25.0212 (scheduled for initial testing on 02/12/2025)

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25.0212 (released 02/12/2025)

Date	Task #	======== **Type** ========	Screen (or Report Name)	**Description**	Requested by Customer	**Links to Additional Info**
02/21/25	32192	Bug	Purchase Order	PURCHASE ORDER: When user click Recalculate button weight is not calculated.		
02/21/25	30808	Bug	Reports	Exception Report - Sales Order Item Price Changes: Shows error while running.	Quality	
02/21/25	32197	New	Printing	Add the time when a document was printed on All Document Print outs.	APS	
02/20/25	32193	Bug	Shipping and Receiving	Not showing the correct values based on the status.	Quickfit	
02/20/25	32191	Bug	Purchase Order List	PO List - When sorting the column for the Vendor Number an undefined error pops up. PO List - Vendor Number Column should be named as Vendor Name. Vendor number is different.	Quickfit	
02/19/25	32062	New	Sales Order	When the Qty Shipped is changed, check to see if the Lot Tracking true/false option on item is checked. If so, then POPUP a screen showing the Receipts in stock and allow the user to select WHICH receipt will be taken out of stock, rather than just taking First In First Out.		
2/18/25	32227	Bug	Reports	When reports module is clicked , the sales order module is duplicated in the list. Similar issue occured in other companies in other modules.		
2/18/25	31873	Bug	Credit Memo	Credit Memo > Payment Info > Give Cash Back or Apply Credit: --Even when the date chosen is greater than the Invoice date, it still gives the date validation error. Example: The Invoice was created on 10/14/2024. Date on the payment date is 10/15/2024. --If the payment date was changed to 10/16/2024, the date on the "Date Paid" field still shows as 10/15/2024. --"Last Synced" field is not showing properly on the Payments Screen --"Give Refund" button is still working even without choosing any Payment Type of Refund. Also, I can still process a refund even after giving a full refund to the order. --Action(x) is not functioning	Quickfit	
2/18/25	32224	Bug	Import Wizard	Customer List > Update Wizard > The file was imported successfully, but some data (City) were not updated based on the file.	Express NH	
				User Settings > Edit User > Module Security:		

2/18/25	32194	Bug	Settings	User Settings >Edit User >Module Security: Look for Invoices and uncheck the Edit box. >It restricts the user to access the Invoice screen. This should only restrict user to edit any info on the invoice and still show the invoice form. (Same applied to all Edit checkbox settings)	Orlando	
02/17/25	32218	Update	Invoice Detail	Receive/Edit Payments > Add new Card Instead of a pop up message, the system should highlight the missing field so the user will know they forgot one of the details and they can properly store and save the credit card on file.		
02/17/25	32217	Update	Customer Detail	CREDIT CARD TAB When you add a new credit card and click the SAVE and SYNC button, it makes a copy of the other cards on file. Which shouldn't be happening. Also, remove the space on "Master Card" should be "Mastercard". Automatically add a / symbol when a user types the expiration date on the field. Also, do not allow the user to save the credit card if it is missing any details, I tried adding a card with just 6 digits and it was still saved instead of prompting the user to enter the whole credit card number. (most credit cards has 15-19 digits number)		
02/17/25	32216	Bug	Customer Detail	CREDIT CARD TAB and Invoice Screen > PAYMENT SCREEN When I use an existing card added thru the credit card tab on the customer detail screen to pay for an invoice, it does not work and error says invalid card number. Tried adding the same card thru the ADD NEW CARD button on edit/receive payment screen and it worked fine.		
02/17/25	32198	Bug	Reports	INVOICES/CREDITS PAYMENT DETAILS --Allow user to Group by = None --Sort by Invoice Number --After report is generated, when user clicks the Invoice Number header, it does not sort the records. Pls fix --Please put in newest branch version 25.0212	APS	
02/17/25	32150	Update	Reports	Invoice/CM --Group by = None --Cannot Download to Excel File --Cannot Print when clicking the Print button --Must correctly show all the fields/columns from the report --Must be sorted according to the sort option selected before generating the report. --When user downloads to PDF, the sorting is default to Customer name. Please sort according to the sort option selected before generating the report.	APS	
02/17/25	32220	Bug	Import Wizard	Encountered errors uploading files for Item stocks, item vendors and catalog.	Proparts	
02/17/25	32192	Bug	Purchase Order	The Recalculate button is not saving the values on the PO even when clicking save. Once the page is refreshed, the values are removed. (WE DID NOT MAKE ANY SAVE FUNCTION RELATED ON THIS.) When the CuSqFeet is selected to show on Line 2, it does not show the correct CuSqFeet based on the Vendor Item #. It only shows 0. If a PO has a lot of line items, the page loads, and will not work properly even when opening a new tab	Quickfit	

				work properly even when opening a new tab.		
02/17/25	32188	Update	Item Catalog	1d. DEFINE how the Item Description will be created. - When choosing option 1: Make Model Year Range - Partslink Description (Name) (Partslink Variables), it still shows the description based on option 2 format. Example: AC1000101 - Front bumper cover (LS; prime) 1993-1994 ACURA VIGOR Some Partslink Items are showing the wrong year range. Instead of 12-17, it shows as 12-14.		
02/17/25	32179	Bug	Customer List	Exported file for customers (Express), the discount percentage shows more than 2 decimals	Express NH	
02/14/25	32102	Update	Printing	Printing Options: Need to disable Printing Option settings to all transaction forms.		
02/14/25	32202	Update	Customer Portal	Customer Portal users should not be able to edit the Transaction info on Quotation Example: Date, Entered By, Payment Terms, Sales Rep, Order Source, Shipped Via and Job ID. Except for Customer PO #, Contact and Email fields. On the Line items table, these fields should also not be editable by users: Expiration Date Warehouse Description Discount		
02/14/25	32175	Bug	Reports	Invoices/Credits The following Reports have issues where once you download the file either to PDF/Excel, the webpage would either freeze or send you to a different web page where it will have a webpage error message: INVOICES / CREDITS BY CUSTOMER AND ITEM VENDOR (Excel) INVOICES / CREDITS BY MONTH (TOTALS) (Excel) INVOICES / CREDITS BY TYPE (Excel) SALES HISTORY - 2 YEAR COMPARISON BY ITEM (ALPHA) (Excel) SALES HISTORY - 2 YEAR COMPARISON BY ITEM (BEST TO WORST) (PDF)		
02/13/25	32201	Bug	Customer Portal	Customer Portal > Find Parts: After adding an item you want to add to your shopping cart using the right arrow button, and then when the user reduce the quantity to buy using the left arrow button to Zero, the shopping cart keeps the item with quantity of 1, even though it should be removed already since the Qty to buy is 0 already.		
02/13/25	32122	Bug	Credit Memo	ADDITIONAL COST FOR RETURNED PARTS FROM CREDIT MEMOS >When returning parts from the Credit memo to stocks, the additional costs for the returned part gets wiped out/zeroes out. REPORTS >INVOICE/CREDITS REPORT >When running the report with a CM with unreturned parts, it shows the amount for the additional cost and when the item is returned to stock, the additional cost gets wiped out. Need to double check and update the Returned CM that have additional cost wiped out from Jan 1, 2025 till present date to correct the error.	Orlando	
02/13/25	32204	Bug	Shipping and Receiving	PENDING/ FUTURE DELIVERY: The Future delivery screen should have the features we used to have for Quality. We need to restore it back.	Quality	
02/13/25	32206	Bug	Sales	SOPO>PO: When creating PO from the SOPO screen, it only opens a	TipTop	

			Order PO	blank tab. When opening POs, it directs to blank tabs.		
02/12/25	32226	Bug	Receive Payments	Worked in the issue where the Customers are not shown when the open invoices customer is selected.		
02/12/25	32225	Update	Settings	In Sales > General Sales Settings > Payment Terms table -only the Payment Term Name, # of Days, # Days for Discount, Discount percent is shown and updated.		
02/12/25	32196	Bug	Manifest	Showing duplicate orders on the list.		
02/12/25	32187	Update	Receive Payments	--Change the title Payment Reference # to CK#/CC# --Add a new field below called Authorization # this is the same Authorization # field in the Payments Info tab on the Invoice/CM detail screen.		

