

2025 Q3/Q4 - 1place Master Version (Changes Log)

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2025 Q3 & Q4 Version Changes Log

Stay up to date with the latest improvements, fixes, and new features in 1place.

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	SR-1343

			issues.	
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
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	SR-1177

			been relabeled to “ Pick Up Date ” for clarity.	
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
25.1211	YES	Scanner	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 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 functioning as expected.	SR-91
25.1208	YES	Sales Order	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	Sales Order	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	SR-90

			PO is received, the Distribute Costs button is disabled.	
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		Sales Order	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 Receiving	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 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.	251201-1
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.	251201-1
25.1203		Item Catalog	BUG FIX: Fixed the screen freezing when changing the Catalog Source between Partslink and Customer .	
			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	

25.1203		Purchase Order	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-I
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-I
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-I
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-I
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-I
25.1201	YES	Purchase Order	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 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-I
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-I
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-I
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-I
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 $(QtyInStock \times Cost) + (QtyInStock \times AdditionalCost)$, for any selection of warehouse, category, or all warehouses/categories .	251124-I
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-I
25.1127		Sage Integration	UPDATE: Added Export to Excel functionality for AP Bills, Sales Revenue, Inventory Transfers, and Adjustments .	251118-I
25.1127		Sage Integration	UPDATE: AP Bills : Enabled column sorting for easier data management.	251118-I
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	251126-I

			in scan version 25.1127.	
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-I
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-I
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-I
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-I
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-I
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-I
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-I
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-I
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-I
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-I
			UPDATES: Memorized the Start Date and End Date between sessions. Fixed Excel export to use the correct date range .	

25.1124	YES	AR Aging Summary	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.	251106-1
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.	T25101601
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.	251118-1
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.	T25101601
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.	
25.1121	ISSUE	Scanning Report	BUG FIX: Resolved an issue where the Summary report incorrectly showed no Pick to Cart – Order Transfer entries. 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.	251118-1
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.	251117-1
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 .	251119-1 251119-1
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.	251118-1
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.	251118-0
25.1120		AR Receive	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 .	251118-1

25.1120		Payments	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.	251119
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- N251101
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 .	251023-1
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-
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	251023-1

			version 25.1119 and later.	
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.	251029-1
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 .	251115-1
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.	251113-0
25.1114		AR Statements	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 -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	251029-1
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.	251113-0
			BUG FIX: Fixed an issue where transfers were not moving correctly	

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.	251113-0
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.	251111-1
25.1112	YES	AR Receive Payments	UPDATE: Updated the display so that Credits and Unapplied Amounts now appear as negative numbers for clarity.	251111-1
25.1112	YES	AR Receive Payments History	UPDATE: Added the Batch # field to the export data for better tracking and reporting.	251111-1
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 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	251111-1
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.	251111-1
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.	251110-1
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 .	251110-1
			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	

25.1111	YES	AR Receive Payments History	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-H
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.	Mu251101
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., next page of 100, etc.).	251104-H
25.1107		AR Receive Payments	BUG FIX: Fixed issue where some past paid Invoices and Credits were incorrectly appearing on the combined screen.	251106-H
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-H
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-H
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	25.1107

			Removing: Payment #, Rec, Amt Paid, Amt Received, AR Rec -Renaming: Ck/Card #/CM → Pmt # Restored the Invoice Totals section to its original location.	
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-I
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-I
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-I
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-I
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-I
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-I
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.	N25103:01
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.	N25110:01
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 .	251023-1
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.	251029-1
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.	251029-1
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.	251028-1
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.	251028-1

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.	S25103003
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: $(\text{Stock.Cost} + \text{Stock.AdditionalCost}) \times \text{Stock.QtyInStock}$ 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.	251029-1
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.	M25103002
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.	S25103002
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.	251022-1
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.	251023-0
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.	251027-1
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.	251028-1

			and other rules.	
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- 251023- 05a
25.1029		Descartes Integration	UPDATE: Added table creation and backend functionality for driver 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- 251028- 05a
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- 251023- 05a
			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	

25.1029		Sales Order	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-I
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-I
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-I
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-I
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-I
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.	251023-1
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 .	251023-0
25.1024		Customer Portal	BUG FIX: Fixed issues logging in to the customer portal with the error	251023-0

25.1024		Customer Portal	message "There is a problem with your login. Please contact.....".	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.	T25102302
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.	T25101601
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.	251023-1
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.	
			BUG FIX: Quotations / Quotations by Customer : Fixed stored procedure issue where WarehouseId was being passed as null.	

25.1023		Reports	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-H
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-H
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-H
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-H
	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-H
25.1022	YES	Receive Payments History	BUG FIX: Updated popup display logic so Credit Memos now appear as negative values.	251015-H
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-H
25.1022		Scanning Report	UPDATE: 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-I
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-I
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-I
		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:	151014-I

			"Cannot modify this Credit Memo because it is in a Financial Period that is CLOSED ."	
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-I
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-I
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-I
			BUG FIX: Fixed an issue where pricing templates and custom pricing by category were not applying the correct price-level discounts.	

