoices/Credits by Customer & Sales Rep grouped by Sales Rep. - Criteria: Sales Rep, Sort Order (Best to Worst, Alphabetical), Date Range selector. - Alter excel download function to add # of Invoices column
24.0122.51	10/03/24	31821	Bug	Reports	When opening the report screen, an error pops up.
24.0122.51	10/03/24	31819	Bug	Shipping and Receiving	The Filter By buttons were showing Shipped Via buttons that do not have any Orders in the list with the same Shipped Via. (It shows Shipped via button for Route 4 but there are no existing orders on the table with Route 4)

					orders on the table with Route 4.
24.0122.51	10/03/24	31818	Bug	Sales Order	When line items in backorder status is set to Future Deliver need to show the line item on the Future Delivery screen or Shipping and Receiveing screen.
24.0122.51	10/03/24	31816	Bug	Login Screen	They experience randomly getting kicked out of 1place. I checked the server performance and there were no sudden peaks with the DTU.
24.0122.51	10/03/24	31768	New	Sales	- Add a new option to calculate the Sales Taxes based on Bill Address. (related to Task#31178) tested on 24.1001v BUG - SALES ORDER, QUOTE, INVOICE, CREDIT MEMO >When change the ship to customer, the tax still updates based on the ship to. It should not be changed when the ship to address is shipped.
24.0122.51	10/02/24	31803	New	Settings	User Security >When the 'Hide Dashboard Screen' box is checked, it should then allow user to select which screen to (by default--instead of the Dashboard). But, if the HIDE Dashboard is TRUE and the Default screen to show is NOT selected, then show the Customer List by default.
24.0122.51	10/01/24	31016	Bug	Shipping and Receiving	The S/R screen displays service and non-inventory items.
24.0122.51	10/01/24	30780	Bug	Find Parts	Find parts--> When selecting a line item on the Find Parts screen users cannot alter both the net price and discount fields simultaneously. If one field is altered, the other becomes error.
24.0122.51	10/01/24	30781	Bug	Find Parts	Find parts --> Sales order --> List price & net price are changed when the user alters Qty orders values "After receiving the stock from the purchase order."
24.0122.51	09/30/24	28239	Bug	Purchase Order	- When items are received into Stock from PO make sure the Add'l / Landed Cost values do NOT influence the 'Average Cost (for Markup Pricing)' (That value should be the weighted average cost of all items in stock for that item). - Also, when the LAST item is sold from stock do NOT reset to \$0.
24.0122.51	09/30/24	27815	Bug	Sales Order	- Margin % on Sales Order Screen - The margin % is not calculated properly when inputting new values on the Unit Cost field.
24.0122.51	09/30/24	28442	Bug	Sales Order	Payments > AUDIT LOG not logging Sales Order Payment Deletions. (And maybe not logging Invoice Payment deletions well)
24.0122.51	09/30/24	31777	New	Month End	- 1p Sales (but all fields made in table will have NO spaces). - Net Sales (Total 1place Invoices - Credit Memo's) + Freight NOT INCLUDE SALES TAXES) - Qb Sales
24.0122.51	09/30/24	31801	Bug	Find Parts	Sort the Make and Model to Ascending order.
24.0122.51	09/30/24	31800	Bug	Invoice	The line item totals only calculates for 1 item even though there are multiple on the SO it shows the correct amount.
24.0122.51	09/30/24	31799	Bug	Item	When user clicks the Adjust qty in stock button for item# GM1230465, the screen would load indefinitely. This works with an older version. Prevent the loading error to occur when there are spaces on bin numbers.
24.0122.51	09/30/24	31809	Bug	Sales Order	When the form opens up it has the correct date. Then it changes to today's date.
24.0122.50	09/27/24	31777	New	Month End	- Create new table called QBOMonthEnd and Store the calculated values on Database - Show the Current Year Record at firsttime when they open the screen - Add Change Validation on

					Screen Prev and next functions - UI Changes, validation and ErrorMessages, based on the Year selection
24.0122.50	09/27/24	31804	Bug	Reports	Invoice number 158908 is not able to print or download pdf because of the number of lines.
24.0122.50	09/27/24	31775	Bug	Sales Order	Entered by not getting inserted on the Batch create Invoice function on Ship/Rec screen.
24.0122.50	09/27/24	31660	New Feature	Customer Portal	Item pictures upload.
24.0122aw	09/26/24	31797	Bug	Integration	Ebay - Fix deprecated OAuth Access Call in eBay.
24.0122aw	09/26/24	31777	New	Month End	Journal Entries for that month for the COGS and Inventory.
24.0122aw	09/25/24	31744	Update	Item Details	24.0122AU ITEM PRICE LEVEL > IMPORT WIZARD: Update record option > We need a validation for the Price levels if there are not in record yet before we proceed to update the data.
24.0122aw	09/25/24	31766	Bug	Replenish Stock	- o Past Sales History: ■ Selecting the option to show all items. It always up to an error. Execution time out error.
24.0122aw	09/25/24	31655	Update	API	API-Count by Bin, Count by Item. - Also, be able to scan the item by the Vendor Item #. - In all cases, when receiving data INTO the API - Item if the # is not found as the ITEM NUMBER in the Item table, look for CROSS REFERENCE of the item # in all of the places listed in API - ITEM.
24.0122aw	09/25/24	31772	Update	Import Wizard	ALL IMPORT WIZARD TABLE FIELDS. Make sure any field have a NOT NULL have a DEFAULT VALUE, such as 0 for Boolean fields and number fields. Ignore this for any REQUIRED FIELDS
24.0122aw	09/24/24	31770	Bug	Item Details	Manage Catalog - When making NEW Parts, and selecting the Create Duplicate for Capa option it makes the duplicate Part it also puts (CAPA) at the end of the Part Description it is duplicating.
24.0122aw	09/24/24	31753	Bug	Credit Memo	OLD CMs with zero Returned but stocks were added in record. When you put in the Qty Return for the parts, it created duplicate returns and you choose the option not to return the item in stock the Unapplied amount updates to Amount Applied field and doubles the amount. It also marks the CM PAID even though it has not been applied to any invoices. Please see video and samples CMs below.
24.0122aw	09/23/24	31765	Bug	Import Wizard	Fix issue on customer import.
24.0122aw	09/23/24	31764	Update	Invoice	Print - Need to add a bit more space for people to sign? space too narrow.
24.0122aw	09/23/24	31761	Bug	Item Detail	ITEM PRICE LEVEL > IMPORT FUNCTION bug: The import function should only filter those items that match the file. On 0919v on the dev server it includes all records including the Price levels on the data validation table.
24.0122aw	09/23/24	31760	Bug	Settings	USER SETTINGS: - When opening the User setting, there's a blank popup window that appears on top of the screen. When I click ok, a Please Wait appears and redirects me to a different screen - When clicking the Edit icon, the User Window does not open
24.0122aw	09/20/24	31660	New Feature	Customer Portal	Item Pictures upload features needed. [X]. 1. Add an update check box and update the pictures in Settings only if the check box is checked [X] 2. Add Partial Match Items with __ or more characters that are the same. So, In Partial match it will show only the Items that match the required characters

					Match the required characters 3. Paginate the table. 4. Delete the Unmatched Images from the Server
24.0122aw	09/19/24	31757	Bug	Integration	CCC > FTP FILE EXPORT - The line items in the FTP file are being duplicated and the duplicates are showing CAPA that why non CAPA items still show CAPA.
24.0122aw	09/19/24	21071	Update	Import Wizard	Update option - When using the 'Update' option ONLY REQUIRE the ID / Primary Key field. For instance, updating a customer record requires selecting a Customer Number and a Company name. Doing an Update assumes that there is already a properly constructed record. To Update it should only require the user defined Unique # like the Customer #, Invoice #, etc.. - All fields that have a description that starts with: 'This is a value' needs to have a 'the' inserted. For example: This is the value'.
24.0122aw	09/19/24	31755	Bug	Item List	Item Receipts > When putting one character in the Search the page refreshes automatically not letting the user put the next character without refreshing the page.
24.0122aw	09/19/24	31275	Bug	Purchase Order	- It seems that there is a mismatch between the total PO and POBO on the list table. - Added payment terms are not properly updated on the list table. - The print dates are not being updated correctly. - The checkbox for drop ship is not functioning properly on the list table.
24.0122av	09/18/24	31721	Update	Invoice	24.0122AUv INVOICE > ENTERED BY> When invoices are created from the DISPATCH screen the Entered by should be filled in with the User name who created the invoices.
24.0122av	09/18/24	31754	Bug	Shipping and Receiving	PENDING/FUTURE DELIVERY STATUS: When manually changing the status of the order from Future Delivery screen CLOSED on the sales order, the orders are still showing on other warehouse's Future delivery screen.
24.0122av	09/18/24	31756	Bug	OS Scan	Inventory > Count by Bin: When trying to scan item # Ztest10002, this item was successfully saved in the Bin Location and adjusted the quantity in stock, however, item # TO12402 did not save properly. Also, the quantity of item # TO12402 was not changed in 1place even though it was changed in OS Scan. This also applied to some items in 1place.
24.0122av	09/18/24	31758	Update	Receive Payments	Exclude the Sales order payments from Credit Memo table and Un applied amount.
24.0122av	09/17/24	31751	Update	Sales Order	Copy over Sales Orders Entered by to Invoice and CM Entered by and Sales rep
24.0122av	09/17/24	31750	Bug	Shipping and Receiving	The batch dispatch stopped printing all the sudden after the driver "Casey" while on driver "Drew". system kicked every out but not the main computer we were dispatching on. We multiple times to restart the process but the status of printing was all clear and nothing was happening.
24.0122av	09/17/24	31731	Update	Import Wizard	CUSTOMER IMPORT WIZARD: Add the Reason for Sale to Import and Update on the Customer List table.
24.0122av	09/17/24	31748	Bug	Sales Order PO	Whenever opening a sales order with an old date on the SO screen, it shows me today's date on the SO screen.
24.0122av	09/17/24	31743	Bug	Import Wizard	Item List Import Issue
24.0122av	09/16/24	31746	Bug	Invoices	DELETING INVOICES: When deleting invoices, the Invoice remains on the Sales Order that prevents it to get invoice again

					from the SO screen or dispatch screen
24.0122av	09/16/24	31573	Bug	Sales Order PO	Filter on the SOPO invoiced sales orders with backorders n appear on the SOPO screen.
24.0122av	09/16/24	31741	Bug	Reports	INVOICES/CREDITS BY PRODUCT: When selecting a perio and asked to download a report, it redirects to a screen that says: This site can't be reached. On the report criteria, inste Customers change it to Items so the user can filter the grou items.
24.0122av	09/16/24	31740	Bug	Sales Order	Print -->Stock picking Ticket After Selecting both Bin Location (from Sales Order) and Bi Location (from Item). the bin location from the sales order is shown twice when printing. When the user prints the packing slip for a single line item, i shows duplicate values.
24.0122au	09/13/24	31713	Bug	Invoice	SYNCING INVOICES TO QBO > Duplicate invoices are cre when syncing invoice to QBO.
24.0122au	09/13/24	31743	Bug	Credit Memo	CREDIT MEMO >CMs before they update to the new versi has issues with CMs not applied yet to any invoice and are marked as PAID. We need to look for CMs with similar issue fix it.
24.0122au	09/13/24	31739	Bug	Find Parts / Invoice	Invoice -->.Credit memo --> Freight charges are not applied the Total. Find parts --> When user selects a different bill to and ship t customer, after mapping qty and create SO., it shows empty to and ship to.
24.0122au	09/12/24	31734	Update	Shipping and Receiving	1. Clear all the Drivers when the ExportIntoELite button is clicked 2. Show the users the Orders failed to sync in EliteExport ar Make a Resync button to Sync the failed order to sync again
24.0122au	09/12/24	31723	Bug	Import Wizard	24.0122AUv BUG >IMPORT WIZARD >ITEM PRICE LEVE Update Existing Records > It gets stuck on the loading wind
24.0122au	09/12/24	31727	Bug	Shipping and Receiving	24.0122AMv Dispatch >Edit /Reprint Delivery Manifest: - When downloading the Excel file Manifest, it downloads b there is no data on the Excel file. - Reprint option, when reprinting the Manifest, it does not s the dispatch number and the Driver's name.
24.0122au	09/12/24	31737	Bug	Reports	SALES ORDER BY VENDOR REPORT: Orders are showing duplicates (it's showing the same number as the number of l items it has)
24.0122au	09/12/24	31726	Bug	Sales Order	24.0122AU > SALES ORDER STATUS: When changing the i SO's status then click on No on the pop-up to ask to update line items. When refreshed, it does not save the changes ins the SO's main status changes back to its original status.
24.0122au	09/11/24	31178	New	All Transactions	- Add a new option to calculate the Sales Taxes based on Bil Address. - Add a new Sales Option in Settings > Sales > Sales Taxes, u the Tax Code Creation Method drop down list called: [] Calculate (and maintain) Sales Taxes based on the 'Bill To Address' instead of the (Default) Ship To Address. - In all places where the Sales Taxes are enforced, updated, maintained, we need to check to see if the option above is checked. If so link all calculations and UPDATES to tax code the Bill To address.
				Shipping and	PICKING SCREEN: When picking orders, it only allows the t to pick items max of 15 parts and on the older version like

24.0122au	09/11/24	31728	Bug	Receiving	24.0122S, it only allows user to pick a max of 200 items even after clicking show all items.
24.0122au	09/11/24	31708	Update	List Screens	Which VALUES (like the Source of Order) are coming in as a rather than a user understandable value, such as 'CCC'.
24.0122au	09/10/24	31720	Bug	Credit Memo	For old CMs that are created with zero Returned but shows Line total amount, whenever user attempts to recalculate the line total on the new version, it marks the CM PAID even though the total Returned field is zero.
24.0122au	09/10/24	31719	Bug	Credit Memo	When clicking on Create Credit Memo > Clicked on Yes for RETURN ENTIRE CREDIT MEMO and Yes for auto-return on CM, the Return field are still set to zero.
24.0122au	09/09/24	31660	Bug	Item Details	Item Picture > Issue-- Unable to cancel the upload when it is into server.
24.0122au	09/09/24	31718	Bug	Invoice	When creating invoice from the sales order, it sometimes does not bring the warehouse to the invoice which causes issues creating credit memo. (It should everytime bring over the warehouse to the next transaction form Quote to Sales Order Invoice to Credit Memo).
24.0122au	09/09/24	31715	Bug	Item List	ITEM LIST > EDIT - On the item list screen, when user clicks 'Edit' button, the list price and oem prices cannot be edited. the prices show '0'.
24.0122au	09/06/24	30607	Bug	Settings	DO NOT ALLOW > USER CANNOT VIEW COSTS, + Vendor POs. - #5 Sales Order Purchase Order screen > Vendor Cost - Show vendor cost with this setting on
24.0122au	09/05/24	10972	Update	Item Detail	FINANCIAL (TAB): PRICE LEVEL table. Need a way to allow user to sort.
24.0122au	09/05/24	31710	Bug	Settings	(MODULE SECURITY > View Checkbox > When disabling the options for the following, it won't hide it for the user. Cash Management - Move Cash, Cash Management - Receive Count Cash, Cash Management - Reconcile Cash, Cash Management - Reconciliation Logs, Month End, Receive Payments
24.0122au	09/05/24	31707	Update	Settings	Each time a USER SECURITY setting is opened the system has to check the # of screens in the MASTER list of screens and auto update it to that user, so the user always has every possible screen on the list of screens.
24.0122au	09/04/24	31711	Bug	Purchase Order	When clicking on receive all on a PO, all items are NOT being received. which is causing sales orders to not update properly.
24.0122au	09/04/24	31709	Bug	Item Details	Item > PO's: Incorrect QtyOnOrder value shows on item details. For Example, Item CH1225198 shows QTY on Order says it 150 but the PO says 100.
24.0122au	09/04/24	31712	Update	API	Item API > Need to show list of Item that match with passing parameter.
24.0122at	09/03/24	31174	Update	Invoice List	- Add a column for Contact field on the Invoice List screen. Add the same column on the Show/Hide Setting and make them searchable and sortable. - Invoice/Credit Memo's Module Security. When the EDIT option (for a user) is enabled, AND IF the Invoice has already been paid, Keep ALL fields locked EXCEPT for certain fields
24.0122at	09/03/24	31706	Bug	API	Item > It shows invalid QTYINSTOCK value. Example : 76003J9000.
					CREDIT MEMO APPLIED AMOUNT > Not calculating based on the CM application. The used CM amount is not deducted to