25.0212 Version Releases History

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

25.0212 (Known Issues Fixed in this Version)

Fixed in Version #	Date	Task #	======== Type ========	Screen (or Report Name)	Description
25.0212.10	08/28/25	32694	Bug	Shipping and Receiving	Invoice Printing Issues (on Ship/Rec > To Dispatch) --Sometimes 'Preview' Freezes --Every time SOME Invoices (on PDF Preview) has NO INVOICE #, TO, NO BILL TO, but DOES have Customer PO #, Shipped Via, and Line items. --MOST URGENT: Fix the issue above. --MOST URGENT 2: (IF YOU CALL ME I CAN CREATE THE BATCHES INVOICES...) Create Batches of PDF Invoices (25-100 each) for HO ones that are 100% ready to Go), so HOUSTON can PRINT those I Invoices to give to drivers to deliver parts to customers. --(SEE EMAIL for ISSUE 1 from Steve) --When this is DONE and PDFS sent to me...CALL ME ON MY TEAM CELL PHONE (+1 801 209-2190) --When OPS, probably CCC, and maybe PartsTrader when Orders RANDOMLY it takes ITEMS out of stock from the wrong warehous (without making a Stock Transfer) and without making the pick t Trans & Ship Order). ---SEE EMAIL FOR ISSUE 2 from Steve) --BROKEN SHIP TO BILL TO ON INTEGRATIONS: When OPS, (proba CCC, and maybe PartsTrader when Orders come in) it was puttin SHIP To Customer in the BILL TO field and leaving the Ship To Cu field blank. (So Julian made it so if there is no Bill To or SHip To h duplicates it...) --INTEGRATIONS (OPS, and CCC? Maybe PT?) Not inserting the Ex Delivery Date --INTEGRATIONS ? API-SALES ORDER: When Customer is NOT TAX EXEMPT it is not auto filling/inserting the Tax Code from the Taxe --DOUBLE CHECK sending OPS the proper Estimated Delivery Dat Order comes in AFTER the Cutoff Time (usually 5pm). --Order before Est Del Date tomorrow, Order after 500 Est Del Da be 2 days later.. --SHIP/REC > TO DISPATCH: Each time select SHOW ALL make su RETAIN the settings for Driver, Dispatch Day, Dispatch # so user have to start over again.. --For OPS they will only pass in 1 THIRD PARTY Id. We need to tak and compare to third party IDs for OPS. Then when we find we ge customer id related to it. Then we make a sales order with that c # and put it as the ship to customer #. Then we look at the addr for that customer # to determine which bill to Cust in 1place to u
					NEED OPTION Added to AUTO SHIP new PartsTrader and OPS Ord (Like they you added for CCC a few weeks ago). SHIP/REC: To Dispatch > on the [ ] Select ALL checkbox add another option Select ALL Order Transfer's Ready to 'Transfer' Example: If I have 10 new Orders for parts for Customers in the 9 warehouse that each have items that need to be 'Transferred' to (Houston) FROM 93TX (San Antonio), after the items have been p and marked 'To Dispatch' in 93TX, we need a simple way to auto ALL of those 10 Items, in the 93TX to be Dispatched–with 1 clicks selecting a new option called 'Select ALL Order Transfer's Ready 'Transfer'. Once they are selected, then the user can quickly Disp them which will put the in the IN ROUTE (in the 93TX) and In Rou Warehouse in the 92Tx. (Without this option they will have to ma find 300-400 transfers every day and click on each one of them). ITEM DETAIL:

25.0212.10	08/26/25	32694	New	Integrations	Stock tab. When press the Recalculate Qty in Stock (for just 1 ite not recalculating the Quantity Available, Qty on PO, and maybe c (such as the QTY on PO, and Qty ON BO), also make sure the Rec Qty in Stock ALL does the same thing. ITEM DETAIL: Adjust Qty in Stock. When trying to EDIT a RECEIPT where the Re = TRUE gives an error. API-Item: Quality Indicator settings for SWAGGER Item XML. The SWAGGER ITEM XML should return the Item.QualityIndicator QualityIndicator element. HO1202108C is returning CAPA rather (I think it has to do with the Part Type / Code Mapping table in th Integration settings. Please CHANGE the NAME of the SWAGGER ELEMENT called: “OneSourcePartTypeQualityCode” To “ThirdPartyPartTypeQualityCode” Settings > Sales: Invoices/Credit Memo. When ADDING or EDITING a RETURN REAS wont SAVE properly. --ADJUST ITEM: Changed or SPLIT Item and then set the Reservec does NOT update the QTY Available. --RETEST - CALC ALL ITEM QTYs button, does it reset the Average Cost field, based on ALL Receipts for each item? IP--ITEM DROP DOWN LISTS: Add a another column called: Qty Av to the right of the Qty in Stock column.
25.0212.10	08/22/25	32694	Update	Find Parts	--(REDO) UNDO YOUR CHANGES. Make it work exactly like it work before, when press ENTER (ONE TIME) on a line (where the curso auto check the line, auto calc price, and auto change Qty = 1, an select/highlight the Qty field. --(REDO) ALSO, to prevent the user from having to DO all of what described above to GET a price…when the user clicks on the line doesn’t press enter and doesn’t click the checkbox) STILL auto ca Price, but do not move the cursor. (IF IT IS EASY, when a price is calculated change the background color of the net price field to l green, the same color if the QTY in ALL Warehouses > 0…) SHIP/REC: --Its still making phantom lines on the To Print & Pick (with NO SA ORDER #) when I create an Order with items local and to transfe --Selected a Picker, then searched for part #, picker got cleared o --SHOW ALL Picker gets cleared out.. --SHIP/REC: When we have an item that is a STOCK Transfer, that been transferred from WH A to WH B, and is now showing in the ROUTE TO WAREHOUSE (in WH B), if we select it and select To D in the Move to Status, it is NOT appearing in the To Dispatch of W (maybe it is getting put in the To Dispatch back in WH A where it from?). We need to fix that… --SHIP/REC: IN ROUTE, when select a Dispatch Number (to filter t by the Dispatch #) do not ERASE the Dispatch # from the Drop d after the items are displayed. --SHIP/REC: IN ROUTE TO WAREHOUSE: Add a new (optional) colu (under/right of the Document # field) called Dispatch # (which w the user the Dispatch # that item is assigned to… CREDIT MEMO: --When the Credit Memo screen is opened, if the SubTotal = $0 (nothing has been returned yet) change the LABEL for Credit Mem Return Authorization # and change the background of the label f Yellow (to hightlight the fact that this is a Return Authorization, n Credit Yet. --CREDIT MEMO: When a Credit Memo is PRINTED, if the SubTota then change the label from Credit Memo to Return Authorization API:

