2026 1place Master Version Changes Log

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Stay up to date with the latest improvements, fixes, and new features in 1place. These release notes include details about **new features**, **enhancements**, **bug fixes**, and **known issues** for each version.

Some versions are designated as **Production Releases**. A Production Release is a version of 1place that has completed our automated and manual testing process and is intended to provide a stable and tested version of the system. New features are not added to a Production Release, which helps reduce the possibility of new bugs being introduced through feature changes.

To make these releases easier to identify:

- **Green highlighting** indicates fixes included in weekly minor releases for Production Releases.
- **Red highlighting** indicates known issues that users may encounter when updating to or using a particular version.

Version 26.1001 –Latest Release

Version #	QA Tested	Module	Description	Support Request #
26.1124	YES	**Customers**	**UPDATE:** Added a setting under **Settings > Customer** to configure default communication methods for new customers. When defaults are configured, users must enter a **Contact Name** and **Email Address** for each configured communication type on the **Communications** tab before creating the customer.	SR-5461
26.1119	YES	**Reports**	**BUG FIX:** Fixed an issue that prevented the **Sales Tax Liability** report from running or downloading in some cases.	SR-5549
26.1119	YES	**Scanner**	**UPDATE:** On the **Scanner Settings** screen, **Save** turns red and **Close** changes to **Cancel** when there are unsaved changes. Selecting **Cancel** restores the last saved settings and keeps the screen open. After saving, **Save** turns white and **Cancel** changes back to **Close**.	SR-5299
26.1117	YES	**Customer Portal**	**BUG FIX:** Fixed an issue on the **Manage Users** screen under **Customer Details > Customer Portal** where **Send Invite** could fail despite correct email settings, and **Resend** could report that an invitation was sent without sending the email.	SR-5486
26.1116	YES	**Invoice**	**UPDATE:** Added the **Position Totals and Payment Details at the Bottom of the Final Page** checkbox to **Invoice3 settings**. When enabled, the invoice PDF places both sections near the bottom of the final page for single-page and multi-page invoices.	SR-5245

26.1116	YES	**Item Details**	**BUG FIX:** Fixed an issue in **Item Vendor List Settings** where some selected columns did not appear in the table. The list now retains column selections and displays the selected fields.	SR-5427
26.1116	YES	**Scanner**	**UPDATE:** Updated the Scanner's purchase order receipt email notifications to display **1place** as the product name.	SR-5496
26.1116	YES	**Shipping and Receiving**	**UPDATE:** Improved loading performance on the **Invoice & Dispatch** screen under **Shipping & Receiving**, particularly when many tickets are displayed.	SR-5487
26.1116	YES	**User Security**	**BUG FIX:** Fixed an issue that prevented **users imported** as inactive customers from being activated in **1place**. These users can now be changed from **Inactive** to **Active** so they can sign in.	SR-5373
26.1112	YES	**Item Detail**	**UPDATE & BUG FIX:** Labels printed from the **Item Details** screen now use the **Item Number** for the barcode instead of the PartsLink number. The Item Number appears above a smaller barcode, and users can adjust the font size of each label field independently.	SR-5310
26.1112	YES	**Print Settings**	**UPDATE:** Added print defaults for **Purchase Order** and four actions under **Shipping & Receiving > To Dispatch**: **Invoice Selected Orders**, **Dispatch 1 Driver**, **Dispatch All Drivers**, and **Edit or Reprint Manifest**. These actions now apply the defaults configured under **Settings > System > Printing**. If no specific defaults are set for manifest reprints, 1place uses the existing print defaults.	SR-5050
26.1112	YES	**Reports**	**BUG FIX:** Fixed an issue in the **Item Purchasing – Min/Max** report where columns selected through the gear icon, such as **Item Notes**, were reset each time the report was reopened. The report now retains the selected columns.	SR-5474
26.1112	YES	**Shipping and Receiving**	**BUG FIX:** Fixed an issue in version 26.1111 that displayed an "Undefined" error when opening the **Invoice & Dispatch** screen.	SR-5479
26.1111	YES	**Item List**	BUG FIX: Fixed an issue on the **Item List** screen where the **Include Inactive checkbox** did not save correctly and changing it could affect other users in the same company. The setting now saves separately for each user.	SR-5423
26.1111	YES	**Item List**	BUG FIX: Fixed an issue on the **Item List** screen where the **Include Inactive** setting did not save for newly created users. The setting now saves correctly, and inactive items appear when Include Inactive is selected.	SR-5421
26.1111	YES	**Scanner**	UPDATE: On the **Delivery > Receive Payment > Review Balance** screen, drivers can now enter **discounts** as **dollar amounts** or **percentages**. Dollar discounts display a $ sign, and the Recalculate button changes color when a discount is entered. The payment amount now displays two decimal places.	SR-4339
26.1111	YES	**User Security**	**UPDATE:** Added two permissions on the **User Security** > **Do not Allow** tab to restrict users from viewing or editing gear options. Restrictions can be set separately for forms and reports.	SR-5460
26.1110	YES	**Catalog Management**	BUG FIX: Increased the **timeout** for **Add New Items on the Catalog Item**s screen from 30 seconds to 200 seconds, giving longer requests more time to complete.	SR-5329
26.1110	YES	**Item Details**	BUG FIX: Fixed an issue in the **Upload Pictures from a Folder** workflow where a connection interruption could cause a large batch of item pictures to stall and fail when saving.	SR-5354

26.1110	YES	**Sales Order**	UPDATE: Changing the **Bill To or Ship To** on the **Quote or Sales Order** screen now prompts users to **recalculate prices** for all line items, along with the order's subtotal and taxes.	SR-4789
26.1110	YES	**Scanner Reports**	UPDATE: Improved loading performance for the **Picking and Put Away (Detail)** report on the **Scanning Reports** screen. When the report contains more than 5,000 log entries, users can download the results directly to Excel without waiting for them to load on screen.	SR-5171
26.1109	YES	**Item Details**	**UPDATE:** Added a **Default Vendor** checkbox to the **Vendor** tab on the **Item Details** screen. Selecting a vendor as the default moves it to the top of the item's vendor list. The **Vendor** filter on the **Item Purchasing – Min/Max** report now shows only items for which the selected vendor is the default.	SR-5086
26.1106	YES	**Scanner**	BUG FIX: Fixed an issue that could display a **blank white screen** when opening **Pick to Cart.** Testing with the affected user's account and an administrator account confirmed that both **Pick to Cart** and **Cart to Staging** loaded successfully.	SR-5420
26.1105	YES	**Find Parts**	UPDATE & BUG FIX: Added a **clickable item image thumbnail** beside the category filters on the Find Parts screen. The thumbnail opens the **full image** and updates when an item is selected with a mouse click or the arrow keys. If no image is set in **Item Details**, the preview uses the **default image** from the **Pictures tab**. Fixed an error that prevented some uploaded images from displaying and improved Special Notes loading performance when selecting an item.	SR-4637
26.1105	YES	**Reports**	BUG FIX: Fixed an issue where users' **Favorite Reports** were not being saved correctly or disappeared from the **Favorites list**. This recurring issue caused saved favorites to be deleted for all users. Favorite Reports should now save and remain available as expected.	SR-5045
26.1105	YES	**Sales Integration**	**UPDATE:** Added the **Only Include Items where eCom flag = True** checkbox to the CCC, PartsTrader, and OPS settings screens. When enabled, the selected integration includes only items with the eCom flag enabled.	SR-4367
26.1104	YES	**Import Wizard**	BUG FIX: Fixed an issue where some **invoices and credit memos** remained open even though the **Import Wizard** reported a successful payment import. Updated batch processing to handle large payment imports more efficiently.	SR-5090
26.1104	YES	**Reports**	UPDATE: Added a **Region column**, **Region filter**, and **Group By Region** option to both **Sales Tax reports**, using the **Ship To Customer's Region**. Updated the reports to combine tax jurisdictions within the same county into a county-level summary.	SR-5100
26.1104	YES	**Scanner**	UPDATE: Improved processing speed on the **Inspect Returns** screen after users select **Good for Stock** or **Not Good for Stock**. During testing, the **Good for Stock** action completed in a few seconds.	SR-5322
26.1104	YES	**Scanner**	BUG FIX: Fixed an issue where an item image could prevent the **Cart to Staging** page from loading. Testing confirmed that the page now loads for multiple users, including a previously affected user.	SR-5424
26.1104	YES	**Item Details**	NEW FEATURE: Added **Item Label Printing** with eight selectable field options. Users can choose which fields to include, and the system automatically arranges the label layout based on their selections.	SR-3989

26.1103	YES	**EBizCharge Integration**	UPDATE: Added a **Type** column to **Transaction History** and included **Sales Order payments**, including those made through the **customer portal**. Added a **magnifying glass icon** to view details for Sales Order payment transactions.	SR-5357
26.1103	YES	**Find Parts**	BUG FIX: Added a **progress indicator** when creating **bulk orders** to show users that the request is being processed. This helps prevent repeated clicks on the **Add to Sales Order** button while the system is working.	SR-5370
26.1103	YES	**Import & Export**	BUG FIX: Fixed an issue where an error popup displayed " **Null**" instead of a meaningful error message when an **export** failed.	SR-4166
26.1103	YES	**Item List**	UPDATE & BUG FIX: Fixed missing columns in the Entire List download so both Current Page and Entire List exports include the user-selected columns. Added a progress bar during Excel file generation to show that processing is ongoing. Large lists may take approximately two minutes to generate and download.	SR-5075
26.1103	YES	**Purchase Order**	BUG FIX: Added the **green Save button** to allow users to **save resized columnsettings** for all users, consistent with Quotes, Sales Orders, Invoices, and Credit Memos.	SR-5139
26.1103	YES	**Scanner**	**BUG FIX:** Fixed an issue in **1place Scan** where picking accepted only one unit of a part even when the sales order requested multiple units. The scanner now accepts the full ordered quantity, and the **Cart to Staging** screen and weekly picker dashboard reflect the correct pick counts.	SR-5323
26.1102	YES	**Print Labels**	UPDATE: Added a **Show the Report Header** on **Every Page setting** to the Invoice, Invoice2, and Invoice3 layouts and all picking ticket formats. Picking tickets also include an option to display the company logo, helping warehouse staff identify which company each ticket belongs to.	SR-5047
26.1102	YES	**Scanner**	BUG FIX: Fixed an issue on the **Assigned to Me** screen under **Shipping > Picking** that could show picking assignments from a warehouse the user wasn't assigned to.	SR-5258
26.1030	YES	**Auto Job**	**BUG FIX & UPDATE:** When an Auto Job is deleted, its associated logs are now removed first. The **Job Summary** on the **Auto Jobs** screen is now resizable so users can see more jobs at once.	SR-5333
26.1030	YES	**Scanner**	UPDATE: Users can now **select or unselect multiple delivery routes** at the same time when **assigning orders** for picking.	SR-5340
26.1029	YES	**Item Details**	BUG FIX: Fixed an issue in versions 26.1015 and 26.1022 where the **Pictures tab** was missing from the Item Detail screen. The tab is now available to all users across all versions.	SR-5327
26.1029	YES	**Sales Tax**	BUG FIX: Updated **tax exemption** handling to prevent **tax** from being charged to customers marked as **Tax Exempt**. Users can no longer assign a **Sales Tax Code** while **Tax Exempt** is checked, and any existing **Tax Code** is automatically cleared when the customer is marked as **Tax Exempt.**	SR-5272
26.1028	YES	**EBizCharge Integration**	BUG FIX: Fixed an issue where selecting a **credit card** from the dropdown could populate another card's details when multiple cards shared the same **last four digits**. The selected card now populates the c**orrect name**, **expiration date**, and **ZIP address**.	SR-5305

26.1028	YES	**Scanner**	**UPDATE:** Added a per-user **Allow user to auto assign Orders** setting so pickers can select orders and assign them to themselves in **Pick to Cart**. The selection screens show order summaries, support filtering across all displayed columns, and update the total number of items to pick as orders are selected. A confirmation displays the number of selected orders and items before assignment. Available for **Customer Pickup,Single Order, All Orders**, **Delivery Route**, and **By Warehouse Zone**.	SR-5116
26.1027	YES	**Customer Portal**	BUG FIX: Fixed issues that could cause the portal to stop responding when users changed the **number of items per page** or leave users stuck before **signing in** after resetting their password.	SR-4344
26.1027	YES	**EBizCharge Integration**	BUG FIX: Fixed an issue where a **dding a credit card** from the **Invoice Payment** screen incorrectly recorded an **Email Pay** payment.	SR-5279
26.1027	YES	**General Sales Settings**	BUG FIX: Fixed an issue that prevented users from adding a payment term named **Weekly** under **Settings > Sales > General > Payment Terms**.	SR-5200
26.1027	YES	**OPSTrax Integration**	BUG FIX: Fixed an issue in version **26.1022** where **OPSTrax Invoice Posting** showed progress even though no invoices were posted. The configured start date excluded all retrieved invoices from posting.	SR-5287
26.1027	YES	**Shipping and Receiving**	**BUG FIX:** Fixed an issue where applying the **Shipped Via** filter on the **Invoice & Dispatch** screen in **Shipping & Receiving** caused an "Undefined" error.	SR-5495
26.1026	YES	**Descartes**	BUG FIX: Fixed an issue where **Return Reason Codes** were not being uploaded to **Descartes** for a certain POD.	SR-5229
26.1026	YES	**Descartes**	BUG FIX: Fixed an issue where importing **invoice line items** could send invoices to **Descartes** without user confirmation. When the Descartes integration is enabled, 1place now asks whether to sync the imported invoices. The invoices are sent to Descartes only if the user selects Yes.	SR-4971
26.1026	YES	**Reports**	BUG FIX: Fixed an issue where **invoice and credit memo totals** were split because the report grouped transactions by the **Company Name** recorded on each transaction. The report now groups transactions by **Customer ID** to ensure totals are correctly consolidated for each customer.	SR-5130
26.1026	YES	**Scanner**	BUG FIX: Fixed an issue preventing users from **picking items** stored in **ON DOCK.** The existing functionality to remove spaces from bin locations remains in place, with an exception for ON DOCK so the bin location is recognized correctly during picking.	SR-5251
26.1023	YES	**Invoices**	BUG FIX: Fixed an issue where creating SR-5154from the SR-5154 screen could result in duplicateSR-5154. The process now checks whether a SR-5154 is already linked to an existing invoice line and skips it to prevent duplicates.	SR-5154
26.1022	YES	**Auto Job**	**UPDATE:** Added an **Auto Job** for **OPSTrax** that automates posting invoices and credits, similar to the existing CCC invoice posting workflow.	SR-4121

26.1022	YES	**Bin Management**	UPDATE: Added a keyword search to the **Define Staging Bin** screen in **Bin Management** so users can filter across all columns. Pressing Enter moves to the next field or, from the last column, to the next row. Replaced Save with Close and removed Cancel. Closing the form with Close or X automatically discards incomplete rows.	SR-4846
26.1022	YES	**Import & Export**	BUG FIX: Replaced **OLE DB** with **ExcelDataReader** for Excel imports to support 64-bit application mode. Verified that imports work with 32-bit mode disabled in IIS, reducing reliance on 32-bit functionality.	SR-5184
26.1022	YES	**Import Wizard**	UPDATE: Improved the **Item List import process** to provide more detailed results, including the number of **inserted**, **updated**, and **failed records**. Users can now download an **Excel file** containing the import results and retry failed records. This helps identify missing items and resolve import discrepancies more easily.	SR-5103
26.1022	YES	**Item Details**	BUG FIX: Resolved an issue where **inventory stock records** were created with a **NULL warehouse value**, preventing affected items from being sold.	SR-5025
26.1022	YES	**Item List**	UPDATE: Added an **Is Not Empty** filter option to the **Custom List Tab Wizard**, allowing users to filter records with non-empty fields across all **Custom Lists.**	SR-1713
26.1022	YES	**Purchase Order**	BUG FIX: Resolved an undefined error when creating **Purchase Order** from **Sales Order (SOPO)** and the **Error Message Log**. Error messages can now be searched by **ID**, and the log displays messages from **all users** within the company. Pressing **Enter** in the search field also triggers the search.	SR-5032
26.1021	YES	**Purchase Order**	BUG FIX: Resolved an issue where imported **Purchase Orders** that had not yet been received could not be edited or marked as received. Users can now edit the PO, manually mark items as received on the **Purchase Order screen**, or receive items using the separate **Scanner** tool.	SR-5104
26.1021	YES	**Sales Order List**	UPDATE: Improved **search functionality** by allowing users to search the **Sales Order list** by **Comments**. The **Sales Order Items list** can now also be searched by **Item #**, **Item Description**, and **Company Name**.	SR-4644
26.1021	YES	**User Security**	BUG FIX: Fixed an issue where **new users** assigned to multiple companies were missing company mappings and couldn't access all of their assigned companies.	SR-5172
26.1020	YES	**Catalog**	UPDATE: Renamed the **PType setting** to **Set List Price % off OEM List Price** and added an **informational tooltip** explaining that setting it to **0** sets all **List Prices** for that **PType** to **$0.00.** The **duplicate-items table** now displays below the **checkbox** when **Make Additional (Duplicate) Items** for parts with different Quality or Grade is enabled.	SR-3807
26.1020	YES	**Import Wizard**	BUG FIX: Resolved an issue where Sales Order imports could get stuck at 100% when the customer prefix number contained a text value. For Purchase Order imports timing out, increasing DTU capacity may help while import performance improvements are being worked on.	SR-5178
26.1020	YES	Item Details	UPDATE**:** The item picture on the **Item Details** tab is now view-only. Hovering over it shows the standard pointer, and clicking it no longer opens the file picker. Removed the "Click to add new Logo" tooltip from the placeholder shown when an item has no picture.	SR-5148

26.1016	YES	**Auto Job**	BUG FIX: Fixed an issue where **invoices** were not being sent as scheduled. Updated the **email-sending workflow** to use a **Service Bus** trigger for faster processing. The job now sends invoices only, excluding Credit Memos, and includes a **Run Job Now** option so users can manually run and test the job.	SR-5034
26.1016	YES	**Scanner**	UPDATE: Added the **item description**, **return code description**, and a **link** to the item picture on **Inspect Item to Return (2 of 2)** to help users identify returned items during inspection.	SR-4821
26.1016	YES	**Scanner**	BUG FIX: Fixed an issue where approving a **credit authorization** displayed an error on the first attempt. Users previously had to exit and reopen the screen before the credit could be approved successfully.	SR-5128
26.1015	YES	**Auto Job**	UPDATE: Added the **Inventory - Snapshot Sales & Qty's Auto Job** to record **daily inventory snapshots** at a user-configured time. The job saves the on-hand quantity for every active **Inventory item** in each **warehouse**, including warehouses with zero stock, in the new **ItemStockHistorical** table, using the current date. The historical data can be used to support purchasing decisions.	SR-4817
26.1015	YES	**Find Parts**	UPDATE: Improved the performance of the **Make and Model dropdown lists** on the **Find Parts screen** to reduce delays when using a version for the first time. The lists now load more efficiently, and the **Category list** refreshes as needed when the **Year, Make, or Model** selection changes.	SR-4809
26.1015	YES	**Receive Payment**	UPDATE: Improved error handling on the R**eceive Payment**s screen when the selected **warehouse** is missing required default values in **Sage** settings. The system now provides a message explaining the configuration issue and how to resolve it, instead of displaying a generic Bad Request error.	SR-5091
26.1015	YES	**Sales Order**	BUG FIX: Fixed an issue where parts could be transferred to the wrong warehouse when processing **Sales Orders**. Affected bin locations have been corrected as well.	SR-5175
26.1013	YES	**Purchase Order**	BUG FIX: Fixed an issue where downloading the **Purchase Order** list did not include all columns displayed on screen. The downloaded file now includes all visible columns from the list.	SR-5010
26.1013	YES	**Reports**	UPDATE: Added **Special Notes** as a column in the **Sales Orders - Back Orders** report, allowing users to view special notes directly in the report.	SR-5046
26.1012	YES	**Customer Portal**	UPDATE: Improved **search performance** to reduce delays after selecting a **Make** during the first portal login. Removed the **side-search** option and added **color palette** settings for the entire l**eft navigation bar**. Color options that do not apply to the selected layout are now hidden when the search layout is positioned at the top.	SR-4657
26.1010	YES	**Find Parts**	UPDATE: Added a **When Sales Order is Created option** in **Find Parts settings**, allowing users to choose between **Create Order(s) and Open Order (default)** and **Create Order(s) and Auto Submit**. This ensures all **Sales Orders** created when line items are split into multiple orders can be submitted without needing to open each order individually.	SR-5049
26.1008	YES	**Customer Portal**	BUG FIX: Fixed an issue where the **Customer Portal's Find Parts** screen could become unresponsive and display no parts due to processing a large number of category and subcategory records. Improved processing performance and completed the required portal configuration to ensure parts display correctly.	SR-4974

26.1008	YES	**Import Wizard**	BUG FIX: Fixed a timeout issue that caused the **Import Wizard** to get stuck at **Linking Transaction** with **Corresponding PaymentTerm(s)**. Improved performance by processing **Excel** data in batches when reading and inserting records into the temporary database.	SR-5017
26.1008	YES	**Invoices**	BUG FIX: Fixed an issue preventing **PartsMax** users from entering values in the **Freight/Other** field on invoices due to the **Save** button being disabled. Removed obsolete import-status validation so footer field editability is now determined solely by the user's current security permissions, regardless of whether the invoice was imported.	SR-4862
26.1008	YES	**Login**	UPDATE: Added the ability to **reorder company names** on the **login screen** by dragging and dropping them, allowing users to arrange companies in their preferred order.	SR-4842
26.1008	YES	**Reports**	UPDATE: Added the **Item Purchasing - Min/Max** report with **Vendor** and **Display** filters, plus a date range defaulting to the past 365 days through the current date. The report includes optional columns for item details, vendor information, Min/Max quantities, stock levels, sales, back orders, purchase orders, last PO details, expected delivery date and comments from the oldest unreceived PO, and Item Notes from the Special Notes field. The report supports downloading for further analysis and purchasing decisions.	SR-4977
26.1008	YES	**Sales Tax**	BUG FIX: Added a **Sales Taxes Last Updated date field** to display the actual date the **sales tax rates** were last updated, rather than the current date. The date is read-only for users and is also displayed on the **Tax Code Assignment** popup for reference.	SR-4177
26.1007	YES	**Invoices**	BUG FIX: Fixed an issue where the **invoice logo** and **company name** could disappear or fail to save when switching between companies. **Invoice Print Settings** now handle company **attachments** correctly, helping ensure invoices display the correct logo and company name.	SR-4877
26.1007	YES	**Print Settings**	BUG FIX: Fixed an issue where the **Display Logo setting** would reset to **No** when opening **Print Settings**. The setting now retains the saved value across **Invoices**, **Credit Memos**, **Purchase Orders**, **Quotations**, and **Sales Orders**.	SR-4970
26.1007	YES	**Print Settings**	BUG FIX: Fixed an issue where **Invoice Print Settings** could disappear or reset when switching between companies. **Invoice print settings** are now retained correctly when using the **Switch Company function**.	SR-4201
26.1006	YES	**Catalog Management**	**UPDATE & BUG FIXES:** Fixed issues where updating or importing **Sort Orders** could clear **catalog data** or remove **Part Types.** Imports now preserve **Part Types** omitted from the file and existing values for columns excluded from the spreadsheet. Added an **Add Part Type** button for manually creating **Part Types** with an optional **Sort Order.** The **1b export** now includes Min, Max, and Shippable, and the 1c import supports Shippable updates. **Added 1f** – **Export PType Category Defaults to Excel** and **1g – Import/Update PType Category Defaults from Excel to manage Part Type, Catalog Category, Catalog Sub-Category, Item Pricing Category, and PO Category defaults** for your company. Blank import cells retain existing defaults, new **Item Pricing Categories** are created automatically, and defaults fill only blank fields on the **Part Types** screen.	SR-4875

26.1006	YES	**Credit Memo**	BUG FIX: Fixed an issue where changing the returned quantity of a previously unreturned item on an existing **Credit Memo** did not create a new **Credit Memo Back Order a**s expected when the option was enabled. The fix ensures the system handles these changes correctly without unintentionally updating the original **Credit Memo** date and **Journal Entry** date.	SR-4772
26.1006	YES	**Customer Portal**	UPDATE: Added a new **Reports (& Audit Log)** section under Settings > Customer Portal, with separate tabs for Reports and Audit Log. The Reports tab includes three report types: **Sales – Best to Worst**, **Sales – Biggest Drop in Sales**, and **Login Abuse**, with filters for date range and customer selection. Reports display relevant customer sales, order, quotation, login, and engagement metrics, with configurable periods of 30, 90, or 365 days where applicable. Added sorting to highlight top-performing customers, declining sales, and potentially abusive login activity.	SR-4286
26.1006	YES	**Descartes**	BUG FIX: Updated the **Descartes integration** to prevent **invoices** from being automatically **re-uploaded** when edited. When a **Credit Memo i**s created, the **invoice** will sync to **Descartes** once; any subsequent invoice changes will only be uploaded when the user manually clicks the **Upload/Updateinto Descartes** button.	SR-4971
26.1006	YES	**Import Wizard**	BUG FIX: Improved **Import Wizard** performance for large data files by processing validation in smaller batches to prevent timeouts. Added a **progress bar** to display validation progress and improved the import process to handle large files more reliably.	SR-4866
26.1006	YES	**Invoices**	UPDATE: Added a **Unit Price** option under **Gear > Settings(Print)** to control whether the **Unit Price** column appears on printed invoices. When enabled, **Unit Price** is displayed between List Price and Discount on Invoice, Invoice 2, and Invoice 3.	SR-4966
26.1006	YES	**Item Details**	BUG FIX: Fixed an issue where items remained marked as **Reserved** after their associated **Sales Order Line Item** was deleted during **Purchase Order** creation from a **Sales Order.** This ensures the reservation status is correctly cleared so available items can be added to other Sales Orders.	SR-4593
26.1006	YES	**Sales Integration**	BUG FIX: On **Ecom Imports (Generic),** fixed an issue where the **Default Bill To/Ship To** customer drop-down list could freeze and fail to load the full customer list.	SR-4930
26.1006	YES	**Scanner**	BUG FIX: Fixed an issue where selected **Company Settings** for **1place Scan** were not being saved. **Settings** now remain selected after clicking **Done** and refreshing the screen.	SR-4951
26.1005	YES	**Customer Detail**	BUG FIX: Resolved an issue where clicking **Proceed** in the **Customer Merge Tool** did nothing. The **merge wizard** now opens correctly, allowing users to select a merge option, click Next, and choose the customer to merge into.	SR-4808
26.1005	YES	**Customer Detail**	BUG FIX: Resolved an issue where the customer list in the **Customer Merge Tool** did not filter correctly when searching by customer name. Search results now match the entered text.	SR-5001
26.1005	YES	**Receive Payments**	Update: Replaced the **Yes** and **No** buttons in the **Payment Date Change popup** with more descriptive labels to make the available actions clearer to users.	SR-4498