24.0122at	09/03/24	31689	Bug	Credit Memo	Unapplied Amount, which still makes the whole amount available to use to another invoice.
24.0122at	09/03/24	31699	Bug	Credit Memo	User clicked the option not to auto-return the part and the system marked the CM as PAID because of a Total amount of zero and locks the screen.
24.0122at	08/30/24	31660	New Feature	Item Details	Item Pictures - Single Image upload irrespective of the version - Multi Image upload mapping with file name and <u>Item Number</u>
24.0122at	08/30/24	31332	New Feature	Payments	Testing all Calculations and Issue fixing - When deleting Credit memo payments in Invoice, credit memo amount will double up the amount - Apply the payment based on the existing un-applied payments
24.0122at	08/29/24	31651	Bug	Settings	USER SETTING: When copying user setting from another user, some Module security options disappear.
24.0122at	08/29/24	31332	New Feature	Payments	Testing all Calculations and Issue fixing - Add un-applied payment payments on the show / apply credit screen. - Apply the payment based on the existing un-applied payments
24.0122at	08/28/24	31622	Bug	Dispatch	Make sorting work on dispatch screen for driver and dispatch and tracking number
24.0122at	08/28/24	31698	Bug	Purchase Order	Line Item Tab: It shows invalid total record count after line item import.
24.0122at	08/28/24	31695	Update	CCC	CCC not importing List price on Quotes (and possibly Sales Orders?).
24.0122at	08/28/24	31697	Bug	Integrations	Undefined Error when trying to access Integrations>Parts Trader>Warehouse.
24.0122as	08/27/24	31694	Update	CCC	1.(ADS) Add 0 as prefix for Numberofdelivery field in CCC
24.0122ar	08/26/24	31609	New Feature	Find Parts	UPC code to be searchable in the F3 field.
24.0122ar	08/26/24	31691	Bug	Import Wizard	Invoice Headers Import function: It allows user to import duplicates and it does not import all records in excel file.
24.0122ar	08/26/24	31690	Bug	Dashboard	Extra vertical bar appearing next to main nav section on left
24.0122ar	08/26/24	31692	Bug	Invoices	When use OPENS an existing Invoice with an date older than today, it shows the invoice date as TODAY's date.
24.0122ar	08/24/24	31332	New Feature	Payments	- Payment Term Missing on Open Invoices - Testing all Calculations - Credit Memo Check Calculations
24.0122ar	08/23/24	31332	New Feature	Payments	- Redirect to receive payment screen when clicking on the receipt id from payment info tab - DO NOT AUTO SELECT INVOICES after entering Amount Received From Customer value.
24.0122ar	08/22/24	31688	Update	API	CCC File Export & API > ITEM Export for CCC On the Sales > Integrations > Part Type / Code Mapping TAB lets make these changes. - Move the column called: Your Equivalent Part Type Quality Code (see Quality Indicator Field on Item Detail screen) to the far left. - Rename the moved column to: 'If the 1place > Item Detail Quality Indicator field is...' - Rename the column called: API Supplier Part Type Quality Code to 'Then Make the CCC PartType value...' (add another column with title) 'And Make the CCC Industry Certification value...' (FIELD NAME: API Supplier Part Type Quality Code) - Add another column with title 'And Make the CCC Industry Certification value...' (FIELD NAME: API Supplier Part Type Quality Code)

					API Integration Code Mapping, Supplier Industry Certification - Then on the Sales > Integrations > CCC File Transfer (for Export File or FTP File or Email file) when making the file for Part.txt insert the PartType value into Column 5 and insert Industry Certification value into Column 10. - On the API for Item, add a new tag called: IndustryCertification and insert the mapped value for the industry certification.
24.0122ar	08/22/24	31332	New Feature	Payments	- Amount Set Zero when editing Existing Receive payment item - Payment terms not showing on Edit Screen. - Apply the Credit memo amount if partially applied when manually editing the amount paid on invoices - On the Rec Payments screen, when a value is selected, turn entire row light green like on the Find Parts line items when get selected. - Redirect to receive payment screen when clicking on the receipt id from payment info tab - DO NOT AUTO SELECT INVOICES after entering Amount Received From Customer value.
24.0122ap	08/21/24	31675	Bug	Settings	USERS > MODULE SECURITY: The WAREHOUSE option in Screen Category is not showing.
24.0122ap	08/21/24	31686	Bug	Reports	INVOICE/CREDIT By Customers Report: The Total Invoice Amount on the downloaded Excel file does not match with the report in 1 place.
24.0122ap	08/21/24	31677	Bug	Credit Memo	When applying a CM partially on an invoice, the Total Unapplied/Applied amount is calculated incorrectly.
24.0122ap	08/21/24	31684	Bug	Customer	CANNOT DELETE CUSTOMER DATA for Express Body Part (000 Server) without waiting forever. Same issue on 001 server (and maybe 003 server).
24.0122ap	08/20/24	31676	Bug	Reports	Custom Report > Export - The 'State' column is completely blank. Please fix.
24.0122ap	08/20/24	31679	Update	Credit Memo	Remove the popup 'This Invoice has NOT been paid. Are you sure you want to create a Credit Memo for an Unpaid Invoice'.
24.0122ap	08/20/24	31680	Bug	Credit Memo	When user returns a part and typed in NO on the popup to put back the item into stock, it still adds it in the record.
24.0122ap	08/20/24	31662	Bug	Credit Memo	- On the 24.0122M, CREDIT MEMO BUG > When deleting on an invoice, the CM amount applied on the CM payment would not be deleted, making it appear it was still applied on invoice. and can no longer be reapplied - User was able to apply the credit several times (using 23.1 and 24.0122AM at the same time)
24.0122ap	08/19/24	31674	Bug	Sales Order	PRINT > PREVIEW > PICKING TICKETS: When using the 24.0122AN version, upon printing the stock picking tickets the sales order, the items got duplicated.
24.0122ap	08/19/24	31672	Bug	Item Detail	FINANCIAL: Price Level > The "X" Icon under the Action tab not shown correctly.
24.0122ap	08/19/24	31673	Bug	Customer Detail	When adding a tax code, a POP-UP will appear to verify the information and you can click the SAVE button to save that correct tax code. However, even when you click the SAVE button on the pop-up, it will not be saved automatically. Also, when deleting a customer (without any sales history), the page will be unresponsive, if you wait for the page to load, a POP-UP will appear with the UNDEFINED ERROR.
					- Change, when Apply SOME OR ALL of 1 Credit Memo to 1 Invoice, on the Invoice screen, CM screen, or Rec Payments

24.0122ap	08/19/24	31332	New Feature	Payments	screen--save the Invoice, CM #s in the payment detail. User be able to go to Invoice and see the CM # that applied \$x to User will be able to go to CM and see the Invoice # that applied \$x to it. - When a Payment is made that combines 2 or more Credits pay 1 or more Invoices then we will insert MULTIPLE as the Invoice # or CM# that appears on the Invoice Payments tab the CM payments tab. Then on the CM Payments > Invoice column, turn the Invoice # value (such as the Invoice # 1001 the word MULTIPLE into a link that will open up the Receive Payment screen - RECEIPT if the value = MULTIPLE, or open up the Invoice screen to the Invoice it paid, if the value is NOT EQUAL to MULTIPLE. On the Rec Payments screen, when a value is selected, turn entire row light green like on the Find Parts line items when get selected.
24.0122an	08/15/24	31665	Bug	Sales Order	SALES ORDER STATUS ISSUE: When receiving items from the status won't update after clicking yes on auto ship pop up window
24.0122an	08/15/24	31332	New Feature	Payments	Show applied invoice number on Credit Memo Payment info
24.0122an	08/14/24	31656	New Feature	Item List	Make a way for user to see the items in 1 or more bins, to confirm or verify. - On Item List > Item Receipts screen by the Bin #.
24.0122an	08/14/24	31650	Bug	Settings	USER SETTINGS > DO NOT ALLOW WINDOW: - When User goes directly to the Module Security window it clears out all the checkboxes setup in the DO NOT ALLOW
24.0122an	08/14/24	31639	Bug	Sales Order PO	Sales Order Backorder > SOPO screen Cost: - User manually enters the cost for their backordered items when the SOs are invoiced from the DISPATCH SCREEN, the costs entered from the original SO should also be on the SO for the backordered line item and on the SOPO screen
24.0122an	08/13/24	31626	New Feature	Settings	USER SETTING >DO NOT ALLOW TAB > User Cannot reprint Quotes - User cannot reprint sales Orders - User cannot reprint Invoices - User cannot reprint Credit Memos
24.0122an	08/13/24	31654	Bug	Integration	The orders from CCC are not coming in correctly. There is an issue with the Third Party Customer ID field.
24.0122an	08/13/24	31653	Update	API	Alter FetchItem and Inventory Bin API to get a data based on OEM #,Other #,UPC Code,Alt #1,Alt #2 fields.
24.0122an	08/13/24	31649	Bug	Item Details	ADJUST QUANTITY IN STOCK > EDIT RECEIPT >RECEIPT DROP DOWN: - COST >The Cost on the dropdown table shows different Cost amount from the one on the Item Stock table. When Selected updates the Cost of the first line item and the edited receipt
24.0122an	08/13/24	31332	New Feature	Payments	- (BUG) Place a small right hand arrow button to the LEFT of Discount Amount. When clicked, auto calculated, and insert DIFFERENCE between the Net Balance Due and then Amount Paid. The purpose is to help the user calculate and enter the 'Difference' paid and applied to the Invoice vs the Amount Due. In this case, for example, if the Amount STILL due after entered the Amount Paid was \$3.23 cents. When the button is clicked will insert \$3.23 cents into the Discount Amount field and will change the Net Balance Due to \$0.00

			Feature		change the net balance due to \$0.00. - When user clicks CHECKBOX to apply a CREDIT, lets calc the Amount to Apply (on the selected Credit) based on this 1. If the REMAINING CREDIT < or = the NET UNAPPLIED, I set the Amount Applied (on the Credit) to be = REMAINING CREDIT. 2. If the REMAINING CREDIT > the NET UNAPPLIED, lets s the Amount Applied (on the Credit) to be = NET UNAPPLIE
24.0122an	08/12/24	31636	Update	Import Wizard	ITEM PRICE LEVEL >Import wizard: - Import New Records >When importing records that match with the record in 1place, there should be a data validation i show the item prices that are already exist to avoid any duplication of data. - When updating records, it should only update those that matches the item number and the MatrixPriceCode and cre data validation for those that does not exist in yet in record.
24.0122an	08/12/24	31646	Bug	Reports	When selecting any report to run the screen would load indefinitely.
24.0122an	08/12/24	31630	New	API	Item Count API: - Alter Bin count API to get a data based on OEM #,Other #, Code,Alt #1,Alt #2 fields.
24.0122an	08/12/24	31101	Bug	AP Bill	QBO wont sync PO 8047268. I tried removing data on back What is it that makes the PO AP BILL Sync BUTTON get en or disabled? What data changes or PO states locks it up? Hc I manually unlock it?
24.0122an	08/12/24	31076	Bug	AP Bill	(IPC) Bug 24.0122c AP Bill sync - User created an AP bill in 1place for PO P6560 and Vendor Invoice # 998419836. It v created in QBO, the QBO AP Bill ID = 17071. it had a wrong amount so user deleted the AP Bill in QBO. User corrected i amount in 1place and tried to sync the AP bill again but it gi an error. As a workaround, user created a Bill in QBO with Vendor Invoice # 998419836. Can we please connect the A from QBO so it syncs properly in 1place?
24.0122an	08/12/24	30747	Bug	Invoice	- INVOICE QBO SYNC: There are invoices with items synce QBO that have not Qty Ordered and Price. Those items usu have special orders and IMPACT syncs their invoices via QE Sync Center. - Some orders duplicated the line items after they were invc and created duplicate invoices in QBO when synced. Examp I231211-004
24.0122an	08/12/24	31585	Bug	Credit Memo	- There's a paid mark on the CM even though it's not applic any invoice example: C240719-0025 - Invoice # I240718-0097, we applied credit memo of \$33 (C240719-0031), however the credit memo still shows avai to be applied again. But when you open the credit memo the a "paid" stamp. Also on the credit memo it does not show ho paid or to which invoice its applied to.
24.0122an	08/09/24	31634	Bug	Customer List	The customer list on the last tab that shows customer sales not sorting properly. It seems to sort, highest based on wha the first page instead of all of the records combined.
24.0122an	08/09/24	31618	Bug	Credit Memo	REDO 24.0122AM version > CREDIT MEMO: - When a credit memo is applied to an invoice, on the CM payment tab the invoice number where it was applied to is r recorded on the CM payment tab.
					- Show receive payment on the invoice and Credit memo sci - Add receipt number when creating receive payments from

24.0122an	08/09/24	31332	New Feature	Payments	invoice screen - Redirect to receive payment screen when clicking on the receipt id from payment info tab - Place a small right hand arrow button to the LEFT of the Discount Amount. When clicked, auto calculated, and insert DIFFERENCE between the Net Balance Due and then Amount Paid. The purpose is to help the user calculate and enter the 'Difference' paid and applied to the Invoice vs the Amount Paid. In this case, for example, if the Amount STILL due after entering the Amount Paid was \$3.23 cents. When the button is clicked will insert \$3.23 cents into the Discount Amount field and will change the Net Balance Due to \$0.00.
24.0122an	08/08/24	31641	Bug	API	API-OBP needs to be able to pull out items with similar item numbers like the find parts.
24.0122an	08/08/24	31642	Update	API	Check Stocks API: Alter Check Stocks API to get a data base OEM #, Other #, UPC Code, Alt #1, Alt #2 fields.
24.0122an	08/08/24	31635	Bug	Items	Price Levels: Add New Regional List Price feature (to the Price Level table). - On the Item > Price Level table, add ability for User to add LIST Price that is associated with the Price Level, that will be copied over to the Q, SO, I, CM, and FP screens when a PRICE Level NET Price is used to calculate an Item Price AND when LIST price field > \$0.. - Change the Price label on Item > Price Levels to read: Net and then add a column to the LEFT of the NET Price called LIST Price. - When the PRICE LEVELS option is used to calculate an item price, if there is a LIST price >0 in the new List Price field, copy that list price over to the Transaction List Price field. However the LIST - - Price field (on the price levels table) is \$0 then copy the LIST price from normal LIST price field. - Lets move the Qty Low and Qty High to the RIGHT of the Discount Off List Price column. - Added to 0731 and SOURCE versions.
24.0122an	08/07/24	31288	Update	Credit Memo	Add pagination to the CM, along with prev button, next button and show all options for the line items.
24.0122an	08/07/24	31631	Bug	Import Wizard	Vendor Items > Update function > Instead of updating the existing records, it adds new record. - Import new records > When importing new records, there should be a data validation window and list those that are duplicate and/or already exist in 1 place.
24.0122an	08/06/24	31621	Bug	Find Parts	Showing this error when searching 'ztest' ship to address on Parts screen: Could not find stored procedure 'FetchMultiColumnDropdownFilter_2024_06_25'.
24.0122an	08/06/24	31589	Bug	Invoice and Sales Order	SALES ORDER AND INVOICE DATE: - Seem to be storing midnight UTC, need to check this. Make sure to store the dates Eastern Time (quality's time zone)
24.0122an	08/06/24	31616	New	Integration	CCC - Made changes on the ftp files.
24.0122am	08/05/24	31625	Bug	Settings	TabPreference/GeneralSalesSettings - In payment terms table, the column header next to day of month column is not visible. - Also when saved without entering data, then popup shows wrongly.