					--Check All Qty In stock method to use Qty Available instead of A stock column.
25.0212.10	08/22/25	32694	Update	Shipping and Receiving	X–TO DISPATCH: Select ‘Dispatch 1 Driver’. Create a Dispatch #. Proceed button. A popup appears to print. (At this point for KSI th already created Invoices in batches throughout the day…so they want to select the Create Invoices checkbox. So next they click tl PROCEED button and it says to select a Dispatch. But the Dispatc down list is locked. I suggest we UNLOCK it and also just AUTO FI Dispatch # for them. X–When I tested making a ‘Dispatch’ on the scanner and then go to the To Print screen and ‘Reprinting’ the MANIFEST is still show AMOUNT = $0. Also, there were 4 parts on the manifest. Each of lines says there are 4 parts, and the total parts is showing as 16. **X–** On the TO DISPATCH screen we made a new option (on the ch drop down menu) called ‘Select ALL Order 100% Ready to Ship’. that option lets make a new option called: ‘Select ALL Orders (wi Transfers) 100% Ready to Ship’. (This will just select ORDERS wh the Transfer From is NOT NULL, the Ship From is the warehouse they are in, the ReceivedFromTransfer = 1 the TransferComplete = 1, and the Entire Order is ready to Ship… Not already Invoiced (This will help them quickly select all Transfers that just came in print Invoices for them. X–SETTINGS: > Sales > Invoices/Credits > Return reasons table. bug in version .0819. Then PK (i think) fixed it in version .0820. T today with version .0821 it is not saving correctly again. X–(REDO) FIND PARTS: Click to calc Price, just like it does now wh selecting the row and pressing enter, or clicking the selection che But, do not select the checkbox and do not change the qty to 1. UNDO YOUR CHANGES. Make it work exactly like it worked before press ENTER on a line where the cursor is, auto check the line, au price, and auto change Qty = 1, and auto select/highlight the Qty ALSO, to prevent the user from having to DO all of what i describ above to GET a price…when the user clicks on the line (but doesn enter and doesn’t click the checkbox) STILL auto calc the Price, a not move the cursor The light green background color on the Qty ALL Warehouses fiel the Qty in MY warehouse = 0 and ALL warehouses > 0) is no long working.
25.0212.10	08/20/25	32684	Update	Settings	"X–A1 API-FETCH SHIPPING FROM LOCATION: When Julians webse makes a call to: FetchShippingFromLocation he passes in a ThirdPartyType (like CCC, etc) then a ThirdPartyCustomerID. If th customer ID cannot be found we need to look for a ‘Fall Back’ (De Customer in whichever Third Party settings that send the request trax is failing to do that. Not sure if it works already for CCC and PartsTrader, but they need to work too). X–A1 SHIP/REC > TO DISPATCH, Needs to show Amount Due on t Manifest. Plus, some items selected were not showing up on the Manifest. Doubt–A1 SHIP/REC > To Dispatch. Do NOT make an Invoice if Sa Order = 0. (PLAN B move to Pending). X–A1 SHIP/REC > To Dispatch. When Reprint Dispatch, make the down list GROUP by the Dispatch #. X–A1 SHIP/REC (TEST make sure what is selected is what gets pri X–A1 SHIP/REC > IN ROUTE TO WAREHOUSE: The Group by Sales # is NOT grouping the lines by Sales Order #. X–A1 SHIP/REC > IN ROUTE, do NOT make the user select a User not give a popup enforcing it. Doubt–A1 FIND PARTS: Click to calc Price X–A1 FIND PARTS: After the hidden YELLOW notes field gets displ then it doesn't become un-displayed with clicking on an item tha

					NOT have any item notes. X–A1 FIND PARTS: Lock Description. X–A1 FIND PARTS: Auto Populate Delivery Date with the Delivery selected for the first item. Copy this over to the Sales Order > De Date field (the one displayed in the SO Header). X–A1 32553 QUICK FIX for NORTHLAND GO LIVE. There is a ‘valid on the Customer PO# field (in the header area) on the Sales Ord maybe Q, Inv, CM) that give this popup if the same customer trie the same Customer PO# ‘, ""This customer PO # already exists"" you please remove that validation?) Thanks. "
25.0212.10	08/18/25	32684	Update	Settings	–Settings > Customer Auto Fill profiles…add 2 drop down lists an alignment –Fix alignment for Country on Customer Details
25.0212.10	08/18/25	32684	Update	API	INTEGRATIONS - ITEM API: --When testing the ITEM API, on KSI data, zTestHou customer, the EstimatedDeliveryDate = "0001-01-01T00:00:00",. --You added some new logic to calculate the EstimatedDeliveryD the FIND PARTS screen called: ‘Cut off time for new Orders to ad ADDITIONAL DAY to deliver the parts’. FOR CCC, OPS, and PartsT (UNDER THE setting called: SAME DAY Delivery Cutoff Time) will please add ‘Cut off time for new Orders to add an ADDITIONAL D deliver the parts’ to the UI screen and also make the ITEM API co that cut off time as well. (Please note the ‘i’ popup explanation o field on the settings for the Find Parts and put that same ‘i’ infor popup to help explain what it is and how it work.
25.0212.10	08/18/25	32684	Bug	Customer	--Settings > Customers > Auto Fill Customer Profile. When click N freezes. Please fix that and then test it thoroughly as they plan to daily. -- Add new Customer, if the Address Type = Both, then we need the LINK to field below it.
25.0212.10	08/18/25	32684	Update	Shipping and Receiving	--Increase the width of To Print and Pick buttons to be wide enou show “Zone 10 (100)” To Print and Pick: --Scenario: Select Zone 5 (4), which selects 4 items, then click th All, then click to De-Select All (basically the user changed their m Zone 5. Then clicks Zone 3 (6). This makes ALL 10 of the items to selected. Whenyou UNSELECT it is still retaining some type of sel in memory or the table for the items unselected…
25.0212.10	08/14/25	32684	Bug	Settings	X--A1 L250813-3 Bin Management > Define Zones popup form gi permanent spinner. Tamil needs this done to move forward on his side… X–LABEL 4x6 will not work. X–Not showing the Zones buttons (with counts like this: Zone 01 Zone 02 (3) X–When click PICKER NAME, check to see if already picking anoth (like it does when we click the PRINT button). X–Can we make the LABELS print faster? (When select 19, which very common, it takes a long time). Ship/Rec > To Dispatch > Invoice Selected option > Print invoice X–When all the 1st popup form is still showing. Needs to auto clo first clicked). X–(URGENT) The CHECKBOX that shows ‘selected invoice’ option ‘Select All Orders 100% ready to ship’ needs to NOT select any O that already have an Invoice #. X--A1 L250811-1 - Add Est Del Date column (and calculation) on Parts Auto screen. See KBA 02426 section called Calculating the Date for detailed instructions.
25.0212.10	08/13/25	32699	Bug	Reports	INVOICES/CREDITS MONTH (TOTALS) REPORT: After downloading report the year under the month column shows 2025 even thoug report is for years 2022-2024.
25.0212.10	08/13/25	32698	Bug	Replenish Stock	IMPORT FROM EXCEL: When importing files, it only imports partia from the excel file.