26.1001.01	YES	**Purchase Order**	BUG FIX: Fixed an issue that prevented users from creating **Purchase Orders** in version 26.1001.	SR-5023
26.1001	YES	**Invoice**	BUG FIX: Fixed an issue where the **Tax checkbox** on **Sales Order** line items was unchecked after the **Sales Order** was invoiced. The Tax selection is now retained correctly on the **Invoice**.	SR-4771
26.1001	YES	**Item Details**	BUG FIX: Fixed an issue where the Pictures tab was missing from the Item Details screen after switching between versions. The Pictures tab now remains available as expected.	SR-3680
26.1001	YES	**PartsTrader Integration**	BUG FIX: Fixed an issue where changing **PartsTrader Warehouse** field values could create duplicate entries. **Warehouse settings** now prevent a second save request from being submitted while the current save operation is still in progress.	SR-4797
26.1001	YES	**Print Setting**	BUG FIX: Fixed an issue where the **Default Printer** field under **System > Print Settings > Advanced** was not displaying available **printers**. Users can now select from the printers available on their computer. (Download printer file on Advanced print option required)	SR-4919
26.1001	YES	**Scanner**	BUG FIX: Fixed an issue where users **zoomed in** on scanner devices could not scroll to the bottom of the screen to select **Good for Stock** during return inspection.	SR-4916

Version 26.0701 –26.0930

Version #	QA Tested	Module	Description	Support Request #
26.0930	YES	**Purchase Order**	BUG FIX: Resolved an issue where the **Qty on Purchase Order** value in the **Item Details Screen** did not update after **importing line items** into a **Purchase Order** and clicking **Save**.	SR-4810
26.0930	YES	**Reports**	BUG FIX: Fixed incorrect values and total counts in the **Invoices/Credits by Item, Invoices/Credits by Item (w/ Item Qtys)**, and **Invoices/Credits by Line Items** reports. Added **Sales Date, Shipping Date,** and **Delivery Date** fields, along with improved Excel exports that include Total formulas, header filters, and a frozen header row. **Excel download** functionality is now also available for the Line Items report.	SR-4855
26.0929	YES	**Item List**	BUG FIX: Fixed an issue affecting data exports from the **Item Receipts, Item Prices, Item Vendors, Item Catalog**, and **Item Sales Last 365** tabs.	SR-4863
26.0929	YES	**Item Picture**	**BUG FIX:** Fixed an issue that could cause **item image imports** to stall when importing from **URLs**. Item images can now be imported from URLs successfully.	SR-4884
			BUG FIX: Fixed an issue where the **Ready to Ship** quantity on the **Invoice and**	

26.0929	YES	**Shipping and Receiving**	BUG FIX: Fixed an issue where the **Ready to Ship** quantity on the **Invoice and Dispatch** screen did not correctly reflect the quantity picked when multiple units of the same item were ordered. This could cause fully picked order lines to remain highlighted in yellow and appear partially picked.	SR-4625
26.0928	YES	**Custom Fields**	UPDATE: Added support for displaying **Custom Fields** on the **Sales Order** screen, allowing configured **Custom Fields** to be viewed directly when working with **Sales Orders.**	SR-4605
26.0928	YES	**Sales Transactions**	BUG FIX: Fixed an issue where the **Created Date/Time** on **Sales Transactions** could display the incorrect **time zone**. The **Created Date/Time** now reflects the **time zone** of the Shipped From **Warehouse**.	SR-4849
26.0928	YES	**Scanner**	UPDATE: Added an **Inventory Assignments** button to **Inventory > Count Inventory**, displaying the total number of assignments and allowing users to **recount assigned items by bin**. Users can scan items to update the recount quantity, reset the count, and complete the recount. Based on the recount results, users can make inventory adjustments to remove missing stock or add extra stock, with an **Adjustment Reason Code** required when an adjustment is needed. Success messages confirm whether inventory was adjusted up or down or no change was made.	SR-3845
26.0925	YES	**Customer Portal**	UPDATE & BUG FIX: Updated the **dashboard font styling** and fixed an issue affecting the **calculation of order percentages** for logged-in users.	SR-4870
26.0924	YES	**Auto Job**	UPDATE: Added a **Customer Portal Abuse** Auto Job to help identify potential portal misuse, such as customers repeatedly checking prices without placing orders. Admins can configure login and login-to-sales thresholds over the past 90 days and receive email notifications when customers meet the criteria, helping them identify accounts for review and determine whether access should be restricted.	SR-4813
26.0924	YES	**Item Detail**	UPDATE: Fixed the **Recalculate Quantities** function to return accurate counts for each pricing category while improving performance. Counts are now calculated separately across Customer Prices, Items, PTypes, and Templates. Added a Delete All With 0 Count button to remove unused pricing categories, automatically skipping any categories that are still in use.	SR-4831
26.0923	YES	**Auto Job**	UPDATE: Created a new Send Invoice Email Daily Auto Job to automatically send invoices daily. When sending invoices, the job checks for an email address in the Customer Communications table with the Invoice type first, then uses the email address on the transaction, and finally falls back to the customer's default email address. A contact name is not required in Communications; only the type and email address are needed. To improve Sales Order creation performance, email addresses are not retrieved or updated when creating Sales Orders through APIs or other methods. When converting a Sales Order to an Invoice, the existing email address is copied without looking up Communications.	SR-2983
26.0923	YES	**Customer Details**	BUG FIX: Fixed an issue where clicking Proceed in the **Customer Merge Tool** did nothing after selecting a merge option. The **Next** button now works as expected, allowing users to proceed after selecting an option.	SR-4841
26.0922	YES	**Customer Details**	BUG FIX: Fixed an intermittent issue where **Third Party information** was not being saved correctly on the **Customer API** screen.	SR-4715
26.0922	YES	**Custom List**	UPDATE: Added an **Is Empty** filter option to the **Custom List Tab Wizard** for all columns, including **Date fields**, across all **Custom Lists.** Also improved the **New Tab Wizard** loading performance by reducing unnecessary server requests and adding caching and a loading indicator for a faster and smoother	SR-4796

			experience when creating or editing **Custom Lists.**	
26.0922	YES	**Find Parts**	BUG FIX: Added a new setting under **Settings > Sales > Find Parts** to prompt users to enter a **Customer PO#**. When enabled, the **Customer PO#** is included in the tab order, and users are prompted to enter a **Customer PO#** when creating a **Sales Order** if the field is empty. The prompt allows users to enter a PO# but does not require one.	SR-4674
26.0922	YES	**Settings**	BUG FIX: Fixed an issue where **Payment Terms** could not be deleted from **Settings**. **Payment Terms** can now be deleted as expected.	26.0922
26.0922	YES	**Reports**	UPDATE: Added a new **Credit Memo Totals by Return Reason Code** report with date range filtering and credit memo count.	SR-3654
26.0922	YES	**Scanner**	BUG FIX: Fixed an issue where **Bin Locations** or other i**tem/order number fields** could contain **spaces** when entered through scanning or manual test input. **Input fields** in the **Scanner** app now **prevent spaces** from being entered, and **Bin Locations** copied from **Item Stock to Sales Order Line Items** are automatically trimmed.	SR-4430
26.0922	YES	**User Security**	**BUG FIX:** Fixed an issue in version 26.0916 where the **Do Not Allow Changes to Invoices & Credit Memo Dates** setting on the **User Security** screen failed to prevent users from changing invoice and credit memo dates.	SR-4783
26.0921	YES	**Customer Detail**	UPDATE: Improved the **Parent Company drop-down list** on the **Customer Detail** screen by limiting the displayed columns to **Company Name** and **Customer #**, making the list more compact and easier to use.	SR-4675
26.0921	YES	**Customer Portal**	NEW FEATURE: Added new **Customer Portal** settings to **show or hide the Login and Sign Up sections** independently, with an option to **display a Site Down message** over either or both sections. Added formatting options for the **Site Down message**, including font name, size, color, background color, and support for URL links to the previous portal. New User notes are also automatically hidden when **Sign Up** is disabled.	SR-4739
26.0921	YES	**Customer Portal**	BUG FIX: Updated **Customer Portal** login to allow users to sign in using either their **email address** or **phone number**. When a **phone number** is entered, the system cross-references the associated **portal user** and uses the **linked email account** for authentication.	SR-4719
26.0921	YES	**Customer Statements**	BUG FIX: The **Customer Email** column in **AR** > **Customer Statements** now reflects the email address entered under **Customer Details** > **Communications** > **Default Email Communications** when **Customer Statements** is selected as the **Type**.	SR-4769
26.0921	YES	**Custom List**	BUG FIX: Fixed an issue in the **Custom List Tab Wizard** where opening an existing tab for editing would get stuck loading. Existing tabs now open for editing.	SR-4688
26.0921	YES	**Reports**	UPDATE: Added an **Open Balance, Closed Balance, or All** filter to the Invoice/Credits by Customer (Full Invoice) report, allowing users to send only invoices or credits with an open balance. Also expanded the invoices/credits per PDF page options to include 100, 250, and 500.	SR-4768
26.0921	YES	**Sales Order**	BUG FIX: Updated **Sales Order Custom Lists** so **Created Date** displays both the **date and time**, while S**ales Date** displays the **date only** without the time.	SR-4811
26.0918	YES	**Catalog Management**	BUG FIX: Fixed an issue where exporting with option 1b displayed a “This site can’t be reached” error. Also resolved an issue where running an update query against the catalog tables returned an “Operation must use an updateable query” error.	SR-4787

26.0918	YES	**Item Pictures**	BUG FIX: Fixed an issue where the folder upload ignored the **Partial Match Items with ___ characters setting**. When there's no exact match, 1place now uses the number you enter to compare the first characters of the image filename and the Item Number. For example, with the setting set to 4, 06022image.jpg appears as a partial match candidate for Item Number 06022023_TestItem because both start with 0602.	SR-4793
26.0917	YES	**CCC Integration**	BUG FIX: Fixed an issue where **Sales Orders** created through the **CCC integration** could be imported without line items in versions 26.0909, 26.0911, and 26.0915. **Sales Order line items** now import correctly.	SR-4728
26.0917	YES	**Find Parts**	UPDATE: Updated the **Find Parts** screen so the **Save Settings for All Users button** appears when columns are resized, allowing administrators to save the updated column widths for all users.	SR-4774
26.0917	YES	PartsTrader	BUG FIX: Fixed an issue where **Expected Delivery Dates** sent to **PartsTrader** could be incorrect for orders received on Fridays. The API now calculates the **Expected Delivery Date** without adding weekend days to the date sent to **PartsTrader**.	SR-4650
26.0916	YES	**Sales Order**	BUG FIX: Fixed a **display** issue where the **green** and **white line items** in the **Add/Edit Line Item** section were not the same size. The line items now display consistently.	SR-4734
26.0915	YES	**Bin Management**	BUG FIX: Fixed an issue preventing **Bin Location** data from being imported into a new **SQL Server** database. The import now properly handles **Bin Location** data using the **Bin Location template**, including records without **Bin Picking Order** or **Bin Zone** values.	SR-4735
26.0915	YES	**Find Parts**	BUG FIX: Added a new Find Parts setting to control how quantity fields are highlighted, with options to highlight quantities that are 0, quantities that are not 0, or leave colors unchanged. Added a color picker and an option to apply the color to either the quantity fields or the entire row. Rows selected for a Quote or Sales Order will continue to use the standard green highlight.	SR-4693
26.0915	YES	**Descartes**	BUG FIX: Fixed an issue where opening the **Drivers** tab in the **Descartes** integration could cause 1place to hang. The **Driver Mapping** tab has been temporarily disabled until the required **Descartes API** details are available.	SR-4701
26.0911	YES	**Bin Management**	BUG FIX: Updated **Staging Bins and Zones** to allow users to quickly enter multiple records using the keyboard without popups clearing previous entries or requiring unnecessary fields to be completed.	SR-4431
26.0911	YES	**Credit Memo**	UPDATE: Updated **Invoice user security** so users with **Credit Memo View access** can create a **Credit Memo** directly from the Invoice screen, even if they do not have **Credit Memo Edit access**. The **Credit Memo Details** tab is also now available for users with **View** access.	SR-4516
26.0911	YES	**Customer Portal**	UPDATE: Customer Detail > Customer Portal > Dashboard. Added a new **Customer Portal Dashboard** to provide a quick view of **customer portal activity** and **engagement**. The dashboard includes **Portal Sales, Portal Sales Orders, Portal Quotations, Last Login Date, Last Order Date, Days Since Last Order, Total Logins,** and **Login-to-Order percentage.**	SR-4285
26.0911	YES	**Scanner**	UPDATE: Updated **Company Settings** and **User Settings** navigation so that clicking **Done** closes the settings screen and returns the user to the previous menu. **User Settings** will no longer automatically log the user out.	SR-4703
			BUG FIX: Updated **Automated Jobs** to use the **Warehouse time zone** when	

26.0910	YES	**Auto Job**	BUG FIX: Updated **Automated Jobs** to use the **Warehouse time zone** when determining scheduled run times, ensuring jobs run at the time configured by the user.	SR-4392
26.0910		**Auto Job**	BUG FIX: Fixed an issue preventing the **Run SQL** option from opening in **Auto Jobs**.	SR-4109
26.0910	YES	**Find Parts**	UPDATE: Improved **item number** searching on **Find Parts/Portal** so that when no match is found, the system will automatically retry the search after removing **spaces and dashes** from the item number.	SR-4607
26.0910	YES	**Item Details**	UPDATE: Updated Average Cost to **Weighted Average Cost (WAC)** throughout the application, including **Settings** and the **Item Detail > Financial tab**. Improved WAC recalculation logic so it recalculates only when appropriate and does not recalculate when inventory goes out of stock through **Sales or Item Adjustments**, while **Purchase Order** transactions continue to recalculate WAC as needed.	SR-2461
26.0910	YES	**Transactions**	UPDATE: Updated the Freight/Other field on Quotes, Sales Orders, Invoices, and Credit Memos to allow users to enter negative amounts.	SR-4164
26.0909	YES	**CCC Integration**	BUG FIX: Improved batch **CCC Shop Registration** by providing detailed results when the process is completed. When the user clicks **OK** or **Cancel** on the results popup, an **Excel file** containing the customer and error details is automatically downloaded, making it easier to identify and review failed registrations.	SR-4144
26.0909	YES	**Credit Memo**	BUG FIX: Fixed a bug that prevented new **Credit Memos** from saving. They now save correctly and appear in the Invoice & Credit Memo's list.	SR-4670
26.0909	YES	**Credit Memo**	BUG FIX: Fixed an issue where creating a **Credit** entirely through the **scanner** workflow (**Request, Authorize, and Inspect**) could incorrectly create an additional +1 line in **Item Adjustment**. The issue was isolated to the scanner authorization process. Credits created in 1place and only inspected through the scanner were not affected.	SR-4655
26.0909	YES	**Print Settings**	UPDATE: Added Shipping & Receiving > To Print as a new Print Default option on the Print Settings. Users can now configure default documents and copy quantities for the Shipping & Receiving screen, which will automatically populate when the To Print screen is opened.	SR-4671
26.0909	YES	**Quotation**	BUG FIX: Fixed an issue where the printed **Quotation** total could differ from the total displayed on screen when the last line item had not yet been committed. The system now automatically commits the pending line item when the user clicks **Save**, ensuring the printed Quotation includes all line items and reflects the correct total.	SR-4638
26.0909	YES	**Receive Payment**	UPDATE: Added an **Export** button next to the **Filter** button, allowing users to select a date range and download an Excel file in the correct import format. This helps users prepare the data for import and proceed with transactions more smoothly.	SR-4623
26.0909		Shipping and Receiving	BUG FIX: Fixed an issue where fully picked **Sales Order** lines with multiple quantities were incorrectly displayed as partially picked, showing a lower **Ready to Ship** quantity and remaining highlighted in **yellow**. The calculation now counts the relevant **line items** instead of summing the shipped quantities, ensuring fully picked orders display the correct status.	SR-4646
26.0909	YES	**Subscription**	UPDATE: Updated the **Subscription** settings to ensure user count and subscription changes display the correct pricing and behave consistently.	SR-4007
			UPDATE: Added an option in **AR / GL Settings** to enable **Force Balance**	

26.0908	YES	**AR Aging Summary**	UPDATE: Added an option in **AR / GL Settings** to enable **Force Balance** controls on the AR Aging screen. When enabled, users can specify a date range and balance threshold to automatically force-balance invoices with very small positive or negative differences. The adjustment is now handled through **Freight Charges**, with the transaction amount added or subtracted to update the balance, providing a straightforward way to resolve minor AR balance differences.	SR-4076
26.0908	YES	**AR Payment History**	UPDATE: Improved the **Payment History** display when grouping by **Received By & Payment Method** or **Received By & Batch #**. The **payment method** or **batch number** is now displayed next to each payment for better visibility and clarity, and **Payment Method** and **Batch Number** sections are collapsed by default.	SR-2731
26.0908	YES	**Reports**	UPDATE: Created a new **Inventory Valuation + UnInvoiced Sales Orders Shipped** report. Added **Type** and **Sales Order** columns, with existing inventory records identified as **Stock**. The report also includes each line item from shipped but un-invoiced **Sales Orders**, identified as **Sales Order** with the corresponding **Sales Order #**, so inventory that has been shipped but not yet invoiced remains included in the valuation.	SR-4101
26.0907	YES	**Customer Portal**	UPDATE: Added new options to customize the **Embedded Search background color** and **vertical accent bar**, giving users more control over the Customer Portal's color palette and overall appearance.	SR-4596
26.0907	YES	**Customer Portal**	BUG FIX: Added the **List Price** back to the **Customer Portal invoice** display.	SR-4634
26.0907	YES	**OPS Trax**	BUG FIX: Fixed issues with **Expected Delivery Date** calculations for **OPS Trax orders**. The calculation now uses the correct warehouse time zone based on where the part will be picked and properly applies the **Same Day Cutoff Time**, **Cutoff Time to Add Additional Day, Stock Transfer days, Warehouse Shipping Priority days,** and **ZIP Code** additional days without incorrectly adding extra days.	SR-4649
26.0907	YES	**Purchase Order**	UPDATE: Added a **validation prompt** to remind users to **post** and/or **distribute additional costs** before receiving a **Purchase Order**. The prompt applies to **Fully Received**, **Partially Received,** and **Line Item-wise Received Purchase Orders** when additional costs have not yet been distributed.	SR-3909
26.0907	YES	**Picking Ticket**	UPDATE: Improved the **Picking Ticket** layout and field customization options. **Header and Line Item fields** are now organized into separate sections, with new options to display the C**ustomer PO #** under the **Company Name** and **Item Description** beside the **Item Number**. Also adjusted the header field placement to provide additional spacing.	SR-4590
26.0903	YES	**Auto Job**	NEW FEATURE: Added the **Integrations - OPS - Invoice Postings** automated job to process invoice postings in a manner consistent with the Integrations - CCC - Invoice Postings auto job.	SR-4609
26.0903	YES	**Auto Job**	UPDATE: Improved **Auto Jobs** settings by preventing the **Enabled status** from being changed directly from the **Automated Job List summary** screen. When **disabling** a job from the J**ob Setup/Edit screen**, users are no longer required to complete other fields before saving.	SR-4611
26.0903	YES	**Descartes Integration**	BUG FIX: Updated the **Descartes integration** to control when **invoices** and **Credit Memos** are uploaded. **Invoices** are uploaded when created manually, processed through **Shipping & Receiving > ToDispatch**, or manually resubmitted using **Resubmit Selected to DesCartes**. Editing an **invoice** or **Credit Memo** without changing quantities or amounts will not trigger an upload. Transactions with an existing **GPSLink** will not be automatically re-	SR-4528

			uploaded when changed; users can still manually upload them through **More Invoice Options > Upload / Update Pickup to Descartes**.	
26.0903	YES	**Item Label**	UPDATE: Added options to **Label Design** for all label sizes to display **Sales Order # Barcode** and **Invoice # Barcode** on printed labels.	SR-3512
26.0903	YES	**Shipping & Receiving**	UPDATE: Improved the **Statuses** section on **Shipping & Receiving** screen to make individual columns easier to **resize**, allowing users to adjust each column wider or narrower as needed.	SR-4538
26.0902	YES	**CCC Integration**	UPDATE: Added a **Starting From Date** field to the **API Integration Details** tab under **CCC Settings**. This allows users to specify the date from which CCC integration data should begin.	SR-4502
26.0902	YES	**Credit Memo**	BUG FIX: Fixed an issue where deleting a **Credit Memo** prevented you from making a new one from the same Invoice. The system now correctly registers the deletion, allowing you to recreate the **Credit Memo** without receiving a 'You have already returned ALL that can be returned for this line item.' error message.	SR-4613
26.0902	YES	**Customer Details**	UPDATE: Added **Customer Statements** to the **Default Email Communications** dropdown on the **Customer Details > Communications** tab. When sending statements, the system now uses a valid email address designated as **Customer Statements**. If none is available, it falls back to the customer's general email address.	SR-3892
26.0902	YES	Import Wizard	BUG FIX: Fixed an i **nvoice header import** issue caused by a conversion error involving the **Customer Next Number**. Improved import performance by optimizing validation updates, implementing batch processing, and adding an index to support faster validation.	SR-4582
26.0902	YES	**Invoices**	BUG FIX: Fixed an issue where **Items** were not transferred from a **Sales Order** to the **Invoice** when an **Invoice** was deleted and then recreated from the same **Sales Order**.	SR-4547
26.0901	YES	**Customers**	BUG FIX: Fixed an issue where the **Parent Customer ID** did not properly update the **BillToAddress** field. Also updated the **Parent and Child Customer ID** field instructions to clarify that these fields are only used for Multi-Region, Parent/Child company configurations.	SR-4565
26.0901	YES	**Item List**	BUG FIX: Fixed issues with **Custom Filter Tabs** when using **Reserved** and **ItemStock** fields. Reserved filters now work correctly, and tabs combining **Item** and **ItemStock** fields no longer produce undefined or SQL errors when creating or loading tables.	SR-4559
26.0831	YES	**Cash Management**	BUG FIX: Fixed an issue where refunded **Credit Memos** were incorrectly counted as positive cash in Cash Management. Also fixed an issue where certain batch or customer names could cause the Cash Deposit screen to fail to load, preventing access to the Reconciliation Logs, Move Cash, and Receive Cash tabs.	SR-3878
26.0831	YES	**Item Details/ Sales Order**	BUG FIX: Fixed an issue where **Sales Orders** could incorrectly use inventory that are marked as **Reserved**.	SR-4487
26.0831	YES	**Reports**	UPDATE: Added a new **Invoices / Credits by Order Source** report that displays each day in the selected date range as a separate row. The report includes a column for each unique **Order Source,** showing the total number of orders and total sales for each source by day.	SR-3900
			BUG FIX: Fixed a discrepancy between **Inventory Adjustment** report totals	

26.0831	YES	**Sage Integration**	BUG FIX: Fixed a discrepancy between **Inventory Adjustment** report totals and **Journal Entry** amounts. The inventory adjustment calculation now uses the adjustment quantity and item cost from the **Item Adjustment** table to ensure the reported totals are consistent.	SR-4093
26.0831	YES	Scanner	NEW FEATURE: Added a **Receive Payment** screen on the **Scanner** for **drivers** to collect **invoice payments** at the time of delivery. The screen supports processing **credit card payments** through eBizCharge, saving or recalling saved credit cards, and applying available Credit Memos or Unapplied Payments to outstanding invoices.	SR-4339
26.0831	YES	**Support Tickets**	BUG FIX: Resolved issues with the **Jira Integration** where users were unable to **add comments a**nd where an unposted comment remained in the comment entry box when navigating to a different **Support Request**. The comment box now properly clears when switching between SRs. Also added the **Given By** name to identify the actual **user** who added each comment, since the integration uses a single registered Jira account.	SR-3581
26.0827	YES	**AR Receive Payments**	BUG FIX: Resolved an issue where the **Group Byfilter** in **Payment History** was not working correctly.	SR-4505
26.0827	YES	**Customer Portal**	UPDATE: Reorganized the **Email Templates** section into **Individual Requests**, **Mass Invitations**, and **New Transaction Confirmations** to make the available templates easier to understand and manage. Added an **i** icon next to each template with a description explaining when and how the template is used, including user signup requests, account activation and invitations, mass user invitations, and Quote and Sales Order confirmations.	SR-4499
26.0827	YES	**Import Wizard**	BUG FIX: Improved the **Invoice Payment Import** process to reduce validation timeouts and improve import performance by optimizing validations, adding database indexing, and processing records in batches. Added the new fields to the **InvoicePayments** and **InvoicePaymentLineItems** tables, ensuring payment records now display correctly on the **Invoice Detail** screen. Also completed UI updates to the **Additional Options** and **Help** sections.	SR-4510
26.0827	YES	**Test Mode**	BUG FIX: Fixed an issue where **Test Data** was not deleted after taking a user out of **Test Mode** and confirming the deletion.	SR-4010
26.0826	YES	**CCC Integration**	UPDATE: Added a **user note** to clarify that all fields above can be left blank if the company does not have a dedicated **CCC API Server**.	SR-4484
26.0826	YES	**Customer Portal**	UPDATE: Added a **PlainTextYesNo** column to the **Customer Portal** import template. When **Yes** is entered, the system will encrypt the password during the import process.	SR-4288
26.0826	YES	**Import Wizard**	BUG FIX: Fixed issues with **Invoice Payment imports** that could cause duplicate processing, timeouts, and excessive database load. Improved **batch processing** and reduced the batch size to improve import performance and reliability. Also fixed an issue where **imports** could stop after 1,000 records and corrected the **Payment Info tab** for **Credit Memos** with multiple payment records so the corresponding payment amounts display correctly.	SR-4463
26.0826	YES	**Import Wizard**	BUG FIX: Fixed issues with **Pricing Categories** and **Customer Custom Pricing Template imports**. Added support for importing **Pricing Templates**, P**ricing Categories**, and I**tem Numbers** using a single spreadsheet. Also added Additional Options for import **settings** and improved post-import navigation and pricing value handling.	SR-4199
26.0825	YES	**Invoices**	BUG FIX: Resolved an issue where some outstanding **Invoices and Credit Memos** could not be located during initial posting. The search failed when **invoice/CM numbers** contained leading or trailing spaces. The search logic	SR-4434

			was updated to trim spaces and correctly locate the matching records.	
26.0824	YES	**Auto Job**	UPDATE: Added a new **SystemAutoJobsLog** table to record when each **Automated Job** starts and finishes. Start and end times are recorded using the **Warehouse time zone** instead of UTC.	SR-4373
26.0824	YES	**Customer Details**	BUG FIX: Resolved an issue in v26.0819 where the **Customer Merging Tool** was not functioning correctly. The merge process now works as expected.	SR-4464
26.0824	YES	**Find Parts**	UPDATE: Updated the **Find Parts s**creen to keep the **Line Item headers** fixed while scrolling, so the **column headers** remain visible at all times.	SR-4380
26.0824	YES	**Sales Order**	BUG FIX: Fixed an issue where selecting a **Shipped Via** with **Delivery Charge** under **Shipped Via** was not adding the configured delivery fee to the S**ales Order** total.	SR-4492
26.0821	YES	**Customer Portal**	UPDATE: Improved Embedded Search to use the Item Catalog for Category and SubCategory searches, keeping the drill-down search consistent with the catalog data used for Year, Make, and Model. Added a new setting to choose whether Categories and SubCategories are populated from the Item List or Item Catalog. Also reduced the width of the Item Popup and removed the Left Side search layout option for new configurations. Existing customers using the Left Side layout will not be affected.	SR-4385
26.0820	YES	**Find Parts**	UPDATE: Improved Item Number searching in Find Parts, Customer Portal, and API integrations by ignoring dashes and spaces when matching Item Numbers. This allows searches to find matching items even when the entered Item Number formatting differs from the stored value.	SR-4607
26.0820	YES	**Sales Integrations**	BUG FIX: Resolved issues with **Estimated Delivery Date** calculations, particularly for **OpsTrax** orders after the 5 PM cutoff and **PartsTrader** orders on **Fridays**. Updated the calculation to ensure the delivery date is based on the correct **warehouse time zone** and **ZIP Code** delivery days, preventing inconsistent dates across **Eastern** and **Central time zones.**	SR-4407
26.0819	YES	**Customer Detail**	UPDATE: Replaced the three existing merge options with an **Open Customer Merging Tool** button that launches a new **wizard-style Customer Merging Tool screen**. The tool guides users through selecting a merge option and clearly explains what will happen before proceeding. Added a **Proceed** button to execute the selected merge option.	SR-3724
26.0819	YES	**Dashboard**	UPDATE: Added a new **Source of Order (Top 10) widget** to the **Dashboard**. The widget displays order counts by **Order Source** across different time periods, including **Today**, **Last 30 Days**, P**revious 30 Days**, and **Last 365 Days**, with percentage change comparisons. The list is limited to the **Top 10 Order Sources**, ranked by order volume.	SR-3333
26.0818	YES	**AR Receive Payments**	UPDATE: Enhanced **AR Receive Payments** so the selected **Payment Method** and Batch # are retained when switching between customers. The Batch Total now accumulates across payments within the same batch. When the user changes the Payment Method, a new batch is automatically created and the Batch Total resets to $0.	SR-4412
26.0818	YES	**Item List**	BUG FIX: Fixed an issue where selected **Item Catalog** records on I**tem List** could not be deleted. Deleted records now remain removed after refreshing the Item Catalog.	SR-4416
			BUG FIX: Resolved several issues in **Auto Jobs**, including the inability to edit	