24.0122am	08/05/24	31624			Receive payments: when tab is continuously pressed in cust input tab, then the page loads infinitely with black screen.
24.0122am	08/05/24	31623	Bug	Quotes	Print > Quotes print setting, 'Note to Customer' section is missing
24.0122am	08/05/24	31622	Bug	Sales Order	Print > 'Note to Customer' section in Sales Order print sett does not allow you to enter any texts.
24.0122am	08/05/24	31620	Bug	Item Detail	Save button gets an undefined error: Could not find stored procedure 'FetchItem_31_07_2024'.
24.0122am	08/05/24	31598	Bug	Item Detail	Fixed Cost (ForMarkupPricing): - Fixed Cost is being updated by new PO costs. The Fixed Co should not get auto-updated in any way. - Fix issue notes: Not able to recreate
24.0122am	08/02/24	31332	New	Payments	Add 2 quick calculation buttons: - Place a small right hand arrow button to the RIGHT of the Payment Terms. When clicked, regardless of # of days, if the Payment Terms 'could' have a discount, calculate it and insert Discount Amount, % - Place a small right hand arrow button to the LEFT of the Discount Amount. When clicked, auto calculated and insert DIFFERENCE between the Net Balance Due and then Amount Paid. The purpose is to help the user calculate and enter the 'Difference' paid and applied to the Invoice vs the Amount Paid. In this case, for example, if the Amount STILL due after entering the Amount Paid was \$3.23 cents. When the button is clicked will insert \$3.23 cents into the Discount Amount field and will change the Net Balance Due to \$0.00. - o In company field, typed zTest and then pressed TAB, it sometimes hangs. When repeating the process again and again it hangs each time. But pressing ENTER does NOT seem to hang. - o We have a few invoices that appear that show \$0 due to zTest (0602 McDonalds Anaheim). - o There is still an issue where the user tries to CHANGE Discount Amt or % and is being prevented from doing so. We need to remove ALL controls and let the user make any changes to those 2 fields, before or after the eligible discount date.
24.0122am	08/01/24	31615	New	Dispatch Screen	Show columns Elite Dispatch status and Elite manifested name
24.0122am	08/01/24	31208	New	Sales Order	Allow to add and save Qty Rtn. Before adding Qty order & quantity ship enter on line items.
24.0122am	08/01/24	31610	Bug	Credit Memo	Tried returning and unreturning an item and it gives me a pop up 'Cannot Unreceive Item'. I was trying to zero out the Line total because the Returned field was originally zero quantity.
24.0122am	08/01/24	31614	New	Catalog Management	ITEM LIST AND ITEM CATALOG: - Download the following columns for item list: Item Number, year, make and model and description. - Download all columns for item catalog.
					- DO NOT AUTO SELECT INVOICES after entering Amount Received From Customer value. - When selecting a customer with an Invoice that is partially paid AND has a discount payment term, AND is within the range to receive an early payment discount, then re-calculate the full amount and discount and insert into the fields, even if there already has a partial payment applied.

24.0122am	08/01/24	31332	New	Payments	- Be able to Select or Unselect the CHECKBOX using the SP BAR OR ENTER keys. - After saving, when completely saved, clear screen, make a sound, and set focus on Company name, ready to enter the Payment. - There is still an issue where the user tries to CHANGE the Discount Amt or % and is being prevented from doing that. ' need to remove ALL controls and let the user make any change to those 2 fields, before or after the eligible discount date. - So we had a \$200 Credit. We applied \$50 toward an Invoice pay the Invoice in full. Then the Credit Memo no longer shows the remaining \$150 open.
24.0122am	07/31/24	31456	New	Integration	Change all CCC file name in Capital
24.0122am	07/31/24	30607	Bug	Settings	DO NOT ALLOW > USER CANNOT VIEW COSTS, + Vendor POs. #1 On the Item List, it only removed the header for the Average cost, not totally removing the column #2 On the Item Receipt tab, the Cost column still appears on table. #3 On the Item Vendors tab, the Cost still appears on the tab #4 Item Detail screen > Financial tab > last Additional Cost Service Cost #5 Sales Order Purchase Order screen > Vendor Cost -world but please double check (REDO) > Items > Items details > financial tab (anything to do with cost) Also on this tab, they should not be allowed to change the price levels, they must view but not be able to change.
24.0122am	07/31/24	31613	Bug	Import	- The Elite Import Function Is not working - Change the Elite PDF download path
24.0122am	07/31/24	31611	Bug	Credit Memo	- There are unapplied credit memos that appears on the Customer credit screen with zero amount. When I clicked on magnifying glass, it directs me to a bad request screen. - There's a blank invoice with an existing amount on the pay tab. - There are CMs with zero unreturned items that has a Line amount, we need to clear the Line Total for CMs whose Returned field is zero.
24.0122am	07/31/24	31612	New	API	Alter Bin count API to get a data based on OEM #, Other #, L Code, Alt #1, Alt #2 fields.
24.0122am	07/31/24	31332	New	Payments	- When selecting a customer with an Invoice that is partially AND has a discount payment term, AND is within the range receive an early payment discount, then re-calculate the full and discount and insert into the fields, even if there already partial payment applied. - When click CHECKBOX to apply a CREDIT, lets calculate the Amount to Apply (on the selected Credit) based on this logic • If the REMAINING CREDIT < or = the NET UNAPPLIED lets set the Amount Applied (on the Credit) to be = REMAINING CREDIT. • If the REMAINING CREDIT > the NET UNAPPLIED, I set the Amount Applied (on the Credit) to be = NET UNAPPLIED. - In company field, typed zTest and then pressed tab. It then hung. • After saving, when completely saved, clear screen, make a sound, and set focus on Company name, ready to enter the Payment.

					DEEP SOUND, and set focus on Company name, ready enter the next Payment.
24.0122al	07/30/24	31606	Bug	PrinterConnect	1Place Printer Connect download pdf is not working on Live servers
24.0122al	07/30/24	31599	Bug	Purchase Order	CHANGING LIST PRICE: - When changing the List Price for a line item, a popup appears re-auto-ship the item and it updates the status of the SO line item.
24.0122al	07/30/24	31608	Bug	Find Parts	The 'Find Parts' screen shows a quantity of zero, but in the detail screen it shows a number in quantity in stock.
24.0122al	07/30/24	31605	Bug	Credit Memo	CREDITS THAT ARE NOT EVEN RETURNED YET ARE SHOWING UP AS AVAILABLE ON CUSTOMERS ACCOUNT Example: I240717-0358 check the Show/Apply Credits window
24.0122al	07/30/24	31602	Bug	Credit Memo	- Returned CMs not showing on the Find parts screen > Customer Credits window - When deleting a credit memo, a popup appears saying that there's a related payment related to the invoice even though there's none. - When applying CM, the Payments tab on the Credit memo is missing the Invoice#, Receipt # and Payment # and it adds another extra line above with zero amount.
24.0122al	07/30/24	31332	Bug	Payments	- Cannot close form, after saving, clicking the Close button. - After saving, when completely saved, clear screen, make a sound, and set focus on Company name. - Deleting WORKS but doesn't get through the progress bar process.
24.0122al	07/30/24	31602	Bug	Credit Memo	Returned CMs not showing on the Find parts screen > Customer Credits window
24.0122ak	07/29/24	31606	New	CCC Integration	Change CCC true FTP File name to capital letters.
24.0122ak	07/29/24	31600	Bug	Purchase Order	The screen is stuck from loading and when deleting an item, screen would load indefinitely and gets stuck.
24.0122ak	07/29/24	31604	Bug	Item Details	ADJUST INVENTORY STOCK: - SPLIT RECEIPT BIN LOCATION > When you click on the dropdown icon, the table does not show the info for the Bin #, PC and Vendor.
24.0122ak	07/29/24	31601	Bug	OsScan	Gets an error when logging in.
24.0122ak	07/26/24	31332	Bug	Payments	When DELETE previously made Payment, it doesn't delete. Make the Payment Terms and Discount DATE un-editable. When I tried to use 1 or more of the Credits it didn't use the just made ANOTHER Credit for the amount not applied.
24.0122aj	07/25/24	31060	Bug	Sales Order	- Cannot properly Delete Sales Order. (On 24.0122c and 24.0213 version) Created Sales Order, Created Invoice. Deleted Invoice. Said NO to NOT delete the related Sales Order. Encountered 3 issues. - The Invoice # was still in the Invoice # field, even after it had been deleted. - When trying to delete the Sales Order it gave popup error 'Could NOT delete Sales Order because it has 1 or more line items that are shipped.' (It's supposed to just unship them and put them back in stock and delete the Sales Order after the types YES to confirm. - After getting the error above I clicked on the Close button (think...) and then I got a popup that is related to the new Make Delete form. DK created to help mass delete Invoices from

					Delete form PR created to help mass delete invoices from QuickBooks Online for - IPC. The message reads: TITLE: Mass Delete Invoices from QuickBooks Online? Message: This will delete ALL of the transactions in QuickBooks Online (for the Transaction Type selected) in the date range selected. Do you want to Continue?
24.0122aj	07/25/24	31595	Bug	Logout	The error page shows up when logging out.
24.0122aj	07/25/24	31332	Bug	Payments	When I tried to use 1 or more of the Credits it didn't use the just made ANOTHER Credit for the amount not applied. When DELETE previously made Payment it doesn't delete.
24.0122aj	07/24/24	31429	Bug	Sales Order	Backorder on an invoiced Sales Order > REPLENISH STOCK (MIN/MAX) - The backordered line items in an invoiced sales order should no longer be accounted to purchase on the SOPO screen and should not be counted as backorder. There are some old backorder showing that aren't valid. This causes the replenishment quantities to increase beyond what is actually needed to be ordered. Here are 2 examples: H903-0066 and 110-0128E0 They run replenishment on min/max - Plastic
24.0122aj	07/24/24	31592	Bug	API	API: - When receiving item from API it did not update PO status received.
24.0122aj	07/24/24	31586	Bug	Import Wizard	ITEM VENDORS >IMPORT WIZARD: click on the Item Vendors tab, click the import button select my file and then click proceed, and error occur
24.0122aj	07/24/24	31332	Bug	Payments	- When QBO Syncing is ON and have 1 or more Invoices that are NOT synced to QBO, and then SAVE the payment, and get prompted to SYNC the Invoice to QBO and answer NO, the doesn't finish the syncing. When I closed the Popup manual still didn't SAVE the payment... - Make the Payment Terms and Discount DATE un-editable
24.0122ai	07/23/24	31591	Bug	Sales Order	CLOSING SALES ORDER STATUS: - After typing yes on the popup window that asks to update line item to close, the screen would load and get stuck.
24.0122ai	07/23/24	31210	Bug	Catalog Management	When the user creates an item from the 'Manage Catalog' section, the pricing category is not being fetched.
24.0122ai	07/23/24	31225	Bug	Sales Order	When a user adds a line item and closes the SO without saving the header and list status is not updated.
24.0122ai	07/23/24	31520	Bug	Invoice and Sales Order	SALES ORDER AND INVOICE ROUNDING ISSUE
24.0122ai	07/23/24	31332	Bug	Payments	- Partial Payment shows duplicates - On Edit Screen Partial Applied Credit memo Calculation wrong
24.0122ai	07/22/24	31182	Bug	Reports	Items - Based on the report criteria, the created date is empty on the report. - Change the header column name "Manufacturer" to "Vendor" - Sorting not working properly. - Change the popup while clicking the print option. it shows can only download a pdf with 10 or fewer columns. Please fix and try again." - The customize option not working on the hide/show columns - Item(date added) Not working properly.
24.0122ai	07/22/24	31581	Bug	Sales Order	Packing Slip > The Bin (From Sales Orders) should be after the Qty Ship Column as it was on the old version.

24.0122ai	07/22/24	31583	Bug	Credit Memo	The Sales order S240718-0122 with item CH1043120 was originally has 2 Qty Ship items, when user returned the part an invoice it changed the Qty Ship 2 to Qty Backorder 2.
24.0122ai	07/22/24	31587	Bug	Shipping and Receiving	Kindly fix the 'Shipping & Receiving' screen, it is in gray and cannot proceed. I tried to find something in the settings but could not resolve it.
24.0122ai	07/19/24	31154	Bug	Reports	INVOICES / CREDITS BY SALES REP (TOTALS) report has 3 bugs. - Remove column (and show/hide options) for Average Sale. - Move Total Cost column over to the left of the Profit column. - Move Net Sales over to the left of the Total Tax and change name to Total Item Sales (and make sure that columns show total of the SUBTOTAL fields). - Add a new column called Freight/Other that shows the total of that field on the invoice. - Add a new column called Total Sales (that shows the total sales field for invoices) - Add a new column called Total Paid (that shows the total payment field for invoices) - Add a new column called Balance Due (that shows the total balance due field for invoices) - Add Show/Hide options for Total Profit and Total Profit - When i test showing/hiding columns (using ASMs data it gives an error). - Please make sure all currency columns have totals.
24.0122ai	07/19/24	31578	Bug	Settings	USER SETTING > DO NOT ALLOW TAB: - It clears out the checked boxes. Need to make sure it does clear out. (need to check what causes it)
24.0122ai	07/19/24	31580	Bug	Sales Order	When creating a SOPO transaction under Quick Fit, after creating the sales order, clicked 'Create PO(s)' button, the Sales Order Purchase Orders (to create) screen does not show the items of the sales order
24.0122ai	07/19/24	31332	Bug	Receive Payments	- When CHANGE the Amount Paid, if the Discount Amount AND the Amount Paid NOT = to the Net Balance Due, then the Discount % and the Discount Amount to 0 and then give popup: Title: Discount Removed Msg: 'You cannot apply a payment discount if the Invoice is not paid in full. The Discount will be reset to \$0.' - If manually change the % discount (for early payment) or the Discount \$ amount it is losing, it's formatting and NOT updating the Amount Due. - We have a few invoices that appear that show \$0 due, for example (0602 McDonalds Anaheim). - Saving Received payment the syncing process got to the 4th step (35%) and got stuck.
24.0122ai	07/18/24	31573	Bug	Sales Order	When deleting SOBO, it makes the previous backorder on the original sales order to appear on the SOPO screen
24.0122ai	07/18/24	31576	Bug	Reports	INVENTORY VALUATION - CURRENT >Download to excel not working.
24.0122ai	07/18/24	27547	Bug	Reports	Report 'names' do not match the report name in the report selection list.
24.0122ai	07/18/24	31573	Bug	Sales Order	Open Invoice Reports - When CHANGE the Amount Paid, if the Discount Amount AND the Amount Paid NOT = to the Net Balance Due, then the Discount % and the Discount Amount to 0 and then give popup: Title: Discount Removed Msg: 'You cannot apply a payment discount if the Invoice is not paid in full. The Discount will be reset to \$0.'