25.0212.10	08/13/25	32697	Bug	Purchase Order	P1196 - Line items were duplicated. Delete all duplicate line item have $0.00 cost.
25.0212.10	08/12/25	32694	Bug	Import Wizard	IMPORT WIZARD (IMPORT PAYMENT) >Not importing
25.0212.10	08/11/25	32684	Update	Admin Portal	--Admin.1place.cloud admin portal > users > trying to change th version for an individual user is showing a popup box on TOP of t (hiding what we type) and also is NOT showing any versions to se --Update the Label option 'label' to this: Use Conditional Shading: When the Transfer From WH field has a AND is on the label, SHADE the background of the Transfer From field. Otherwise leave the background white when it is empty. (pl make sure the line 2 of the label is under the line 1, left justified.
25.0212.10	08/11/25	32684	Bug	Settings	--LABELS: Labels freeze if user puts the Transfer From WH or Shi WH fields on the label. We need to be able to put those fields on label. We also need to add a new section UNDER the field options Label Designer) called: Special Options: Then add this new optior [ ] Use Conditional Shading: When the Transfer From WH field ha value AND is on the label SHADE the background of the Transfer field. Otherwise leave the background white when it is empty. --The other labels have the same hanging issue with those 2 fielc --Changing the Ship/Rec print reports isn't getting saved/memori --On the 4x6 label (and others when you get time) if the Transfer From field is VISIBLE AND Has a Value, print the background shac put an outline around the field. Otherwise do NOT show it at all. (help the warehouse inventory pickers know if the Item is Transfe --When DELETE memorized Reports on SO printing, and others, n sure they stay deleted. They keep re-appearing.
25.0212.10	08/06/25	32691	Bug	Invoice	Payment > When deleting the payment for Invoice# I46697, errc with this message:
25.0212.10	08/06/25	32684	Bug	Settings	When DELETE memorized Reports on SO printing, and others, ma they stay deleted. They keep re-appearing.
25.0212.10	08/06/25	32684	Update	Credit Memo	On the Credit Memo, move the Invoice # from Line 2 to Line 1, a Reason drop down list.
25.0212.10	08/05/25	32618	Update	Settings	Grant tried to setup a 'global email' (Settings > System > Global Settings. He found these issues: X–It needs to have a drop down list at the top to help auto fill the settings. X–Lets remove '(POP3)' from both field labels. X–The settings are NOT getting saved. X–There was a bug when clicking the Test Email Connection that NOT encountered when using the exact same settings on an indi users account. X–When a user sends an email, or a Portal Invitation request, if th Email settings are blank then it needs to use this Global Email as back email.
25.0212.10	08/05/25	32680	Bug	Sales Order	–Tamil has completed the Signature capture for Order delivery. W click on the button it should show the Signature, Person's name w signed, and date/time. Please use Order# 250731-0006 as an ex --On the shipping receiving to dispatch screen when a user prints batch of invoices please make it so that it does not go to the nex since it was not actually dispatched. --How does the audit log work for Turn off all? Vs unchecking all? there any other things that get audited like POs? Items? –Ship/Rec, when JUST print the invoices, it needs to NOT move to next status, but needs to stay in the Same status until dispatche
25.0212.10	08/05/25	32684	Bug	Settings	–Settings > new setting for warehouse, fix ICON to delete. --Adding a new Customer, when select Price Level type and Price it is NOT getting saved to the New Customer record.
25.0212.10	08/04/25	32684	Update	Settings	--Lets move the System Audit Logs SECTION from Sales > Genera System > Audit Logs (which will be a new Nav option/screen.
					Item List > The progress bar remains stuck at 1% and fails to cor the file import.

25.0212.10	08/04/25	32683		Import Wizard	Troubleshooting steps taken: >Tried using different versions – issue not fixed >Created and used a new Excel file for the data – no change. >Checked the file information and overall data – still unsuccessfu
25.0212.10	08/04/25	32678	Update	Find Parts	Find Parts --When selecting an item that is in another warehouse, and the p screen appears to transfer the part, we need to determine the BE warehouse to ship it from (that has enough inventory) and then a the Order QTY to THAT warehouse. (Talk to Thiru about how he d on the Portal settings with a table structure…).
25.0212.10	08/01/25	32680	Update	Sales Order	SalesOrder: Table: Signatures Fields: ID, CompanyID, TransType (Sales Order, Invoice, etc), TransID (u of Trans Type), TransNumber (user friendly Trans #, such as 250 0005), DeliveredToName DeliveredToSignature (needs to hold a signature…), DeliveredDa On the Sales Order Print Date needs to show the Print Date. Printed By needs to sho printed it. REMOVE: Auto Calc Net Available, Line Type drop down list. And shows Product Detail, Quick Display Move the Back Order checkbox up under the Tab All fields. Add Delivered To _____________ Add Delivered Date/Time __________ Signature (picture) (Then just make the whole area look nice…an uniform)
25.0212.10	08/01/25	32676	Bug	Item Detail	(REDO) FINANCIAL TAB, Price levels If List price is entered, and a Discount exists, recalc the NET Price that Price Level) If a Discount is entered, and a List price exists, recalc the NET Pri that Price Level) If a line level List price is $0 then use the List price for the item r (REDO) Adjust QTY in STOCK (Add, Remove, Adjust…) , if only ha Receipt lets auto select the receipt and then set the focus on the When removing, set the focus on the Quantity Then when tab or enter set focus on User Notes (and make sure blank by default).
25.0212.10	08/01/25	32667	Udpate	Customer Detail	Pricing>Make the Pricing Templates Columns sortable with a clic
25.0212.10	08/01/25	32679	Update	Integration	For the Integrations on all 4 CCC, OPS, PartsTrader, and APU.. General Tab: Change the General Settings from 4 columns into 3 columns (mo column 2 under column 1). Also put spaces in between the words Column 1. Example: OurContactFirstName = Our Contact First Na Also make the fields on column 1 2x wider. Move the ‘settings’ into 1 single 2nd column with more room for descriptions Change these labels for the next column 2 Change the label: Delivery Cutoff Time to: ‘SAME DAY Delivery Cu Time’ Change label: # Days Stock Transfer to: # ADDITIONAL DAYS to a Stock Transfer Use Supplier Qty change to: Use Vendor Qty (+ add this ‘i’ messa This will check to see if you have any Vendors on the Item Detail and if the Vendor Qty in Stock (Ven QIS) > 0 and if the Qty in Sto Updated (QIS Last Updated) has a date within 24 hours. Add a new option called: # DAYS TO ADD if Sale is from Vendor C (NOTE: DONT TAKE THE TIME TO MAKE THIS WORK YET…I will ad as a task for later…) Zip Codes tab: there is a Delivery Area Zip Codes, on all 4 CCC, C