26.0817	YES	**Automated Job**	**Run SQL** and missing **Schedule** and **Next Run** information. Also removed the popup message from **Invoices - Send Invoices Created Today** .	SR-4374
26.0817	YES	**Import Wizard**	BUG FIX: Resolved an issue where saved **Import Templates** did not retain the correct **field mappings**. When reusing a **saved template** for **Item Search Catalog**, fields could be mapped incorrectly, potentially causing data to be imported into the wrong fields. Saved templates now retain and apply the correct field mappings.	SR-4247
26.0817	YES	**Receive Payments**	UPDATE: Updated the **AR Receive Payments** screen by changing the **Filter** button from blue to white for a cleaner and more consistent UI appearance.	SR-3404
26.0817	YES	**Receive Payments**	UPDATE: Added a **validation message** requiring users to complete the necessary **payment details** before selecting **invoices or credits**, while allowing a $0 payment amount when applying only **credits/unapplied amounts.**	SR-4307
26.0817	YES	**Scanner**	UPDATE: Added a new company setting, **Require PO Status to Receive PO**, allowing users to select which **Purchase Order status** must be met before a PO can be received using the scanner.	SR-4303
26.0817	YES	**Scanner**	UPDATE: Added two new **Company Settings** options for **Scanner** to allow users to configure **Return Reason Codes for Physical Inventory / Cycle Counts** and **Inspect Return items** marked as **Not Good for Stock.**	SR-4035
26.0813	YES	**Find Parts**	UPDATE: Added a **Display** drop-down that allows users to choose which records to view, with the selected setting also applying to the YES buttons. Added 500 as an option under Gear > Show # Records and a Show All link next to the Pages/# Records controls. Also added additional spacing above the footer area for improved readability.	SR-4324
26.0812	YES	**AR Aging Summary**	UPDATE: Added **91–120 Days** and **120+ Days columns** to the **AR** > **AR Aging** screen to provide a more detailed breakdown of balances over 90 days.	
26.0812	YES	**Import Wizard**	BUG FIX: Resolved an issue where the **Customer List** import displayed "**Import Successful**" but did not actually import the records. The import logic was updated to automatically truncate values based on the maximum field length defined in the database, preventing oversized values from causing the import to fail silently.	SR-4326
26.0812	YES	**Shipping and Receiving**	BUG FIX: Resolved an issue where the **Sales Agent** on a **Sales Order** was incorrectly changed to the user who dispatched the order. The original **Sales Agent** is now retained even when the order is dispatched by a different user.	SR-3916
26.0811	YES	**Invoices**	UPDATE: Updated the **Freight/Other field** on **invoices** so that it remains editable before payment is posted for users with the appropriate permissions, allowing authorized users to make necessary adjustments without the field being locked prematurely.	SR-4291
26.0811	YES	**Sage IntAcct**	BUG FIX: Resolved an issue where users were unable to proceed when posting a **Debit Memo**. The **Debit Memo** posting process now works correctly.	SR-4356
26.0810	YES	**Customer Portal**	BUG FIX: Resolved an **Undefined Error** that occurred when creating a **Sales Order** during **Customer Portal checkout**. The issue was caused by reverted code related to Sales Tax changes, which affected certain conditions and stored procedures.	SR-4334
26.0810	YES	**Receive Payments**	BUG FIX: Resolved an issue where changing the **Payment Date** of a reversed payment caused its amount to be reset to $0, preventing it from appearing correctly in **Payment History**. The validation was updated to properly handle negative amounts for reversed payments when the payment date is changed	SR-4322

			negative amounts for reversed payments when the payment date is changed.	
26.0810	YES	**Shipping & Receiving**	BUG FIX: Resolved an urgent issue in **v26.0803** where users were unable to **print documents** from **Ship/Rec > To Print & Pick**. Printing now works correctly.	SR-4338
26.0807	YES	**Receive Payments**	NEW FEATURE: Added a **Reverse Payment** function on the **Receive/Edit Payments** on **Invoices** to allow users to reverse payments for returned checks, NSF, chargebacks, or other payment reversals without affecting the original sales transaction. The process creates a new negative payment using the current date and the selected NSF or OTHER payment method, reverses the payment across all related **Invoices/Credit Memos** when applicable, and resets the related **Invoice/Credit Memo** to unpaid.	SR-3737.
26.0807	YES	**Scanner**	UPDATE: Updated **Inspect Returns** to allow users to **scan and inspect returned items** at the **warehouse** where they were received without having to select the **original warehouse.** After inspection, the item is now **returned** to stock in the **warehouse where it was inspected** , rather than being sent back to the original warehouse.	SR-4295
26.0806	YES	**CCC Integration**	UPDATE: Added CCC Invoice Posting functionality, allowing invoices to be sent to CCC directly from the Sales Order and Shipping & Receiving screens. The Invoice screen now includes an Integration Info tab, and the integration has been updated to support proper token management for shop registration and invoice posting, separate handling for customers with and without an integration server, and validation to ensure only eligible CCC records are posted. The Repair Order Number is also now included in the CCC invoice posting process and automatic invoice posting job, along with fixes to invoice data formatting and posting issues.	SR-2660
26.0806	YES	**Customer Portal**	BUG FIX: Resolved an issue in v26.0805 where the left navigation **menu** failed to load and the loading indicator remained visible indefinitely.	SR-4319
26.0804	YES	**Bin Management**	BUG FIX: Resolved an issue where **Bin Management** automatically removed trailing decimal values (e.g., 100.0 became 100) during import or processing. **Bin locations** now retain their original format, ensuring compatibility with existing warehouse and scanner configurations.	SR-4265
26.0804	YES	**Invoice**	BUG FIX: Resolved an issue in **v26.0803** where the **More Invoice Options** menu was incorrectly disabled, preventing users from accessing the **Credit Memo option**. The **menu** and **Credit Memo** functionality are now available as expected.	SR-4296
26.0803.1	YES	**Invoice**	BUG FIX: Resolved an issue in **v26.0803** where the **More Invoice Options** menu was incorrectly disabled, preventing users from accessing the **Credit Memo** option. The **menu** and **Credit Memo** functionality are now available as expected.	SR-4296
26.0803	YES	**API**	UPDATE: Optimized the **API query** used to calculate the **Estimated Delivery Date** by consolidating multiple lookups into a single query using a **UNION** condition. This reduces query overhead and improves performance, particularly when processing requests with multiple items.	SR-4258
26.0803	YES	**API**	UPDATE: Optimized the **Create Sales Order API** by eliminating unnecessary pricing validation for API-generated orders. The system now accepts the pricing supplied by the **API** and avoids redundant pricing lookups, significantly reducing order creation time and helping prevent timeout errors. For large orders (50+ items), processing time was reduced from approximately 90 seconds to 40 seconds.	SR-4256
			UPDATE: Added a new **CreateSalesOrderWithGUID API** endpoint that	

26.0803	YES	**API**	UPDATE: Added a new **CreateSalesOrderWithGUID API** endpoint that returns the newly created Sales Order Number and **GUID** in the **JSON** response.	SR-3436
26.0803	YES	**CCC**	NEW FEATURE: Added CCC Shop Registration, allowing 1place to register customers with the CCC TRUE integration service. Once registered, the customer is authenticated with CCC and can use features that require shop registration.	SR-2009
26.0803	YES	**Customer Fields**	BUG FIX: Resolved an issue where assigning a **custom field** to **Form Column 2** caused the field to be duplicated instead of being placed in the second column. **Custom fields** are now displayed in the correct column without duplication.	SR-4277
26.0803	YES	**Customer Details**	BUG FIX: Resolved an issue where **Merge** into **Bill-To Customer** did not correctly update the **Bill-To** customer on existing transactions. Transactions now retain the correct **Bill-To** information after the merge.	SR-3803
26.0803	YES	**Customer Portal**	BUG FIX: Resolved issues in the **Customer Portal Users** screen where the **Show All** option only refreshed the page instead of displaying all users. Also fixed an issue that prevented portal invitations from being resent, restoring both functions.	SR-4223
26.0803	YES	**Descartes**	BUG FIX: Resolved an issue where editing an invoice associated with a Credit Memo automatically triggered a resync to Descartes. Invoice edits no longer trigger an automatic re-upload after the initial submission. Users can manually resync when needed, preventing deliveries from being incorrectly resubmitted or appearing as unrouted in Descartes.	SR-3074
26.0803	YES	**OPSTrax**	UPDATE: Updated the **OPSTrax integration** to reject **quote requests** when the related customer is marked **Inactive**. The integration now uses **StatusCode 2** for failed responses and **StatusCode 1** for successful responses to maintain consistent API handling.	SR-4173
26.0803	YES	**Sales Order Labels**	UPDATE: Enhanced **Sales Order Labels** to include the **Customer PO Number**, providing additional order reference information on printed labels.	SR-3891
26.0730	YES	**API**	BUG FIX: Resolved an issue that prevented users from deleting **RFID/API** records from the **Customer API table** when the associated shop was not registered in **CCC**. The deletion process now continues even if **CCC** returns a failure during shop unregistration, allowing the **1place API** record to be removed successfully.	SR-4231
26.0730	YES	**API**	BUG FIX: Enhanced the **DoReturn API** endpoint to accept **Warehouse ID, Warehouse Code, or Warehouse Name**, along with new **Customer PO#**, **Order Source**, and **Shipped Via** parameters. Also resolved issues with **Credit Memonaming**, **line item quantities**, **Partslink Item #, credited unit cost**, and carrying over relevant invoice information.	SR-3664
26.0730	YES	**API**	BUG FIX: Updated the CreateSalesOrder API to use the ShipToStreet and ShipToCityStateZip parameters first when determining the Shipping Address, with ShippingAddress used as a fallback. Also resolved an issue where the API could return a 200 Success response with an empty result without creating the Sales Order. The endpoint was tested on the Florida POD using v26.0723.	SR-4192
26.0730	YES	**Auto Job**	UPDATE: Added a new Integrations – Sage – Auto Post Sales Revenues (JE) auto job . When executed, the job automatically compares 1place sales revenue against Sage for each day of the selected period, identifies any discrepancies, and creates the required Journal Entries. The process is performed for all configured Division/Warehouse combinations, fully automating the reconciliation and journal entry workflow that previously	SR-4103

			required manual execution.	
26.0730	YES	**Sales Order**	UPDATE: Enhanced the **Picking Ticket** to include S**ales Order Comments** in the printed document, providing warehouse personnel with additional order instructions during the picking process.	SR-4233
26.0730	YES	**System**	UPDATE: Improved **system performance** by changing how **popup messages** are loaded. Instead of loading and storing all **popup messages** during **user login**, the system now retrieves them through an **API** only when needed. This reduces login overhead and improves screen loading performance, especially when opening a new version for the first time.	SR-4243
26.0729	YES	**Credit Memo**	UPDATE: Added automatic **Batch Number** generation when posting a Credit Memo refund. Users can also **edit the generated batch number** if needed, eliminating the need to manually assign a batch number to each receipt after posting the payment.	SR-4074
26.0729	YES	**Customer Details**	BUG FIX: Resolved issues in **Customer Details > Contacts** where **contact information** (including Title) did not immediately display after saving, certain contact fields could not be edited, and the **Close** button was unresponsive. **Contact details** now save, display, and can be edited as expected.	SR-4117
26.0729	YES	**Customer Portal**	UPDATE: Updated the subscription pricing text in **Settings** > **Portal**	SR-4227
26.0729	YES	**Descartes**	BUG FIX: Resolved an issue where an **item** billed only once on an **invoice** was being duplicated in the **XML** sent to **Descartes**, causing the same line item to be submitted twice.	SR-4215
26.0729	YES	**Scanner**	BUG FIX: Updated the **Scan picking logic** to prevent duplicate items from appearing during the **Cart to Staging** process. The system now validates **Sales Order Line Item ID**s to ensure each line item is processed only once. This enhancement is available in **v26.0729 Scan Beta.**	SR-4221
26.0729	YES	**Receive Payments**	BUG FIX: Resolved an issue where **posted refunds** were incorrectly displayed as $0.00, causing refunded amounts to appear as outstanding customer credits. **Refunds** now correctly reflect the posted amount, preventing customers from mistakenly appearing to have available credit.	SR-3964
26.0728	YES	**Item Details**	UPDATE: Added a setting to define the **default Return Reason Code** for **Inventory Adjustments**. The selected reason code is now automatically populated when adjusting stock quantities in **Item Details > Adjust Qtys in Stock.**	SR-4195
26.0728	YES	**Scanner**	BUG FIX: Resolved an issue where the **Additional Warehouse to Select From for Item Inspection Return setting** was not functioning correctly. Users can now select and process return items from the configured additional warehouses as intended.	SR-4170
26.0727	YES	**Customer Details**	UPDATE: Reorganized the **Settings** tab fields and added a **Parent Company** field for linking **Bill To** and **Ship To** customers. The Bill To Customer field is automatically hidden when the customer is set as Both (Bill To & Ship To).	SR-3734
26.0727	YES	**Customer Statements**	UPDATE: Added a new O**pen Item (All Shipping Locations - Parent Company)** statement type that allows users to view and export transactions for all **Bill To** and **Ship To** customers associated with the selected **Parent Company.** Expanded the drop-down width to make longer customer names easier to view.	SR-3734
			UPDATE: Enhanced the **Adjust Qty's in Stock** workflow by improving the **Bin**	

26.0727	YES	**Item Details**	UPDATE: Enhanced the **Adjust Qty's in Stock** workflow by improving the **Bin** selection experience. A loading indicator is now displayed while **bin locations** are being searched, and the system validates the selected bin before allowing the adjustment. If an invalid bin is entered, users are notified to select a valid bin from the available list.	SR-4091
26.0727	YES	**Item Details**	BUG FIX: Resolved an issue where the **Reserved checkbox** in **Item Detail > Stock > Edit Receipt** could not be checked or unchecked for received backorder items. The reservation status can now be updated successfully.	SR-4167
26.0727	YES	**Record Numbering**	BUG FIX: Resolved an issue where newly created **companies** could be missing the required **Sequence value** in the **SystemRecordNumbers** table after activation. **Company creation** now correctly initializes the **sequence values**, ensuring r**ecord numbering** functions properly for new companies.	SR-4200
26.0724	YES	**Receive Payments**	UPDATE: **Credit** entries in **AR > Received Payments** are now displayed in light red for better visibility and easier identification.	SR-1393
26.0723	YES	**Auto Job**	UPDATE: Added a new **Integrations – Sage – Auto Post Inventory Adjustments (JE)auto job** with configurable **Daily**, **Weekly**, or **Monthly** scheduling. When executed, the job automatically compares **1place inventory adjustments** with **Sage**, identifies any discrepancies, and creates the required **Journal Entries** for each applicable date. The process runs across all configured **Division/Warehouse** combinations, eliminating the need for manual reconciliation and journal entry creation.	SR-4105
26.0723	YES	**CCC**	BUG FIX: Improved the **CreateSalesOrder API** to address slow response times and help prevent duplicate orders from **CCC**. Added a **ThirdPartyOrderNumber** field to **Sales Orders, Invoices, and Credit Memos**, displayed on the **More Info tab**. When provided by **CCC**, the API can use this number to identify duplicate orders from the same integration platform and reject additional submissions, helping prevent duplicate orders when requests are delayed or retried.	SR-4145
26.0723	YES	**Custom List**	UPDATE: Expanded the **Date filter** options available in **Custom Lists** by adding a comprehensive set of relative **date ranges**, including L**ast 1 Day, 2 Days, 3 Days, 5 Days, 7 Days, 10 Days, 14 Days, 21 Days, 30 Days, 60 Days, 90 Days, 6 Months, 1 Year, and 2 Years**. These new filters have been added to the bottom of the existing date filter list in a logical order, making it easier to quickly filter records based on commonly used time periods.	SR-4146
26.0723	YES	**Customer Details**	UPDATE: Enhanced **Sales Notes** by displaying them on the **Customer Details screen** in addition to the **Find Parts screen**. The **Sales Notes** display on **Find Parts** has also been refined for improved usability. On both screens, a **new expand button (magnifying glass icon)** opens a larger popup where users can **view, add, edit, or delete Sales Notes** , with all changes saved directly to the customer record.	SR-3988
26.0723	YES	**Customer Portal**	UPDATE: Enhanced the **Customer Portal Find Parts** screen with **new layout options** and usability improvements to provide a wider and more efficient workspace for finding parts. Added configurable Left, Top, and **Embedded in Nav Bar layouts**, options to hide the navigation/footer, show all or in-stock items, customize row height and column sizing, and automatically remember user layout and column settings. The Top and Embedded layouts were also enhanced with streamlined **Year/Make/Model and category** navigation, while additional Portal settings support ItemCatalog fields and configurable Year/Make/Model descriptions on Quotes and Sales Orders.	SR-3696
26.0723	YES	**Item Details**	BUG FIX: Resolved an issue where the **Save button** on the **Item Details** screen failed to save changes. Updates made to item records are now saved correctly,	SR-4172

			eliminating the need to exit and reopen the screen for changes to take effect.	
26.0723	YES	**Sales Order**	BUG FIX: Resolved an issue where the **Sales Rep field** could be changed when converting or dispatching a **Sales Order** to an **Invoice**. The original **Sales Rep** is now preserved throughout the transaction lifecycle.	SR-4174
26.0722	YES	**Customer Portal**	BUG FIX: Updated **Return Reason Codes** so the **# Days** setting applies only to the **Customer Portal**. **Reason Codes** configured to display on **Credit Memos, Scanner**, or **Item Adjustments** will now always be available when their respective display option is enabled, regardless of the **# Days** value. Additionally, an informational "i" icon has been added next to the **# Days column** to clarify that this setting only limits the availability of Reason Codes on the Customer Portal.	SR-4089
26.0722	YES	**Find Parts**	BUG FIX: Updated **Find Parts** to honor the configured order **cutoff time** when calculating the **Delivery Date**. Orders placed after the **cutoff** now automatically advance the **delivery date** based on the **warehouse's local time zone**, ensuring consistent behavior with Customer Portal orders and returns.	SR-4088
26.0722	YES	**Item Details**	UPDATE: Improved the **Adjust Inventory Stock** workflow by enhancing the **Binselection field.** The **dropdown** now displays the complete list of available **bin locations** and supports searching, allowing users to quickly filter and select the appropriate bin.	SR-3843
26.0722	YES	**Item Details**	BUG FIX: Resolved an issue where the **Adjust Qtys in Stock button** on the **Item Details** screen failed to open the **inventory adjustment form**.	SR-4150
26.0720	YES	**Customer Portal**	BUG FIX: Resolved an issue where customers could bypass the available **quantity limit** by adding a partial quantity of an item, searching for another part, then searching for the original part again and adding more. The system now correctly validates the total quantity added against the available stock, preventing customers from ordering more than the available quantity.	SR-3799
26.0720	YES	**Item Catalog**	BUG FIX: Standardized the **Year Range format** across the **Item Catalog** to consistently use the **xx-xx** format (e.g., 98-02, 02-08). All **Catalog Manager** import and update processes now apply this format, and validation has been added to **Item Details, Item Catalog, Add New Item**, and other manual entry screens to enforce the format for **Auto Parts** companies.	SR-4113
26.0720	YES	**Item Details**	Enhanced the **Item Details** screen by adding an **OEM Number field** to the header for improved visibility. The **OEM Number** is now also displayed beside the **Item Number** in the header (e.g., HO1000254 (123454576)), while the **Item Description field** has been expanded to display more information. Changes to the **OEM Number** are now automatically synchronized between both locations on the **Item Details screen** when updated by the user.	SR-4111
26.0720	YES	**Reports**	BUG FIX: Resolved an issue where running the **Invoices/Credits by Date** report resulted in a "**This site can't be reached"** error during download. The report download process has been corrected, and **database performance** was optimized by adding indexes to the Invoice, InvoicePaymentLineItems, InvoicePayments, and SalesOrderLineItemBins tables, improving report generation and download performance.	SR-3787
26.0720	YES	**Sales Order**	BUG FIX: Resolved an issue where the **Sales Order Print Preview** became stuck on the loading screen after selecting **Print > Preview**. The print preview process has been corrected to load successfully, restoring normal printing functionality.	SR-4001
			NEW FEATURE: Added a **Cannot Find in Bin** option to the Scanner **Pick to Cart** screen, allowing users to **select alternate bin locations** when an item	

26.0720	YES	**Scanner**	cannot be found. Added configurable actions for items that cannot be found, including doing nothing, adjusting inventory, or creating an Inventory Assignment, along with improved alternate-bin selection, quantity tracking, logging, and optional warehouse notifications.	SR-2054
26.0716	YES	**Items**	BUG FIX: Updated **item** handling to map **Vendor ID**s , address missing **images** from **Item Details** tab, and prevent **SKUs** from appearing in the **Customer Portal** and **Sales search results**.	SR-4480
26.0716	YES	**Item Catalog**	BUG FIX & UPDATE: Enhanced the **Item Catalog search experience** by changing the **search behavior** to execute only when the user presses the **Enter key**, matching the functionality of the **Item List search**. Additionally, expanded the search capability to support **multiple search terms** separated by **commas**, allowing users to search for multiple item numbers simultaneously using exact, partial, or contains matches.	SR-4112
26.0716	YES	**Item Details**	UPDATE: Added a **Bin Locations** drop-down list to the **Bin field**, allowing users to select from available **bin locations** when **adjusting quantities in stock**.	SR-3470
26.0716	YES	**Reports**	BUG FIX: Resolved issues preventing **report** drill-down functionality from opening when selecting **report details**, restoring access to transaction-level information. Also corrected the **Cost of Sales calculation** discrepancy, ensuring the reported cost aligns correctly with the associated invoice amounts. Additionally, addressed the underlying report execution issues to improve overall report reliability.	SR-3929
26.0715	YES	**Invoices**	BUG FIX: Resolved an issue where **Invoice** print formats could **reset** after installing a **new version**.	SR-4094
26.0714	YES	**Find Parts**	BUG FIX: Resolved an issue where creating a **Sales Order** from **Find Parts** incorrectly reduced the **Qty In Stock** instead of the **Qty Available**. Inventory is now reserved correctly by reducing the **Qty Available** while leaving the **Qty In Stock** unchanged until the item is shipped.	SR-4086
26.0714	YES	**Import Wizard**	UPDATE: Enhanced the **Customer Import process** to preserve imported **tax information** without setting **TaxCode1** to **NULL** when no matching tax code exists in the system. The import process now also updates the **Created/Modified date** and **user** information for imported and updated records. After the import completes, users are notified that they may need to run the **Refresh Tax Rate Codes** function from **Settings > Sales > Sales Taxes** to ensure tax rates are up to date.	SR-4019
26.0714	YES	**Sales Order**	BUG FIX: Enhanced the **Sales Order** workflow to allow the **Status field** to be **edited** even after the **Sales Order** has been **Invoiced**, providing greater flexibility for post-invoice status management.	SR-3829
26.0713	YES	**Sales Order**	BUG FIX: Resolved an issue where **Sales Order Line Items** were not displaying correctly. Line items now appear as expected.	SR-4085
26.0713	YES	**Scanner**	BUG FIX: Enhanced th**e Count to Bin** process to correctly **clear items** when a bin has no **physical inventory** after advancing to the next step. Also improved scan validation to reject invalid or non-existent item numbers, preventing random values from appearing to be accepted by the system.	SR-4031
26.0710	YES	**Reports**	BUG FIX: Resolved an issue introduced in **v26.0630** where reports failed to display after clicking **Run Report.Reports** now generate and display correctly across all report types.	SR-3925
			BUG FIX: Resolved an issue where downloading reports from **1place**	