24.0122ai	07/18/24	31332	Bug		will be reset to \$0.' - If manually change the % discount (for early payment) or the Discount \$ amount it is losing, it's formatting and NOT updating the Amount Due. - Opening QBO Sync Center and Receive Payments are BOTH opening TOP of the other, rather than opening a new tab.
24.0122ai	07/17/24	31574	Bug	Reports	INVOICE/CREDITS REPORT: - After selecting columns (specifically the Additional Cost column) to show on the report, downloading to excel redirected to 'This site can't be reached'
24.0122ai	07/17/24	31567	Bug	Find Parts	OBP can pull out items with similar item numbers like the find parts. Also they wanted to be able to show their List Price instead of the Net Price.
24.0122ai	07/17/24	31571	Bug	Reports	INVOICE by sales rep (totals) report > Can't download to excel file.
24.0122ai	07/16/24	31332	Bug	Invoice	- Payment Method Validation - Pop Up Message not closing after saved - Undefined error when saving Received Payments - Highlight the Cost when focusing on the price fields - Un Applied amount calculation - Tab index on Receive Payments Screen - Save the Notes field - Change the Font style for Total Balance Due
24.0122ai	07/16/24	31568		Catalog Manager	Fix Part Description, option #2 for new Catalog search records (visible on the Find Parts screen and copied over to the Sales Order). (A few months ago you made a new feature to allow user to determine HOW the Part Description would be formatted. Option 1 was the original way: Year, Make, Model, Item Description. The New Option 2 was Item Description, Year, Make, Model. That option #2 works perfectly when making NEW Part. But when making new search Catalog records, which are visible on the Find Parts screen, they appear in the Option 1 format. We need to fix that asap on the latest SOURCE version.
24.0122ai	07/16/24	31328	Bug	Shipping and Receiving	CANCEL/RESTOCK SCREEN> SHOW ALL is not working
24.0122ai	07/16/24	31091	Bug	Sales Order	SALES ORDER BACK-ORDER PROMPT: - When the item on backorder is at the end of the sales order, it creates an item that goes on the 2nd page. It doesn't show the NEED for SOBO prompt and auto-creates the SOBO.
24.0122ai	07/16/24	31569	Bug	Customer Portal	QUOTES > SALES ORDER/INVOICE: - The Qty column alignment should be centered. This also happens when adding new line from the main account. - On the sales order, the magnifying glass for invoice and quotes is disabled. - When requesting to return a part, user should only be able to create a credit memo one time. Right now, it allows users to create multiple CMs for the same part and invoice.
24.0122ai	07/16/24	31570		API	Create API credentials and check it on swagger.
24.0122ai	07/15/24	31456	Bug	Integrations	CCC Integrations - FTP Inventory and part file don't have any file. - Check ISS Connections - (Auto door store tempa)File Missing Supplier ID in Deliver
24.0122ai		31520	Bug	Sales Order	SALES ORDER AND INVOICE ROUNDING ISSUE On SO S56857, item: CT30-200 has rounding issue but, on Invoice, I59345, it is correct.

24.0122ai	07/15/24	31332	New	Payments	List the Un applied Payment amount on the Credit Memo tab so that user can apply the over paid amount to the open invoice.
24.0122ah	07/12/24	31277	Bug	Item Details	Adjust quantities in Stock -->Edit receipt and Split Receipt & Location functions are not working. Adjust quantities in Stock -->Tab & enter Function not working properly.
24.0122ah	07/12/24	31158	Bug	Customer Details	CONTACTS TAB --> unable to select Title dropdown. MARKETING INFO-->' Last Campaign Method' change to 'Last Campaign Method'.
24.0122ah	07/12/24	31565	Bug	Invoice	When user changes the Qty Shipped change the popup to an input box with this text that allows the user to enter a new Qty Shipped value: - Changes to the Qty Shipped on an Invoice do NOT adjust the Inventory Levels. (Inventory levels are adjusted on the related Sales Order). If you want to adjust the Qty Shipped on this Invoice (without affecting inventory levels) please enter Qty in the field below. - Please also fix the tab order. It is skipping the Item Number field.
24.0122ah	07/12/24	30499	Bug	Find Parts	Pictures on the item are no longer showing on FP screen (user don't know how to make it work). - Also, when delete picture (on Item Detail) and replace it with different (better) version of picture--it just shows the old version. It doesn't seem to delete it the original on the server. - 2nd issue is it shows the URL on our server in a particular VERSION folder. It would seem that when we change the Customer version to a newer version I think it will break the link to the pictures..
24.0122ah	07/11/24	31183	Bug	Reports	Purchase order Issues - Report period dropdown values not working properly. - On purchase order list table, make warehouse values center alignment. - Cannot edit a number of columns - Cannot print or download to PDF because the number of columns is more than 10 and columns cannot be edited.
24.0122ah	07/11/24	31159	Bug	Item Details	- When the user unchecks the Assembly Check box after adding an Assembly type on the detail screen, the type still appears on the screen. - After checking the vendor tab check box, the vendor tab is not appearing.
24.0122ah	07/11/24	31151	New	Settings	SUBSCRIPTION INFO prices. - Please change the Pro from \$70 to \$65 and the Enterprise from \$90 to \$80 and all related calculations.
24.0122ah	07/11/24	31564	New	Server	0001 Server Auto Scale Up / Down
24.0122ah	07/10/24	31562	Bug	Reports	When user run TOTAL SALES BY ITEM (ASCENDING ORDER) report it shows undefined error.
24.0122ah	07/10/24	31073	Bug	Credit Memo	User unchecks the 'To Sync' button, the button turns red. But when mouse pointer hovers over the save button, it turns blue immediately even if user does not click yet. If you click the save button, and refresh, the 'to sync' button is still checked because it did not save properly
24.0122ah	07/10/24	31184	Bug	Sales Order	Line item-->Unable to commit line item. user previews the description tab and closes it. during the time it occurs.
					Item adjusts Quantities in Stock: - The last added cost will be shown by default in the "On Cost" field.

24.0122ah	07/09/24	31009	Bug	Item Details	The last added cost will be shown by default in the 'On Cost' field." Fix issue notes: - First we check latestItemStockCost for that item. - If no cost exist, then we will check latest PO cost. - If no cost exist, then we will check first vendor cost. - If no cost exist on all above scenarios, then we will show 0 in cost fields.
24.0122ah	07/09/24	31559	Bug		24.0122AGv Stock Transfers In Route: - Undefined error: Cannot find table 7.
24.0122ag	07/04/24	31181	Bug	Reports	Item adjustment - Based on the 'Report period' values are not shown properly display "this report doesn't contain any data". - Sorting feature is not functioning properly - Reason/User notes are displayed empty
24.0122ag	07/04/24	31557	Bug	Invoice	Update all invoices and credit memos on IPC those blank warehouse field to master warehouse.
24.0122ag	07/04/24	31556	Update	Purchase Order	Purchase Order screen and print out - On the screen and print out, column indentation: 'Qty Ord Recd' and 'Sales Order#' should be right indented. - Print out: - Columns 'Qty Ord', 'Qty Rec'Shipped', and 'Line Total' should have a comma separator every 3rd digit from the right and right indented - Should be left indented: 'Vendor #' column
24.0122ag	07/04/24	31555	Update	Invoice	Invoice screen and print out - On the screen and print out, column indentations: 'Qty Ord', 'Qty Ship', 'Qty BO', 'Prev Shp', and 'Qty Rtn' should be right indented. - Print out: Columns 'Qty Ord', 'Qty Ship', 'Qty BO', 'Qty Prev Shipped', and 'Line Total' should have a comma separator every 3rd digit from the right. - Print out, payment section: - Columns should be right indented: 'Ck/Card #', 'Amt Paid', 'Amt Applied'. - Should be left indented: 'How Paid' column - Columns should have a comma separator every 3rd digit from the right: 'Amt Paid' and 'Amt Applied'
24.0122ag	07/04/24	31554	Update	Sales Order	Sales Order screen and print out - On the screen and print out, column indentation: 'Qty Ord Ship', 'Qty BO', and 'Prev Shp' should be right indented. - Print out: Columns 'Qty Ord', 'Qty Ship', 'Qty BO', 'Qty Prev Shipped', and 'Line Total' should have a comma separator every 3rd digit from the right.
24.0122ag	07/04/24	31535	Bug	Credit Memo	- Find the last version in RELEASE 24.0122 that does NOT use the Setting for Allow User to NOT return the item back to stock AND DOES keep inventory levels proper. Then send that version # to Steve via email and then make another newer release 24.0122AH that REMOVES the checkbox option in settings makes the Returned field on the CM properly return values from stock, when >0 or Remove values from stock when changed >0 to 0. - On the latest unreleased SOURCE version, implement the Checkbox option explained in KBA 02531, and implement the code logic in the section called: Required and Optional Columns for Line Items (next to the RTS field). -

24.0122ag	07/02/24	30938	Bug	Sales Order	When the user adds an item and enters a quantity of 0, the status changes from "New" to "To print & pick". We should not allow the status to be changed.
24.0122ag	07/02/24	30066	Bug	Sales Orders	After Importing a unshipped line item on SO. based on that import line total are not fetching. Fix Issue Notes: - We did not make any calculation while importing. We just validate and insert a record from excel file.
24.0122ag	07/02/24	31082	Bug	Reports	Purchase order issues - PO -->Add a \$ symbol before the prices in the PO Amount - PO -->When the user clicks on the 'PO date' header column sorting, the page hangs and does not respond. - Purchase orders special orders reports are not displayed based on vendors related to special types. - Po -->The purchase order (PO) field was not updated with value during PDF export.
24.0122ag	07/01/24	31535	Bug	Credit Memo	CM Setting >INVOICE>QTY RTN: - The first popup that asks, 'Do you want to automatically RETURN this item back to stock when the Credit Memo is created? Please type YES or NO in the field below.' and I type Yes and created the credit memo, it should auto-populate the Qty Return field on the Credit memo. If NO, then do NOT auto-populate the Qty Returned on the CM. ---Right now, what happens is when I type in NO, when I try to return the part on CM and answered yes to the 2nd popup 'Do you want to return this item back to stock? Please type YES or NO in the field below', it does put back the item back into stock. (BUG) - The first popup on the Invoice screen should only either auto-populate the QTY Returned field and auto return the item to stock ('YES'), or NOT auto-populate the QTY Returned field ('NO') - The 2nd popup on the CM when inputting the QTY Return will be the one that will decide whether to put back the item to stock or not.
24.0122ag	07/01/24	31114	Bug	Sales History	SALES HISTORY - 2 YEAR COMPARISON BY CUSTOMER (BEST TO WORST) bugs. - Its not sorting Best to Worst. - It needs to NOT show any customers that dont have sales at least 1 of the 2 periods.
24.0122ag	07/01/24	31113	Bug	Sales History	SALES HISTORY - 2 YEAR COMPARISON BY CUSTOMER (ALPHA) report has bugs. - Its not sorting alphabetically. - It needs to NOT show any lines where there are NO sales for at least 1 of the 2 periods.
24.0122ag	07/01/24	30075	Bug	Sales Order	- SO PO—> When the user create PO via SOPO. it need to be update based on SO Qty BO not a Qty order. Bcz if the user made partial Shippement messed up on PO. - Sales order —> Line item2—> Not fetching the item vendor values on vendor field.
24.0122ag	06/27/24	31545	Bug	Report	Not all items with stock is showing on the report
24.0122ag	06/27/24	31534	Bug	Invoice Detail	Invoice payments window > Show/Apply Credits >Add a magnifying glass next to the CM#.
24.0122ag	06/27/24	31543	Bug	Reports	Items - When you select Items, the report criteria appears to be glitched showing duplicates.

					- When running the Item Stock report, it loads indefinitely.
24.0122ag	06/27/24	31532	Bug	Credit Memo	When returning items to stock, it does not register the warehouse for the returned item.
24.0122ag	06/26/24	29947	Bug	Purchase Order	PO Label>Customer PO# - Not showing the data in the Customer PO# field on the label
24.0122ag	06/26/24	31207	Bug	Sales Order	- When the SO header is SAVED where the Status = New, if are any line items that need to be ordered it is changing the Header status to 'Waiting to be purchased'. Lets make it wo this way: When the SO header is SAVED where the Status = New, if there are ANY line items that CAN be picked, lets ch the SO Header status to the 'next status'. Otherwise, if any line items are waiting to be purchased then we will change t SO header status to Waiting to be purchased. - Header status is not updated properly while creating SOB currently displaying as 'waiting to be purchased' instead of 'moved to backorder'.
24.0122ag	06/26/24	31531	Bug	Shipping and Receiving	Change dispatch dropdown from single to multi search. Wh loading single search it takes more time to load 12k records
24.0122ag	06/25/24	29180	Bug	Credit Memo	- Must add an item to delete a Credit Memo. If 1--user start CM and then changes mind, AND - if 2--there are no line items lets allow the user to delete an give any further pop ups.
24.0122ag	06/25/24	30078	Bug	Shipping and Receiving	To Print & pick: - When the user print stock picking Ticket on preview scree location are showing incorrect.
24.0122ag	06/25/24	31475	Bug	Warehouse	INTERCOMPANY STOCK TRANSFER: - When clicking on Proceed button, undefined errors popup Violation of PRIMARY KEY constraint 'PK_StockTra__3214EC272EE72814'. Cannot insert duplic key in object 'dbo.StockTransfer'. The duplicate key value is
24.0122ag	06/25/24	31332	Bug	Payments	- Receive payments --> Total amount mismatching when partially paid invoice with Discount amount - Receive payments --> Calculate balance amount after appl the amount to invoices from credit memo
24.0122ag	06/22/24	31245	Bug	Sales Order	SALES ORDER STATUS: - When changing the MAIN Sales Order STATUS field to CLOSED, a popup will appear and ask, 'Do you want to CLO this Sales Order and also set the Status of ALL LINE ITEMS (THIS SALES ORDER to Closed?' If so, please type YES in the below. - If the user types YES set the STATUS of all line items to Clk If the user presses Cancel then UNDO any changes to the S Order Status field.
24.0122ag	06/22/24	31383	Bug	Printing	The invoices were printing the entered by name, but actual viewing the invoice in 1.place its cleared out when trying to it.
24.0122ag	06/22/24	31530	Bug	Transactions Tab	Fix tab index issue on all transaction module like PO,SO,Invoice.CM and Quote.
24.0122ag	06/22/24	31524	Bug	Sales Order	When creating orders from the Find Parts screen, the Order Source should autofill to Find Parts, and For OPSTrax, PartsTrader, CCC True.
24.0122ag	06/22/24	31528	Bug	Sales Order	0620 version commit line item not saving.
24.0122ag	06/21/24	31527	Bug	Integration	Add Integrations on Item Details Tab for Excel and ADST
					I made 1st sales order with ship date 6/3, it added the \$10.C