					PartsTrader, APU lets change the LABEL over the NumDaysToDel "# 'Extra' Days to Deliver 'i' " When the user hovers over the i (meaning information) it will hav text: This is the # of 'extra' days to add to deliver the item, in additior DAY Delivery Cutoff Time and ADDITIONAL DAYS added for items requiring a stock transfer. Example 1: If an Order comes at 10am item you have in stock, for Zip Code 12345 (which requires 1 ext to deliver), and the SAME DAY Delivery Cutoff Time is 12noon, th Estimated Delivery Days will be 1 day. Example 2: If an Order co 2pm, (for an item you have in stock in another warehouse), for Z 12346 (which requires 2 extra days to deliver), and the SAME DA Delivery Cutoff Time is 12noon, and the ADDITIONAL DAYS for a Transfer is 1, then the Estimated Delivery Days will be 4. (1 day cutoff time, 1 day to transfer the item, and 2 extra days because very remote zip code).
25.0212.10	07/31/25	32676	Update	Item Detail	--FINANCIAL TAB, Price levels, when enter a Price Level, and a LIS for the Price Level and then enter a discount it needs to USE the Discount in the PRICE LEVEL Line, IF one exists. If a line level List $0 then use the List price for the item record. --Also if the PRICE LEVEL LIST price is changed and a Discount ex then auto update the Net Price for the Price level. Same if Discou changed and a List price exists, update the Net Price on the Price --Click Catalog tab, click Add a New Row button, it took FOREVER open up (v 0730). When adding fields to add a new Catalog entry need to Auto fill the Catalog source = Customer Tabbing from Catagory to Sub category skips the field. --Adjust QTY in STOCK (Add, Remove, Adjust...) , if only have 1 R lets auto select the receipt and then set the focus on the next
25.0212.10	07/31/25	32647	Update	Shipping and Receiving	Ship/Rec, To Dispatch, Invoice Selected Orders (do not require a # for printing Invoices).
25.0212.10	07/30/25	32667	Update	Pricing Template	X--Add a PROGRESS BAR to the process when click the UPDATE A CUSTOMERS button on the Pricing Templates screen. X--Make the Columns sortable with a click. Join issue popup errors when sorting by Disc %, etc... X--On the CUSTOMER > CUSTOM PRICING, add an X to the right s the Template NAME, in the Template Column. When clicked prom Do you want to DELETE ALL Price Settings for this customer for th Pricing Template?
25.0212.10	07/30/25	32675	Update	Pricing	Revamp the Pricing using the logic defined in KBA.
25.0212.10	07/30/25	32630	Bug	API	MAKE SURE UNIT COST IS CALCULATED PROPERLY.
25.0212.10	07/29/25	32668	Bug	Item Detail	Backorder field on Item detail screen > Example: 910-0108, Item invoiced sales orders still shows total backorders on the item det screen.
25.0212.10	07/29/25	32672	Bug	Find Parts	--Check net price calculation for zTest- NoCostWithPOList, zTest- NoCostWithVendorCost and zTest-WithCost with customer name zTest-Steve.
25.0212.10	07/29/25	32673	Bug	Portal	Check customer portal with Thiru when create SO from portal site not create Unit cost and also it did not make changes on ItemSto
25.0212.10	07/28/25	32671	Bug	Invoice	Invoice: --Whenever I click the Save Layout Changes for All Users button, undefined error popsup appears.
25.0212.10	07/28/25	32667	Update	Customer	--PRICING TEMPLATES: Remove the Pagination on Pricing Templa screen. (They will never have more than 50-100 pricing categorie --CUSTOMER DETAIL > PRICING Templates. Sort by Pricing Categ default. Also be able to click these columns to sort: Pricing Categ Pricing Level, Discount, Markup, Multiplier, Specific Price --Show the COUNT of records on the Customer Details > Pricing Template. --FIND PARTS SCREEN: Add Part# search to the TAB or ENTER OR after the Description field. Then when Tab or Enter set next focus Great Search Button.
					CUSTOM PRICING TEMPLATE ISSUES:

25.0212.10	07/24/25	32667	Bug	Pricing Template	CUSTOM PRICING TEMPLATE ISSUES: --On ABC Company (and Houston Auto Parts - 4388 company) the Customer Details > Pricing and Add Custom Pricing Template fiel locked. We need to unlock them. --Also on the Custom Pricing Template SCREEN there is a button footer called: Update ALL Customers using this Template. When t button is clicked it is supposed to UPDATE all Customers where tl Customers!DefaultCustomPricingTemplate = to the Template ID Custom Pricing template screen where the button is… This was w assign Template X to 1000 Customers and then go to Template X press that button and push ALL of the Pricing Template Rows out of those customers.. --Also on the Custom Pricing Template screen we need to display Custom Pricing Template ID (for the selected Template) in a grey about an inch to the left of the User Name / Gear icon in the Prici Templates 'Title' bar. --When opening the Custom Pricing Templates they need to sort Pricing Group Name (alpha) --Make the Columns sortable with a click.
25.0212.10	07/24/25	32647	Update	Shipping and Receiving	To Dispatch: Print Invoices option. (FOR ALL invoices) Find a slanted, black, Paid icon to display on the Invoice, on the f page, to the left of the Footer Totals (above the payment details) vector-illustration-black-paid-icon-260nw-1189933174.jpg (260× Remove the paid that is forcing the Invoice to have a 2nd page. When the Invoice requires more than 1 page, have the additiona items start to display about 1 inch down the page on the additior pages, and have a header on the additional pages, in the top righ corner, that looks like this: Invoice # XXXX-XXX (Page 2 of x)
25.0212.10	07/23/25	32664	Bug	Printer Connect	1placePrinter Connect X--Put the Latest version in whatever folder the LINK in the optior Settings > Print Settings > Advanced option in that folder, zippec (not zipped 2 times with a .rar file as well, and not in a Debug fol --Try downloading and testing, with Advanced printing turned on, printing a few 4x2 labels on the To Print & Pick screen.
25.0212.10	07/22/25	32663	Update	Find Parts	Make the NOTES box look better, but resizing it to be smaller? RE the RED when out of stock, and show a light green background fo Qty in Stock (>0) if the Qty in Stock for ‘local’ warehouse = 0.
25.0212.10	07/22/25	32647	Bug	Shipping and Receiving	Items in route, from a Stock Transfer, are NOT appearing on the S > Receiving > In Route to Warehouse screen. They need to make they appear and can all be selected, by filtering the Dispatch #, a updating the Status…. X--Unlock the Warehouse Worker and Driver drop down lists on A screens. X--Opening the Ship/Rec is now VERY slow.. X--Ship/Rec > To Dispatch, when select “Invoice Selected Orders then select x (maybe 2 invoices) and press Proceed, and then sel option to print Invoices and print preview it seems to create more invoices. Need to make sure it only prints the exact invoices sele X--Lets MOVE the Filter By Shipped Via section to the left of the D Information. X--Lets remove the ‘…’ after the Select an Option, and Dispatch Information (Tamil)--If earlier versions (i think as recent as 25.0717 version, w select Dispatch ALL drivers, and then press Proceed, it would disp popup form showing every driver that had at least 1 Sales Order selected (to dispatch) and the COUNT of how many ORDERS were assigned to each Driver… X--When the Warehouse worker is selected AND the option to aut all zones assigned to the user = True, then when the Worker butt clicked, auto SHOW ALL, and the select all that match. X--Make the mouse over on the buttons show the counts. **(Doubt)**On In Route, the Group By defaults to Sales Order # but doesn’t really group by Sales Order # unless your re-select Sales