26.0710	YES	**Reports**	redirected users to a **"This site can't be reached"** page. Report downloads now complete successfully without redirect errors.	SR-3863
26.0709	YES	**Integrations**	UPDATE: Enhanced the **integration quote process** to continue processing all remaining line items even if one or more items cannot be found. Missing items no longer stop the import, allowing valid items to be processed successfully while skipping only the unavailable entries.	SR-3894
26.0709	YES	**Sales Taxes**	BUG FIX: Resolved an issue where importing taxable customers could cause **TaxCode1** to be set to **NULL**. **Customer imports** now preserve existing **tax codes**, while **sales tax codes** and **rates** are managed separately through the **Sales Taxes** settings using the **Refresh Sales Tax Codes** and **Refresh Tax Rates for All Customers** functions.	SR-3935
26.0707	YES	**Find Parts**	UPDATE: Enhanced the **Find Parts** screen to allow users to edit the **Ship To Company Name** and **Ship To Address** for the selected shipping location. Any changes made are automatically carried over to the resulting Quote or Sales Order, providing greater flexibility for one-time shipping destinations without modifying the customer record.	SR-4006
26.0707	YES	**Find Parts**	BUG FIX: Resolved an issue where setting **Phone #** as the default c**ustomer search method** caused the search results to display incorrect columns and prevented searches from working properly by phone number. The search dropdown now displays the correct columns and returns accurate results based on the selected search method.	SR-4005
26.0707	YES	**Reports**	UPDATE: Expanded the **Sales History – 2 Year Comparison** reporting with new **Bill To Customer and Ship To Customer** report variations in both **Alpha** and **Best to Worst** formats. Added a new **Group By filter** with options for **All, Order Source, and Sales Rep**, allowing users to analyze sales history from multiple perspectives. The **Reports screen** has also been updated to accommodate the longer report names, and all four reports now support on-screen viewing with the ability to **export directly to Excel** from the report toolbar.	SR-3896
26.0706	YES	**Shipping and Receiving**	BUG FIX: Resolved an issue where **orders** containing **multiple quantities** on the **same line** remained in the **yellow picking status** after all items had been **picked**. Orders now correctly update their status once picking is complete.	SR-3902
26.0706	YES	**User Security**	BUG FIX: Resolved several **User Security** permission issues that restricted users with appropriate **access rights** from performing common tasks. Users with the required permissions can now **edit paid Credit Memos**, **manage comments**, **process** and r**emove payments**, **update Bill To and Ship To information**, **modify Sales Rep and Entered By fields** , **manage item lines,** and **access reports** as permitted by their assigned security settings.	SR-3701
26.0703	YES	**Customers**	BUG FIX: Resolved an issue on the **Customer > Add New screen** where entering a valid **ZIP Code** did not automatically retrieve and populate the appropriate **Sales Tax Code** and T**ax Percentage**. **Automated tax calculation** now correctly assigns tax information based on the entered **ZIP Code.**	SR-3954
26.0703	YES	**Customer Portal**	BUG FIX: Resolved an issue where Customer Portal orders displayed the Unit Price as the List Price instead of the Net Price. Portal orders now follow the same pricing logic as standard orders, ensuring the Unit Price reflects the customer's Net Price consistently across all order sources.	SR-3911
26.0703	YES	**Sales Order**	BUG FIX: Resolved an issue where the **Commit Line Item** action on the **Sales Order screen** did not complete after confirming the **Stock Selector dialog**. Selected **inventory** can now be successfully committed and saved to the **Sales Order**	SR-3953

26.0702	YES	**Credit Memo**	BUG FIX: Restored the missing **Check Number field** on the **Payment (Give Cash Back or Apply Credit Button) screen** to support refund check processing. The payment reference field was then further enhanced to dynamically update its label based on the selected payment method, providing a more flexible and consistent user experience.	SR-3850
26.0701	YES	**Catalog Management**	BUG FIX: Resolved an issue in **Catalog Management** that could cause an **undefined error** when opening a catalog. Users can now access catalogs without encountering the error.	SR-3907
26.0701	YES	**Descartes**	BUG FIX: Updated the **Descartes integration** so that **Credit Memo and Return Authorization** uploads always send an amount of **$0.00.** The **List Price** continues to be included, while the return amount is correctly set to zero since no payment is owed for return pickups.	SR-3915
26.0701	YES	**Import Wizard**	BUG FIX: Resolved an issue that caused an **undefined error** during the **Vendor Item Numbers import** and update process. The comparison logic between Excel records and existing database records has been corrected, ensuring the **Vendor Item Numbers** (1 Vendor) update function processes records accurately.	SR-2911
26.0701	YES	**PartsTrader**	BUG FIX: Updated the **PartsTrader integration** to send a **1-day delivery estimate** for orders placed on **Fridays**. This allows **PartsTrader** to calculate the correct **Monday delivery date** instead of incorrectly pushing the Repair Delivery Date to **Wednesday.** This change applies only to PartsTrader Friday orders and does not affect other integrations.	SR-3887

Version 26.0401 –26.0630

Version #	QA Tested	Module	Description	Support Request #
26.0630	YES	**Customer Portal**	UPDATE: Updated the subscription pricing text in **Settings** > **Portal.**	SR-4227
26.0629	YES	**Warehouse Shipping Priorities**	BUG FIX: Resolved an issue where **Warehouse Shipping Priorities** were not being followed correctly when selecting **inventory** from alternate warehouses. The system now properly evaluates available stock and prioritizes warehouses according to the configured shipping priority rules, ensuring eligible warehouses are selected and displayed correctly in inventory transfer recommendations.	SR-3834
26.0627.2	YES	**Descartes**	BUG FIX: Resolved an issue where **invoice line items** were incorrectly uploaded to **Descartes** as duplicate pieces, causing delivery receipts to display the same part multiple times. Invoice uploads now correctly reflect the actual quantity and line item structure, ensuring accurate delivery receipts.	SR-3587
26.0626	YES	**Reports**	UPDATE: Added **Ship To Address** and **Ship To Customer Number** columns to the **Invoice/Credit Memo report**. Also resolved an issue where the **Source of Order** column was not displaying data, and it now reports the correct values.	SR-3652

Version #	QA Tested	Module	Description	Support Request #
26.0625	YES	**Integration**	BUG FIX: Added a new **CCC Integration** option to continue searching the **Cross Reference table** when an initial part match is found but none of the matched items have inventory available. This ensures additional cross-reference matches are evaluated, improving part matching accuracy and increasing the likelihood of returning in-stock alternatives.	SR-3782
26.0625	YES	**Menu Bar**	BUG FIX: Resolved an issue where the **left navigation menu** would intermittently expand beyond its intended width on various screens, causing layout and spacing inconsistencies. The **navigation bar** now maintains a consistent width, ensuring proper alignment of menu highlights and page content across the application.	SR-2743
26.0625	YES	**Reports**	BUG FIX: Updated the **inventory report (Inventory Valuation)** export to ensure the **Bin** column is exported as **text**. This prevents Excel from automatically converting bin locations into date formats, preserving the original bin values and improving data accuracy.	SR-3805
26.0624	YES	**Cash Management**	BUG FIX: Resolved multiple issues on the **Cash Management (1 Step Process) > Final Reconciliation & Deposit screen**. Fixed the **Select All** checkbox, **Search** functionality, **Total Amount and Total Amount Selected calculations**, and the **Make Deposit** process. The screen now functions correctly, allowing users to complete reconciliation and deposit workflows successfully.	SR-3816
26.0624	YES	**Item Catalog**	BUG FIX: Resolved an issue where new **Item Catalog** entries created from the **PartsLink table** did not place the **Year** at the beginning of the description. Catalog descriptions now follow the correct formatting when imported from **PartsLink.**	SR-3840
26.0624	YES	**Replenish Stock**	BUG FIX: Resolved an issue in **Replenish Stock** that could cause the process to fail with an **undefined error.** Users can now run stock replenishment successfully without encountering the error.	SR-3828
26.0624	YES	**Reports**	BUG FIX: Resolved an issue that prevented the **Invoice/Credits by Date (Totals)** report from being exported to **Excel**. The report now exports successfully while preserving the report data and totals.	SR-1469
26.0624	YES	**Sales Order**	BUG FIX: Resolved a user interface issue where the **Show/Hide Columns popup** opened above the **Gear** button, causing part of the window to be cut off. The popup now displays in the correct position and is fully visible on Sales Transaction screens.	SR-2986
26.0624	YES	**Shipping and Receiving**	BUG FIX: Resolved an issue where **4×2 labels** could not be printed from the **Shipping & Receiving > To Print & Pick screen**, causing the print process to remain in a loading state. Label printing now completes successfully while maintaining support for configured label fields.	SR-3841
26.0623	YES	**Descartes**	BUG FIX: Updated the **Descartes integration** so editing an **invoice** no longer triggers an **automatic resync**. **Invoices** are now **synced** only when they are **created**, manually **resubmitted from Shipping & Receiving**, or when the **Delivery Date** is **changed** to a future date.	SR-3820
26.0623	YES	**Reports**	BUG FIX: Resolved an issue where the **Item Stock Report** displayed an incorrect "As Of" date on the screen while the exported report showed the correct date. The report now consistently displays the current "As Of" date in both the application and exported output.	SR-2954
26.0622	YES	**Find Parts**	BUG FIX: Updated the **Find Parts settings** so the **"Prompt User if the Same Customer Calls Back..."** option is hidden whenever Display **Find Parts in Standard Layout** is enabled, ensuring only relevant settings are shown for the selected layout.	SR-3514

Version #	QA Tested	Module	Description	Support Request #
26.0622	YES	**Reports**	BUG FIX: Updated the **Inventory Valuation (Current)** and **Inventory Valuation (Historical)** reports to include the **report headers** when exporting to **Excel**. Exported files now display the **Company Name, Report Name**, and **Report Date**, matching the information shown in the on-screen report.	SR-2956
26.0622	YES	**Shipping and Receiving**	BUG FIX: Resolved an issue where accessing the **Shipping & Receiving > To Invoice & Dispatch** screen could result in an undefined error. The screen now loads correctly and users can proceed with invoicing and dispatch operations without errors.	SR-3793
26.0618	YES	**Credit Memo**	UPDATE: Added a new setting under **Sales > Invoice/Credit Memo Setting**s that allows users to enable or disable automatic assignment of **returned items** to the **Returns Area bin location.** When enabled, **items** returned to stock through a **Credit Memo** are automatically placed in the **Returns Area**, making them easy to identify and scan for relocation to their proper bin locations. This enhancement does not automatically change the item's reservation status.	SR-3146
26.0618	YES	**Customer Statements**	BUG FIX: Resolved an issue where **Customer Statements** failed to send when **multiple email addresses** were entered in the **recipient** field. **Statements** can now be successfully emailed to multiple recipients.	SR-3792
26.0618	YES	**Import Wizard**	UPDATE: Enhanced the **AR Payment Import** process by optimizing performance, implementing batch processing, and improving database efficiency to better support large import files. Additional **validation** was added to prevent duplicate invoice payment creation, and duplicate payment records were removed to ensure successful and reliable payment imports.	SR-3791
26.0618	YES	**Partslink**	BUG FIX: Resolved an issue where new items created through the **PartsLink Wizard** were incorrectly marked as **non-taxable**. Newly created items now apply the correct taxable setting by default.	SR-1497
26.0618	YES	**Purchase Order**	UPDATE: Updated the **Purchase Order print layout** to include additional **spacing** and display the **Purchase Order Number** on the second and subsequent pages, improving readability and providing consistency.	SR-1579
26.0618	YES	**Sales Order**	UPDATE: Updated the **Packing Slip** print layout to include additional **spacing** and display the **Sales Order Number** on the second and subsequent pages, providing a consistent multi-page format similar to the Invoice print layout.	SR-1561
26.0617	YES	**Scanner**	BUG FIX: Resolved an issue in **ScanBeta v0611** where **return reason codes** were not being accepted during the return process. Return reason code validation has been corrected and the selected codes now process as expected.	SR-3773
26.0617	YES	**Shipping and Receiving Screen**	BUG FIX: Resolved a display issue on the **Shipping & Receiving > Pending** screen. The screen now loads and displays pending records correctly.	SR-1788
26.0616	YES	**Purchase Order**	BUG FIX: Resolved an issue in **v26.0316** where the **total amount** displayed on the **Purchase Order List** did not match the total shown within the **Purchase Order detail screen**. **PO list totals** now accurately reflect the values calculated on the corresponding **Purchase Orders.**	SR-2780
26.0616	YES	**Sales Order**	BUG FIX: Updated the **Order Source field** to use only values defined in the **Order Source Settings** table. Manual orders created through **Find Parts** now default to **Phone**, ensuring the field is never left blank. The available **Order Source list** has been standardized to approved values, and manual entry has been disabled so users can only select from the predefined list.	SR-3682

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26.0616	YES	**Scanner**	UPDATE: Add the ability to filter records in the **Scanner Items on Dock** section by **Item Number or PO Number.** This will make it easier for users to quickly locate specific items and improve dock management efficiency.	SR-2017
26.0615	YES	**Catalog**	UPDATE: Updated the **Item Detail > Catalog tab** so the **Category** and **SubCategory** dropdown lists dynamically display distinct values based on the selected **Year Listing, Make,** and **Model**, similar to the behavior on the **Find Parts screen**. Added **refresh** buttons next to both fields to allow users to manually reload and update the available Category and SubCategory options.	SR-2366
26.0615	YES	**Catalog**	UPDATE: Enhanced the **OEM Price Update** process in **Catalog Manager** to always use the **OEM Price** from the latest model year associated with the **OEM Number**. The selected **OEM Price** is now consistently applied to both **CAPA** and Regular parts.	SR-1855
26.0615	YES	**Import Wizard**	BUG FIX: Resolved an issue in **v26.0608** where the **ParentCustomer field** was not being updated during **customer imports**, even though the import process completed successfully. Parent Customer relationships can now be imported and updated correctly when valid Parent Customer identifiers are provided.	SR-3749
26.0615	YES	**Import Wizard**	BUG FIX: Resolved an issue where the Customer Import Wizard attempted to fetch and update Sales Tax Rates during customer imports, resulting in import errors. Customer imports now bypass sales tax rate updates and process successfully without modifying tax rate data.	SR-3612
26.0615	YES	**Item List**	UPDATE: Added a new Item Receipts record source to the Item Lists > Items Custom Tab. All fields available on the Item Receipts List, including the new Reserved field, can now be selected and displayed. Filtering, sorting, and Excel export functionality have also been enabled to support reporting and analysis of reserved inventory.	SR-3209
26.0615	YES	**Item List**	BUG FIX: Resolved an issue where the **Bin Location** column in **Item List** custom views displayed a generic bin instead of the item-specific bin location. The field now correctly shows the corresponding bin location for each individual item line.	SR-3132
26.0611	YES	**Invoice and Credit Memo**	UPDATE: Consolidated Return Reason Codes and Item Adjustment Codes into a single configurable table, allowing administrators to define which reason codes are available for Credit Memos, Customer Portal, Scanner, and Item Adjustments. The settings screen has been updated with new visibility options, improved layout, resizable columns, and streamlined data entry. The Item Adjustments screen now uses the shared Reason Code list, requires users to select a valid reason before saving, and replaces the previous Adjustment Reason Code field. Dropdowns throughout the system now display only the reason codes applicable to their respective screens. The Item Adjustments report has also been enhanced with a Reason Code column, separate User Notes, and new filtering options for Reason Code and Warehouse to improve reporting and analysis.	SR-2553
26.0611	YES	**Scanner**	BUG FIX: **Receiving > Return Items > Request Credit.** Updated the **Reason** dropdown behavior so it no longer defaults to the first available option. The field now defaults to **"Select One"**, and users must choose a valid reason before they can proceed. This helps prevent accidental selections and improves data accuracy.	SR-3706
26.0610	YES	**Catalog**	BUG FIX: Resolved an issue where **Catalog Descriptions** could include unnecessary parentheses () when rebuilding the catalog. The fix has also been applied when adding items directly from the **Catalog screen**, ensuring consistent description formatting across both processes.	SR-3471

Version #	QA Tested	Module	Description	Support Request #
26.0610	YES	**List**	BUG FIX: Resolved an issue where exporting records from Customer Lists, Custom Wizard Tables, and other data tables could fail, displaying an incorrect record count and redirecting users to an error page. Export functionality has been corrected and selected records now export successfully across supported lists and tables.	SR-3745
26.0609	YES	**Catalog**	BUG FIX: Resolved an issue where the **Make and Model filters** in **Manage Catalog** were not being applied correctly, causing unrelated models to appear in the list of items available to add. Filter results now properly reflect the selected **Make and Model criteria**. The **Year Range filter** was also reviewed and confirmed to be functioning correctly.	SR-2365
26.0609	YES	**Customers**	BUG FIX: Resolved an issue that prevented certain **inactive customer accounts** from being **reactivated**. Customer records can now be successfully reactivated without generating errors.	SR-3758
26.0609	YES	**Sales Order**	BUG FIX: Updated the **Sales Order print document** to display the **Bill To Customer Number** instead of the **Ship To Customer Number**. This ensures the correct **customer number** is shown on printed sales orders when the Bill To and Ship To customers are different.	SR-1833
26.0608	YES	**AR Receive Payments**	UPDATE: Enhanced the **customer search functionality** on the **Receive Payments** screen by adding **Company, Customer #, Phone #, Address, and Address Type** columns to the standard customer search results. Added a new **Default Customer Search Method setting** under **AR & GL Settings**, allowing users to choose between Company Name, Phone #, Customer #, or Search All Columns as the default search method. The **Receive Payments** screen now dynamically adjusts displayed **columns** based on the selected search method and supports searching across all available customer fields when Search All Columns is selected.	SR-3181
26.0608	YES	**Catalog Management**	UPDATE: Added a new **Catalog Manager** option to create generic **Item Descriptions** when generating new items. When enabled, the **Item Description** is populated using only the **PartsLink Description** and its associated variables, excluding the **Year, Make, and Model**. The setting is retained between sessions, allowing users to consistently create generic item descriptions for parts that fit multiple vehicle applications.	SR-3688
26.0608	YES	**Descartes**	BUG FIX: Resolved an issue where **invoice line items** with **quantities greater than one** were uploaded to **Descartes** as a single line. Invoice uploads now correctly reflect the item quantities, ensuring delivery receipts generated in **Descartes** display accurate totals.	SR-3501
26.0608	YES	**Users**	BUG FIX: Resolved an issue where attempting to **add a user** after reaching the **licensed user** count generated an error. License validation has been corrected, and support was added to accommodate the requested additional user account.	SR-3702
26.0605	YES	**Item Details**	BUG FIX: Resolved an issue in v26.0528 where accessing **Default Bins by Warehouse** from the **Item Detail > Stock tab** resulted in an undefined error. Users can now successfully view and manage default bin locations for each warehouse.	SR-3683
26.0605	YES	**Reports**	BUG FIX: Resolved a calculation issue in the **Invoices/Credits by Customer (Item Vendor)** report where invoice totals were being counted multiple times across vendors, resulting in inflated report totals. The report now correctly allocates amounts by **Item Vendor** and calculates accurate invoice and summary totals	SR-3628
26.0604	YES	**Help Button**	BUG FIX: Reviewed **Help** buttons across the application to ensure they are properly linked to the correct **Knowledge Base** articles.	SR-3660

Version #	QA Tested	Module	Description	Support Request #
26.0604	YES	**Labels**	UPDATE: Added a new **4×6 (Landscape) label layout** option, allowing users to print labels in landscape orientation to better accommodate their labeling and printing requirements.	SR-3356
26.0604	YES	**Reports**	BUG FIX: Resolved an issue where the **Invoices/Credits Payment Details** report could not be downloaded. The report now generates and downloads successfully.	SR-3585
26.0604	YES	**Reports**	BUG FIX: Resolved an issue in v26.0527 where the **Cost values** displayed in the **Inventory Valuation Historical** report did not match the values exported to **Excel**. The report and exported file now use consistent cost calculations and display the correct values.	SR-3633
26.0604	YES	**Reports**	UPDATE: Added new reporting capabilities for **Customer Portal return requests**, **Credit Authorization requests in 1place Scan**, and **all returns** across all sources. The reports include key return details such as **Item Number, Quantity Returned, Reason Code, Request/OrderDate, Driver Name, Original Invoice Number,** and **Credit Memo Number** to improve return tracking and reporting.	SR-3395
26.0604	YES	**Sales Order**	BUG FIX: Resolved an issue in v26.0604 where opening a **Sales Order** could result in a **Bad Request error**. Sales Orders now open correctly without generating the error.	SR-3725
26.0602	YES	**Customers**	BUG FIX: Resolved an issue where the **Customer Record Number** was incorrectly **skipping** or jumping to the next number in the sequence. **Customer numbering** now follows the configured numbering logic correctly when creating new customer records.	SR-3617
26.0602	YES	**Sales Order**	BUG FIX: Resolved an issue where enabling **Define Prefix by Warehouse** caused **Sales and Credit Memo numbers** to ignore the configured numbering format and generate incorrect values. **Document numbering** now correctly follows the selected number type and formatting rules while applying warehouse-specific prefixes.	SR-3251
26.0602	YES	**Shipping and Receiving**	BUG FIX: Resolved an issue where the **Waiting to Be Purchased list** count did not match the **total displayed** on the left-side counter. Also added a **Customer PO** column option and a **magnifying glass button** to quickly open the related **Sales Order.**	SR-1669
26.0602	YES	**Reports**	BUG FIX: Resolved an issue in the **Total Sales by Item (Ascending Order)** report where the **Warehouse filter** was not being applied correctly. The report now properly filters results based on the **selected warehouse.**	SR-325
26.0601	YES	**AR Receive Payments**	BUG FIX: Updated the **duplicate payment validation** to prevent unnecessary **warnings** when entering values in the **Check / CC # field** for **credit card payments**. The duplicate payment warning is now displayed only for **check payments**, helping prevent the reuse of **duplicate check numbers** while eliminating unnecessary popups for recurring credit card transactions.	SR-3375
26.0601	YES	**Integrations**	BUG FIX: Updated the **Integration Mapping Tables** to display the correct integration names. References to **CCC PartType** have been replaced with the appropriate **OPSTrax PartType** and **PartsTrader PartType** labels in their respective mapping screens.	SR-3646
26.0601	YES	**Reports**	BUG FIX: Added a **Customer Ship-To Statecolumn** to the existing **Invoice/Credits report**, allowing users to filter, group, and export invoice and credit data by the customer's shipping state.	SR-3473
26.0601	YES	**Sales Order Lists**	UPDATE: Expanded filtering capabilities on **Sales Order Lists** to support **filtering** by all available **columns**, including **SO Status**, **Order Source**, **Invoice Date**, and other list fields. Added support for date **range filtering** to make it easier to locate and analyze Sales Orders based on specific time periods.	SR-125

Version #	QA Tested	Module	Description	Support Request #
26.0601	YES	**Special Notes**	UPDATE: Added a new **Sales Order setting** that controls how **Item Special Notes** are displayed when an item is added to a **Sales Order.** Users can choose to **never display notes**, show them **embedded on the Sales Order screen**, or display them as a **popup message**. Also updated the field label to indicate that **Special Notes** can be displayed on both **Find Parts** and **Sales Order** screens.	SR-2060
26.0529 (26.0608)	YES	**Invoices**	BUG FIX: Resolved an issue where the **Qty Rtn field** was locked on **imported invoices**, preventing users from creating **manual return authorizations**. Users with permission can now enter **return quantities** and process returns as expected.	SR-3328
26.0529	YES	**Lists**	BUG FIX: Added a **Created Date** column to the **Vendor, Quotation**, and **Purchase Order (PO)** lists, allowing users to **view** and **filter records** based on when they were created.	SR-318
26.0527	YES	**Item Details**	BUG FIX: Added a **confirmation prompt** when users click **Recalculate All Qty's in Stock**. Users must now type **YES** to proceed, helping prevent accidental execution of the long-running process. Also added a **Cancel** button to the progress screen so users can stop the recalculation while it is running.	SR-3489
26.0527	YES	**Item Details**	BUG FIX: Removed the **Default Bin Locations tab** and related **column filter settings** from **Item Detail**, since the same functionality is now available through the popup form/button interface.	SR-3590
26.0527	YES	**Reports**	UPDATE: Added **date range** selection functionality to the **Invoice / Credits by Item Category (Summary)** report.	SR-3433
26.0526	YES	**Item Details**	BUG FIX: Resolved an issue on **Item Details > Financial** where the **List Price** and **OEM Price** fields were incorrectly rounding decimal values. Entered values now retain the correct precision without unwanted rounding changes.	SR-3498
26.0526	YES	**Item Details**	BUG FIX: Renamed the existing **Special Notes field** to **Special Sales Notes** to better reflect its use on the **Find Parts** screen. Added a new optional **Additional Notes** field on **Item Detail**, supporting up to approximately 1,000 characters of text. Also added **AdditionalNotes** to the Item Detail Import Wizard for both import and update operations.	
26.0526	YES	**Item Details**	UPDATE: Added a new **Patented checkbox** to **Item Detail** > **Other Details** for internal use. Also updated integration mapping support to recognize DSC (**Diamond Standard CAPA**) quality indicators as CAPA parts across the applicable integrations.	SR-3207
26.0526	YES	**Import Wizard**	BUG FIX: Added support for the following fields in the **Item Import Wizard** for both import and update operations: **YearRange, eCommerce, Shippable, and Patented.**	SR-3369
26.0526	YES	**Record Numbering**	BUG FIX: Updated the **Use Sales Order Number for Invoice #** functionality to properly handle record prefixes. When converting a **Sales Order** to an **Invoice**, the system now applies the configured **Invoice prefix** and removes the **Sales Order prefix** when both prefixes are defined. If no **Invoice prefix** is configured, the original **Sales Order** number and prefix are retained. This ensures consistent numbering and reduces confusion between Sales Orders and Invoices.	SR-3430
26.0526	YES	**Reports**	BUG FIX: Resolved an issue where **reports** such as the **Invoice/Credit Report** would fail to download to **Excel** and remain stuck spinning without generating the file. Excel exports now complete correctly.	SR-3308
26.0526	YES	**Auto Job**	UPDATE: Added a new automated maintenance job to delete records from the Integrations > Requests table that are older than a configurable number of days. This helps reduce database size and maintain system performance by automatically removing outdated integration request records.	SR-3589

Version #	QA Tested	Module	Description	Support Request #
26.0525	YES	**Sales Order**	BUG FIX: Investigated and resolved an issue where **backorders** were still being created even though the **Make a Backorder** setting was **disabled**. Updated the validation logic to properly respect the company backorder setting during order processing.	SR-3516
26.0522	YES	**Support Tickets**	NEW FEATURE: Added a **Support Tickets** feature under **Settings** > **Support Tickets**. Customers can view **support requests** related to their company, search and filter tickets, review SR details and work logs, and track ticket status. Additional functionality, including saved filters, prioritization, and expanded ticket management features, will be added in future updates.	SR-336
26.0521	YES	**Customer Portal**	BUG FIX and UPDATE: Implemented multiple **Customer Portal** enhancements based on user feedback: Fixed the **MAKE** and **MODEL dropdowns** to always display in **alphabetical order.** Changed the default **Items/Page setting** to **50**. Updated the results grid so the **header row** remains visible while scrolling. Investigated and improved the u **pper-right Search field behavior** to properly support searching by relevant fields such as **Description**, **Item #**, and **OEM #.**	SR-3552
26.0521	YES	**Item Details**	BUG FIX: Resolved an issue where the **EXP DATE** was intermittently missing from the **Item Detail > POs** section. **Expected dates** now display consistently when available.	SR-3523
26.0521	YES	**Labels**	BUG FIX: Resolved an issue in **v26.0519** where using the **Zone filter** caused **transfer and ship order label** data to not display correctly on **printed labels**. **Labels** now properly show the related transfer and shipping information when filtered by zone.	SR-3565
26.0521	YES	**Reports**	BUG FIX: Resolved an issue where **custom fields s**uch as **Sales Tax** were not available when exporting the **Invoice/Credit Detail Report** to **Excel**. The report now properly supports the **Sales Tax field** and **custom column exports**.	SR-3297
26.0520	YES	**AR Receive Payments**	UPDATE: Added the ability to search the **Payment History** tab on the **Receive Payments** screen by **Invoice #** or **Credit Memo #**, along with performance optimizations for faster results.	SR-3544
26.0520	YES	**Scanner**	UPDATE: Added support for assigning **additional warehouses** to Scanner users for **Inspect Returns**. Users can now select which **assigned warehouse** to process the return into, and **inventory** will be returned to the **selected warehouse.**	SR-3462
26.0519	YES	**Merging Accounts**	NEW FEATURE: Added support for two distinct customer account management processes: **Account Merge** and **Account Adoption.** The **Account Merge** process is designed for **consolidating duplicate customer records** by moving invoices, credits, payments, API settings, contacts, and portal users into a primary account while preserving the primary account's pricing, tax settings, payment terms, shipping methods, and customer information. The **Account Adoption** process supports **parent/child customer relationships** by allowing one customer account to serve as the **billing account for another**. Child accounts retain their own customer records, shipping addresses, contacts, portal users, API settings, and account preferences, while billing and statements are managed through the designated parent account. Statements can also be separated by shipping location.	SR-3100
26.0519	YES	**Shipping and Receiving**	Resolved an issue where **Sales Orders** containing **transfer items** were being marked as **complete** too early. The **# of Items** on **Order** now correctly counts **quantities** across all warehouses, preventing premature syncing to Descartes.	SR-3406