24.0122ag	06/21/24	30275	Bug	Sales Order	When I made the 2nd sales order for the same customer, with the same ship date of 6/3 it did not add delivery fee which is good, however, continuing on the same 2nd sales order, I changed the ship date to 6/5 or any other date, it is not charged the delivery fee.
24.0122ag	06/21/24	31457	Bug	Printing	- The print bleed in Invoices - Increase length of the print collation option
24.0122ag	06/21/24	31332	Bug	Payments	- Receive payments-->When users make partial payments on the receive payment screen, it shows duplicate values on the invoice payment tab. - When manually clicking a checkbox, after changing the Discount % or Amount it is not putting the proper TOTAL Received - When Syncing with QBO there is a step that reads: Check all Transaction(s) were synced with QuickBooks Online - Let's change this to read: Checking to see if all Transactions have been synced with QuickBooks Online. - Also, it did not finish syncing with QBO when we had an Invoice that we gave an early payment discount.
24.0122ag	06/20/24	31495	Bug	Customer Portal	For Customer Portal email, this email only directs me to 1place.cloud, it used to be a page where I can setup my customer portal password. When we sent the email, and manually activates it and tried to login in, it tells user that the account not activated and have to click on the activation link.
24.0122ag	06/20/24	27816	Bug	Import Wizard	When updating the Item Vendor, instead of updating the value for a particular vendor, it imports the data and creates another line.
24.0122ag	06/19/24	31522	Bug	Sales Order	On the 24.0122AG version, when I invoiced an order with a backorder the status for the backordered line item did not update to Moved to Backorder. I invoiced the SO from the Dispatch screen.
24.0122ag	06/19/24	31332	Bug	Payments	- Payment date doesn't fill in automatically, after opening and closing a few times, or switching back and forth between the Receipt and the Log. - Add magnifying glass to open a Transaction on a new tab. - Add Receive Payments to the User Security as 'Sales - Receive Payments' - On Settings > Sales > General > Payment Terms we cannot add a % sign. In the real-world company make payments terms like 2% 10 Net 30. - Also on Payment Terms screen the columns are overlapping and not resizable. - If manually change the % discount (for early payment) or the Discount \$ amount it is losing its formatting and NOT updating the Amount Due. - When Syncing with QBO there is a step that reads: Check all Transaction(s) were synced with QuickBooks Online - Let's change this to read: Checking to see if all Transactions have been synced with QuickBooks Online. - Also, it did not finish syncing with QBO when we had an Invoice that we gave an early payment discount.
24.0122ag	06/18/24	31457	Bug	Printer Connect	Printer connect issues and customizations. - After printing 1 batch of Invoices for 1 driver it did NOT update the Status of the Invoice to the Next Status...
24.0122ag	06/18/24	31049	Bug	Purchase Order	PO BO-->We should disable the "Backorder PO" button once the line items have been received.

24.0122ag	06/18/24	31517	Bug	Print	When clicking the Print and then click the label gear icon, the label design disappears.
24.0122ag	06/18/24	31503	Bug	Invoice	INVOICING from Sales order screen: - On sales order S240611-0198, we applied payment to the sales order, and invoiced it. - When we invoiced it, it took off 3 parts and took off the payment.
24.0122ag	06/17/24	31498	Bug	Purchase Order	RECALC button, error occurs: Column 'Weight' does not belong to table PurchaseOrder.
24.0122ag	06/17/24	31511	Bug	Items	MIN/MAX: Exporting the records to excel, error occurs. Procedure or function 'FetchReplenishStockExportList' expects parameter '@FromDate', which was not supplied.
24.0122ag	06/17/24	31513	Bug	Reports	Items On the list of Reports, user clicks Items, page is stuck on load. Gear icon spinning only and does not do anything.
24.0122ag	06/17/24	31489	Bug	Find Parts	Check to see if the SHIP TO customer selected is LINKED to BILL TO Customer. If so, auto fill in the Bill To Customer and highlight the value. Otherwise, do not auto fill.
24.0122ag	06/17/24	29951	New Feature	Purchase Order	NEED A WAY TO DELETE UNRECEIVED INDIVIDUAL PO LINES. - Check the AP Bill status when edit Qty Received value - PO--> when user receive the item manually during that time received checkbox are not enabled automatically. as well as an order auto ship popup is not shown.
24.0122ag	06/17/24	31474	Bug	Tasks	TASK LIST bugs. - Be able to sort by Task # - Be able to SHOW ALL. - Be able to Export ALL selected.
24.0122af	06/14/24	31324	Bug	Customer Detail	Data changes not getting saved. When user adds, deletes, or changes data on tab x and then clicks on another tab--the data does NOT get saved. When navigating from 1 tab to another the RED Save button is enabled then we need to auto save the changes (and sync to QBO if enabled) taking the focus OFF the tab with unsaved data.
24.0122af	06/14/24	31454	Bug	Purchase Order	PO that was created in QBO and synced to 1place does not show the line items.
24.0122af	06/14/24	31320	Bug	Invoice	24.0122 BUG Invoice > Payments - Payments does not sync. The checkbox does not save when checked.
24.0122af	06/14/24	31332	Bug	Payment Info	Need to be able to resize columns on both tabs.
24.0122af	06/13/24	31509	Bug	Dispatching	Have trouble with the dispatching screen printing out one invoice and a manifest.
24.0122af	06/13/24	31501	Bug	Shipping and Receiving	PICKING SCREEN >When picking over 100 pieces of items picking a Picker to select all orders, it only filters only up to items and the Show All button disappears.
24.0122af	06/12/24	31494	Bug	Replenish Stock	PAST SALES HISTORY: The returns or credit memos are not deducted to the total number of quantity SOLD.
24.0122af	06/12/24	31499	Bug	Credit Memo	On the 24.0122AD version > CREATING CREDIT MEMO: It automatically adds the qty on the Returned field.
24.0122af	06/11/24	31438	Bug		NEW COMPANY creation wizard isn't inserting some LIST TABs for ITEMS, VENDORS, CUSTOMERS, and maybe others...

24.0122af	06/11/24	31482	Bug	Replenish Stock	MIN/MAX: - It is still showing items that should have had their back order deleted after being invoiced. They invoice an order and it should ask us if we want to delete the back order. If the back order is going to ship from another location, we opt to delete the back order. - part # 922-ODS6. It shows 151 on b/o that should have been deleted when invoiced on sales order # 24002749
24.0122af	06/11/24	31310	Bug	QBO Sync Center	24.0122M: Not selected and To Sync links > When I click on number links, it directs me to a blank tab.
24.0122af	06/11/24	31332	Bug	Payment Info	Edit Receive Payment and Delete Receive Payment
24.0122af	06/10/24	31488	Bug	Transaction List	SO and Invoice list: Sales Order and Invoices List cannot be downloaded. Shows an error. user needs to download ALL Sales Order list and Invoices List.
24.0122af	06/10/24	31478	Bug	API-Items	Having some issues with the API developed for them, when search for a part link example TO2503286, the results does show the TO2503286C or TO2503286V.
24.0122af	06/10/24	31483	Bug	Dispatching Screen	DISPATCH SCREEN using 1place admin user account: When dispatching and updating status, an error occurs: The conversion of a datetime2 data type to a datetime type resulted in an out-of-range value.
24.0122af	06/10/24	31332	Bug	Payment Info	Fix the behaviour of the Delete button, when editing data, after the connection to QBO.
24.0122ae	06/07/24	31332	Bug	All Transactions	- When SAVING data, show a progress or spinner. - Changes on the X button behaviour.
24.0122ae	06/06/24	31376	Bug	ALL Transactions	- Created By: By default, this is filled in with the logged in user name. However, if you are creating a Sales Order from a Quote (or an Invoice from a Sales Order) the original Created By user value is retained and copied over. - Entered By: This is auto filled in with the logged in users' name. (Even if the Sales Order or Invoice is 'converted' from a Quote or Sales Order, this will auto fill in the logged in users' name) - Sales Rep: By default, this field remains empty. If the selected Customer has a Sales Rep saved on its record, then that Sales Rep will be auto filled. There is also an option in the settings to auto fill the Sales Rep field with the logged in user that is creating and/or entering the sales transaction.
24.0122ae	06/06/24	30634	Bug	Credit Memo	CREDIT MEMO > When creating a new credit memo from a invoice, it should not auto-populate qty returned to "1".
24.0122ae	06/06/24	31481	Bug	Customer Portal	- Create new portal user and check to search to fetch data properly. - Also check Quote and SO is working or not.
24.0122ae	06/06/24	31432	Bug	Sales Order PO	Margin % column not working.
24.0122ae	06/06/24	31480	Bug	Reports	For Item vendors report, there's no report criteria and Date filters.
24.0122ae	06/05/24	31444	Bug	Shipping and	- When select a few Orders, then click NEXT (to show more orders) it ERASES the driver and does NOT retain the selected Orders on the TOP of the list. (It needs to show selected on top of list). - When click SHOW ALL it is erasing the driver. - After entering a Sales Order # (in the Find Order field) and press Enter, then 1--Find and Select the Sales Order, 2--Send Beep signal if it finds and selects it successfully, 3--Display a popup if it does NOT find the Order successfully: Title: Order Not Found. Msg: The Sales Order # you have entered cannot

24.0122ae	06/05/24	31411	Bug	Receiving	found. - Please check the # and try again. 4--HIGHLIGHT the value the field so it can be SEEN by the User AND easily typed OV by the user when entering the next Sales Order #. (This field should NOT tab). - Add a button, to the right of the Refresh button called: Ref Sort Order (when clicked it will show SELECTED ORDERS c Top, then sort by Stop #. - Lets remove the FIND Batch ID field but leave the space t (so the searching features are in their own little group).
24.0122ae	06/05/24	31477	Bug	Dispatch	PRINT AND UPDATE STATUS - When clicking this function, it loads and gets stuck. - When doing stock transfers, the orders from Fairway to Pr not showing up on the In Route to Warehouse of Pro.
24.0122ae	06/05/24	31476	Bug	Item Details	MIN/MAX: Show all button not working.
24.0122ae	06/04/24	31446	Bug	Invoices	INVOICING SALES ORDERS WITH BACKORDERS: - When invoices are created the unit cost entered for the backordered line item on the sales order disappears when it invoiced and moved to SOBO.
24.0122ae	06/04/24	31472	Bug	Dispatch	Cannot update the order to the next status. Error: InsertWarehouseBatchesForToDispatch.
24.0122ae	06/03/24	31342		Item Catalog	MANAGE CATALOG > PTYPE FILTER: - On the Manage catalog Ptypes filter, the parts that are sel not to appear, shows up on the Find Parts screen. - ADDITIONAL FUNCTIONS > 3a and 3c need to be tested fixed if not working properly.
24.0122ae	06/03/24	31426	Bug	Import Wizard	MISSING COLUMNS ISSUE
24.0122ae	06/03/24	31099	Bug	Sales Order	- After printing the sales order, click on Create Invoice, a po 'No Item Selected. Do you want to DELETE this line' appear requires you click yes or no. Even after clicking Yes, it does not delete any lines. This all happens before they can invoice the sales order. - Fix issue notes: We cannot re-create this issue. We will test it again after the 24.0122e version is updated on the live server.
24.0122ae	06/03/24	31470	Bug	Sales Order	SALES ORDER STATUS BUG on SO backorder - Status line items for the SO backorder that are moved to the SOBO are not updating from Waiting from delivery from vendor to the next status.
24.0122ae	06/03/24	31471	Bug	Purchase Order	RECEIVED PO LINE ITEMS > EDITING COST - When editing the cost of a received line item, the Auto ship popup always pops up and when the user clicked on Yes, it keeps updating the status of the order. We should not show the auto ship pop up once the line item is already received.
24.0122ac	05/30/24	31445	Bug	Invoices	DELETING INVOICES > When deleting invoices, the Sales order still shows it's tied to the deleted invoice number and line items 'Waiting to be Purchased' can't be seen on the S/I screen.
24.0122ac	05/30/24	31462	Bug	Import Wizard	Item List > The Microsoft Access database engine could not find the object 'F:\Production_HOSTING\S2\21.0122Y.
24.0122ac	05/29/24	31459	Bug	Invoice / Credits	Downloading invoice/cm list shows a blank page.

The search by Year Make Model doesn't display any parts

24.0122ac	05/29/24	31264	Bug	Customer Portal	- The search by Year Make Model doesn't display any parts that we have moved the search buttons to left side. - After Category selected, the Sub Category is not getting selected.
24.0122ac	05/29/24	31410	New Feature	Customer Portal	- Add a SORT ORDER field and icon for the Item Detail > Pictures tab (in the Item Images table). - Display the picture for the item, using the URL for the picture of the item (with the lowest sort order), usually the one with a picture. - MOVE the HORIZONTAL search fields from the top of the screen to the left side of the screen and make the search field section movable by the use in case the area is too wide or not wide enough.
24.0122ac	05/28/24	31392	Bug	Printing	- Elite Batch Dispatching bugs - Printing Is very Slow.
24.0122ac	05/28/24	31440	Bug	Purchase Order	Purchase Order (SO-PO) - I intentionally clicked NO to the first auto ship pop up and clicked YES to the auto ship pop once you clicked save. The pop up message is "It appears that there is 1 or more items on this PO that are linked to Sales Order Back Orders. Do you want to ship the Sales Order line items that are linked to Special Order items on this PO?" Upon checking only 1 of the 3 items was shipped. It should be all items received be auto shipped. Fix issue notes: - Its wrongly called autoship popup method on salesorder save method. Actually we handled everything on line item save.
24.0122ac	05/28/24	31411	Bug	Shipping and Receiving	■ When click Next to see next page getting bug. ■ When searching for records (such as Find Order) that are on another page, it is not finding the Order. ■ When typing the Order # and press Enter Or Tab, it moves to NOT tab or move the cursor but should do the search and then (if it cannot find it it will display a popup error) retain the focus on the same Find Order field and HIGHLIGHT the previous value entered so it will be quick and simple to enter ANOTHER Order # to search for. It also needs to INSERT the NEXT STOP #. The First searched and selected Order will have stop # 10 inserted into the Stop # field, the 2nd searched and selected Order will have stop # 20 inserted into the Stop # field, etc...always increasing the stop # by 10. ■ After find, the value it needs to select the Order, highlight it, and move it to the list of selected items at the top of the screen so the user can see the selected item(s), sorted in ascending order, by the Stop #, showing all selected items above the non-selected items.
24.0122ab	05/27/24	31455	Bug	Quotes	Quote total mismatch issue occurs when printing.
24.0122ab	05/27/24	31430	Bug	Sales Order	PROMPT to create a backorder - When invoicing an order with a Backorder, you have to "SHOW ALL" or it will NOT ask you if you want to create a backorder automatically generates one.
24.0122ab	05/27/24	31427	Bug	Quotes	Settings > The page loads indefinitely.
24.0122ab	05/23/24	31444	Bug	Reports	Some Exception report throws error.
24.0122aa	05/22/24	31441	Bug	Invoice	Customer warehouses are not syncing. User made payment SO after creating invoice and then processed invoice to create memo.
					- REP STOCK (for MIN/MAX SOBO Calculations). Program