25.1013		Customer Pricing	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.	251008-1
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-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.	251008-1
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.	251008-1
			UPDATE: When the user changes the date range , the Preview button	

25.1008	YES	Customer Statements	now turns blue and changes its label to Recalculate Totals. Clicking Recalculate Totals refreshes and redispays 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.	M2509101
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.	M2509103
25.1007		Admin	UPDATE: Added functionality to set the 1place version for a Company and/or its Users when operating in Parent Company mode.	251002-1
25.1007	YES	Purchase Order	UPDATE: Added " Date Received " as an optional column available for display in the PO list views.	251004-1
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.	251004-1
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.	
			BUG FIX: Resolved multiple issues in Invoice/Credit reports to ensure accurate data and consistent totals:	

25.1007		Reports	-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.	M2509101
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-I
25.1006	YES	Data	UPDATE: Added a “Download to Excel” link for each section of the 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-I
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-I
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-I
			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”	

25.1003		Customer Statements	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.	
25.1001		Customer Statement	UPDATE: Added a new dropdown 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. <i>Still not working.</i>	
25.0930		Customer Statements	UPDATE: Customer Statements – Updated to remove invoices and line items with \$0 balances , ensuring cleaner and more accurate statements.	250925-0
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-
			UPDATE: Updated the Order search so that if the Order # cannot be	

25.0930	ISSUE	Shipping and Receiving	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.	250926-1
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.	250929-1
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	250926-1
25.0929	YES	Quick Search	BUG FIX: Improved performance for invoice searches to reduce delays when opening results and loading invoice details.	250926-1
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 25.0929	YES	Scanner	BUG FIX: Removed the " Set Picking Order " button and related user security option. Updated " Manage Bins " to " Manage Bins & Zones ." 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.	250926-1
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.	250926-1
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.	250917-1
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.	
25.0925	YES	Item Price Level	BUG FIX: Resolved multiple issues with Item Price Levels . Dropdown 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-I
25.0925		Integrations	BUG FIX: Update the integration to detect and correct invalid dates before saving them, ensuring proper delivery dates are recorded.	250924-I
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-
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-I
Scan 25.0926		Scanner	BUG FIX: Adjusted the logic for handling inspected items: Good for Stock sets InvoiceLineItems.ItemStockStatus to Returned . Not Good for Stock - Give Refund and Not Good for Stock - Do Not Give Refund both set InvoiceLineItems.ItemStockStatus to NotReturned .	
			BUG FIX: Cart to Storage Updated the process to correctly display	

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-I
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-I
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-I
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-I
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 25.0924	YES	Scanner	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. 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.	250922-1
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.	250922-1
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	250922-1
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.	250922-1
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 .	250918-1
25.0923	YES	Reports	UPDATE: AR Aging Summary Report - Replaced As of Date with Starting Date and Ending Date fields for date range filtering.	250922-1
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.	M2509101
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	250902-

			time whenever a status is changed	
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-I
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-I
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-I
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-I
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-I
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-I
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.	250919-1
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.	250919-1
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	250918-1
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-
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-
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 Sales Order is generated through integrations.	250915-
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-

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.	250915-1
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-
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.	250912-1
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	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)	

		Payments	-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 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 proper data isolation and security.	250912-1
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.	250912-1
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.	250912-1
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.	250912-1
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	250912-1
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.	250910.0
			BUG FIX: When applying a payment with a discount , the system now	

25.0912	YES	Receive Payments	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.	250911-1
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 Item Transaction Log.	
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.	250911-1
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.	250912-1
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.	250910.0
25.0911	YES	Receive Payments	BUG FIX: Resolved an issue where receiving payments for invoices across multiple warehouses caused GL Out of Balance errors .	250910.0
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-

			tracking.	
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.	250911.0
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.	250910.0
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.	250910.0
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.	250910.0
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-
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-
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-
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.	250903-01
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-
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-
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-
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	250909-

			all records are displayed correctly.	
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.	
25.0909	YES	Cash Management	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: 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-
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 25.0909	YES	Scanner	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 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 .	250908-1
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 they are using.	250903-
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-
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.	50903-1
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-
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-
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	

25.0904	YES	Item Detail	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-
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: <i>"Return Authorization # _____ was created."</i>	250903-
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-
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-
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. <i>The column Invoice Batch Print is not visible on the To Dispatch screen.</i>	
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	250903-

		Accounting	"Auto create Invoices..."	
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-
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-
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-
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-
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-
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-
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-
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-
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-
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. "	
25.0902	YES	Shipping and Receiving	UPDATE: The Shipped Via dropdown filter and Select All checkbox 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.	
			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:	

Portal 25.0901	YES	Customer Portal	BUG FIX: The Search screen now displays the following information: -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.	

Upcoming Updates, Bug Fixes and Features

Here's a preview of what's coming in the next release:

UPDATING SOON.

Current Release

These updates are now live:

UPDATING SOON.

Previous Releases

Highlights from earlier versions:

UPDATING SOON.