Version #	QA Tested	Module	Description	Support Request #
26.0519	YES	**Shipping and Receiving**	Resolved an issue where **cancelled Sales Order lines** (Qty Ordered changed to 0) were still included in the **# of Items** on **Order count**. The **dispatch screen** now updates **totals** correctly based only on remaining **active quantities.**	SR-3406
26.0515	YES	**Scanner**	UPDATE: Completed functionality for the existing **All Sales Orders**, **Single Order**, and **Customer Pickup** options in **Shipping > Picking > Pick Orders** and **Cart to Staging**. Also added a new setting to define which **Shipped Via** value represents **Customer Pickup**. Added a new **Shipping Options** section in **Settings** and moved the **Customer Pickup Shipped Via** setting into that section. Fixed **UI alignment** issues where **checkbox** descriptions were not displaying correctly beside their checkboxes. Updated scanner prompts and instructions for improved clarity. Also resolved issues when the same **item** appears on **multiple lines** of the same **Sales Order**, improved handling for **"All Orders"** workflows, and added a **Back** button for easier scanner navigation.	SR-3280
26.0514	YES	**Reports**	BUG FIX: Resolved an issue where the **Invoice/Credits (Open) Report** was incorrectly including fully **paid invoicesand credits**. The report now properly filters and displays only **open balances.**	SR-3352
26.0514	YES	**Credit Memo**	BUG FIX: Resolved an issue in v26.0512 where **users** were unable to delete **Credit Memos or Return Authorizations** . Delete functionality now works correctly.	SR-3481
26.0514	YES	**Customers**	BUG FIX: Resolved an issue where the **Zip Code** on a new customer record would change after saving and confirming the **sales tax code**. The entered **zip code** now persists correctly without being overwritten.	SR-3484
26.0514	YES	**Sales Order**	UPDATE: Enhanced the **Packing Slip / Order Acknowledgment** print layout by adding a new **Row Padding** option under **Print Settings**. **Users** can now adjust spacing between line items from **4px to 10px** for improved readability and clearer separation of item descriptions.	SR-2859
26.0514	YES	**Scanner**	BUG FIX: Resolved an issue where scanning a **new part number** not already in the **Count by Bin** list would disappear without being added. New items are now properly added during the counting process	SR-3482
26.0513	YES	**AR Customer Statements**	BUG FIX: Resolved an issue in v **26.0507** where the **Customer Statements screen** failed to load correctly and features from v **26.0427** appeared missing. Fixed a **layout** conflict caused by the newly added **Payment Term field**, where the **File Type** field merged with the **From Date field** when **Distribution Method = Email**. Screen positioning and workflow have now been corrected.	SR-3445
26.0513	YES	**AR Receive Payments**	BUG FIX: Resolved an issue where **payment imports** were incorrectly showing **balance discrepancies** and preventing users from proceeding. The calculation logic has been corrected, and batch processing for database uploads has been optimized for better performance.	SR-3451
26.0513	YES	**Purchase Order**	BUG FIX: Resolved an issue where changing the **PO Qty** back to 0 did not reset the **Line Total** to $0. **Line totals** now recalculate correctly when quantities are updated.	SR-3474
26.0512	YES	**Scanner**	UPDATE: Added support for **searching** and **filtering Return Items** by both **Invoice #** and **Sales Order #**. The related **Invoice #** is now also displayed during the return process for easier tracking.	SR-3073

Version #	QA Tested	Module	Description	Support Request #
26.0511	YES	**API**	UPDATE: Created a new **API** to return available quantities for **active**, **shippable items** (QtyInStock - QtyReserved), with optional **DateTimeSince** filtering and restricted access hours based on Mountain Standard Time.	SR-2292
26.0511	YES	**Catalog**	UPDATE: Updated **Manage Catalog** so **users** can modify the **Make Duplicate CAPA** and **Make Duplicate Tier Part** options before generating item lists. Temporary records are now automatically cleared on page load, with a progress bar displayed during cleanup to prevent old records from appearing by default.	SR-3370
26.0511	YES	**Customers**	BUG FIX: Resolved an issue when adding a **new customer** where entering a **Zip Code** caused a duplicate key **error in SalesTaxRates**. Updated the **unique key** logic to use the combination of CompanyID, ZipCode, TaxCode, and TaxRate, allowing multiple tax codes/rates per zip code.	SR-3456
26.0511	YES	**Customer Details**	BUG FIX: Resolved an issue where customer **RFID/Third Part IDs** (**Customer Details** > **API** tab) were not saving correctly and would disappear after changing tabs.	SR-3367
26.0511	YES	**Import Wizard**	BUG FIX: Enhanced the **Invoice Payment Import process** to correctly apply imported payments, ensuring **unapplied amounts** are handled properly and **AR balances** remain accurate. Support has been added for **negative reversal payments**, allowing them to **offset previously imported positive payments** without automatically converting values to positive numbers. The **Import Wizard** instructions for **Invoice Type and Total Payment** have also been updated for clarity, and the **Invoice Payment** screen now includes improved action icons and tooltips for deleting, syncing, and reversing payments.	SR-3124
26.0511	YES	**Purchase Order**	BUG FIX: Resolved an issue where the **RCVD checkbox** could not be unchecked because the value would automatically revert back. The checkbox state now saves correctly.	SR-3411
26.0511	YES	**SOPO**	BUG FIX: Resolved an issue where creating a **PO** from a **Sales Order** would hang, return an error, and fail to refresh the screen. The **PO creation** process now completes properly and updates the **Sales Order** automatically without requiring manual refresh.	SR-3450
26.0511	YES	**Wizard Table**	UPDATE: Added **Customer Type** and **Customer Sub Type** to the filter options in **Wizard Tables** for **Sales Orders, Invoices**, and **Credit** lists, improving filtering and segmentation.	SR-3380
26.0508	YES	**Scanner**	UPDATE: Updated **Scanner** > **Receiving** > **Return Items** > **Inspect Returns** so returned inventory is added back to the **user's assigned warehouse** (scanner warehouse) instead of the Credit Memo warehouse, ensuring inventory is returned to the correct physical location.	SR-3402
26.0507	YES	**AR Aging Summary**	BUG FIX: Resolved an issue in version **26.0505** where the **AR Aging Summary** calculation could become unresponsive or fail to process after extended loading.	SR-3418
26.0507	YES	**Customer Detail**	BUG FIX: Resolved an issue on the **Customer Detail > API** tab where deleting one **API** entry was removing two lines. Also corrected the confirmation message to display **"Do you want to delete this API?"** instead of "contact."	SR-3278
26.0507	YES	**Sales Order**	BUG FIX: Resolved an issue where **Sales Order numbers** were being skipped or duplicated. The system now maintains a consistent and sequential numbering without reuse.	SR-2594
26.0507	YES	**Purchase Order**	BUG FIX: Resolved an issue where error messages appeared during **PO receiving** even though the **receipt process completed successfully**. Receiving now processes without unnecessary error prompts.	SR-3376

Version #	QA Tested	Module	Description	Support Request #
26.0506	YES	**AR Statements**	UPDATE: Added a new **Payment Terms filter** to the **Statements** (View, Print, PDF, and Excel) and **AR Aging Summary** screens. The filter displays a unique customer-based list of **payment terms** in alphabetical order and defaults to **ALL**. The Statements screen layout was also updated by moving the **From Date field** above the **To Date field.**	SR-3326
26.0506	YES	**AR Receive Payments**	BUG FIX: Resolved an issue in version **26.0505** where a **validation error** on the **Receive Payment** screen was preventing users from processing payments.	SR-3373
26.0506	YES	**Labels**	BUG FIX: Resolved an issue where **printed labels** did not match the selected **bin/zone filter** and included picks from unrelated zones. **Labels** now print only for the **bins** and **picks** selected by the applied **filter**.	SR-3302
26.0506	YES	**Sales Order**	UPDATE: Updated the **Unit Cost field** behavior for **Sales Order** line items to support backordered item processing. **Users** with the appropriate permissions can now edit and save the **Unit Cost** when no quantity has been shipped, or when shipped quantities exist but the current cost is zero. Once a line item has shipped and a cost has been established, the **Unit Cost** field becomes locked to prevent further changes.	SR-2884
26.0506	YES	**Scanner**	BUG FIX: Resolved an issue where **Count by Bin** did not translate **scanned cross-reference/KSI numbers** to the correct item during cycle counts. The scanner now properly converts and counts the related item.	SR-3295
26.0506	YES	**SOPO**	BUG FIX: Updated the SOPO > Update Item Vendor Cost Prompt functionality to properly respect the Yes / No / Prompt settings and correctly save vendor cost information to the Item Detail screen for future auto-population. Added a new Vendor Item # column, and when the setting is configured to Prompt, users will now be prompted to save the cost if a Vendor Item # is entered.	SR-2959
26.0505	YES	**Find Parts**	BUG FIX: Updated **Quick Search (Search by Category)** so that selecting a **category** button automatically clears the **Keyword** search field, ensuring accurate results.	SR-2173
26.0505	YES	**Label Designer**	BUG FIX: Resolved an issue where **labels** designed from **Sales Order print** were not matching those in **Shipping & Receiving**. Label configurations are now synchronized across both screens.	SR-3294
26.0505	YES	**Reports**	BUG FIX: Resolved an issue where the **Inventory Valuation Report** was not including all items. The report now correctly includes all inventory records.	SR-3351
26.0505	YES	**Scanner**	BUG FIX: Resolved an issue where removing a **user** in **Scanner > User Security** would log out the current session. Users can now be removed without forcing a re-login.	SR-3353
26.0504	YES	**Integrations**	BUG FIX: Resolved an issue where **Sales Orders** created through **integrations** (such as **CCC, OPSTrax, and PartsTrader**) did not correctly update their **status** after invoicing. **Sales Order statuses** now transition as expected throughout the order lifecycle.	SR-2881
26.0504	YES	**Scanner**	BUG FIX: Resolved an issue where **returns** could not be created for **partial quantities** on an **invoice** line. Users can now process returns for individual quantities (e.g., 1 of 2 items).	SR-3296
26.0430	YES	**AR Statements**	UPDATE: Added a **Customer PO#** (from Invoice) column to **AR Statements**, placed to the right of the **Trans #** column. Adjusted existing column widths to accommodate the change. This update applies to all statement types, including Excel exports.	SR-3267
26.0430	YES	**Import Wizard**	UPDATE: Added **Credit Card Number** and **Authorization Number** fields to the **Invoice/Credit Payment Import Wizard** for import support.	SR-3228

Version #	QA Tested	Module	Description	Support Request #
26.0430	YES	**Purchase Order**	UPDATE: Added a **Customer PO # column** to **AR Statements**, replacing the previous **Type** column for improved visibility and reference.	SR-3284
26.0430	YES	**Sales**	BUG FIX: Resolved an issue where **markup pricing (%)** was not being applied correctly in **Find Parts**. Pricing now properly calculates as **Cost + (Cost × Markup %)** and reflects accurately for customers with assigned markup rules.	SR-3304
26.0429	YES	**AR Receive Payments**	UPDATE: Added new **AR Import options** to either **Cancel & Re-Reconcile** or **Proceed & Force Balance** when payments do not match exactly. The system can now automatically handle **overpayments/underpayments**, add **balancing notes**, and generate an **Excel summary** with applied amounts and adjustment details.	SR-3049
26.0429	YES	**Purchase Order List**	BUG FIX: Resolved an undefined error that occurred when applying filters on PO Status in the PO List (including custom lists). Filtering now works correctly when refining results for open or not-yet-received POs.	SR-3276
26.0429	YES	**Import Wizard**	UPDATE: Added support for the **Volume field** in the **Item Import Wizard** for both **Import** and **Update** processes, positioned between **FixedCostForMarkupPricing** and **ShipLength.**	SR-3246
26.0429	YES	**Sales Order**	UPDATE: Added a new **Import Line Itemsoption** to **Sales Orders** with support for **importing line items into a single order**, including optional **Auto Ship** and **Auto Price Calculation** features.	SR-3069
26.0428	YES	**Import Wizard**	BUG FIX: Resolved an issue where the **Customer Import Wizard** was not importing **customer lists** due to **validation** and **format mismatches**. Fixed handling of **NULL CreateDate** values by removing the field from mapping, and updated the temporary import table to allow **NULL DeliveryFee** values (aligned with Customer table behavior). Import now completes successfully.	SR-3265
26.0428	YES	**Item Details**	BUG FIX: **Item Details > Custom Fields**. Resolved an issue where newly added **Custom Fields** were not appearing in **Item Detail, Item List, or Add screens**, and where date-type custom fields were not saving. **Custom fields** now display correctly across screens and persist after saving.	SR-2877
26.0428	YES	**Item List**	BUG FIX: Resolved issues where **Export to Excel** caused **undefined errors** or **timeouts** when exporting **reports** such as **Item List** and **Stock Replenish List**. Export processing has been stabilized and optimized.	SR-3203
26.0427	YES	**Cross Reference**	BUG FIX: **ITEM DETAILS > CROSS REFERENCE**. Resolved issues where **"Modified By"** was not updating when users edited **cross references** and where user changes were being overwritten. Updates now correctly track the **modifying user** and persist without being overridden.	SR-3068
26.0427	YES	**Customer Portal**	UPDATE: Added support for **mass importingCustomer Portal users** with automatic matching of imported CustomerID values to existing customer records, bulk approval functionality, template-based onboarding emails, and a new CreateNewPassword email variable for password setup links.	SR-2990
26.0427	YES	**Customer Portal**	BUG FIX: Resolved issues with **Customer Portal Returns** for **Credit Memo/RA (Descartes)** processing. The system now applies the correct document **prefix**, calculates the proper **Estimated Delivery Date** using the same logic as invoices, and uploads the **To Return Qty** instead of the **Returned Qty** to **Descartes**.	SR-3071
26.0427	YES	**Integrations**	UPDATE: Added a new **Include Vendor Qty's in Inventory File** option to the **CCC FTP Export** screen. When enabled, inventory exports will include items with zero local stock if vendor inventory quantities are available.	SR-2973
26.0427	YES	**Sales Order**	BUG FIX: Resolved an issue where invoices marked **Tax Exempt** still showed **tax** when printed. The system now automatically unselects tax checkboxes when **Tax Exempt** is enabled, ensuring accurate print output.	SR-2931

Version #	QA Tested	Module	Description	Support Request #
26.0427	YES	**Scanner**	BUG FIX: Resolved an issue in the **Putaway process** where **Step 3** only accepted a **Parts Link number** after initially scanning a **company item number**. The system now recognizes and accepts either the **company item number** or the **Parts Link number** throughout the entire **putaway** workflow.	SR-3228
26.0427	YES	**Scanner**	BUG FIX: Resolved an issue where **items** could be stocked using **cross-reference numbers** but could not be **picked to cart**. The scanner now supports c**ross-reference values** for both **stocking** and **picking** workflows.	SR-3202
26.0424	YES	**Customer Detail**	BUG FIX: Resolved an issue where unchecking **Tax Exempt** would revert after saving and reloading the customer. The setting now persists correctly when updated.	SR-3225
26.0424	YES	**Items Details**	BUG FIX: I**tem Details > Cross Reference tab**. Added **Modified Date** to the **Cross Reference section**, displayed alongside **Modified By User** (e.g., Admin 01/01/2001) for clearer tracking of changes.	SR-3116
26.0421	YES	**AR Customer Statements**	BUG FIX: Resolved an issue where **Customer Statements** were excluding **same-day payments, credits,** or **invoices** due to the selected **TO Date** only using 00:00:00 time. The system now automatically includes the full day range (23:59:59) for the selected TO Date, ensuring all transactions for that day appear correctly on statements.	SR-3180
26.0421	YES	**Find Parts**	BUG FIX: Resolved an issue where clicking **Clear All** on the **Find Parts** screen would log users out of **1Place**. The button now properly resets filters without terminating the session.	SR-3198
26.0421	YES	**Item Details**	BUG FIX: Added the **Shippable** and **Patented** field to the **Item Detail screen** and **Item List Settings**.	SR-3188
26.0421	YES	**Purchase Order**	BUG FIX: Resolved an issue where **Container Detaildata** was being cleared after the container was marked as **received**. Data now remains intact for reference after receipt.	SR-3156
26.0420	YES	**Customer Portal**	BUG FIX: Resolved issues in Customer Portal: **Other Settings > Email Templates** where the layout became disarranged after selecting **Edit** and saved templates were not retaining changes properly. Templates now save and display correctly.	SR-2016
26.0420	YES	**Shipping and Receiving**	BUG FIX: Enhanced the **Cancel/Restock** screen with top-level options for **Select All, Unselect All, and Delete & Unship All Selected** . The bulk action properly unships, logs, and deletes selected records.	SR-2682
26.0417	YES	**Invoices**	BUG FIX: Resolved an issue where the system incorrectly blocked **invoice deletion** due to a non-existent **payment**. **Validation** now accurately checks for **actual payments** before preventing deletion.	SR-3129
26.0417	YES	**Reports**	BUG FIX: Resolved an issue where the **warehouse filter** on the **Invoice/Credit Total** report was not applying correctly and showed totals for all locations. The report now filters accurately by the selected warehouse.	SR-3171
26.0416	KNOWN ISSUE	**Credit Memo**	Unable to save **line item.**	
26.0416	KNOWN ISSUE	**Purchase Order**	Unable to **Send email**. Documents to **print dropdown** are disable. Unable to **create AP bill** while click "**Sync with Quickbooks online'**	
26.0416	YES	**Audit Log**	BUG FIX: Resolved an issue where the **Audit Log "Turn Off"** setting was being automatically **enabled** after changing versions. The setting now retains its configured value during **version updates** and changes.	SR-2065
26.0416	YES	**Customer Portal**	BUG FIX: Resolved an issue where **Customer Portal transfer orders** were adding an extra day to the **Estimated Delivery Date**. Transfer orders now calculate and display the correct delivery date.	SR-2778

Version #	QA Tested	Module	Description	Support Request #
26.0416	YES	**Quick Search**	BUG FIX: Resolved an issue where changing the "Search By" dropdown caused the system to freeze. The dropdown now updates correctly without impacting performance.	SR-3232
26.0416	YES	**Receive Payments**	BUG FIX: Resolved an issue where changing the **Customer or Display Filter** (All Customers / Customers with Balance) caused popup errors. **Customer selection** and **filtering** now work smoothly without errors.	SR-3042
26.0416	YES	**Receive Payments**	BUG FIX: Fixed the **Select All button** to properly **select all records** when checked and **deselect all** when toggled again.	SR-3058
26.0416	YES	**Scanner**	BUG FIX: Resolved an issue where **Move Dock Items to Bin** did not require scanning each item after selecting a **PO**. The system now enforces item-by-item scanning before completing the move.	SR-3061
26.0416	YES	**System**	UPDATE: Redesigned how **PDF reports** are stored. Instead of copying files across versions, all **PDFs** are now saved in a single centralized folder, improving storage efficiency and cleanup management.	SR-3039
26.0413	KNOWN ISSUE	**User Security**	Unable to edit **Shipped via** while user have edit rights.	
26.0413	KNOWN ISSUE	**Reports**	**Invoice/Credit by Customer (Open)** Report Displays **All Records** Instead of Only Open Balance Orders	
26.0413	YES	**AR Receive Payments**	UPDATE: Added a new validation to the Receive Payments screen to help prevent duplicate payment entries. Users will now receive a Duplicate Payment? warning message when the same payment number is entered for the same customer within the past 90 days, helping identify potential duplicate payments before posting.	SR-3019
26.0413	YES	**Item Detail**	BUG FIX: Resolved an issue in **Item Detail > Custom Filters > Tabs** where duplicate entries (e.g., multiple Show Default Bin and Show Picture options) were appearing. **Filters** have been cleaned up to display correctly without duplicates.	SR-3096
26.0413	YES	**Item Detail**	BUG FIX: Improved the **Item Cross Reference Wizard** import process by reducing the batch size from 500 to 100 to help prevent performance delays during large uploads. Additional testing was completed against the database, including **CAPA files**, and **cross-reference values** were verified to import and display correctly. Further QA testing was also performed for **Item Vendor,Item Manufacturer, Notes,** and **Cross Reference** update behavior.	SR-3087
26.0413	YES	Record Numbering	BUG FIX: Resolved an issue where **warehouse-based numbering** in **Find Parts** was using the **Bill-To warehouse** instead of the selected **warehouse**. The system now correctly applies the prefix based on the chosen warehouse.	SR-3103
26.0413	YES	**Sales Order**	BUG FIX: Resolved an issue where editing the **line item description** (and other fields) would reset the status to **NEW**. Line item status now remains unchanged when making edits.	SR-3076
26.0413	YES	**Settings**	UPDATE: Reorganized the Settings navigation menu for improved usability, including renaming AR & GL and removing QuickBooks Online Integration (moved to Sales > Integrations),	SR-3067
26.0413	YES	**Shipping and Receiving**	UPDATE: Removed all **filters** and **criteria** below the blue title on the **Ship/Rec > NEW** screen for a cleaner interface.	SR-3077
26.0409	KNOWN ISSUE	**Record Numbering**	Warehouse-based record numbering prefix. **Settings → System → Record Numbering →Warehouse Prefix Numbering** while creating a **Sales Order** and accessing **Find Parts**, the warehouse-based numbering is being fetched incorrectly. The system currently retrieves the numbering prefix based on the Bill-To warehouse instead of the selected Warehouse.	
26.0409	YES	**Customers**	BUG FIX: Resolved an issue where the Save button would not create a new customer in version 26.0406. Customer creation now works correctly.	SR-2998

Version #	QA Tested	Module	Description	Support Request #
26.0409	YES	**Customer Details**	BUG FIX: Resolved an issue where the **search field** was missing from the **Invoices tab** in **Customer Detail**. The search functionality has been restored to match previous versions.	SR-3059
26.0409	YES	**Find Parts**	UPDATE: Updated the **security validation** when selecting a **customer** in **Find Parts (Corporate)**. If a user does not have **access rights** to the company associated with the selected customer, the system now displays a clearer **Missing Credentials message** explaining that additional **company security permissions** are required and advising the user to contact their system administrator.	SR-2988
26.0409	YES	**Item Details**	BUG FIX: Fixed an issue where **Receipt ID** was not automatically populating when manually **adding stock** in Item **Details > Stock** (v26.0407 and earlier). **Receipt IDs** are now correctly generated and assigned during stock entry, ensuring items can be properly adjusted. A cleanup process has also been applied to update existing stock records missing Receipt IDs.	SR-3028
26.0409	YES	**Item Details**	BUG FIX: Updated the system to ensure **audit** and **logging fields**, such as **Date Added, Date Edited, Added By, Edited By,** and similar tracking fields, remain **read-only** at all times, regardless of user security rights or administrator privileges. This includes the **Date Added field** on the **Item Detail** > In **Stock tab** and other applicable screens throughout the system.	SR-2602
26.0409	YES	**Label Designer**	UPDATE: Added **Other #** field in the **label designer** and verified functionality through testing. Also fixed the issue with saving the changes on the label.	SR-2896
26.0409	YES	**Label Designer**	BUG FIX: Resolved an issue where **added fields** and **label** changes in **Label Designer** were not saving properly. Fields now persist after saving and display correctly in both the designer and preview.	SR-2962
26.0409	YES	**Record Numbering**	BUG FIX: Resolved an issue where **Customer record numbers** were not consistently **auto-populating** and the **Next Number field** was being cleared or triggering an error popup. The **record numbering sequence** has now been properly implemented and stabilized on the Customer creation screen.	SR-3032
26.0409	YES	**Sales Order**	BUG FIX: Resolved an issue where the **"Item Added to PO"** log entry was showing an incorrect time. The system now consistently uses the **user's local time** for all fulfillment log entries.	SR-3013
26.0409	YES	**Sales Order**	UPDATE: Added a new setting under **Settings > Sales > Sales Orders**: [ ] Prompt to mass set Qty Ordered to 0 for Back Ordered items. When enabled, and a user changes **Qty Ordered to 0 on a non-invoiced SO**, the system prompts to reset all **backordered items** to **0**. If confirmed (by typing "ALL"), all qualifying items are updated with no inventory or adjustment impact, followed by a **success confirmation message**.	SR-3065
26.0409	YES	**Shipping and Receiving**	BUG FIX: Resolved inconsistencies in the **"New" status** section across locations where **item counts** did not match **actual records.Counts** and **item listings** are now aligned and display correctly per warehouse.	SR-3003
26.0409	YES	**User Security**	UPDATE: Added a new Check for Modules & User Tab Updates button to the Module tab in User Security. This utility checks for missing modules and automatically synchronizes any missing user tabs across all screens, ensuring users have access to all applicable tabs based on their assigned security settings.	SR-2693
26.0408	KNOWN ISSUE	**User Version**	Unable to assign version to users on the admin portal	
26.0408	YES	**Admin**	BUG FIX: Resolved an issue with the **Show Users** screen in **Admin.1Place.Cloud** and added **pagination** to display users in batches of 500 records per page for improved performance and usability.	SR-3329