24.0122aa	05/22/24	31439	New Feature	Replenish Stock	Code for Min/Max Calculation Method - NEW ON 5/21/24: When we calculate the QBO we do NC the Item.QtyOnBO field. To Make it more accurate we reca # on BO on Sales Orders where there is NO Invoice.
24.0122aa	05/21/24	31429	Bug	Sales Order PO	Backorder on an invoiced Sales Order - The backordered line items in an invoiced sales order should longer be accounted to purchase on the SOPO screen and should not be counted as backorder. There are some old backorder showing that aren't valid. This causes the replenishment quantities to increase beyond what is actually needed to be ordered.
24.0122aa	05/21/24	31134	Bug	Sales Order	SHIP TO field >Add new customer: - After inputting information for the new customer and save the New name fills in both for the Bill to and Ship to address should only auto fill the Ship to field. - After adding the new customer on the ship to, the tab key is only shifting from bill to to warehouse. The tab should go over the Line items table till the end.
24.0122aa	05/21/24	31428	Bug	Sales Order PO	SOPO > PO: - Items for PO created from the SOPO screen did not bring over the description.
24.0122aa	05/20/24	31435	Bug	Shipping and Receiving	Update Invoiced Stock Transferred Sales Orders from In Ra Closed
24.0122aa	05/20/24	31421	Bug	Import Wizard	Invoice / Credits > Imported a file with 50,000 records and it took an hour and confirmed all data imported but no data was imported in 1place.
24.0122aa	05/20/24	31434	Bug	Item Detail	When I try create a new Item, click save then a blank page shows up.
24.0122aa	05/20/24	31433	Bug	Sales Order	Unable to make payment on the sales order. It shows an execution timeout error.
24.0122z	05/17/24	31379	Bug	Reports	CUSTOM REPORT is not working. Stuck at loading.
24.0122z	05/16/24	31424	Bug	Sales Order	SALES ORDER > PRINT SETTING > LABELS > Settings - When clicking the gear setting for the label for the first time label designer table show blank but when you click on the preview and click the label for the 2nd time the design appears
24.0122z	05/16/24	31414	Bug	Reports	INVOICE/Credit and line items report - Created By column, not showing the value for the credit memo
24.0122y	05/15/24	31409	Bug	Sales Order	SALES ORDER PAYMENT > When they Invoiced S240510- with 2 line items, it only brought over one line and the payment from the sales order was not copied to the invoice.
24.0122y	05/14/24	31328	Bug	Shipping and Receiving	CANCEL/RESTOCK SCREEN> SHOW ALL is not working
24.0122y	05/14/24	30893		Cash Management	- Will you please update the CASH MANAGEMENT screen to hide all unreconciled payments from 1/17/24 and back? - I am meeting with him on Friday at 11am MST. Can you join to help us test/use it/train us. - Will you please DELETE the Default BIN LOCATION for ALL ITEMS in the ITEMS. - On the Cash Management screen, when the screen is first opened, please check to see what the OLDEST records are. I pop this message to the user: 'You have [x] days of Cash Receipts to reconcile. Please type in the field below the # of days to keep to be reconciled. The rest will be removed from the reconciliation screen.' (Where X is the # of days of the oldest unreconciled payment)

					from today). (When it hasn't been in use for weeks or months usually freezes. - Please give Quality the very latest version on their server in preparation to run the Batch Printing test with Ray on Thursday 1/18 in afternoon, and Cash Management changes you make 1/18 for meeting with Tom on 1/19.
24.0122y	05/14/24	31359	Bug	Sales	Come up with a way to avoid and/or warn user if there is a price that is \$0.
24.0122y	05/14/24	31167	Bug	Shipping and Receiving	when select a Driver it makes the system do some type of work. It shouldn't do any real work except to COPY the the Name the driver button clicked over to the Driver field in the top right side.
24.0122y	05/14/24	31273	Bug	Quotes	- Started quote. Changed mind. It would not CLOSE using Close button. - Deleted a line item. After popup confirmation it HIDE all line items. Had to close and reopen to make them come back. - Cannot delete a line when there is no item. It forces you to finish adding a line in order to delete the line.
24.0122y	05/14/24	31408	Bug	Credit Memo	CREDIT MEMO PRINT - On the Credit Memo detail and print, the first line item total shows \$0.0.
24.0122x	05/13/24	31406	Bug	Item Detail	Vendor Tab -> Not opening and throws an error.
24.0122x	05/13/24	31357	Bug	Reports	Invoice/Credits Line item Report (BUG) - The columns headers are not matching with the data - Add Entered By and Created By and Last Modified By Columns on the Report Lists Settings - Add on Group By: Created By.
24.0122w	05/10/24	31384	New Feature	Reports	INVOICE/CREDIT REPORT > Report Criteria - Add on the Group By: Entered By and Created By.
24.0122w	05/10/24	31402	Bug	Reports	Invoice/Credits Report - Downloading the report to Excel and PDF not working.
24.0122w	05/10/24	31398	Bug	Customer Portal	Customer Portal issues 24.0122S - When clicking on the Sales Order and Invoice screen on the panel, a popup comes up and says I do not have permission to access the page - Find Sort Order not working on the Customer Portal.
24.0122w	05/09/24	31399	Bug	Customer	When user clicks on a customer, it directs the user to a bad request screen.
24.0122w	05/09/24	31396	Bug	Audit Log	AUDIT LOG > QUOTE - Next button on the Quote Audit Log - Editing Freight/Other not getting logged.
24.0122w	05/09/24	31394	Bug	Find Parts	Orders created from the Find Parts screen it only moves the characters to Quote.
24.0122u	05/08/24	31375	New Feature	Purchase Order	Total Cubic Square Feet / Volume: - Should calculate the Qty x Volume for each part and show total. - DO NOT SHOW the Value of the Total Volume (by default then (2) add a small white button to the right of the field called Calculate. Then when pressed it could do the work to calculate on the fly.
24.0122u	05/08/24	31393	New Feature	Item Detail	Add QPC SortOrder column on item list import.
					- On Picking status, when click the picker it needs to auto fill

24.0122u	05/08/24	31374	Bug	Shipping and Receiving	that Picker's items being picked. - On To Dispatch, when click the Driver name it stalls a little should only insert the Drivers name in the field and NOT run other code to slow it down. Show be immediate. - On the To Dispatch status it is clearing out selected items, click NEXT. If the user selects a Driver, creates a Dispatch # then scans or hand types Sales Order numbers and presses it finds and selects the proper Sales Order, but then if click I to see the next page of records it CLEARS selected Sales Or (and possibly the Driver and Dispatch #...I cant remember o that).
24.0122u	05/07/24	31388	Bug	Sales Order	FIND PARTS SCREEN > SALES ORDER - When adding new items from the find parts screen to sale order one by one, the unit price of the first item gets update the List Price amount.
24.0122u	05/07/24	31385	Bug	Sales Order	When correcting Bill to and Ship to addresses on an invoiced Sales order with backorder, they delete the invoice the backorder. The Bill To and Ship To field becomes restric for change and when clicking the Create Invoice button, a p appears that a backorder is already created even though it v already deleted.
24.0122u	05/06/24	31373	Bug	Catalog Manager	Additional Function 3c isn't working correctly. Using versio 24.0122u I used function 3a to DELETE the Catalog records then I used function 3c to re-build the catalog. It is suppose use the various criteria to EXCLUDE certain Makes, Models Year range etc. (I did NOT test that function). It is also suppose EXCLUDE (NOT INSERT) any catalog search records that h any of the PTYPES in the ItemCatalogPartsLinkPTypes.ExcludePartType where the v is TRUE, meaning YES EXCLUDE these records.3
24.0122u	05/06/24	31364	Bug	Invoice and Sales Order	Invoice/Sales order Last Modified By - When someone adds a payment on the invoice or sales or the Last Modified By on the Invoice/Credits or Sales Order report does not update to the user who applies the payment.
24.0122u	05/06/24	31363	Bug	Audit Log	Audit Log for Quote and Invoice - When a Quote and Invoice are created, there's no record i log added. - When someone else edited a Quote, it records the person edited the log as the person who created the Quote and or invoice. - For quote log, when you add or edit info that's the only tim log appears. - Audit Log is incorrect in Quote and Invoice- giving wrong information. It doesn't appear who created the invoice and paid the invoice. - (InProgress)The Audit log should record everything that is being changed on all of the fields. Including payment on sale order and invoice and Freight.
24.0122u	05/02/24	31360	Bug	Credit Memo	Allow the option to NOT return items back to stock when it are returned on a Credit Memo. - When creating a credit memo from an invoice, the Line tot always gets set to zero even if there's quantity on the return field.
					TO PRINT AND PICK: When Selecting the Shipped Via, and clicked on Print and Pi

24.0122u	04/30/24	31353	Bug	Shipping and Receiving	Selected. For Quality, old Sales order's item labels were reprinted. For Orlando, old Sales order's Packing Slip got reprinted. When they checked the Sales Order status, every line item were in Route.
24.0122u	04/30/24	31354	Bug	Invoice	When they were invoicing old sales orders - usually from Full Delivery, only the first item on the SO is moved to the Invoice - Fix issue notes: Please check it on 24.0122S version. We can re-create it.
24.0122u	04/30/24	31304	Bug	OS Scan	OSSCAN > CREDIT AUTHORIZATION: - When an Invoice has 3 different line items but THE SAME number and requested for return, it only shows 1 out of 3 of those same items on the Credit Authorization table.
24.0122t	04/29/24	31133	Bug	Find Parts	SPLIT LINE ITEM PROMPT > Find part screen > Enter part number available stocks to an item > Create Quotes Not working on 24.0122d.
24.0122t	04/29/24	31302	Bug		Waiting to be Purchased screen > Undefined error Refresh.
24.0122t	04/29/24	31352	Bug	User Settings	Create a new 1place account screen - An error message occurs. And cannot proceed with the activation of the account. - Kindly replace "an" instead of "a" in the error message. It should be "Error: Company Creates an invitation...." instead of "Error: Company Create a invitation..." Please see email for your reference screenshot of the message. - Issue: Transaction failed. The server response was Message rejected: Sending paused for this account. For more information please check the inbox of the email address associated with AWS account.
24.0122t	04/26/24	31346	Bug	Invoice	Payment Info > If CM is applied to an Invoice, the sync box on payment screen is not checked and cannot be checked and saved. Hence, the payment does not sync to QBO.
24.0122t	04/26/24	31350	Bug	Credit Memo	Credit Memo Issues - Old CMs with zero Returned, when filled with Qty. The Credit Memo does not appear on the 'Show Apply/Credits Window' - When creating a credit memo and it auto fills the Qty Returned and you remove the Qty on the Returned field. The amount that appears on the 'Show Apply Credits' will still be the whole amount of the CM, even when it's actually zero amount. - When user has 2 items returned on a CM, returned 1 part. It adds to the total of the CM, the amount that appears on the 'Show Apply Credits' will still be the whole amount of the CM even when it's only partially returned. - When user is trying to remove the qty on the Returned field this popup appears and it won't go away even after clicking OK button.
24.0122t	04/25/24	31347	Bug	Find Parts	On version 2.0122Q When selecting a part on the FIND Parts screen from another warehouse from the multiple warehouse popup screen it does NOT make a Stock Transfer... Let's fix it asap.
24.0122t	04/25/24	31043	New Feature	Sales Order	Bill to and Ship to search field - Typing Core & Main maximize the search drop-down from Z. (all the list that begins with Core & Main)
24.0122s	04/24/24	31343	Bug	Batch Printing	When we Auto Create Invoice. The Batch Printing not work for the Auto Created Invoice.

24.0122s	04/24/24	31285	Bug	Reports	Invoice/Credits Received Payments report > Sort by Payment type by date range: - Invoice Paid Amount column for Credit Memos, we need to show the total amount of applied per date range for this filter. Right now it just shows the total amount of the Credit Memo. - Add Balance column on the right side after the Invoice paid amount. - When clicking the lines it opens a about:blank tab. - Also, there are CM that does not belong to the date range under No Payment Type.
		31341	Bug	Invoices	Payment info > Some CM does not appear on the Show/Apply Credits window of the Invoice screen.
24.0122s	04/23/24	31326	Bug	All Transactions	Audit Log - Does not record who initially created the order. It does create log for Sales order but not for other sales transactions. - When the page is more than 20 records, the next button is working.
24.0122s	04/23/24	31064	Bug	Item Detail	MIN/MAX Calculation issue.
24.0122r	04/22/24	31338	Bug	SO - Invoice	When user changes an order from taxable to tax-exempt an invoice the SO, the Invoice still becomes taxable. As a workaround, I unchecked the tax exempt checkbox and unchecked the line items' taxable columns and re-invoice the order.
24.0122r	04/22/24	31245	Bug	Sales Order	- When changing the MAIN Sales Order STATUS field to CLOSED, a popup will appear and ask, 'Do you want to CLOSE this Sales Order and also set the Status of ALL LINE ITEMS to THIS SALES ORDER to Closed?' If so, please type YES in the below. - If the user types YES set the STATUS of all line items to Closed. If the user presses Cancel then UNDO any changes to the Sales Order Status field.
24.0122r	04/22/24	31294	New Feature	Invoice	Payment > When changing the payment date to an older date remove the popup that restricts the user to change the date.
24.0122r	04/18/24	30607	Bug		Hide Costs, disable viewing Vendors and Pos.
24.0122r	04/18/24	30867	New Feature	Reports	Invoice/Credits by Payment Details. The Group by on the report criteria is locked. Lets REMOVE the GROUP BY criteria and make it group by default on the report by Payment Type (Please remove the Date group by that is currently there). The goal of the report is to be able to run it for a date range of 1 day, or days, and to have it show each payment, by payment type, such as Cash, Check, Credit Card, etc with the detail of each receipt that type below the grouping header, and the TOTAL of all payments for that payment type being in the header for the Payment type, over to the far right side. so it is easy to see the total and easy to see the smaller details of each payment of type below it. Make sure it sorts by date in ascending order, by Customer Name ascending.
24.0122r	04/18/24	31329	Bug		Orders coming from other warehouses and when the order is placed on the In Route screen of the other warehouse, the orders do not appear on the Main warehouse's In Route to Warehouse screen.
24.0122q	04/17/24	31298	Bug	Settings	Module Security > QBO SYNC CENTER > The QBO Sync set for the all user roles is not saving.
24.0122q	04/16/24	31293	Bug	Report	When downloading the SALES ORDER REPORT to excel or PDF it should include ALL columns shown on the report screen.