					# first… X--On In Route, change ‘Select Your Name…’ to: Select Driver Na X--On In Route (and actually most other Ship/Rec screens, select then do something else, like Show All records, or select somethin then the User gets erased, and then gives a popup error when try proceed) Other values in drop down lists get erased as well… X--On In Route, selected a few items and Driver and tried to mov Closed, got this error: Permission denied (password). Renci.SshNet.Common.SshAuthenticationException at Renci.SshNet.ClientAuthentication.Authenticate(IConnectionInfoI connectionInfo, ISession session) at Renci.SshNet.ConnectionInfo.Authenticate(ISession session, IServiceFactory serviceFactory) at Renci.SshNet.Session.Connect Renci.SshNet.BaseClient.Connect() at OSO.Controllers.ShippingReceivingController.UpdateInRouteStatu Type, String Action, String User, String BatchID, String SOLineItemDetails, String Module, String NextStatus) in D:\OSO\OSO\Controllers\ShippingReceivingController.cs:line 1016
25.0212.10	07/17/25	32642	Update	Statements	CUSTOMER STATEMENTS: The statements need to be GROUPED or 'Bill To' -- NOT BY SHIP TO. In other words, the LIST of compan have unpaid invoices should NOT show any Companies that are a to' location. THEN, when the statement is printed it needs to hav GROUPING by Locations where the the Address Type = Both or S Here are some scenarios: 1--Customer Address Type = Both (Bill To & Ship To). They have Invoices and 1 unapplied Credit Memo. Then they will appear on and the 'statement' will have their address in the Header of the statement and also their Company Name as a Grouping name, al actual rows of Invoices/Credits. 2--Customer Address Type = Bill To AND there is another 2 comp that are 'linked' to them which both have an Address Type = 'Shi (Linked to the Bill To company). Then the Bill To company will ap the list (and the 2 Ship to's would NOT). The statement would ha Bill To in the Header area (so it could be mailed to the Bill To con Then all the Invoices and Credits for Both companies would appe the Statement BUT, they would be GROUPED by Ship To Address grouping would have the Ship To Address Name (in a grouping tit then all of the Invoices and Credits, and then a SubTotal. Then th statement would have a BOTTOM line for all Invoices and Credits AGING at the bottom would show the aging for Both companies combined. 3--Same as scenario 2, but instead of having 1 Bill To and 2 Ship there would be 1 Both (Bill To & Ship To) and 2 Ship To's linked t 'Both' company. In this case if the Both location had any unpaid i or credits it would show them as a group. In other words, if all 3 companies has some unpaid Invoices or Credits it would have a g for all 3, and then totals for all 3 oombined on the bottom. --IN SUMMARY: If the Address Type starts with a B, and the comp open transactions it should appear on the list of Companies (on t statement screen) and should have a statement. Also, if there ar Ship To companies that are 'linked' to the Bill To, or Both... comp they need to be included on the same statement, but grouped / displayed / sub-totaled for each company on the statement. If th only 1 company, if it is easier, we can still show the grouping nar sub totals.
					Misc Changes. X--On the To Print & Pick, after I select a Warehouse worker, if I c Show All button (in bottom left) it clears out my warehouse work selection. --On the To Dispatch screen, When the user clicks the CHECKBOX the Line Item checkboxes, Display this little drop down list of sele options (like on the Customer List screen): Select ALL Orders, Sel Orders 100% Ready to Ship, Un-select All Orders When the user clicks the 'Select all Orders 100% Ready to Ship' c

25.0212.10	07/16/25	32647	Update	Shipping and Receiving	select the Orders where the # Items on Order = # Items Prev Sh Items Ready (which you will see these #s as columns. Basically t is trying to select ALL Orders that are NOT YELLOW. --When the screen opens HIDE the Dispatch Information... sectior have the Filter by Shipped Via section shift over to the left. (the F tops right corner should say where they are if that is easy to do). --Make these CHANGES to the 'Select Driver' section. ----Rename the section from 'Select Driver' to: Select an Option... ----REMOVE the DRIVER buttons. ----Add these radio button options: ( ) Dispatch 1 Driver ( ) Dispatch All Drivers ( ) Invoice Selected Orders IF THE USER CLICKS 'Dispatch 1 Driver' --UN-HIDE the Dispatch Information section. --Insert a new drop down list in the top left of the Dispatch Inforn section called: Select Driver --Remove the 4 Radio buttons Today, Tomorrow, etc... and make Drop Down list with those same 4 values with a label: Select Day --Reformat the Dispatch # and # Orders selected so it looks nice the 4 fields left aligned properly. Move the Create Dispatch # down below the 4 fields and make it and shorter (1/2 as tall). IF THE USER CLICKS 'Dispatch all Drivers' then it will operate the very same, but it will REMOVE the 'Select drop down list (since ALL drivers will be displayed on the next sci IF THE USER CLICKS 'Invoice Selected Orders' DO NOT display the Dispatch Information section, and do not require a Dispatch num Proceed to Print the selected Invoices CHANGE the GREEN Print button (and remove the up arrow that s options, since now the options will be selected in the new sectior creating above. Change the name of the Green button to Proceed The ultimate goal is to use the To Dispatch screen to make a sim (easy to understand) process for different companies who want t to perform 1 of the 3 processes. (KSI needs to just select Orders 100% ready to Invoice) and then batch create the Invoices.
25.0212.10	07/15/25	32644	New	Shipping and Receiving	ADD ZONE SELECTION option and Label Printing by BinPickingOrd then BinLocation (on the To Print & Pick screen) . X--Add new tables Warehouse Bins, Warehouse Zones, and Ware Zone Assignments. See KBA for TABLE DESIGN Ideas. (IN THE INT OF TIIME...HOLD on making the BIN Management screens. JUST A TABLES). X--On the To Print & Pick screen, REMOVE the 'Select Orders' sec X--Make the Select Your Name section wider so the Drivers will n out of the Box. X--MOVE the Filter By... over to the right (where you removed the Orders section). X--Where the Filter by was...add a new section called: Select War Zone... X--When the To Print and Pick screen opens (or refreshes) show t ZONES (for the selected warehouse) which are entered in the WarehouseZones table, in alpha Order, with the COUNT of # iten each zone. Example: Zone A (15), Zone B (12), etc... X--Make the ZONE buttons 'Toggle' buttons, so they can be selec unselected. **(Doubt)**--In Settings > Warehouse > Shipping/Receiving sreen a new section at the top of the screen called: Options X--On the Shipping/Receiving screen, when a ZONE is clicked, sel not filter, but just select) all items that are in that zone. (Cross re