Version #	QA Tested	Module	Description	Support Request #
26.0408	YES	**AR Receive Payment**	BUG FIX: Added a **date range filter** to the **Receive Payments** screen in the footer of the detail area. Users can now specify **Start and End dates** (defaulting to 1/1/2000 and today's date) to filter displayed invoices and credit memos before or after selecting a customer.	SR-2935
26.0408	YES	**Credit Memo**	BUG FIX: Resolved an issue where the **Credit Memo numbering** field was being cleared, causing **CMs** to be created without numbers.	SR-3017
26.0408	YES	**Descartes**	UPDATE: Enhanced the **Descartes integration** by moving pickup creation and updates from the **Scanner** to the **Credit Memo** workflow. Added a new setting under **Sales > Integrations > Descartes** to optionally prompt users to create a **pickup** after submitting a **Credit Memo**. A new **Upload/Update Pickup to Descartes** option has also been added to the **More Options** menu on the **Credit Memo screen**, allowing users to create or update pickups based on the scheduled pickup date. The system now validates existing pickups, displays appropriate status messages, and supports automatic pickup creation after Save & Submit when the feature is enabled.	SR-2409
26.0408	YES	**Purchase Order**	BUG FIX: Resolved an issue where **PO line items** were not saving and totals were not calculating correctly.	SR-3060
26.0408	YES	**Sales Order**	BUG FIX: Resolved an issue where **Sales Order numbers** were being skipped or duplicated. The system now maintains a consistent and sequential numbering without reuse.	SR-2594
26.0408	YES	**User Interface**	BUG FIX: Reverted the **Item Detail** screen section styling to the previous color scheme, restoring a consistent appearance across all tabs.	SR-3035
26.0408	YES	**User Settings**	BUG FIX: Resolved an issue where the User Settings screen could become stuck on the loading screen when handling large numbers of users. Added pagination support for environments with more than 200 users to improve loading performance and usability.	SR-2033
26.0407	YES	**Customer Portal**	UPDATE: Added a new **Customer Portal setting** to automatically create a **Descartes Pickup** when a customer submits a **Credit Memo / Item Return request.** When enabled, return requests from the portal automatically generate a pickup request in **Descartes**, streamlining the return process for customers using the optional Descartes integration.	SR-2835
26.0407	YES	**Find Parts**	BUG FIX: Updated the **Last Sale Price (LSP$)** behavior in **Find Parts** to calculate per **customer** and per **item** only upon selection. The **column** now defaults to $0 and displays the c**ustomer-specific last sale price** when selected; if none exists, it remains $0. System updates to the global **Item!LastSalePrice** field have been removed.	SR-2375
26.0407	YES	**Invoices**	BUG FIX: Added a **print setting** on the **Invoice Detail** screen to allow users to hide the **date and time** at the bottom of the printed invoice, accommodating customer preferences.	SR-1578
26.0407	YES	**Purchase Order**	BUG FIX: Fixed a layout regression where **"Import Line Item"** and **"Commit Line Item"** were incorrectly stacking instead of displaying side-by-side. Restored the previous UI behavior (white button left, blue button right).	SR-2999
26.0407	YES	**Reports**	BUG FIX: Resolved an issue where the **Inventory Adjustment** report failed to generate due to an error. The report now runs successfully.	SR-2902
26.0406	KNOWN ISSUE	**Customers**	Unable to add new customer.	
26.0406	YES	**AR Receive Payment**	BUG FIX: Resolved an issue where the **Payment History screen** would freeze and continuously show the loading icon. The data now loads properly without delays.	SR-2971

Version #	QA Tested	Module	Description	Support Request #
26.0406	YES	**Customer Details**	BUG FIX: Implemented **pagination** on the **Sales History tab** in **Customer Details** to resolve the issue where the data would keep loading indefinitely. **Sales history** now loads efficiently with large datasets.	SR-2979
26.0406	YES	**Find Parts**	UPDATE: Enhanced the **Find Parts** screen to highlight the entire row in **yellow** when an item's **QIS (Qty In Stock) = 0**, improving visibility of out-of-stock items.	SR-2376
26.0406	YES	**Item Details**	BUG FIX: Resolved an issue where typed **Bin Location** values were not saving unless selected from the dropdown. Users can now manually enter or select a **bin**, and the value (including blank) will save correctly without auto-assignment.	SR-2807
26.0406	YES	**Shipping and Receiving**	UPDATE: Added a new **Check / Move to Next Status** button in **SHIP/REC > In Route** for **Descartes-enabled deliveries**. The process now displays progress updates for each order being processed, along with **Cancel** and **Close** options during status updates.	SR-2390
26.0403	YES	**Integrations**	BUG FIX: Resolved issues where imported **E-Commerce backorder item**s were missing **Warehouse** and **Shipped Via** values. The **Sales Order warehouse** is now pulled from **Integrations** > **Ecom Imports** > **Create Sales Order In**, while the default **Shipped Via** is sourced from the EBay customer's default **Shipped Via** setting	SR-2955
26.0402	YES	**AR Receive Payment**	BUG FIX: Added a **date range filter** to the **Receive Payments** screen in the **footer** of the detail area. Users can now specify **Start and End dates** (defaulting to 1/1/2000 and today's date) to filter displayed invoices and credit memos before or after selecting a customer.	SR-2935
26.0402		**Invoice**	BUG FIX: Resolved an issue where **comments** on **invoice line items** were not appearing after **importing data**. Imported **comments** now correctly display in 1Place.	SR-2987
26.0402	YES	**Reports**	BUG FIX: Resolved errors causing the **Item Adjustments** report to fail and **Sage** uploads to get stuck. **Performance tuning** was applied to ensure reports generate correctly and uploads complete successfully.	SR-2935
26.0402	YES	**Shipping and Receiving**	UPDATE: Added a **multi-select filter** for the **Shipped Via** field on **To Dispatch/Invoice** screens, allowing users to select and filter by multiple shipping methods at once.	SR-2118
26.0402	YES	**User Security**	BUG FIX: Resolved an issue where **users** with the appropriate **User Security permissions** were unable to access the **User Security screen**. Access validation has been corrected to properly honor assigned security rights.	SR-2805
26.0402	YES	**Vendor Detail**	BUG FIX: Fixed an issue where the **PO Date column** was blank in **Vendor Detail** > **Purchase Order tab,** even though dates appeared correctly on the main PO list. **Dates** now display properly for all POs under the vendor.	SR-2410
26.0401	YES	**AR Receive Payment**	UPDATE: Updated the **Credit Memo Refund** tab to include additional **columns** similar to the **Payment History tab** and added a field to enter a **batch number** for refunds.	SR-2772
26.0401	YES	**Find Parts**	BUG FIX: Added a new setting under **Settings > Sales > Find Parts** called **Default Order Source for Find Parts.** Users can enter a **value** to auto-populate the **Order Source** on **Sales Orders** created from **Find Parts**; if left blank, the field remains unchanged.	SR-2107
26.0401	YES	**Import Wizard**	BUG FIX: Resolved an issue where the **Delivery Zip Code Import Wizard** was not detecting the **WarehouseCode** field, causing the process to get stuck. The import now correctly recognizes the field and completes successfully.	SR-2934
26.0401	YES	**Invoices**	BUG FIX: Resolved an issue where deleting **payment lines** on **invoices/credit memos(imported data**) caused an undefined error. Also enabled the **Give Cash Back** button to allow users to view payment details.	SR-2668

Version #	QA Tested	Module	Description	Support Request #
26.0401	YES	**Item Details**	BUG FIX: Resolved an undefined error that occurred when **adding inventory** due to a missing stored procedure. **Inventory adjustments** can now be added successfully.	SR-2936
26.0401	YES	**Sales Order**	BUG FIX: Resolved an issue where cancelling " **Ship From Different Bin/Lot**" would incorrectly change the line item to **Back Order** / **Waiting for Purchase**. The item status now remains unchanged when canceling.	SR-2938
26.0401	YES	**Scanner**	UPDATE: Added **Other #** field in the label designer and verified functionality through testing.	SR-2896

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Version #	QA Tested	Module	Description	Support Request #
26.0331	YES	**Find Parts**	BUG FIX: Resolved an issue where **stock information** would not display after clicking the **Show Stock** button in **Find Parts**. The stock details now appear correctly on the screen.	SR-2761
26.0331	YES	**Bin Management**	BUG FIX: Resolved an issue where the **Bin Locations Import Wizard** would get stuck on the loading screen during import.	SR-2019
26.0331	YES	**Integration**	BUG FIX: Resolved an issue where **E-Commerce** transfer orders between that were getting stuck and not appearing in the **"Transfers into Our Warehouse"** menu. Transfer orders now display correctly in the warehouse transfer queue for proper processing and tracking.	SR-2915
26.0331	YES	**Shipping and Receiving**	BUG FIX: Resolved an issue where **Print Preview** on **Print and Pick Selected** would hang with the loading icon. **Users** can now successfully preview picking documents after selecting users, routes, and orders.	SR-2947
26.0331	YES	**Shipping and Receiving**	BUG FIX: Resolved an issue where items were stuck in **"transfer into our warehouse"** due to incorrect **Pick Type** (set to **Ship-order** instead of **Trans-Ship-Order**) from API/imported orders.	SR-2930
26.0331	YES	**Vendors**	BUG FIX: Resolved an issue where viewing a PO from the **Vendor Details** screen opened a blank page. **POs** now display correctly when accessed from the **Vendor > Purchase Order tab**.	SR-2882
26.0330	YES	**AR Receive Payments**	BUG FIX: Updated **AR Receive Payments**, **AR Aging,** and **AR Statements** to display all **open balances**, including those for **inactive customers**, ensuring full visibility of outstanding amounts.	SR-2639
26.0330	YES	**Customer Detail**	BUG FIX: Resolved an issue where marking a customer **Inactive** and then attempting to **reactivate** them caused an undefined error. **Customers** can now be **reactivated** without errors.	SR-2883
26.0330	YES	**Customer Portal**	UPDATE: Enhanced image display in the **Customer Portal** to support improved **zoom** with better quality. There are no specific size or format requirements, and the system handles scaling automatically. The same image can be used for both thumbnail and full-size views.	SR-2665
26.0330	YES	**Find Parts**	BUG FIX: Resolved an issue where T **ax Recalculation** would trigger multiple times on **Find Parts** and **Sales Order** screens and not save on the first attempt.	SR-2018

Version #	QA Tested	Module	Description	Support Request #
26.0330	YES	**Find Parts**	BUG FIX: Resolved an issue in **Find Parts** where customer searches under the **Corporate account** were not routing users to the **correct pod database** and instead remained in the corporate database.	SR-2338
26.0330	YES	**Item List**	BUG FIX: Resolved the export issue from **Item List > Custom Tab** that previously showed a "site can't be reached" error. A **progress bar** with a **cancel** option has been added for item record downloads. Note: For very **large datasets** (e.g., over 200k records), errors may still occur due to volume limits. A full fix will require **server-side file generation** instead of **HTML** rendering.	SR-2815
26.0330	YES	**Invoices**	BUG FIX: Resolved an undefined error when using **Save Layout for All Users** button on the Invoice screen.	SR-2852
26.0330	YES	**Labels**	BUG FIX: Resolved an issue where **transfer orders** were generating labels without the **"Transfer From"** field. Labels now correctly display the **source warehouse** to avoid confusion during picking.	SR-2890
26.0330	YES	**User Security**	BUG FIX: Reviewed and corrected the **"Do Not Allow" settings** so they now accurately enforce **restrictions** as described. Specifically, users are prevented from modifying **invoice fields** (dates, line items, quantities, prices) but are still able to **print, reprint, or email invoices**.	SR-2888
26.0330	YES	**Reports**	BUG FIX: Resolved an issue where the **Invoices/Credits by Customer** report would not download to **Excel** after selecting the export option. The download now triggers correctly.	
26.0330	YES	**Customer Detail**	BUG FIX: Fixed an undefined error that prevented changing customers from **Inactive to Active**. Updates now work correctly both on the **Customer Detail** screen and via the **Import Wizard.**	SR-2872
26.0330	YES	**Sales Order/Invoices**	BUG FIX: Resolved issues where **Category** and **Item #** columns appeared merged, field **checkboxes** could not be toggled, and the **Layout Designer Close button** was disabled. Fix applies to both **Sales Order Detail** and **Invoice Detail** screens.	SR-2880
Scan 26.0330	YES		BUG FIX: Resolved an issue where **staging a part** after **picking** in **scanbeta** returned a **500 error**. The staging process now completes successfully.	SR-2892
26.0326	YES	**Bin Management**	BUG FIX: Resolved an issue in **Bins Import Wizard** where uploads were incorrectly processed as **invoices/credits**, failed to import, and redirected to the wrong screen.	SR-2495
26.0326	YES	**Customer Portal**	BUG FIX: Resolved an issue where **Customer Portal** orders were pulling **Shipped Via** from the **Bill-To address** instead of the **Ship-To address**. The system now correctly applies the shipping method based on the delivery location.	SR-2857
26.0326	YES	**Import Wizard**	BUG FIX: Updated the **Delivery Zip Code Import Wizard** to support both add and update functionality, preventing duplicate records during import.	SR-2862
26.0326	YES	**Item API**	BUG FIX: Updated the **ITEM API** process for **OPSTrax** orders to automatically use the customer's **Ship To ZIP Code** when a **ZIP Code** is not included in the **API request**. This **ZIP Code** is now used to calculate the appropriate **Estimated Delivery Date** based on **OPS** transit data.	SR-2866
26.0325	YES	**AR Receive Payments**	BUG FIX: Resolved an issue where **credits** would not open in the **Receive Payments** screen and returned a **Bad Request** error.	SR-2837
26.0325	YES	**Created By Process**	BUG FIX: Added support to populate the **CreatedByProcess** field for all **transactions** across key sources (FindParts, Sales Orders, Quotes, Customer Portal, Scanner, and integrations such as CCC, PartsTrader, and OPSTrax) to improve reporting accuracy.	SR-2773

Version #	QA Tested	Module	Description	Support Request #
26.0325	YES	**Customer Detail**	UPDATE: Added **Default Printed Transactions** in the **Customer Detail** > **Communications tab**, allowing users to define default print options for **Quotes, Sales Orders, Invoices, and Credit Memos**. Also added a new **Sales Defaults** section in **Settings** to manage system-wide default print preferences instead of relying on last-used selections.	SR-2354
26.0325	YES	**Quotes**	BUG FIX: Resolved an issue causing undefined errors when creating **quotes** on versions **0323** and **0324**. Users can now create **quotes** without errors.	SR-2839
26.0324	YES	**Sales Order**	BUG FIX: Resolved an issue where the **Sales Order Delivery Date** was not consistently saving, causing some **orders** to be created without a **delivery date.**	SR-2829
26.0324	YES	**Reports**	BUG FIX: Resolved an issue where running the Sales History – 2 Year Comparison by Customer (ALPHA) report for "Last 365" days exported an Excel file with detailed invoices and credits instead of the summarized data. The Excel export now matches the report view for all date ranges.	SR-2492
26.0324	YES	**User Security**	BUG FIX: Resolved an issue where updating a **user's settings** was not applying changes to other **linked (copied) users**. Settings now correctly propagate to all related users.	SR-2225
26.0323	YES	**Catalog Management**	BUG FIX: Resolved an issue where certain **PartsLink** items were not being identified as available in the **Add New Items from PartsLink** function within **Manage Catalog.** The underlying detection logic has been corrected, ensuring all eligible PartsLink items are properly included in the list of items available to add.	SR-3359
26.0323	YES	**Find Parts**	BUG FIX: Resolved an issue where clicking **"Reset Item"** in **Find Parts (Standard Layout)** prevented new or repeated searches from displaying results. The screen now refreshes properly without needing to reopen the page.	SR-2510
26.0323	YES	**Invoices**	BUG FIX: Resolved an issue where the Invoice # was not displaying in the Payment Details tab and required additional clicks to view. The Invoice # now displays correctly, and the Payment Details print setting is retained after saving.	SR-2525
26.0323	YES	**Labels**	BUG FIX: Resolved an issue where **label design** changes were not being saved on the **Dispatch screen**. The **Save** button now properly activates when modifications are made, ensuring label updates are retained.	SR-2762
26.0320	YES	**Customer Portal**	BUG FIX: Resolved an issue where searching for **parts** in the **Customer Portal** (via **part number** or **Year/Make/Model**) returned an **undefined error.**	SR-2706
26.0320	YES	**Customer Portal**	BUG FIX: Resolved an issue where customers were unable to print Credit Memos from the Customer Portal.	SR-2755
26.0320	YES	**Invoices**	BUG FIX: Resolved an issue where **users** could type **comments** on **invoices** but received an error when saving. **Comments** can now be saved properly according to user permissions.	SR-2424
26.0320	YES	**Purchase Order**	UPDATE: Updated the PO functionality and KBA to ensure proper enforcement of editing, deleting, and adding rules.	SR-2631
26.0320	YES	**Purchase Order**	BUG FIX: Resolved issues with the **PO description field** so it now behaves consistently with the **Sales Order description** field, including proper **click/edit** functionality on all lines. Also corrected special character handling so the **"&"** symbol no longer converts to "amp".	SR-2493

Version #	QA Tested	Module	Description	Support Request #
26.0320	YES	**Users**	BUG FIX: Updated the system so that for new companies, the Dashboard is visible by default for all new users, instead of being hidden.	SR-2518
26.0319	YES	**Credit Memo**	BUG FIX: Fix: Resolved an issue where the **Show Payment Details** option on **Credit Memo** printing was not saving and therefore not appearing on printed documents.	SR-2754
26.0319	YES	**Find Parts**	BUG FIX: Resolved an issue in **Find Parts** where **Sales Orders** could be created without **Bill To** and **Ship To** by restricting selection to **active** customers only.	SR-2787
26.0319	YES	**Integrations**	BUG FIX: Added validation to prevent **integrations** from creating **quotes or orders** for **customers** marked as **Inactive.**	SR-2372
26.0319	YES	**Labels**	UPDATE: Redesigned **label** storage to use existing tables with added **versioning**, ensuring the latest label is always used and preventing loss of designs. The **Save** Label button now activates on changes, and users can optionally save previous versions, view version history, and restore or revert to earlier label designs as needed.	SR-2276
26.0319	YES	**Sales Order**	BUG FIX: Resolved an issue where customer **orders** were created without **prefixes** despite having a **default warehouse** assigned.	SR-2727
26.0319	YES	**Sales Order**	BUG FIX: Resolved a stored procedure error that prevented creating **Sales Orders** in versions **0323** and **0324**. Users can now create **SO**s without errors.	SR-2841
26.0319	YES	**User Security**	BUG FIX: Fixed an issue where creating a new company caused **User Security** to display incorrectly (modules showing random codes).	SR-2769
26.0319	YES	**Vendor Detail**	BUG FIX: Resolved an issue where users were unable to save **vendor contact information** even with full permissions. **Contact** updates now save correctly.	SR-2760
26.0318	YES	**Item Detail**	BUG FIX: Added a dropdown for **Default Bin Location** on **Item Detail,** displaying bin locations from the **Warehouse Bin Locations** table in alphabetical order.	SR-2650
26.0318	YES	**Item Detail**	PDATE: Updated the **Stock tab** to hide **multi-warehouse-related buttons** when the **Multi-Warehouse functionality** is **disabled** in settings.	SR-2650
26.0318	YES	**Item Picture**	BUG FIX: Fixed an issue where uploading **item images** using the **template** would fail with a "path format not supported" error. Added a **Default checkbox** column in the **Item Detail** > **Picture table.** Updated layout to reposition **Picture ID** before the **Updated By/User/Date fields**.	SR-2695
26.0318	YES	**Labels**	UPDATE: Added a new **field** for **Received Date** in all **labels**, and the related logic has been completed.	SR-2725
26.0318	YES	**Labels**	UPDATE: Enhanced **PO label printing** by adding larger **font size** options (34, 36, 38, 40, 42) to improved readability of **Item Numbers** when printed.	SR-2723
26.0318	YES	**Sage Integration**	BUG FIX: Resolved an issue where the **AP Bill Uploadbutton** was not working in **Purchase Orders.**	SR-2667
26.0318	YES	**Shipping and Receiving**	BUG FIX: Resolved an issue where **items** were being picked from **reserved "On Dock"** bins. The system now prevents selection from **reserved bins** during picking.	SR-2717
26.0317	YES	**Credit Memo**	BUG FIX: Updated reporting for **Credit Memos** created from **Customer Portal orders** so the **Created By** reflects the **1Place user** who created the original Invoice, instead of the **Customer Portal user.**	SR-2694

Version #	QA Tested	Module	Description	Support Request #
26.0317	YES	**Customer Portal**	BUG FIX: Resolved an issue where the default **Created By** value was not auto-populating for integration orders from **PartsTrader**, **CCC**, and **OPSTrax**. Also corrected Customer Portal return processing so the Customer Portal user name no longer overrides the **Created By** value on generated Credit Memos.	SR-2724
26.0317	YES	**Invoices**	BUG FIX: Resolved an issue where the **PO Box** option was being automatically checked on **invoices**. The default behavior has been corrected, and existing **invoices** have been updated to uncheck the **PO Box** option where applicable.	SR-2550
26.0317	YES	**Invoices**	BUG FIX: Prevented duplicate **Invoice** and **Sales Order** numbers by adding a unique **index** to the **Invoice** and **SalesOrder** tables.	SR-2696
26.0317	YES	**Item Details**	BUG FIX: Resolved an issue where the **Put Away function (scanner)** was not recording the user in the **Transaction Log.**	SR-2697
26.0317	YES	**Reports**	BUG FIX: Resolved an issue where the Sales Tax Liability Summary report was not exporting data to Excel. The file now downloads correctly with complete data.	SR-2669
26.0317	YES	**Sales Order**	BUG FIX: Added validation to check for duplicate Customer PO numbers per customer when creating Sales Orders or using Find Parts. A warning prompt now appears if a duplicate PO is detected.	SR-2685
26.0317	YES	**Stock Transfer**	BUG FIX: Fixed the issue preventing **transfers** from updating correctly after being sent and received. **Transfers** that were previously stuck in **"In Route"** status now properly move to **Invoice & Receiving** once the transfer process is completed.	SR-2164
26.0316	YES	**Descartes**	BUG FIX: Updated logic so that only **invoices** with one or more line items having **Qty Shipped > 0** are sent to **Descartes**. Invoices with zero Qty Shipped are excluded from upload.	SR-2451
26.0316	YES	**Descartes**	BUG FIX: Updated **invoice** uploads so that only **Ship-To customer information** is sent to **Descartes**. **Bill-To customer** data is no longer used in routing or stop creation. This prevents duplicate or split stops and ensures deliveries are correctly consolidated by Ship-To address for routing accuracy.	SR-2680
26.0316	YES	**Ecom Integrations**	BUG FIX: Updated **integrations** (**CCC, PartsTrader, etc**.) to prevent quoting or selling inactive items and customers. The system now automatically sets the **ECOM** flag to **FALSE** when an item is marked inactive, ensuring inactive parts are excluded from API transactions.	SR-2037
26.0316	YES	**Item Details**	UPDATE: Added functionality so that when **images** are **uploaded via URL**, the **first photo** is automatically set as the **Default image** to display on the **Find Parts screen**.	SR-2653
26.0316	YES	**Item Details**	BUG FIX: Resolved an issue where certain **logins** were missing **tabs** on the **Item Detail** screen. **Tabs** and **settings** are now properly displayed and configurable.	
26.0316	YES	**Sage Integration**	BUG FIX: Resolved an issue causing **errors** during **API recalculation** with **Sage Intacct.**	SR-2727
26.0316	YES	**Sales Order List**	BUG FIX: Resolved an issue where the " **Contains" filter condition** for the **SOStatus** field was not functioning correctly in the **New Tab Wizard.**	SR-2683
26.0316	YES	**Sales Tax**	BUG FIX: Resolved discrepancies between the **Sales Tax Liability Summary and Detailed reports**, and addressed incorrect **tax calculations** for unregistered jurisdictions. Customers outside applicable states have been updated to **Tax Exempt** with a default **Federal Tax ID**, ensuring accurate tax reporting and compliance.	SR-2778

Version #	QA Tested	Module	Description	Support Request #
26.0316	YES	**Customer Details**	BUG FIX: Resolved an issue where **customers** set as **Bill To** only were incorrectly populating both **Bill To and Ship To** addresses on **Quotes, Sales Orders, and Invoices**. The system now correctly assigns the **Bill To address** and pulls the linked **Ship To** customer where applicable.	SR-2313
26.0316	YES	**User Security**	BUG FIX: Updated **Custom Security** behavior so that changes made to a **user** with a **Custom security type** are automatically applied to all linked users.	SR-2308
26.0314	YES	**Item Catalog**	BUG FIX: Resolved issues with incorrect **year ranges**, missing **models**, and incomplete **catalog data** after **rebuild**. **Items** now reflect accurate **year coverage** and display all applicable **models** for proper search results. Also fixed issues where some items (e.g., KI1000212) were missing **catalog data**, and corrected item **description formatting**, including **spacing**, removal of **extra parentheses**, and restoration of proper **CAPA/Non-CAPA** and **Diamond Standard suffixes.**	SR-2467
26.0312	YES	**Credit Memo**	BUG FIX: Resolved an issue where **users** were unable to view the **credit receipts** and **payment info** and access the **Give Cash Back or Apply Credit t**o review how a **payment** was applied on a **Credit Memo.**	SR-2664
26.0312	YES	**Descartes**	BUG FIX: Updated invoice uploads to **Descartes** to include the **total tax amount** for the order and a **calculated estimated tax per line item**. Line item tax is derived proportionally and may have minor rounding differences compared to the total.	SR-2513
26.0312	YES	**Integrations**	UPDATE: Enhanced API logic to use **Ship-To ZIP code** when determining estimated delivery days. For integrations like **OPS Trax** (where ZIP is not provided), the system now derives the **ZIP from the customer's Ship-To address.** Also corrected delivery mapping to ensure ZIP-based rules apply accurately (e.g., OK ZIP codes now return 3-day delivery as configured), resolving incorrect ND/overnight quotes.	SR-2581
26.0312	YES	**Scanner**	BUG FIX: Resolved an issue where the **scanner** displayed the wrong **Default Bin Location**. The **scanner** now correctly references the **Default Bin Location by Warehouse table** instead of the old **Item Detail Default Bin** field.	SR-2636
26.0311	YES	**AR Aging Summary**	BUG FIX: Resolved an issue where **credit memo amounts** were showing as **zero** when exporting the **AR Aging Report to Excel**. The exported file now correctly includes the actual credit memo amounts.	SR-2615
26.0311	YES	**AR Receive Payments**	BUG FIX: Resolved an issue where an **undefined error** would occur after selecting a **customer** in the **AR Receive Payment screen.**	SR-2632
26.0311	YES	**AR Customer Statements**	BUG FIX: Updated the **Excel Statement email export** so that all **Ship To locations** for a single **Bill To** customer are included in one file and one email. This eliminates the previous behavior of sending separate emails for each Ship To, while still distinguishing the different Ship To locations within the statement.	SR-2615
26.0311	YES	**Descartes**	BUG FIX: Resolved **upload failures** by connecting the process to the **Error Handling** table. Errors now display with an error number and message alongside the existing alert, improving visibility and troubleshooting directly on the screen.	SR-2618
26.0311	YES	**Invoices**	BUG FIX: Resolved an issue in **version 0305** where **AR users**, including **admins**, were unable to access the **Edit Payment** button under the **Payment Info tab** in invoices. The button is now accessible to all users with proper permissions.	SR-2558