24.0122q	04/16/24	31239	Bug	Sales Order	SALES ORDER STATUS ISSUE: - When changing the tax-exempt Ship to address to taxable to address, it does not auto select the items to be taxed. Also does not auto-calculate the tax. - As for the status, when I manually checked the boxes for the line items, the status would change to New and when I refresh the page the status disappeared.
24.0122q	04/16/24	31323	New Feature	AP Bill	AP Bill Vendor Invoice number validation with 21 Characters
24.0122q	04/16/24	31217	Bug	Customer Details	Customer tax codes keep changing or being removed randomly
24.0122p	04/12/24	31313	Bug	Reports	- Invoice/CM by Customer OPEN - The total is incorrect. - Please see Mark's email for the screenshot and explanation. - Grand total is incorrect. It adds up all the line items and disregards whether they are positives or negatives. Please see Mark's email.
24.0122p	04/12/24	31255	New Feature	Shipping and Receiving	Make a few changes to streamline how it works. - When the user is on the Ship/Rec > To Dispatch screen and clicks a DRIVER name, if the Sales > Integrations > Elite Extra NOT enabled, then do NOT do run any other code, except to COPY the driver name over to the field, like it does now. - Make sure the Drivers and Shipped Via buttons are displayed in Alphabetical Order. - In the top right corner there is a SEARCH field called Find Order. When the user types in an order # and then presses Enter (or scans an Order barcode and the scanner makes a carriage return / Enter) have it run the code to find/select the order, then set the focus BACK on the same search field and HIGHLIGHT the Order # entered BEFORE. - On the In Route screen make it sort, by default, the the Sales Order #. Make these columns sortable in ascending order (if clicked once time) and descending order if clicked again: Sales Order #, Dispatch #, Date, Delivery Date, Customer Name, Shipped Via. - On the Sales > Integrations, add a new integration on the list (at the top of the list) called '1place Warehouse Management (Scanning)'. Then add a single checkbox option that looks like this: ☐ Enable 1place integration with 1place Warehouse Management (WMS) - On the Ship/Rec > To Dispatch, change the Dispatch Selection button to a BUTTON (not a drop down list) that has options select from in a short drop down list with these values: 'Dispatch Selected' and '1 Click Print' - Then have it remember which option was last selected so that next time the screen is opened it will auto select it.
24.0122p	04/12/24	30117	New Feature	Credit Memo	Make a way to give money back (cash, check, or credit memo)
24.0122p	04/12/24	31306	Bug	Sales Order and PO	SO and PO LABELS > The fields are automatically centered if I remove the checkbox to center. - When we click on the setting for the first time for the label label designs disappears. - The saved labels always disappears.
24.0122p	04/12/24	31311	Bug	Shipping and Receiving	ITEMS TO RECEIVE > IN ROUTE TO WAREHOUSE: - Undefined Error > column 'TotalCount' does not belong to table TotalPOCount.

24.0122p	04/11/24	31240	Bug	Customer Portal	- SALES ORDER LIST and SO backorder tabs/Invoice & Credit Memo List tab > ALL Line items tab > It's showing the company data. It should only be limited to customer's orders. - The Logo for the Portal Login and Company Logo are not showing the picture and not working on their respective areas.
24.0122p	04/11/24	31300	Bug	Sales Order	When selecting a different vendor for the item with a cost recorded in the Vendor tab, it does not auto update the Vendor Cost for the the vendor selected.
24.0122o	04/10/24	31280	Bug	Shipping and Receiving	- Shipping & receiving --> If certain line item items are out of stock, they will not be displayed with the "New" status. - To print & pick --> The Sort function is not working for the and Delivery date fields. - Sales order Back orders (s100-b1) are not shown in the S/F screen.
24.0122o	04/10/24	31283	Bug	Invoice	When the customer changes their credit amount in the "amount to apply" field on the payment tab of the invoice, it automatically updates the prices field.
24.0122o	04/10/24	31284	Bug	Customer	- Customer --> add new-->When the user tries to add a link customer from the dropdown list, the 'Link to' customer does not update in the detail screen. - Customer -->add new -->When a user adds a default pricing method called "Item Price Level + discount", they should have the option to add a discount percentage and pricing level not having the option to add but detail screen we have.
24.0122o	04/10/24	31307	Bug	Import Wizard	IMPORTING/UPDATING DATA in 1place >ITEMS AND PRICE LINE ITEMS: - Undefined error: The 'Microsoft.ACE.OLEDB.12.0' provider is not registered on the local machine.
24.0122o	04/10/24	31270	Bug	QBO Sync	Some CM that were created in QBO and are PAID, do not sync in 1place. User used the QBO Sync center and synced the CM and the CM is still NOT PAID in 1place.
24.0122n	04/09/24	31295	Bug	Invoices	There are old open invoices that were imported but the screens are greyed out. Please remove the restriction.
24.0122n	04/09/24	31299	Bug	Item Detail	List price and OEM price on the item detail screen for an item rounds off.
24.0122n	04/09/24	31297	New Feature	Sales Order	To extend the 'Unit Price' and 'Net Price' to 6 decimals.
24.0122n	04/09/24	31246	Bug	Replenish Stock	PAST SALES HISTORY > Ran 2 different versions: 23.0821d and 24.0122l and both versions gave me 2 different results. The 23.0821d listed 62 items, however, the 24.0122l only listed 20 items to buy both with the same filters.
	4/09/24	30889	Bug	QBO Sync	ITEM LIST QBO SYNC > Synced the item list to QBO using the QBO Sync Center and it zeroed out the List Prices in 1place. Checked the Items in QBO and the items have list prices.
24.0122n	4/09/24	30998	Bug	QBO Sync	UNRETURNED CM SYNCED TO QBO > When unreturned from the CM is synced over to QBO, it brings over the tax amount.
24.0122n	04/08/24	30841	Bug	QBO Sync	Issues on QBO sync and data being shown on the reports such as Totals, and Shipping fee.
24.0122n	04/08/24	29562	Bug	QBO Sync	INVOICE TAX on the QBO Sync Center > Right now it's not syncing the TAX to QBO when syncing using the QBO Sync center. It SHOULD ALSO SYNC THE INVOICE TAX.
24.0122n	04/05/24	31292	New	Credit Memo	Customer wants to return an item for LESS than the amount paid on invoice, then we will allow the creation of the CM to

					proceed.
24.0122n	04/05/24	31059	Bug	QBO Sync Comparison	IMPROVE QBO SYNC COMPARISON screen. - (Issues) Go-Live Date and functionalities.
24.0122n	04/05//24	30788	Bug	QBO Sync	Purchase Order --> when the user create an PO(QBO) and I Paid. after syncing with OneSource those bills and Qty rece are not update properly.
24.0122m	04/03/24	30742	Bug	Sales Order PO	- When entering Vendor cost on the field, it auto round off t cost. It should not auto round off the decimals. The Decimal setting to whole number should not apply to Costs. - They set their Decimal settings for Prices to 0 in the Sales Settings. But on the PO settings, it's set up for 2 decimal pla However, whenever they try to input costs in the Sales Order Purchase Order screen, it auto round off to whole numbers.
24.0122m	04/02/24	31248	Bug	Sales Order	Orders on New status is not showing on the New screen of Shipping and Receiving screen.
24.0122m	04/01/24	31205	Bug	Printing	- Sp's update (Fixed) - 1Place Printer connect app updated.(Fixed) - Status Not Updating properly. (Fixed) (Requested Sikkand share his code knowledge on how he is updating the status) (Progress) Disable the Print Button. Even after the 1Place Printer connect app is running it show PRINTER ERROR to connect. Already the application is running popup. (QUALITY) ELITE BATCH-PRINTING ERROR. If you log into TEST version of Quality > Ship/Rec > To Dispatch > Dispatch Elite Extra Orders (button). Click checkbox next to 1st drive Click the 2 checkboxes on bottom left. Click Print ALL Selected Driver Orders (and make sure the 1placePrinterConnect is already installed and logged in on your PC). I tried to demo t process to Tom, and it gave me an error.
24.0122m	04/01/24	31104	Bug	Item Details	The "Item Price Level + Discount" is not working.
24.0122m	04/01/24	31250	Bug	Invoice	OTHER INFO TAB > CREATED BY field: The Created By Field will be filled out by the user who invoiced the Sales Order, whether it be from the SO Screen or the Dispatching screen
24.0122m	04/01/24	31233	Bug	Replenish Stock	REVISE THE WAY Qty On BO is calculated on Rep Stock. - When we calculate the QtyOnBO we do NOT use the Item.QtyOnBO field. To Make is more accurate we need to recalc the # on BO on Sales Orders where there is NO Invoice
24.0122m	04/01/24	31267	Bug	Invoice	Payment > User wants to pay Invoice I58482 by using CM C58482 but this CM does not appear on the Invoice payment info window.
24.0122l	03/28/24	31266	Bug	Invoice	When a SO is paid in full and converted into an Invoice, it causes a decimal rounding issue and makes the Invoice off by \$0.01
24.0122l	03/27/24	31238	Bug	Credit Memo	The stocks that came from CMs not linked to any Invoice stock even when the CM is deleted.
24.0122l	03/27/24	31251	Bug	Credit Memo	The totals of CMs are not appearing on the Show/Apply Credit screens or Find Parts screens and has to be refreshed every time we need to apply. On the Show/Apply window, the Arrow is not functioning.
24.0122l	03/25/24	31249		Sales Order	Sales Order Line Item Total > The line item total does not give the correct total if the unit price entered is with 5 decimals, only saving 4 decimals which is also a basis for the line item
				Sales Order	Pop Up Message: "Mass Delete Invoices from QuickBooks"

24.0122l	03/25/24	31244	Bug	Sales Order, Invoice, CM	Pop Up message: "Mass Delete Invoices from QuickBooks Online?"
24.0122l	03/25/24	31243	Bug	Customer Details	The 'Link To' field is not saving the linked customer name.
24.0122l	03/21/24	31235	Bug	Purchase Order	PRINTING PO LABEL > When printing labels for 124 line items with a total of 180 stocks, it does not get to have the 2nd have the item labels on the print preview. Example sent through skype.
24.0122l	03/21/24	31206	Bug	Invoice	QTY STOCK/QTY BACKORDER: Invoiced SOs with backordered items should be ignored in calculating the Qty Backorder.
24.0122l	03/21/24	31180	Bug	QBO Sync Center	Customer Checkbox > When checking the Customer sync, undefined error occurs.
24.0122k	03/20/24	31127	Bug	Purchase Order	PO screen> Customer PO# field > The Data on the SO Customer PO# field gets copied to the PO when creating special order
24.0122k	03/20/24	31132	Bug	Invoice Details	Print > Invoice 2 > Some of the Invoice headers are not appearing on the invoices print preview for Invoice#2, LOG Address, it should look the same as the Invoice 1
24.0122k	03/20/24	31229	Bug	Sales Order PO	When selecting some line items with complete data (vendor cost) then click on proceed, there's a popup asking the user out for the fields of unselected line items.
24.0122k	03/20/24	31164	Bug	Sales Order	Status > Orders with backordered items with To Print and F Status and sometimes Waiting to be Purchases but the line are on to print and Pick.
24.0122k	03/20/24	31230	New Feature	QBO Sync	When we are syncing Invoices into QBO that have items NOT in QBO and NOT allowed to be added to QBO for whatever reason, Add new Item called 'default' item to automatically create an Use that item for QBO Transactions.
24.0122j	03/18/24	31226	Bug	Sales Order	All line item tab: - Fix issue on pagination for SOLine item list. - Need to sort this tab to salesorder date descending order.
24.0122j	03/18/24	31187	Bug	Shipping and Receiving	Delivered> The Show All button is not working.
24.0122j	03/16/24	31150	Bug	Purchase Order	RECEIVING PO via Auto-Ship - We found orders that are updating the Qty Ship but not the status of the Order. Please check. - With multiple line items, it sometimes updates the status of another line item when one line item is received from the PO
24.0122j	03/16/24	31219	Bug	Sales Order - PO	Not being able to add a new item to an existing PO, using the Sales Order PO's Prebuild Summary
24.0122j	03/16/24	31086	New Feature	QBO Sync	New Syncing buttons on PO and Payments forms. - On the Last Synced field for the PO AP Bill, Invoice, Invoice Payments, SO payment, Customer, Vendor, Item put a Sync/Resync 'link' on the far right side of the field that when pressed will sync/resync. Then if there is a problem re-syncing because the QBO record is no longer there, then we can just clear out the QBO ID and start over and sync it again like it's being synced for the very first time. - Note: If the SAVE button is RED or any other flag is in place, normally run the sync process, let's avoid syncing it again. - Invoice and Credit Memo (done)
24.0122i	03/14/24	31214	Bug	Shipping and Receiving	To Cancel/Restock screen. When 'Show All' is clicked, the gear icon appears and is running, but it is not showing the rest of list.

24.0122i	03/14/24	30760	Bug	Log Out	- When click you click Log Out from the gear icon, it redirect to 1place.cloud/home/logout and shows the "Your connection not private" message on the screen.
24.0122i	03/13/24	31015	Bug	QBO Sync	Item---> manually added stock(Via adjust Quantities in Stock) in 1place. those added stocks are not updated on QBO.
24.0122i	03/13/24	31007	Bug	Item Detail	QBO Sync -->When the user made changes to the list price (price) in QBO, those changes caused the list price to become 1place
24.0122i	03/13/24	31194	Bug	Credit Memo	When the user saves the CM, it shows QBO sync error "Mismatched QuickBooks Online Settings.". but the QBO settings are correct and connected.
24.0122i	03/13/24	31202	Bug	QBO Sync	- Valiant Marketing, Invoices that were synced from QBO are missing bill to missing city state, and zipcode. Most ship to info are correct. - Some imported invoices are missing their line items. Because of this issue, it cannot be resynced.
24.0122i	03/12/24	31163	Bug	Invoice	Payments > Unable to apply partial amount of the credit memo. It automatically applies the whole amount.
24.0122i	03/12/24	31059	New Feature	QBO Sync Comparison	Make QBO Syncing Errors Log.
24.0122i	03/11/24	31144	Bug	Reports	<u>Sales Order</u> - Duplicate report titles.
24.0122i	03/11/24	31129	Bug	<u>Sales Order PO</u>	(24.0122x) After adding items from SOPO screen to a PO the Item Descriptions are not carrying over to the PO.
24.0122i	03/07/24	31179	Bug	PO Label	It should show the default bin of the item on the label. if the none, we need to show the bin of the stock.
24.0122i	03/07/24	31059	New Feature	QBO Sync	QBO SYNC COMPARISON & LOGGING TOOLS. IMPROVE QBO SYNC COMPARISON screen. - Add Go-Live Date and functionalities - Combine the Sync Center, Sync Comparison, and Syncing Errors Log onto ONE tab with 3 sub tabs.
24.0122g	03/05/24	31146	Bug	<u>Sales Order</u>	Status > Some line items keep on reverting to To Print and F despite changing it repetitively. This is a huge fire for Orlando because they keep on Printing the same orders they already delivered and closed.
24.0122f	03/01/24	31140	Bug		(0122e) The order and Line-Item Statuses not working properly in dev and O3 server
24.0122e	02/29/24	31130	New Feature	Purchase Order	- PRINTED PO Report on PO screen. Please REMOVE the S option from the optional settings for the HEADER. Then please ADD another line item option called SO#, TO THE LEFT of the QTY Ordered on the PO.
in Progress	03/01/24	31059	New Feature	QBO Sync Comparison	- Lets add a SELECT column on the far left side. (Start with the Invoices/CMs and Invoice Payments lists). Then add a Batch Actions buttons (like on Customers list) with option called: Import Sync Selected. (Also if any are selected that do NOT have the SYNC checkbox selected already, please update those first to True and then loop (with progress bar) and sync all selected - Error Log Writing
					- There are numerous rows that shows missing Invoice #s in 1place column (that are actually IN 1place). - Also those same show values of \$0 in both columns. We need that data to be accurate. - Lets add a Show ALL button on the QBO Sync screen and ensure that the CLOSE buttons do not get covered. - Lets add a SELECT column on the far left side. (Start with the