					not filter, but just select) all items that are in that Zone. (Cross re the Item BIN (from the SalesOrderLineItemBins table) with the th Warehouse WarehouseBinLocations table (where the Warehouse Warehouse on the Shipping/Receiving screen. If the user clicks a Zone button, select those items as well. If the user UNSELECTS a then unselect the items for that zone. X--Change the SORTING on ALL Labels (on Sales Order, Invoice, a Ship/Rec screen to sort by BinPickingOrder (in the WarehouseBinLocations) then by BinLocations (in the SalesOrderLineItemBins) table.
25.0212.10	07/11/25	32640	Bug	Customer	Add new-->unable to add Customer via Credit memo (Bill to & sh dropdown), it shows Undefined Error.
25.0212.10	07/11/25	32628	Bug	Shipping and Receiving	On To Dispatch (ABC Company) Search for: S250422-0003 it give error. Also on To Pick & Print, select Driver then select ALL recorc removes the selected driver. Also, after selecting 2 orders to Pick tried to 'test' print the 2 labels, the print dialog would not appear
25.0212.10	07/11/25	32625	Bug	Tas	ADDING NEW TASK (Bugs): --When ON Date, cannot Shift+Tab up. (Trying to reverse tab up Company field). --When on Date, cannot click on any other field without it setting on Type field. --When on Company field cannot tab OFF of the field.
25.0212.10	07/11/25	32639	Bug	API	When we import integration orders, after you finish the 'Auto Shi you please make sure the SO Status, and LINE ITEM SO Status ge pushed to the 'Next' Status after new
25.0212.10	07/09/25	32599	Bug	Find Parts	Find Parts Screen > Ship to Search Field The primary search (which searches only the Company Name fiel returns fewer results than expected. For example, searching for t "auto" only returns 2 companies. However, when the expanded search is triggered—after acceptin prompt "Cannot find value. Do you want to search in other fields well?"—more companies containing "auto" are shown. This suggests that some companies with "auto" in their Company are not being included in the initial primary search. The expectat that all companies with the search term in their Company Name be returned during the primary search, without requiring expand search.
25.0212.10	07/09/25	32607	Bug	Reports	REPORTS > Learning Services company has a custom report but missing in any versions. Please make sure this custom report is a back.
25.0212.10	07/09/25	32610	Bug	API	API > Fix Create Sales Order with: Proper Warehouse for Order Proper Transfer From (in the line item) when the item is in anoth warehouse. Needs to create a proper Stock Transfer from that other warehou it does on the Find Parts screen). API > Have the Create Sales Order API AUTO ship the Order wher created (based on a new Integration setting we need to make ca Auto Ship New Sales Orders
25.0212.10	07/08/25	32612	Bug	Reports	INVOICES/CREDITS BY CUSTOMER (OPEN) - One of the users (Dav Bichun) is having an issue with the Reports. When trying to run a it will just load and then the page will freeze. Ensure the fix cove functions for the user.
25.0212.10	07/08/25	32610	Bug	Find Parts	Item Catalog > Item Description - When searching a non-CAPA it description still shows (CAPA) at the end. Sample Item: HY12401 same issue is happening with Express North Hollywood.
25.0212.10	07/03/25	32596	Update	Item Pricing	Alter existing Markup calculation based on setting preference.
25.0212.10	07/03/25	32599	Bug	Find Parts	Ship to Search Field - The primary search (which searches only th Company Name field) returns fewer results than expected. For ex searching for the term "auto" only returns 2 companies. Howeve the expanded search is triggered—after accepting the prompt "C find value. Do you want to search in other fields as well?"—more companies containing "auto" are shown. This suggests that some companies with "auto" in their Company Name are not being incl

					companies with "auto" in their Company Name are not being inc the initial primary search. The expectation is that all companies v search term in their Company Name should be returned during tl primary search, without requiring expanded search.
25.0212.10	07/02/25	32547	Bug	Sales Order	SALES ORDER > Line 2 > Vendor column - Vendor related to the PO is not showing.
25.0212.10	07/01/25	32563	Bug	Item Catalog	AUTO GROUP SMART (25.0212.08) > ITEM CATALOG > When adc CAPA items using the Item Catalog, it does not filter the CAPA Ite also shows non-CAPA items, and the corresponding OEM # appea incorrect.
25.0212.10	07/01/25	32595	Bug	Items	ITEM ADD NEW: Tab order skipping around..
25.0212.10	07/01/25	32596	New	Items	ITEM PRICING: Add a new option in settings > Sales > General > & Cost Settings (section) under the Number of Decimal Places op called: How Additional Added Costs (for an Item) is used in Marku Calculations: (Drop down list) Additional Cost added AFTER Markup Price is Calculated. (Default selected) Additional Cost added to the Actual Cost BEFORE the Markup Pric Calculated.
25.0212.10	07/01/25	32592	Bug	API	--Make Qty =1 if they send Qty=0. --Set proper customer values on each customer objects --(Doubt)Did R&D about getting users date, But in sql and C# bot we can't get user date we will get server date only.
25.0212.10	06/30/25	32517	Bug	Vendor	Vendor List > Vendor Number - When sorting using the Vendor N column, the numbers are not sorting in sequential order (e.g., 1– Should also be fix in the master version. (Doubt) In sql Vendor number datatype is nvarchar. So it will sort 1,12,13,2,21 not 1 - 10.If they need to sort 1 - 10 we need to con vendor number datatype to Int.
25.0212.10	06/30/25	32592	Bug	API	CCC API Bugs. We did a LIVE test with CCC today to check out the of them sending us some test quotes and orders. Most of it work but we ran into these issues: The NET price was wrong. Also, the EstimatedDeliveryDate field (and the ExpectedDelivery field were both 24 hours later, even if the item was out of stock c another warehouse. I have updated the API ITEM in the kba. This is what we need: --Please re-Order all of the elements to the exact order shown on Elements section of the Item API. --Please revise the code to basically look for Failure. First getting QtyInStock. If we have none, we can fill in the simple fields like It Item Description, and other values from the Item table. But NOT calculate the things that take more effort like the Qty in Custome warehouse, Net Price, TaxAmount, and Estimated Delivery Date. see my logic as you go down the fields. Any time it fails you fill ir easy stuff and skip the rest. If there is qty in stock, move to Price --I have added some more NEW fields signified by GREEN (NEW) --I have noted a few elements to REMOVE in RED. in. --Lets add another option on the CCC, OPS, and PartsTrader UI (II OF THE Setting called: Only Show Special Order) called: Do Not C Quotes [ ] (you can leave the field in db and API alone, but just remove it fr interface. --There is a setting called Hide Zero Price. If that is checked, ther list price = then you can ignore getting the QtyInStock, Net Price --Julian is also expecting us to send him the proper EstimatedDeliveryDate. Ive added some logic to help you come u that date.
25.0212.10	06/26/25	32579	Bug	Sales Order PO	When creating PO line, Before starting NEXT loop make sure ther line item ID before accidentally making it again
25.0212.10	06/26/25	32585	Bug	Receive Payments	Payment 'LOG' tab. When click on the tab (on Bichun data) it FRE their system for over 10 minutes.
25.0212.10	06/26/25	32589	Bug	Item Detail	taking 6-10 seconds to open up (even after initial caching)