Version #	QA Tested	Module	Description	Support Request #
26.0311	YES	**Sales Order**	BUG FIX: Resolved an issue where **users** could not select a specific **receipt** to sell or ship in the **Stock Selector**. The "**Required Quantity already fulfilled"** message now only appears when the quantity has actually been met, allowing proper receipt selection	SR-2445
26.0311	YES	**Sales Order**	BUG FIX: Enhanced the **Re-Import Line Items tool** to fully support **CCC** and **OPSTrax** integration orders in addition to **PartsTrader**. The import process now validates integration requests, imports only missing line items, skips duplicates already on the Sales Order, and provides a summary of imported and rejected lines upon completion. Improved error handling has also been added to detect unsupported **XML format** changes and notify users with a clear import failure message when integration data is no longer compatible.	SR-2575
26.0311	YES	**Send Email**	BUG FIX: Resolved an issue where **users** with **print rights** could not select **Email Document** unless the setting **"User cannot make changes to Invoices & Credit Memos after printed"** was unchecked. Email document access now works correctly with proper permissions.	SR-2399
26.0309	YES	**AR Receive Payments**	BUG FIX: Resolved a critical error that occurred when applying **payments** in **AR Receive Payments**. The issue, caused by an outdated fetch **stored procedure**, has been fixed.	SR-2556
26.0309	YES	**Descartes**	BUG FIX: Resolved an issue where the **Origin DC field** was incorrectly using the **invoice location** instead of the actual **source warehouse/DC**. The system now sends the **correct picking location (origin DC)** based on where the item was fulfilled.	SR-2541
26.0309	YES	**Item List**	BUG FIX: Fixed issues with the **Vendor Items Import Wizard** where uploads would timeout or get stuck, and where some **vendor records** were being created with blank **item numbers**. The upload function now processes updates reliably and ensures all item numbers are populated.	SR-2572
26.0309	YES	**Item Detail**	BUG FIX: Resolved an issue where removing inventory from **Item Detail > Stock > Adjust Inventory Stock** would cause the **Save** button to grey out and not save the record.	SR-2566
26.0309	YES	**Item Detail**	BUG FIX: Resolved an issue where **uploaded image URLs** were not displaying in the **Customer Portal**. Images now appear correctly when uploaded via URL.	SR-2540
26.0309	YES	**Item Detail**	BUG FIX: Resolved an issue in **Item Detail > Vendor Tab** where changes to **Vendor QIS** did not trigger the **Save** button and **QIS Last Updated** was not saving correctly.	SR-2573
26.0309	YES	**Quotes**	BUG FIX: Fixed an issue where creating a **Quote** would result in an **undefined error,** preventing the quote from being created.	SR-2397
26.0309	YES	**Reports**	BUG FIX: Resolved an issue where **totals** and **counts** were incorrect in the **Invoices/Credits by Created By report.**	SR-2097
26.0309	YES	**User Security**	BUG FIX: Resolved an issue in versions **0304** and **0305** where changes made in **User Security** could not be saved.	SR-2559
26.0306	YES	**AR Receive Payments**	BUG FIX: Updated the **Total Balance** display to show the **actual total balance** due across **all records**, instead of only summing the amounts shown on the current page.	SR-2492

Version #	QA Tested	Module	Description	Support Request #
26.0306	YES	**Customers**	NEW FEATURE: Added a new **Merge Customer** function allowing users to **merge** one **customer** into another, re-linking all related records (contacts, transactions, AR data, etc.) and removing the original customer. Supports both **single merge** and **batch merge via upload** (with downloadable template). Includes validation rules to prevent invalid merges (e.g., Bill To/Both into Ship To) and avoid duplicate records via **API**. Handles **Bill To / Ship To / Both** logic to ensure correct reassignment of customer relationships. Provides guided prompts and warnings to ensure proper setup before merging.	SR-2123
26.0306	YES	**Find Parts**	BUG FIX: Resolved an issue where selecting the **Category dropdown** after pre-filling Y**ear/Make/Model** would freeze the page and eventually display an "**undefined**" error. The issue has been fixed across all affected versions, and the **Category** dropdown now loads correctly.	SR-2546
26.0306	YES	**User Settings**	BUG FIX: Resolved multiple issues in **User Settings,** including the persistent loading icon appearing on every screen, inability for admin users to edit accounts, and random lines appearing within the module security.	SR-2552
26.0305	YES	**AR Aging Summary**	BUG FIX: Resolved an issue where running the **Accounts Receivable (AR) Aging Summary** report would return a "**Bad Request**" error. The report now runs correctly and returns expected results.	SR-2521
26.0305	YES	**Customer List**	BUG FIX: Resolved an issue where the **Customer List** screen would display an endless loading spinner.	SR-2534
26.0305	YES	**Descartes**	BUG FIX: Resolved an issue where the **Sync** window would still appear on the **Dispatch screen** when creating **invoices**, even if the **Descartes** integration was disabled.	SR-2522
26.0305	YES	**Item Cost**	BUG FIX: Standardized the costing logic for returns and invoicing: -When items are returned to stock, the system now uses the Invoice Unit Cost only, with Added Cost set to $0, since the invoice unit cost already includes any additional costs. -When creating an Invoice from a Sales Order, the invoice line now inherits the Unit Cost from the Sales Order line item instead of recalculating using the item's Weighted Average Cost. -Cost calculation logic across Credit Memo creation scenarios (from scratch, from Invoice, from Scanner, and from Customer Portal) has been reviewed and aligned to ensure consistent costing behavior.	SR-2327
26.0305	YES	**Payments**	BUG FIX: Fixed an issue where **payments** applied to **Sales Orders** were not correctly reflected on the corresponding **invoices**. **Payments** now properly update both the **Sales Order and its invoices**, ensuring balances are accurate.	SR-2511
26.0305	YES	**Item List**	UPDATE: Added a new **Ecommerce** column to the **Item List Import Wizard**, allowing users to include eCommerce-related data during item imports	SR-2293
26.0304	YES	**Customers**	BUG FIX: Resolved an issue where the **Show/Hide Column settings** panel would incorrectly appear on top when adding a **new customer.**	SR-2532

Version #	QA Tested	Module	Description	Support Request #
26.0304	YES	**Labels**	BUG FIX: Fixed an issue where using **Ship From Different Lot or Bin** could create duplicate lines and labels for the same item. The original pick is now properly replaced, preventing duplicate label printing and avoiding unintended inventory adjustments.	SR-1927
26.0304	YES	**Parent Company**	UPDATE: Added support for ParentID and ChildID fields in the Customer Import Wizard, allowing import and updates for parent-child customer relationships.	SR-1927
26.0304	YES	**PartsTrader Integration**	BUG FIX: Fixed the issue where items without a **Quality Indicator** did not use the configured **Default Quality Indicator**, causing the **Third Party Part Type Code** to not be returned. The integration now correctly applies the default value when the **Quality Indicator** is missing.	SR-2378
26.0304	YES	**Sales Order**	BUG FIX: Resolved an issue where **switching bins** after **printing labels** would not update the **bin** on the label and incorrectly reset the **Qty Ship** and **Qty Ordered to 0**, causing inventory lines to appear missing. The process now updates **bins** correctly without altering item **quantities** or **inventory records.**	SR-2327
26.0304	YES	**User Security**	BUG FIX: Updated the **User Security** screen so that clearing the **Version #** no longer removes the existing list **filters**, keeping the **user list filtered** as expected.	SR-2309
26.0304	YES	**User Security**	BUG FIX: Resolved multiple **user security** issues affecting **Invoice**, **Credit Memo**, and **Sales Order** screens where users with proper permissions were unable to perform actions such as selecting documents to **print/email** or accessing certain fields and buttons. **Security rules** were updated to align with the defined **user rights.**	SR-2231
26.0304	YES	**Warehouse Shipping Priorities**	BUG FIX: Fixed the issue where **orders** were not following the configured **warehouse shipping priorities**. **Orders** now correctly evaluate **warehouse priority** before selecting the fulfillment location.	SR-2269
26.0303	YES	**Catalog**	BUG FIX: Resolved an issue where adding new items from the **Catalog** would get stuck on the loading spinner. The feature now loads new items correctly in all affected versions.	SR-2339
26.0303	YES	**Integrations**	BUG FIX: Resolved an issue where setting **Number of Delivery Days = 3** was incorrectly treated as **overnight** in **integrations**. **Delivery days** now map correctly based on the configured value.	SR-2354
26.0303	YES	**Printer Connect**	BUG FIX: Updated 1 **Place Printer Connect** so that it now prints invoices correctly in addition to manifests.	SR-2414
26.0303	YES	**Stock Transfers**	BUG FIX: Resolved an API-related issue where **transfer warehouse priorities** were not being followed correctly. The **API** now properly checks **warehouses** in the configured order (e.g., 94TX → 92TX → 93TX) when stock is unavailable.	SR-2286
26.0302	YES	**Customer Portal**	UPDATE: Added "**Use Vendor Qty's**" option to **Customer Portal Find Parts** with tooltip and settings for **QIS update days and delivery date** adjustment. When enabled, hides Ship Qty, Needs PO, and PO #. Also improved vendor item updates and added import/update buttons on the Vendors tab.	SR-2082
26.0302	YES	**Descartes Integration**	UPDATE: Updated **Descartes** integration to populate the original **invoice number** on **InvoiceNum**, **Return Reason Code**, and **Customer PO #** fields.	SR-2471
26.0302	YES	**Shipping and Receiving**	BUG FIX: To Print and Pick. Resolved an issue where **printing picking documents** would remain stuck on the loading screen and not proceed to the preview.	SR-2239

Version #	QA Tested	Module	Description	Support Request #
26.0227	YES	**Credit Memo**	BUG FIX: Fixed an issue where **returned items** were still being marked as **Reserved** even when the setting to reserve items on **CM returns** was disabled.	SR-2406
26.0227	YES	**Customer Portal**	BUG FIX: Fixed an issue where **transfer orders** created through the **Customer Portal** were not appearing in **Shipping/Receiving** > **To Print & Pick**. Orders now display correctly for processing.	SR-2443
26.0227	YES	**Descartes**	BUG FIX: Resolved an issue where **Ship Stage, Due Date, Invoice #,** and **Part #** fields were appearing blank in **Descartes** uploads, particularly for **Credit Memos.** These fields are now properly populated during export.	SR-2451
26.0227	YES	**Elite Extra Integration**	BUG FIX: Resolved an issue in the **Elite Extra integration** where incorrect **stop numbers** were being assigned and **driver** data was not importing correctly. The Ship/Rec workflow (Export → Import from Elite → Print grouping by driver) has been corrected and stabilized, restoring proper stop sequencing and driver assignment.	SR-2450
26.0227	YES	**User Security**	BUG FIX: Resolved an issue where a recent update caused User Security module access to become incorrect. User accounts now retain the proper module permissions after updates.	
26.0226	YES	**Catalog**	BUG FIX: Fixed the issue preventing **CAPA** parts from being generated when the Cert column was set to C. The system now allows **CAPA** items to be created even if the item already exists in 1place, and the items display correctly in the **Catalog Management screen**.	SR-2361
26.0226	YES	**Customer Portal**	BUG FIX: Fixed the issue causing **category** and **subcategory** differences between the **Customer Portal** and the **Find Parts** screen. **Categories** are now aligned to ensure consistent filtering and navigation across both areas.	SR-2354
26.0226	YES	**Items**	BUG FIX: Resolved an issue where the **Recalculate All Quantities in Stock** process failed and displayed an undefined error message. The recalculation process now executes correctly and provides proper status handling during execution.	SR-3305
26.0226	YES	**Sales Order**	BUG FIX: Fixed the issue where the Gear button on the Sales Order print screen was not functioning. The button now works as expected, allowing users to access print options.	SR-2402
26.0226	YES	**Sales Order Import**	BUG FIX: Fixed the issue preventing Sales Order Line Items from importing when the Taxable field was missing from the Excel file. Because this field does not allow null values, the import was failing even though it displayed "Imported Successfully." The Taxable field is now clearly marked as REQUIRED, and imports process correctly when the field is included.	SR-2300
26.0225	YES	**Customer Portal**	BUG FIX: Fixed the issue affecting the ability to print from the **Customer Portal.** Customers can now successfully **print** documents directly from the portal as expected.	SR-2212
26.0225	YES	**Descartes**	BUG FIX: Fixed the issue preventing **Descartes** conversions due to the **ModifiedBy** field being saved as **username** instead of **user ID**. **Customer detail** pages now display correctly, and the **Descartes** integration works as expected.	SR-2398
26.0225	YES	**Error Log**	UPDATE: Added search functionality to the **Error Log**, allowing users to search by **Error #** or by description for faster and more efficient troubleshooting.	SR-2280

Version #	QA Tested	Module	Description	Support Request #
26.0225	YES	**Integration**	BUG FIX: Resolved an issue where **integration processes** (including **CCC**) could intermittently slow down or freeze, resulting in timeout errors. Performance and timeout handling have been optimized to improve stability across all integration customers.	SR-2392
26.0225	YES	**Invoices**	BUG FIX: Fixed the issue preventing **invoices** from being properly cleared when duplicate payments were recorded. Invoices that were previously marked as paid in OneSource and later re-recorded in 1place have been corrected to eliminate balance discrepancies.	SR-2337
26.0225	YES	**Quotes**	BUG FIX: Fixed the issue preventing users from **printing quotes** in versions 0.220 and 0.224.	SR-2404
26.0224	26.0224	**AR Receive Payments**	BUG FIX: Fixed the issue where users could not sort **AR Rec Payments** by **Tran #, Invoice Date, Invoice Total, Previous Payments, or Balance Due**. **Sorting** now works correctly both before and after clicking the All link.	SR-1188
26.0224	YES	**Bin Management**	UPDATE: Removed the Bin Counts button from Warehouse > Bin Management. Clicking on a row now displays the items in that bin in a subform dropdown, similar to viewing stock on the Item Detail page, but grouped by bin instead of by item.	SR-1307
26.0224	YES	**Customers**	BUG FIX: In version 0.224, an issue preventing users from **creating new customers** has been resolved. **Users** can now add **customers** normally, and all customer information saves correctly.	SR-2405
26.0224	YES	**Customer Portal**	BUG FIX: Fixed the issue where **sub-categories** displayed options not related to the selected **category** after choosing **Year, Make, and Model**. **Sub-category** results now properly filter based on the selected **category**, ensuring only relevant options are shown.	SR-2326
26.0224	YES	**Invoices**	BUG FIX: Fixed the issue preventing the **invoice header** from displaying when printing **invoices** in version **26.0223**. Invoices now print with the correct header information.	SR-2360
26.0224	YES	**User Security**	BUG FIX: Fixed an issue where **User Security** was not loading due to large data volumes. Implemented **pagination** for the **Users list** and optimized company mapping retrieval to improve performance.	SR-2356
26.0224	YES	**User Security**	BUG FIX: Added a "Check for Module Updates" button on the Modules tab and removed the automatic update check when opening the tab.	
26.0223	YES	**Invoices**	BUG FIX: Fixed the issue where **invoices** appeared to delete successfully but still remained in search results. **Invoices** now delete properly and no longer appear after removal.	SR-2333
26.0223	YES	**Item**	NEW FEATURE: Added a new function to **merge one item into another**, consolidating inventory, pricing, logs, and all references across quotes, orders, invoices, credit memos, and POs.	SR-2124
26.0223	YES	**Reports**	BUG FIX: Fixed an issue where running the **Inventory Valuation reportby History** for specific date ranges could produce an **Undefined Error**. The report now generates correctly for any selected date range.	SR-1886
26.0223	YES	**Scanner**	UPDATE: Updated the **Return Reason** dropdown in the scanner **Return Reason 2/2** screen to display both the **Return Code** and **Description**. The dropdown now shows the **code** and the **description** beside it in parentheses.	SR-202
26.0220	YES	**Bin Management**	BUG FIX: Fixed the issue where certain **bin locations** were not showing available **inventory**. **Inventory** now displays correctly for all locations when viewing line items in **Bin Management**.	SR-2282

Version #	QA Tested	Module	Description	Support Request #
26.0220	YES	**ECom Integration**	UPDATE: Added a new **IsShippable** field to items, allowing **PartsTrader Retail** to identify which parts are **shippable**. **Users** can now enable the **Only Quote/Sell Items Marked as 'Shippable'** option in the **PartsTrader Retail integration settings**. The **API** has been updated to respect this flag, rejecting **quotes** or **sales order**s for items not marked as shippable. Existing items with **SpecialOrder** = **True** have been updated to set **IsShippable = True**. The **IsShippable** field is also included in the API output under the Ecommerce element.	SR-2119
26.0220	YES	**Scanner**	UPDATE: Updated **Inspect Return (1 of 2)** in the scanner to display the full list of parts currently in the **Returns area**, making it easier for users to review and process returned items.	SR-204
26.0219	YES	**Credit Memo/Refund**	BUG FIX: Fixed the issue where the **Credit Refund** line was missing for certain **Credit Memo Refund** transactions. **Refund** payment details now display correctly in the **Payment Info** tab on the **Credit Memo** screen.	
26.0219	YES	**Customer Portal**	BUG FIX: Fixed the issue where **Custom Pricing Templates** were not being applied to orders placed through the **Customer Portal**. **Pricing** now reflects the correct template settings.	SR-2241
26.0219	YES	**Default Bins**	BUG FIX: Fixed the issue where the **Default Bin Location** setup page was not displaying all locations and was not functioning as expected. All **bin locations** now load correctly, restoring proper support for the put-away process.	SR-2209
26.0219	YES	**Delivery Date**	UPDATE: Moved the "We Make Deliveries On" setting to General Sales Settings and updated the label to display on one line as "We Make Deliveries" (dropdown). Enhanced the Estimated Delivery Date logic: If the calculated delivery date falls on a weekday (Mon–Fri), it remains unchanged. 5 Days (Mon–Fri): Saturday and Sunday deliveries move to Monday. 6 Days (Mon–Sat): Saturday remains the same; Sunday moves to Monday. 7 Days (Mon–Sun): No changes; weekend dates are allowed.	SR-2064
26.0219	YES	**Labels**	BUG FIX: Fixed the issue where the **UT** and **PO** fields were not printing correctly on **labels** and were displaying as an **apostrophe** (') regardless of field size in versions **2120** and **2122**. The fields now print properly as expected.	SR-2233
26.0219	YES	**Scanner**	UPDATE:Updated the **scanner** process so that when **returned items** are placed back into **stock** in the **Returns area**, the **ItemStock** n**otes** will display **"Waiting to be Restocked."**	SR-205
26.0219	YES	**Scanning Reports**	UPDATE: Added a new **Item Returns report** under **Warehouse >Scanning Reports**. The report includes the following columns**: Date/Time, Scan User, Item, Invoice/CM #, Price, Good for Stock (Y/N),** and **Return Reason Code**. Users can filter the report by **Date Range, Scan User, Good for Stock,** and **Return Reason Code.**	SR-279
26.0218	YES	**Credit Memo**	BUG FIX: Fixed an issue where a **credit memo** could be automatically marked as **Paid** when the **Returned Quantity** was changed from 0 to 1. The payment status now updates correctly based on actual payment activity.	SR-2255

Version #	QA Tested	Module	Description	Support Request #
26.0218	YES	**Customer Portal**	BUG FIX: Resolved a critical issue where **portal users** could access the full **Customer List** and **customer details** by clicking the **logo** or directly navigating to the **Customer List** URL. The root cause was identified in the invitation workflow, where new **portal users** were automatically assigned all **System User Security** objects by default, unintentionally granting access to unnecessary screens. The invitation process has been corrected to apply only the appropriate permissions. In addition, all existing **portal users' security settings** have been reviewed and updated to remove unauthorized screen access. Additional safeguards have been implemented to prevent **cross-customer** visibility going forward.	SR-2216
26.0218	YES	**Descartes**	BUG FIX: Updated the **invoice** export process to send the **Ship-To Customer ID** instead of the **Bill-To Customer ID**, ensuring the correct customer information is used for shipping in **Descartes**.	SR-2252
26.0218	YES	**Descartes**	BUG FIX: Resolved an issue where **invoices** were not automatically uploading to **Descartes** upon creation as intended. Automatic export now triggers correctly based on the configured integration settings.	SR-2238
26.0218	YES	**Descartes**	BUG FIX: Fixed the issue preventing the **Picture tab** from displaying for certain **users** on newer versions of **1place**. User profile tabs now load correctly based on permissions and version settings.	SR-2114
26.0218	YES	**Partslink**	UPDATE: Updated the **Partslink** data to ensure proper functionality and data alignment.	SR-2261
26.0218	YES	**Reports**	UPDATE: Added a new **report** called **Lost Sales by Date**, allowing users to review **lost sales data** filtered by a selected date range.	SR-1556
26.0218	YES	**Scanner**	Updated **Count by Item** in the scanner to allow users to scan items that are not currently showing in stock. Added **color coding** similar to **Count by Bin** for easier visual tracking.	SR-2088
26.0217	YES	**Descartes**	UPDATE: Updated the **Descartes API** payload to send monetary values with 2 decimal places instead of 4. This applies to **Item List Price**, **Amount**, **VAT**, and **Item Amount Including VAT,** ensuring consistent formatting and compatibility with the **Descartes API.**	SR-2240
26.0217	YES	**Invoice**	BUG FIX: Updated **date editing** behavior so that when a user has **Edit** rights and **GL Lock Dates/Costs** is set to **False**, the **Invoice Date** is now editable as expected.	SR-2169
26.0217	YES	**User Settings**	BUG FIX: Fixed an issue where changes to **module settings** for **users** were not saving. Updates now persist correctly after clicking **Save** and **Close**.	SR-1763
26.0216	YES	**Sales Order**	BUG FIX: Fixed an issue where selecting a **stock line** auto-filled an incorrect (excessive) quantity. The selector now defaults to the **Sales Order** line quantity when available. Additionally, the **Warehouse** field in the **Sales Order** header is now locked once line items are entered to prevent inconsistencies.	SR-2196
26.0213	YES	**Import Wizard**	BUG FIX: Fixed an issue where the **Item Cross Reference** upload process was not functioning correctly. Imports now process and save as expected.	SR-2150
26.0213	YES	**Subscription Info**	UPDATE: **Company Settings > Subscription Info**. Updated the **pricing table** to reflect revised pricing for the **Standard**, **Pro**, and **Enterprise** plans, including updated base package and per-user rates.	SR-2162

Version #	QA Tested	Module	Description	Support Request #
26.0212	YES	**Find Parts**	BUG FIX: Fixed an issue where searching for certain **item numbers** (e.g., Item #2416) could fail and disable the **search button.** The problem was resolved at the **database stored procedure level** (FetchQPCAutoBodyItemSearch_2025_08_18) and is effective in version **25.0818** and later. Search performance and results now return correctly.	SR-2142
26.0212	YES	**Scanner**	UPDATE: Enhanced the **Pick to Cart** screen so the **Item #** now links directly to the **item's photo (Item Picture URL)**, allowing users to quickly view product images during picking.	SR-1419
26.0212	YES	**Statements**	BUG FIX: Fixed the issue where **statements** displayed inaccurate **balances** when partial **credit memos** were applied. The **Balance** column now reflects correct amounts, ensuring statement accuracy.	SR-2202
26.0211	YES	**Descartes**	BUG FIX: Descartes Integration - **Time Window**: Updated the **invoice expor**t so the **Time Window field** is now sent as **blank** to Descartes. This allows routing to default to the standard customer delivery window (e.g., 08:00–17:00) and prevents incorrect time values from impacting route optimization.	SR-2180
26.0211	YES	**Find Parts**	BUG FIX: Fixed an issue where the **Model** dropdown displayed all models after selecting **Year** and **Make**. The list is now correctly filtered to show only **models** related to the selected **make**.	SR-2174
26.0211	YES	**Find Parts**	BUG FIX: Fixed an issue where **in-stock items** were not turning green or being added to the **Quote** or **Sales Order** when clicking **Add to Order**, while out-of-stock items were added correctly. Items now add properly regardless of stock status.	SR-2175
26.0211	YES	**Integrations**	BUG FIX: We resolved an issue that was preventing parts and inventory from uploading to CCC. The account name now correctly matches CCC's requirements. Users can now successfully save a Fax number in the integration settings (even a placeholder like (999) 999-999). These fixes ensure that all parts and inventory uploads sync properly with CCC.	SR-1899
26.0211	YES	**Pick Labels**	BUG FIX: Added a new **Customer PO Barcode** field to picking labels, with support for multiple **label** sizes to ensure proper formatting and scanning.	SR-2146
26.0211	YES	**Scanner**	BUG FIX: Fixed an issue where the **Scanner** could display different **bin locations** than shown in **Item Details**, while **Check Stock by Bin** reflected the correct data. Bin location data is now consistent across all screens.	SR-2187
26.0210	YES	**Purchase Order**	BUG FIX: Fixed an issue where creating a new **PO** and selecting a **vendor** could load an existing **PO** instead of allowing a new one to be created. New **POs** now remain unique and do not display prior vendor orders.	SR-2140
26.0210	YES	**Sage Integration**	BUG FIX: Fixed the issue where updating the cost of an inventory item from a returned Credit Memo did not update the Inventory Adjustment Ledger. Cost updates now correctly reflect in the general ledger when inventory cost is modified after receipt.	SR-1207
26.0210	YES	**Sales Order/Invoice**	BUG FIX: Fixed the issue where Sales Orders with the Back Order setting set to No allowed invoices to be created even when no line items were shipped. The system now properly validates shipment status and only allows invoice creation when at least one line item has been shipped.	SR-2161

Version #	QA Tested	Module	Description	Support Request #
26.0210	YES	**Sales Order**	UPDATE: Updated date editing behavior so that when no **invoice** exists and **GL Lock Dates/Costs** is set to **False**, the **Sales Order** date remains editable as expected.	SR-2167
26.0210	YES	**Scanner**	UPDATE: Completed and aligned both **Bin Transfer** functions to work similarly to the previous **Scan version**, while incorporating the new UI and features where applicable. Updated the workflow so Step 3 automatically skips to Step 4 when there is no PO to select or only one PO available.	SR-1540
26.0209	YES	**Customer Pricing**	BUG FIX: Fixed an issue where certain items displayed only the **fixed cost** instead of the **actual price** on the **Find Parts screen**. Prices now correctly reflect the customer-specific pricing bracket.	SR-1811
26.0209	YES	**Descartes**	BUG FIX: Resolved an issue where many orders were uploading to **Descartes** without the **ShipStage (Shipped Via)** value. The export now properly sends the configured **Shipped Via** field to ensure accurate routing and delivery handling.	SR-2052
26.0209	YES	**Record Numbering**	BUG FIX: Fixed an issue where changes to **Record Numbering settings** could not be saved due to a missing **Save** button. **Prefix** settings now save correctly and are applied as expected.	SR-2135
26.0209	YES	Reports	BUG FIX: Fixed the issue where certain **users** were unable to download the I**nvoices & Credits reports** to Excel. Report exports now function correctly for all users with proper access permissions.	SR-2116
26.0209	YES	**Reports**	BUG FIX: Fixed the issue where exporting the **Invoice/Credits report** to **Excel** generated a corrupted file. Exports now complete successfully and open correctly in Excel.	SR-2125
26.0209	YES	**Reports**	UPDATE: Added **Invoices / Credits by Customer (Full Invoices) report** that generates full invoice and credit copies by customer. To protect system performance, report generation is limited to a maximum of 5,000 invoices per run. If the selection exceeds this limit, users will receive a "Record set Too Large" warning prompting them to narrow their criteria. Performance has also been enhanced with pagination and user-selectable page sizes to reduce loading delays during preview and PDF generation.	SR-1605
26.0209	YES	**Sales**	BUG FIX: Fixed the issue where manually updating the Entered By field was also overwriting the Created By field. The Created By field now retains the original user as intended, and API/Integration processes have been aligned to ensure it is populated correctly.	SR-2141
26.0209	YES	**Scanner**	BUG FIX: Fixed an issue where **users** were unable to scroll to view the full page of data during the **Bin Transfer** process.	SR-2111
26.0209	YES	**Users**	UPDATE: Aligned the **import and export templates** and added two new columns: **Copy from Parent** and **Copy from User**. During import, the system can now copy all **security** and **module settings** from either the **Parent** template or a specified existing **user**, with safeguards to ensure stability and proper validation.	SR-1432
26.0209	YES	**Warehouse**	BUG FIX: Fixed an issue where Statuses were missing in Warehouse Settings.	SR-2165