24.0122e	02/28/24	31059	Bug	QBO Sync Comparison	add a SELECT column on the far left order (start with Invoices/CMs and Invoice Payments lists). Then add a Batch Actions buttons (like on Customers list) with option called: Sync Selected. (Also if any are selected that do - NOT have the SYNC checkbox selected already, please update those first to True and then loop (with progress bar) and sync all selected - Invoice & Credits Payments: Add column for 1place Invoice/CM Date - Change column name: OS Total to: 1place Total - BUG: It is showing several rows with NULL value/Total for 1place that ARE in 1place (but the totals did not match). - Filter the records based on user selected as soon as the selection is made. - Show a progress bar to show the progress - When completely done show: x Selected to Sync, x Synced Successfully, x Not Synced Successfully. - Auto Refresh the screen when done syncing - Add a (Select All) Checkbox. - Have a drop down list with these values: All records, All re (Unmatched, un-intentional) - Add a LOG to track syncing errors (see TASK ____)
24.0122e	02/28/2024	31118		Sales Order	- When manually adding a new line on the sales order line it backorder or with stock it gives a default status new. The correct process for manually adding lines when after the save and save button is gone, it should assign To Print and Pick for those with stock and waiting to be purchased for the ones in BO. - When creating invoice for items in backorder, the status gets deleted for the remaining items invoiced
24.0122e	02/28/2024	31072	Bug	Invoice	INVOICING SALES ORDER WITH BACKORDER >When invoicing a SO with backorders, it does not include those items backorder on the invoice. The older version include those to show to their customers that they have some orders pending
24.0122d	02/23/24	31093	Bug	Sales Order	Line Item > The sorting function not working.
24.0122d	02/22/2024	31090	Bug	Reports	- Gross Amount grand TOTAL is incorrect. Please check other totals as well to make sure. - Fix update: Total off by a penny. Normal to check.
24.0122d	02/22/2024	31092	Bug	Purchase Order	Shows an undefined error when trying to receive a PO or just editing the line item.
24.0122c	02/20/24	31071	Bug	Sales Order	- When they click Save and update status for orders with backorder, the status updates to Dispatch even if it's in backorder. Which leads to when receiving items from a PO or auto ships, the status of the order only updates to Waiting for Delivery from vendor. - Also for orders with multiple lines, when one item is waiting to be purchased or waiting for delivery. The general status of the order should be on that status.
24.0122c	02/20/24	31087	Bug	Invoice	Another rounding error.
24.0122c	02/16/24	31065	New	Sales Order	Sales Order Print Documents - Add the other print documents to the new server. Like Packing Slip (by Bin) and (by Item) to fix the issue on the duplicate line items.
24.0122c	02/16/24	31067	Bug	Packing Slip	Printing the packing slip print out of sequence order. It should show the same way as it is ordered in the line item screen.
24.0122c	02/15/24	31056	Bug	Replenish Stock	REPLENISH STOCK SCREEN > MIN/MAX > Undefined Error

24.0122c	02/13/24	31030	Bug	Replenish Stock	REFRESH STOCK SCREEN < MIN/MAX > Undefined Error
24.0122c	02/14/24	31038	Bug	Item Details	List Price, OEM Price should display amount/ values up to 5 decimal setting
24.0122c	02/14/24	31046	Bug	ALL	When LOGOUT getting an error.
24.0122c	02/14/24	31026	Bug	Sales Order	When invoicing Sales Order from the dispatch screen or the order the status disappears. When invoicing the sales orders from the dispatch screen, a undefined error appears and did not load the google maps The X or delete icons are missing.
24.0122c	02/14/24	31020	New Feature	QBO Sync	We need a way to Programically MASS DELETE ALL Invoice IPCs QBO FROM 12/31/23 and BACKARDS (** WE MUST DELETE ANY Invoices or Credits dated 1/1/24 or newer).
24.0122c	02/13/24	31045		Credit Memo	Print out template (Credit Memo and Credit Memo 2): List Item Net Price, Line Total, Amount (payment details) should have sign and a comma in every after 3 number.
24.0122c	02/12/2024	31042	Bug	Reports	BROKEN INVOICES/CM Reports.
24.0122c	02/07/24	30400	Bug	Shipping and Receiving	Undefined error on the latest version (24.0122) (QUALITY) SHIP/REC Screen, additional issues slowing down their end of day dispatching.
24.0122c	02/07/24	30534	Bug	Delivery Date	If we change the shipped via, the delivery fee will be change after that, if we change the delivery date, the delivery fee will revert to its original value.
24.0122c	02/07/24	30983	Bug	Reports	Sales order -->When the user runs a sales order report, duplicate values appear based on the invoice and credit memo.
24.0122c	02/06/24	31008	Bug	Settings	Shipped via-->"Save" button are not working on the "We make deliveries on" dropdown. while selecting the option should change to red.
24.0122b	02/01/24	30922			When printing 2 copies it is not Collating the copies. (Example: there are 5 invoices, it needs to print Invoice 1, then Invoice 2 etc... then start over and print them all again for the 2nd batch.. This way the dispatcher can HAND 1st stack to the driver and the 2nd stack to the office person without have to separate all of the copies into 2 separate stacks. (In-Progress)Final popup screen to select the Printers needed. REMEMBER the user selections. (Done)Disable the PRINT button. (Done)On the form with Drivers, add more details to Status what is going on. Send detailed list of all code processes to Support so he can help come up with more statuses to show the user (Done)Add a button to bottom of Batch Printing form called Refresh which will unlock the buttons that got disabled. (Be careful to disable the green print button when first pressed). Script For Updating Stock Transfer : (Done)Ship order type (Need To Test) Trans ship order.
24.0122b	02/01/24	30947	Bug	Reports	Invoice/Credits - by Customer (OPEN) > Report has all the details on preview. But when is sent via email, the received invoice does not match the preview. The details are gone.
24.0122b	02/01/24	30946	Bug	Sales Order	Audit log > When 'next' is clicked, it does not show or move to the next page
24.0122b	01/29/24	30969	Bug	SO, Invoice, CM	Sales order/Invoice/Credit memo -->Line item 2 -->The default date of 01/01/2001 is being displayed in the 'date delivered' field.
					Please import customer tax code data for IPC Import Wizard

24.0122b	01/30/24	30954	Bug	Import Wizard	Please import customer tax code data for 10. Import failed. Customer does not have a field for customer tax code. Please request file from Mark.
24.0122b	01/29/24	30965	Bug	Reports	- Loading Spinner does not disappear - Email -> When Entering new mail in To mail, Restricting the User to choose only from the List
24.0122b	01/29/24	30960	Bug	Sales Order	The sales order line item and header status appear incorrect when edited.
24.0122b	01/29/24	30963	Bug	Credit Memo	When a user creates a credit memo from an invoice, the "To returned" values are 0, but the line total updates.
24.0122b	01/29/24	30958	Bug	Find Parts	When a user is on the manual tax code calculation method. If the user clicks on the "calculate tax" button shows a zip code based tax popup. We should restrict that button.
24.0122b	01/30/24	30937	Bug	Sales Order / Quote	SO/Quote --> If the user enters an order quantity of 0, then Purchase Order checkbox should be unchecked."
24.0122a	01/25/24	30948	Bug	Reports	Purchase Order Report > Data shows under wrong column.
24.0122a	01/25/24	30168	Bug	Labels	On the Shipping and receiving screen (If have 2 diff part # in SAME BIN LOCATION. If Have item GM and item CH in the same bin location...Combined doesn't print those in the purchase order. (Report and Labels need to PRINT IN EXACT SAME ORDER: Bin, Item#, SO#) >The labels should be sorted in alphabetical order by bin
24.0122a	01/24/24	30942	Bug	Credit Memo	When returning 1 part out of 3 items on an invoice it creates an empty Credit memo. It did not bring over the selected item's return.
24.0122a	01/24/24	30943	Bug	Shipping and Receiving	To Print and Pick > The Combined Printing ticket on the 24.0102b is stuck on loading.
24.0122a	01/24/24	30944	Bug	Sales Order	SALES ORDER STATUSES: When manually changing the statuses on the line item, it reverts back to old status.
24.0122a	01/24/24	30945	Bug	Shipping and Receiving	When the user navigates to the dispatch screen, the page stays blank and they are unable to proceed.
24.0122a	01/24/24	30939	Bug	Credit Memo	When a credit memo is deleted from the detail screen, the navigation takes the user to the older credit memo list screen instead of the invoice/credit memo list screen.
24.0122a	01/24/24	30367	Bug	Sales Transactions	All transaction--> delete--> "Reason for delete" popup not working properly.
24.0122a	01/24/24	30924	Bug		TRIPLE CHECK TO MAKE ALL AREAS OF SYSTEM DOES NOT ALLOW INCORRECT PRICES AND/OR DISPLAY COSTS IF USER DOES NOT HAVE PERMISSION. 1-->User cannot view Costs, Markup%, and Gross Profit (Gross Profit (Changed) 2--> Find Parts -> COST, Markup and GP% (Removed) 3--> Item Details -> Dashboard -> Profit Details section (Removed) 4--> Item Details -> Stock -> Cost, Additional Cost (Removed) 5--> Item Details -> Vendor-> Vendor Cost (Removed) 6-->Others (Pending)
24.0122b	01/23/24	30941	Bug	Sales Order	Shipped via --> When updating a shipped via on SO, popup appears asking if the user wants to update the delivery fee. However, the tab and enter functions are not working.

[illegible]

					on the credit table application. It is not functioning properly
	03/26/24	31259	Bug	Credit Memo	The newly added Credit Memo's customer credit is not shown on the invoice payments.
	03/14/24	31220	Bug	Purchase Order	Restrict the "Backorder PO" button when the user receives the line items on PO.
	03/14/24	31221	Bug	Replenish Stock	Intercompany transfer --> When the user selects additional criteria, they receive an undefined error message.
	03/14/24	31222	Bug	Customer	When creating a transaction, the customer's tax code keeps changing. To remove the existing tax code on the customer.
	03/14/24	31223	Bug	Tax Codes	Settings-->When the user changes the "tax code creation method" in settings, an undefined error is displayed.
	03/14/24	31224	Bug	Log Out	When the user signs out, they are redirected to a blank page instead of the sign-in page..
	03/12/24	31210	Bug	Purchase Order	List and special order margin values are not updating properly on line items.
	03/12/24	31209	New Feature	Invoice	payments--> QBO sync check-boxes are not updated automatically when making a partial payment using apply for customer credit on an invoice.
	02/21/24	31098	Bug	Replenish Stock	24.0122c PAST SALES HISTORY >Giving incorrect Qty Needed Items with backorders are not appearing on the table. Examples are sent in GC.
	02/21/24	31094	Bug	Sales Order	24.0122c SO Status >After splitting the item with a backorder, all line items are in To Print and Pick. Clicked save and submit the line item with backorder did not update to Waiting to be purchased.
	02/23/24	31112	Bug	Shipping and Receiving	(24.0122c) and d version SHIPPING AND RECEIVING SCREEN >Stuck on loading screen.
	02/13/24	31052	Bug	Purchase Order	The "Auto link sales order" feature is not functioning properly
	02/13/24	31053	Bug	Sales Order	When the user enters a quantity of 0 while adding an item, the status changes from "New" to "To print & pick". It is not possible to change the status to empty values.
	02/16/24	31073	Bug	Credit Memo	User unchecks the 'To Sync' button, the button turns red. But when mouse pointer hovers over the save button, it turns blue immediately even if user does not click yet. If you click the save button, and refresh, the 'to sync' button is still checked because it did not save properly.
	02/19/24	31083	Bug	Sales Order	Freight charges-->User creates multiple sales orders with the same date and freight charges are applied.
	02/19/24	31084	Bug	Invoice	Payments--> Unable to apply partial customer credit on invoice payments. If the user enters a partial amount, the full amount will be applied automatically.
	02/19/24	31085	Bug	Sales Order	When the user receives a Quantity from a Purchase Order using an auto-ship function, the line item statuses are not updated properly.
		31198	Bug	Credit Memo	0122i > Allow to creation of a credit memo for unshipped items from invoice.
		31199	Bug	Sales Order	0122i > We should restrict adding a line item, after creating a sales order.

					invoice & SOBO from SO.
		31195	Bug	QBO Sync Center	0122i > When the user clicks "Turn On QuickBooks Online (QBO) syncing" checkbox. it shows undefined error to the u
		31194	Bug	Credit Memo	0122i > When the user saves the CM, it shows QBO sync er "Missing QuickBooks Online Settings.". but the QBO setting correct and connected.
		31196	Bug	Sales Order	0122i > Added Inventory items bin and location are not upd properly in line items.
	02/05/24	30779	Bug	Find Parts	SO -->SOBO-->When the user alters a Qty order Net Price Unit price back into item list price.
	02/05/24	31006	Bug	User Security	Empty lines in the default user security group table are sho without security level, screen name, and screen category.
	01/29/24	30982	Bug	Reports	Item--> Issues - The "INVENTORY COUNT SHEET (BY CATEGORY / SUBCATEGORY WITH FIXED BIN LOCATIONS)" report displays items without bin locations. - The "INVENTORY COUNT SHEET BY BIN LOCATIONS" report is showing values without bin locations. - The "INVENTORY COUNT SHEET BY BIN LOCATIONS" report displays "SERVICE" and "NON INVENTORY" type it on the inventory report. - The "INVENTORY VALUATION - CURRENT (CATEGORY SUB-CATEGORY)" report is showing invalid data..
	01/29/24	30981		All Trasactions	On manual tax code, when manually selecting a different Sh customer after Bill to customer, the tax code that was manu added is removed and replaced by a zip code-based tax cod
	01/29/24	30970	Bug	Sales Order	Sales order -->When a user makes edits or deletions to exis sales orders, the header status is not updated correctly.
	01/24/24	30962	Bug	Purchase Orders	Online item spec order price, additional cost, and duty field working on the purchase order.
	01/26/24	30959	Bug	Find Parts	Unable to add net price and discount simultaneously. If the adds values on both fields, net price goes back to zero.
	01/23/24	30933	Bug	Customer	add new-->In one source, payment methods added by custo do not reflect in QBO after syncing.
	01/23/24	30933	Bug	Purchase Order	QuickBooks --> when the user creates a PO(QBO) and bill a Paid. After syncing with OneSource those bills and Qty rece not update properly.
	01/24/24	30937?	Bug	Sales Order and Quote	If the user enters an order quantity of 0, then the Purchase Order checkbox should be unchecked.