Version #	QA Tested	Module	Description	Support Request #
26.0208	YES	**Invoice**	BUG FIX: Adjusted the **invoice barcode** size to ensure it prints fully and scans reliably without being cut off.	SR-2138
26.0208	YES	**Printer Settings**	BUG FIX: Redesigned **printer preferences** so that the **default company printer settings** now apply to all users. Defaults have been moved to the **Print Settings** section, ensuring each user starts with the company-wide default.	SR-1890
26.0208	YES	**Sales Order**	BUG FIX: Added the ability to double-click the **Sales Order #** label to edit the **Sales Order number** on the fly, provided no **invoice** exists, no **line items** have been entered, and the **user** has permission to **edit SalesOrders**.	SR-2168
26.0206	YES	**Customer Statements**	UPDATE: Added a **Customer Payment Terms** column between the customer email and customer balance. The column is now also included in the search filter, allowing users to quickly filter customers by payment terms.	SR-2121
26.0206	YES	**Find Parts**	BUG FIX: Fixed an issue where users could receive a **"Please select at least one line item to proceed"** message even after selecting items with quantities.	SR-2113
26.0206	YES	**Invoices**	BUG FIX: Resolved an issue where the print time on invoices could be incorrect due to an unassigned or incorrect warehouse time zone. Once the warehouse time zone is set, the print time now displays accurately.	SR-2115
26.0206	YES	**Labels**	BUG FIX: Fixed an issue where using **Ship From Different Lot or Bin** could create duplicate lines and labels for the same item. The original pick is now properly replaced, preventing duplicate label printing and avoiding unintended inventory adjustments.	SR-1927
26.0206	YES	**Scanning Report**	BUG FIX: Fixed an issue where **unknown users** could appear in **scan reports**. **Scan activity** is now correctly attributed to the appropriate user.	SR-2095
26.0206	YES	**Shipping and Receiving**	BUG FIX: Fixed an issue where orders created from **Quotes** could fail to appear in the **To Print** queue at the picking warehouse. These orders now display correctly for printing.	SR-2049
26.0205	YES	**Credit Memo**	BUG FIX: Updated behavior so that when a **Credit Memo** is created from the **Scanner** and linked to an invoice, the **Created By** field now inherits the **Invoice Created By** value for accurate attribution.	SR-2050
26.0205	YES	**Descartes**	BUG FIX: Updated the **Origin DC** field export to send the **warehouse 4-character code** instead of the warehouse name, removing the "–Warehouse" suffix for cleaner and more accurate mapping in Descartes.	SR-2101
26.0205	YES	**Ecomm**	BUG FIX: Fixed an issue where exporting data files could return a **Bad Request error**. The export process now retrieves records in separate calls, improving performance and reliability when opening the Contact, Delivery, Part, and Inventory tabs.	SR-161
26.0205	YES	**Find Parts**	BUG FIX: Fixed an issue where the **LSP$ (Last Sale Price)** column was not displaying values. The column now correctly shows the last sale price for each part.	SR-1739
26.0205	YES	**Purchase Order**	BUG FIX: Fixed an issue where a portion of a **Purchase Order** could be duplicated during the receiving process, resulting in incorrect **on-dock inventory quantities**. Duplicate **item receipts** have been identified and addressed, and safeguards have been added to prevent duplicate receiving on the same PO items.	SR-2043

Version #	QA Tested	Module	Description	Support Request #
26.0205	YES	**Sales**	UPDATE: Added a new option under **Settings > Customer Portal > FindParts Settings** to set the default **Created By user** for online orders. The system now respects the **Entered By** value and prevents it from being overwritten for Customer Portal orders. This update has been tested and is working as expected.	SR-2051
26.0205	YES	**Scanner**	BUG FIX: Fixed an issue where **Transfer Bin** activity was posting to the wrong column in the **Scanning Report.** Transfer activity now correctly records under the **Transfer Bin** column instead of **Putaway Return Items**.	SR-2096
26.0204	YES	**Integrations**	BUG FIX: CCC Integration. Added new response fields **CompanyContactName** and **CompanyPhoneNumber** to ensure company name and phone information are returned correctly when using real customer IDs.	SR-1945
26.0204	YES	**Integrations**	UPDATE: Updated fallback customer behavior so that **sales orders** created using the **Fallback Customer** are set to **Pending** status	SR-2080
26.0204	YES	**Invoice**	BUG FIX: Fixed an issue where **printing** an **invoice** could result in an error.	SR-2059
26.0204	YES	**PartsTrader Integration**	NEW FEATURE: Added a new **PartsTrader (Retail)** integration. The existing integration has been renamed to **PartsTrader (Wholesale)**, and a separate **PartsTrader (Retail)** settings menu is now available, allowing Wholesale and Retail integrations to be configured independently.	SR-2057
26.0204	YES	**Replenish Stock**	BUG FIX: Fixed an issue where the Replenish Stock tab displayed inaccurate quantities even after using Recalculate Qty in Stock. Stock levels now refresh correctly, providing accurate recommendations for replenishment.	SR-1994
26.0204	YES	**Test Mode**	BUG FIX: Fixed an issue where the **Test Mode** link at login was not working unless the 1place domain was manually copied.	SR-1382
26.0204	YES	**User Security**	BUG FIX: Fixed an issue where changes to module security and security group assignments on the Edit User screen were not saving and would revert after Save & Close. User access updates now persist correctly.	SR-2085
26.0203	YES	**AR Receive Payments**	UPDATE: Notes entered on the **Received Payments Screen** are now added on the **Payment History** screen and included in the **Excel export** for easier reference and reporting.	SR-1699
26.0203	YES	**Replenish Stock**	BUG FIX: Fixed an issue where Past Sales History analysis could calculate incorrect Qty In Stock (QIS) values affecting replenishment recommendations.	SR-2021
26.0203	YES	**Scanner**	BUG FIX: Resolved an issue where **PO scans** were not registering in 1Place when users had a different warehouse selected in the **Scan App**, even though the **warehouse ID** matched the **PO**. The mismatch prevented items from being shifted. The issue has been corrected, and PO receiving and put-away scanning is now working as expected.	SR-1935
26.0202	YES	**Admin**	BUG FIX: Fixed an issue where the Admin Companies page could be accessed without authentication when directly navigating to the URL. Login is now required before accessing the admin site.	SR-2035
26.0202	YES	**Company Version**	BUG FIX: Fixed an issue where the **Current Version** for the company was not visible on the **Users screen.**	SR-1786

Version #	QA Tested	Module	Description	Support Request #
26.0202	YES	**Descartes**	BUG FIX: Improved the **batch invoice export** experience when submitting to **Descartes**. A **progress indicator** now displays immediately upon export, and a completion summary shows which invoices were successfully exported and which failed (with reasons). The export process now properly returns and displays the GPS Link ID when successful.	SR-1846
26.0202	YES	**Emails**	BUG FIX: Added missing **email templates**. Fixed an issue where sending **emails** to customers was not working.	SR-1754
26.0202	YES	**Integrations**	UPDATE: Removed unused **integration** options (**BigCommerce, WooCommerce, Magento, and UPS**) from the Integrations navigation to streamline the menu.	SR-1751
26.0202	YES	**Parent Company Mode**	UPDATE: Implemented synchronization of Items, Catalog entries, Item Vendor Items, and Item image URLs from the parent company to child companies.	SR-1221
26.0202	YES	**Shipping and Receiving**	BUG FIX: In Route Status - Fixed an issue where **column repositioning** was not saving correctly. Fixed an issue where selecting a **single label** to print would print all labels for the order. Corrected the **Delivery Date** so it no longer defaults to the Sales Order creation date. Resolved an issue preventing **Zone selection**. UPDATE: In Route Status - Added a **dropdown option** in the **Select Your Name** section.	SR-1754
26.0202	YES	**Reports**	BUG FIX: Fixed an issue where the exported **Sales Tax Liability Detail Report** Excel file could not be opened after download. The report now generates a valid Excel file that opens correctly.	SR-1756
26.0130	YES	**Customers**	BUG FIX: Fixed an issue where the **Federal Tax ID** entered in **Customer Detail** settings was not displaying in the **Federal Tax ID** column on the **Customer List** screen.	SR-2000
26.0130	YES	**Customer List**	BUG FIX: Fixed an issue where searching by **Phone Number** on the **Customer List** was not working.	SR-97
26.0130	YES	**eCom Imports**	BUG FIX: Fixed an issue where Sales Orders created via ECOM import could select an incorrect part (e.g., CAPA variant) instead of the exact part number specified in the load file. The system now strictly processes the part number provided in the import template.	SR-2010
26.0130	YES	**Shipping and Receiving**	BUG FIX: Fixed an issue where Route and Bin information was missing on several tabs.	SR-260
26.0130	YES	**Tax Codes**	BUG FIX: Resolved multiple issues affecting tax code handling, including missing customer tax codes, incorrect tax code mismatch warnings during order creation, and duplicate tax codes in the sales tax table. Tax codes are now properly calculated, validated, and applied, allowing Customer Portal and Find Parts orders to be placed without errors.	SR-1931
26.0130	YES	**User List**	BUG FIX: Fixed an issue where the **company version list** in the **user** selection popup was not sorting alphabetically.	SR-29
26.0129	YES	**Descartes Integration**	UPDATE: Invoices are exported to **Descartes** only if their **Shipped Via** value is included in the allowed list configured under **Integrations** > **Descartes settings**.	SR-1989

Version #	QA Tested	Module	Description	Support Request #
26.0129	YES	**Sales**	BUG FIX: Fixed an issue where the **Created By** and **Entered By** fields could be mixed up. Previously, the system inserted the logged-in user as **Created By** when creating a **Sales Order → Invoice or Invoice → Credit Memo.** Now, the **Created By** value from the previous transaction is correctly carried forward, while **Entered By** and **Sales Rep** are set appropriately.	SR-475
26.0128	YES	**Catalog**	BUG FIX: Fixed an issue where importing a **PTypes list** from **Excel** using the export format from function #5 was not working. The import process now correctly reads and adds **PTypes** from the Excel file.	SR-1937
26.0128	YES	**Invoice**	UPDATE: Increased the size of the **barcode** for **invoice numbers** in the top-right corner to improve scan reliability.	SR-1879
26.0128	YES	**Sales Order/Invoice/Credit Memo**	UPDATE: Updated field population logic for new and converted records. For newly created **Quotes**, **Sales Orders**, **Invoices**, and **Credit Memos**, **Created By** and **Entered By** now default to the logged-in user (or default integration/portal user), and **Sales Rep** auto-fills from the customer when available. When records are created from another record (e.g., **Quote → Sales Order**, **Sales Order → Invoice**, **Invoice → Credit Memo**), **Entered By** and **Sales Rep** are carried over from the source record for accurate tracking.	SR-1340
26.0127	YES	**eCom Imports**	BUG FIX: Fixed an issue where **Sales Order Transfers** were not appearing in the correct **Pick From warehouse** on the **Shipping & Receiving** screen.	SR-1954
26.0127	YES	**Picking Ticket**	UPDATE: **Picking Tickets.** Added **Qty In Stock** as an optional column on printed **Picking Ticket** documents, allowing visibility without requiring the **With All Bin Locations** format.	SR-1912
26.0127	YES	**QBO Integration**	BUG FIX: Fixed a syncing issue related to **QuickBooks Online** settings.	SR-1997
26.0127	YES	**Sales Order**	BUG FIX: Updated **sales order numbering** to consistently apply the **warehouse prefix** based on the **Default Sales Order Warehouse** setting on the integration page. This ensures sales order numbers are generated consistently.	SR-1820
26.0127	YES	**Shipping and Receiving**	BUG FIX: Fixed an issue where, after the **26.0127** update, the item counts shown in **parentheses** were incorrectly displaying as 0 and **zone filters** are missing.	SR-1979
26.0123	YES	**AR Receive Payment**	BUG FIX: Resolved an issue where a **payment** could be applied multiple times if a **user** was unable to complete a **revert** due to missing **Delete** permissions. Additional safeguards have been reinforced to prevent duplicate application of the same payment. Users should be on the **latest version** and have appropriate permissions to ensure proper revert functionality.	SR-1932
26.0123	YES	**Integrations**	UPDATE: **Ecom Imports**. The **Auto Ship option** is now a dropdown allowing users to select: **Do Not Auto Ship, Ship From All**, or a **specific warehouse**. Orders will only ship from the selected warehouse. If inventory isn't available, the shipped quantity will be 0 and the backorder will match the order quantity.	SR-1776
26.0123	YES	**Sales Order**	BUG FIX: Fixed an issue where a **system error** could occur when changing an order's status to Delivered.	SR-1916
26.0123	YES	**Sales Order Payment**	BUG FIX: Fixed an issue in version 26.0122 where sales order payments could not be applied.	SR-1917

Version #	QA Tested	Module	Description	Support Request #
26.0123	YES	**Scanner**	BUG FIX: **Returns / Put Away to Bins**: Fixed multiple issues affecting the final stages of the **put-away** process. Item scanning now correctly registers when pressing **Enter**, popup selection windows only appear when multiple POs exist, and keyboard navigation (including Enter) now advances properly through the final steps of the workflow.	SR-1801
26.0123	YES	**Receive Payment**	UPDATE: Enhanced the **Search** functionality to allow searching by **Transaction Numbers** and all other numeric fields.	SR-297
26.0122	YES	**AR Receive Payment**	UPDATE: Added a clearer **popup message** when attempting to **revert a payment** without proper permissions, indicating that the **Revert** action requires **Delete** rights in **AR → Receive Payments** user security settings.	
26.0122	YES	**AR Receive Payment**	BUG FIX: Added additional **validation** to prevent posting a **payment** when the **invoice customer** does not match the **payment customer**. This ensures **payments** cannot be incorrectly posted under the same **Payment ID**. Users will now be blocked from proceeding in this scenario, helping avoid posting errors.	SR-1883
26.0122	YES	**Customer Portal**	BUG FIX: Enhanced the **Send Invite** workflow to use the designated **email template** configured under **Settings** > **Customer Portal** > **Email Notifications to Users**. Updated the **activation link** to direct users to a branded activation page while securely maintaining the unique activation token. The activation experience now includes a branded confirmation page after password setup, guiding users to sign in and bookmark the Customer Portal for future access.	SR-1892
26.0122	YES	**Descartes**	BUG FIX: Enhanced **invoice export** controls to better manage which orders are sent to **Descartes**. Added improved **filtering** to prevent **non-delivery orders** (e.g., Diligent, CPU, Ecommerce) from being exported and strengthened **warehouse/location mapping** to ensure **invoices** upload to the correct **Descartes location**, including support for satellite delivery centers.	
26.0121	YES	**API**	BUG FIX: **API / Integrations.** Updated fallback **customer** handling so that when an order is created, **Ship To contact, company, and address details** (Address, City/State/Zip) are correctly populated in the **Ship To** fields for **CCC, PT, and OPS** orders.	SR-1837
26.0121	YES	**Shipping and Receiving**	BUG FIX: Fixed an issue where the **Ship/Rec screen** could become **unresponsive or locked**, preventing warehouse staff from **printing picking labels or invoices**. The underlying query handling has been optimized to prevent multiple stuck sessions.	SR-1910
26.0120	YES	**Scanner**	BUG FIX: **Inspect Returns.** Fixed an issue where items marked as **Good for Stock** during the inspect return process were not being returned to inventory, even though the return was completed and converted to a credit memo.	SR-1853
26.0119	YES	**API**	BUG FIX: **Credit Memo.**Fixed an issue where the **DoReturn** process did not apply the **Credit Memo prefix** defined by warehouse in **Settings** > **Record Numbering** during scanner return processing.	SR-1792
26.0119	YES	**Invoice/Credit Memo**	BUG FIX: Fixed an issue where **invoices** with **applied credit memos** could appear to be paid twice, resulting in incorrect negative balances. **Payments** and **credit applications** are now reflected accurately on **invoices** and **receipts**.	SR-1835

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26.0119	YES	**Item Details**	UPDATE: **Item Details > Catalog Tab** - Moved the **Manage Catalog** button to the right of the **Add New Row** button for improved layout and usability.	SR-1743
26.0119	YES	**Record Numbering**	BUG FIX: Fixed an issue where **record numbers** and **dates** could advance to the next day prematurely, causing confusion about the actual **invoice date.**	SR-1818
26.0119	YES	**Record Numbering**	BUG FIX: Improved Define Prefix by Warehouse behavior to fully respect existing Record Numbering settings. When a record type is set to Manual, record numbers (such as Customer and Sales Order numbers) remain user-editable, even when warehouse-based prefixes are enabled.	SR-1842
26.0119	YES	**Sales Tax**	BUG FIX: Fixed an issue where the **Calculate Sales Tax** button was not functioning as expected.	SR-1782
26.0118	YES	**Custom Pricing**	BUG FIX: Fixed an issue where **markup pricing** was not calculating correctly.	SR-1810
26.0114	YES	**Credit Authorization**	BUG FIX: Fixed an issue where scanning an invoice and its parts during the return process would display "**part is not available for return**." The **Credit Authorizatio**n was being created without any parts populated, requiring manual entry. Parts are now correctly included, allowing returns to be completed without manual input.	SR-1791
26.0114	YES	**Descartes**	UPDATE: Added a new option **"Export each item unit as a separate delivery".** When enabled, each **unit** on an **order** is exported as an **individual delivery** in **Descartes**. For example, an order with 2 of Item X and 3 of Item Y would create 5 separate deliveries.	SR-249
26.0114	YES	**Scanner**	BUG FIX: Resolved an issue in version 26.1222 where clicking **Done** could trigger an **error message**. The **Done** action now completes properly and disables further processing as expected.	SR-1765
26.0114	YES	**Shipping and Receiving**	BUG FIX: Fixed an issue where selecting **Needs Review** or **To Cancel / Restock** could result in undefined errors	SR-1779
26.0114	YES	**Shipping and Receiving**	BUG FIX: Fixed an issue where selecting the **New** status could result in an error.	SR-1707
26.0113	YES	**Credit Memo**	BUG FIX: Fixed an issue where a newly created **credit memo** could be incorrectly marked as **Paid** even when no payments had been applied.	SR-1729
26.0113	YES	**Descartes**	UPDATE: Added an **Export Selected** to **Descartes** button when **Descartes** integration is enabled. Users can now select all **invoiced** orders not yet submitted to **Descartes** in a single action, which highlights the selected orders and moves them to the top of the list for easier review and export.	SR-1525
26.0113	YES	**Find Parts**	BUG FIX: Fixed an issue where the **Delivery Date** was not carried over when creating a **Sales Order** from the **Find Parts** screen, which could impact **Descartes** uploads.	SR-1620
26.0113	YES	**Scanner**	BUG FIX: Fixed an issue where adding bins per warehouse was not saving (v25.1223). Updated bin logic so the Default Bin Location now reflects the warehouse-specific default instead of the item-level default. The Default Bin Location has been moved above the bin table into its own highlighted row for clearer visibility. This enhancement has also been applied to Inventory → Move Bins for consistency.	SR-1549
26.0112	YES	**Credit Memo**	BUG FIX: Fixed an issue where imported credit memos were created without the required "C" prefix in the credit memo number.	SR-1715

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26.0112	YES	**Descartes**	UPDATE: Added support for Loading Zone / Loading Order by introducing a new item-level field used during invoice export. The Delivery Loading Order value is now stored per item and is included when invoices are exported to Descartes, ensuring the correct loading sequence per invoice line item.	SR-1638
26.0112	YES	E **Integrations**	BUG FIX: Fixed an issue where **imported line items** were not displaying the correct **Item Number** in the **Item Number field.**	SR-1676
26.0112	YES	**Integrations**	BUG FIX: **Car-Part EXPORT** - Fixed an issue where the **NumbersMap.cap** file could contain invalid **OEM numbers** (e.g., extremely large scientific notation values).	SR-1674
26.0112	YES	**Payment Terms**	BUG FIX: Fixed an issue where a customer's **Payment Terms** could revert to a previous value after modifying a sales order or invoice.	SR-1705
26.0112	YES	**Printer Connect**	BUG FIX: Fixed an issue where printers were not automatically populated from **Settings > Sales > General** when printing orders.	SR-1703
26.0112	YES	**Printer Connect**	BUG FIX: Fixed an issue where the number of print copies would occasionally double automatically (approximately every 5–10 print jobs).	SR-1721
26.0109	YES	**API**	BUG FIX: **API**: Updated the **Quotation** to automatically calculate **List, Unit, Discount, Net, and Line Total** when no pricing details are submitted. This ensures accurate pricing even if no values are provided in the request.	SR-1698
26.0109	YES	**Find Parts/Sales Order/Quote**	BUG FIX: Fixed an issue where **Find Parts > Create Sales Order or Create Quote** could time out in some versions (0108, 0107, and earlier).	SR-1697
26.0109	YES	**Integrations**	BUG FIX: **ECOM IMPORTS (Generic)** - Fixed an issue where duplicate orders could be created for the same Customer PO # and Order Source. Imports now fail with a warning when duplicates are detected.	SR-1649
26.0109	YES	**Printer Connect**	BUG FIX: Fixed an issue where multiple documents could occasionally print to the wrong printer or with incorrect quantities. Each print job is now correctly sent to the selected printer with the proper number of copies.	SR-1696
26.0109	YES	**Sales Order Import**	BUG FIX: Fixed an issue where the **Sub Total** could be calculated incorrectly during import.	SR-1687
26.0108	YES	**AR Aging Summary**	UPDATE: **AR Aging Report:** Updated the report to show **inactive customers** with remaining balances. **Inactive customer** rows are now highlighted with a light gray background for easy identification.	SR-1271
26.0108	YES	**Customer Portal**	BUG FIX: Fixed an issue where **users** could receive a **permission error** after entering the **vehicle year** and selecting the **make** during vehicle lookup.	SR-1658
26.0108	YES	**Descartes**	UPDATE: Enhanced the **API export** to include additional fields such as Ship-to State, Ship-to Route, Delivery/Pickup type, Customer PO #, Tax (VAT) amount, Confirmation # (Invoice Number), and Return Reason Code.	SR-1326
26.0108	YES	**eCom Imports**	BUG FIX: Updated the import process so the **Ship To name** in the **name** and **address** fields now reflects the imported **ShipToCompany** value.	SR-1653
26.0108	YES	**Integrations**	UPDATE: **Sales > Integrations > Ecom Import (Generic)**. Added a new **Sales Order Status** column, allowing a specific default **Sales Order Status** to be assigned per **Order Source** using a drop-down list of available **Sales Order Statuses.**	SR-1668

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26.0108	YES	**Integrations**	BUG FIX: **Ecom Import (Generic)** - **Ship-To phone numbers** are now added to the **Sales Order comments** because this field is not available on the **Sales Order screen**, ensuring the information is always visible and retained on imported orders.	SR-1665
26.0108	YES	**Integrations**	BUG FIX: **ECOM IMPORTS (Generic)** - Fixed an issue where orders with the same **PO #** but different **Order Sources** could be incorrectly combined, and where the **Ship To Phone value** could be missing. Orders are now uniquely grouped by both **Order Source** and **Order Number** during import.	SR-1664
26.0108	YES	**Payments**	BUG FIX: Fixed an issue where **invoices** with multiple payments could display incorrect values for **Total Previous Payments, Amount Received, and Amount Paid**. All applied payments are now correctly reflected across the invoice and payment screens.	
26.0108	YES	**User Security**	BUG FIX: **User Security** - Fixed an issue where **Company Version updates** could not be saved (save button was missing) and, in some cases, the **User Security screen** would fail to load in certain versions.	SR-1652
26.0108	YES	**User Security**	BUG FIX: **User Settings:** Fixed an issue where **users** were unable to access **User Settings** after a version update (KSI-TX).	SR-1580
26.0107	YES	**AR Customer Statements**	UPDATE: Updated the **Balance** column to display the net amount due per transaction, calculated as **Amount – Amount Applied.**	SR-1617
26.0107	YES	**AR Receive Payments**	BUG FIX: Fixed an issue where clicking the magnifying glass for a Credit Memo would not open the credit memo correctly and could result in an error in a new tab.	SR-1647
26.0107	YES	**Customer Portal**	UPDATE: **Customer Portal** - Hidden the **Balance Forward** statement option on the portal.	SR-188
26.0107	YES	**Invoice**	BUG FIX: Fixed an issue where **applied discounts** caused **invoices** to incorrectly show a **balance due**. **Total Paid** and **Balance Due** are now calculated from **InvoicePaymentLineItems** instead of the **Invoice header**, ensuring discounts are reflected correctly across invoices and credit reports.	SR-1606
26.0107	YES	**Shipping Labels**	BUG FIX: Fixed a critical issue where opening a **label,** making changes, and then clicking **Save or Cancel** could unintentionally delete the label. All automatic delete logic has been removed to ensure label designs are never deleted by system actions. Labels can now only be removed by users manually deleting individual fields, preventing accidental data loss and warehouse disruptions.	SR-1637
26.0107	YES	**User Security**	BUG FIX: Fixed an issue where clicking the **X** to clear or change the version for a single user was unintentionally clearing the version values for all users on the screen. Only the selected user's version is now affected.	SR-1629
26.0106	YES	**Sales Order Import**	BUG FIX: Fixed an issue where imports using **Sales Order Header + Lines (1 File**) could complete successfully but fail to create sales orders. This occurred when certain mapped fields (such as Item Price and Item Quantity) were not processed correctly.	SR-1576
26.0106	YES	**Scanning Report**	BUG FIX: Fixed issues affecting the accuracy and reliability of the Scanning Report	SR-1636
26.0105	YES	**Customer Portal**	UPDATE: Added a Show/Hide Left Navigation Menu option, allowing users to toggle the visibility of the portal's left-hand menu.	SR-1524

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26.0105	YES	**Descartes**	UPDATE: SHIP/REC > Descartes: Added visibility into Descartes export status on the To Dispatch screen. A new field, GPS Link ID, was added to both Sales Orders and Invoices to store the Descartes GPS link returned after export. This field is now available as an optional column on Ship/Rec > To Dispatch, allowing users to quickly confirm whether an order or invoice was successfully exported to Descartes.	SR-1494
26.0105	YES	**Sage Integration**	UPDATE: Added new default settings that allow each Sage Intacct integration component to be individually enabled or disabled. When a component is disabled, related buttons and columns are hidden or adjusted accordingly on the associated screens.	SR-1418
26.0105	YES	**User Security**	BUG FIX: Fixed an issue where the **User Security screen** would not open in versions **1220, 1223**, and **1230.** The screen now loads correctly.	SR-1613