25.0212.10	06/26/25	32589	Bug	Item Detail	taking 6-10 seconds to open up (even after initial caching).
25.0212.10	06/26/25	32587	Update	Receive Payments	Please make the HELP button link to the HELP table FromName: ReceivePayments (so we can link the proper help topic to that bu
25.0212.10	06/26/25	32498	Bug	Label Print	Getting random popup saving errors. "Please Design the Label fo selected label Document."
25.0212.10	06/25/25	32583	Bug	Import Wizard	ITEM CATALOG IMPORT Function >User would get the dialog box import, but no progress bar ever came up at all.
25.0212.10	06/25/25	32580	Bug	Reports	AR- PAYMENTS RECEIVED BUG: When downloading the report to file, the Sales Order deposits are becoming negative in values.
25.0212.10	06/25/25	32584	Bug	Sales Order and Purchase Order	SO Detail and PO Detail User cannot enter a specific/exact Net/Cost because the system i rounding the number.
25.0212.10	06/24/25	32582	Bug	Replenish Stock	REPLENISH STOCK >Error occurs: String or binary data would be truncated. The statement has been terminated. Warning: Null va eliminated by an aggregate or other SET operation.
25.0212.10	06/24/25	32579	Bug	Purchase Order	Line Items > When generating POs, it's duplicating or even quad the SO lines, and also creating multiple POs for the same SO.
25.0212.10	06/24/25	32566	Update	API	Use Vendor QIS, treat it like another warehouse to be transferred from.
25.0212.10	06/24/25	32581	Bug	Customer	Adding a new customer not setting it to Active.
25.0212.10	06/23/25	32467	Bug	Items	Item List Screen > Created a new Item Tab called "Item List for E Unable to select all the records on the entire list when checking t check box.
25.0212.10	06/23/25	32578	Bug	Item Details	ITEM LIST: When opening an item to view the item details screen bug where it will not load any information and will just be a blank
25.0212.10	06/19/25	32577	Bug	Invoice	When PO is checked on the column filters, the line item columns mixed up. Discount column has line total. Unit Price has the discount %. etc
25.0212.10	06/19/25	32566	Update	API	Make seperate function to calculate Vendor QIS if ItemStock is 0. (Doubt) When we assign vendor qty on QIS then there is no ware linked to it. Then how to calculate estimate delivery date.
25.0212.10	06/19/25	32498	Update	Print Label	Printing: Duplicate 4x2,4x3,4x4 labels. We can rename the 1st of each siz something like: 4x2 (1) and the 2nd one for each size 4x2 (2). Th separate labels can be printed using the same labels in the print Add 'Transfer From WH' and 'Shipped From WH' as options as we
25.0212.10	06/18/25	32523	Bug	Quotation	QUOTATION TOTAL: When creating quote for large orders with 15-20 or more items, i add up the last item which makes the total of the quote on the P incorrect. They would notice the difference once they create a sa order from the quote. Example: Q57223.
?	06/17/25	32572	Bug	Items	CATALOG MANAGER - Having an issue with tool 3.3 Rebuild Catal function. Kept having undefined error when running tool. Tried to versions and even placed in Master but still getting same issue.
?	06/17/25	32570	Bug	Customer	Customer Details > Custom Pricing >After Selecting the Default I Method - unable to edit the next field (MArkup %, Discount %, et the Add customer pricing template field
25.0212.10	06/16/25	32566	Bug	API	Calculate Estimated Delivery Date based on Warehouse and Qty
?	06/16/25	?	Bug	SAGE	Not syncing...to show drop down list Sage accounts, etc Checked on code, local and dev server all are working fine, adde logs to identify the issue(Monitoring)
25.0212.10	06/12/25	32568	Bug	Find Parts	Bill to field: Address Type and Phone Number are mixed up. Phon number has the address type and the address type has phone nu
25.0212.10	06/12/25	32567	Bug	Vendors	List > When putting a checkmark on the inactive checkbox, the i vendors are not showing up on the list.
25.0212.10	06/11/25	32540	Bug	Invoice	Send Email > Preview Email Unable to send Email. Gets an error: An error has occurred but n explanation for the error is available at this time. If this error per

25.0212.10	06/11/25	32540	Bug	Invoice	please contact your onsite 1place administrator and ask him or h send a support request to support@onesourcesoftware.com rega error # 2104608.
25.0212.10	06/11/25	32562	Bug	Item	ITEM LIST - Found an issue where Non Capa items have (CAPA) a and needs to be removed/updated.
25.0212.10	06/11/25	32529	Update	API	Unlike PT and CCC, OPS sends the 1place customer number acros we don't need to cross reference it. Due to this, I don't think it m any sense to require them to fill out that third party data on the as its redundant. Can you please make sure the Customer lookup that occurs on m calls will try the customer number directly (if it does not already course) if it doesn't find a matching customer via the Third Party Customer ID lookup?
25.0212.09	06/11/25	32529	Bug	API	There is an issue with the ITEM API, it is not returning all the part want to match everything for the OEM sent in. Add the Bin back to this call.
25.0212.09	06/09/25	32529	New	API	please make a NEW ITEM API called ItemDetail by DUPLICATING t api. And then duplicate the Stored Procedure code as well to reta the ItemDetail API. API: Item. 10x faster! SWITCH names of Item and ItemDetail so tl is the one with the shorter elements list. API: RequireValidCustomer (default to FALSE) API: Sort them by Alpha
25.0212.09	06/09/25	32535	Bug	Purchase Order	MISC Issues to fix: PO List price isnt using the Number of Dec pla Price fields.
25.0212.09	06/06/25	32545	Bug	Customer List	Download error: Conversion failed when converting the varchar v 'Brandi' to data type int. System.Data.SqlClient.SqlException at DataLayer.Customer.DAL_Customer.FetchCustomer(Int32 Display Int32 start, String SortBy, String SortOrder, String SearchConditic D:\OSO\DataLayer\Customer\DAL_Customer.cs:line 133 at BusinessLayer.Customer.BAL_Customer.FetchCustomerList(Int32 DisplayLength, Int32 DisplayStart, String SortBy, String SortOrde SearchCondition) in D:\OSO\BusinessLayer\Customer\BAL_Customer.cs:line 214
25.0212.09	06/06/25	32549	Bug	Integrations	OPSTRAX, CCC, Partstrader> When I try opening the CCC, OPSTr screen on proparts, the screen won't stop from loading- v25.021
25.0212.09	06/03/25	32467	Bug	Item List	Item List Screen > Created a new Item Tab called "MAPP for Expo Unable to select all the records on the list when checking the che
25.0212.09	06/03/25	32529	Bug	API	Invalid Customer Lookup on Item call: Right now the Item call returns data even if it doesn't find a custo match in the 3rd party data. This is fine and needed for some of integrations. But I need a way to check a 3rd party id is valid or r PartsTrader needs to be rejected in that case and notified. Please add an optional parameter to the Item call: "RequireValidCustomer": False Default to false, If that is passed in as True, return the same erro on the calls that already throw an error response here. IE "Please Valid Third Party Type and Third Party CustomerID."
25.0212.09	06/03/25	32530	Update	Shipping and Receiving	Label Print: Need to add Labels on the dispatch screen.
					SalesOrder: The sales orders come in with no warehouse, I do not know if tha correct or something is missing. They also have a status of "Wait Be Purchased". I am unable to turn them into invoices for further FetchShippingFromLocation: Should return a default shipping location if it can't match up a cu This will happen sometimes for insurance quotes or other reason would be best if this returns something that is probably correct ir edge cases. The customer lookup fails such that it gives this curr error: "Message": "Please Enter Valid Third Party Type and Third Party CustomerID."

25.0212.09	06/02/25	32529	Bug	API	Please return the default shipping location information instead. Quotation: This seems to be missing some data when its entered. Specificall Entered By and Warehouse is blank. See the image here compar other quotes. Here is an example api call Customer lookups for OPS Trax: I am not sure if this has been addressed before, as no one uses C currently. Unlike PT and CCC, OPS sends the 1place customer number acros we don't need to cross reference it. Due to this, I don't think it m any sense to require them to fill out that third party data on the as its redundant. Can you please make sure the Customer lookup that occurs on m calls will try the customer number directly (if it does not already course) if it doesn't find a matching customer via the Third Party Customer ID lookup?
25.0212.09	05/30/25	32311	Bug	Item Detail	>AUDIT LOG TAB >Whenever anything is changed on the Item D screen, the changes are not being recorded in the audit log. - We record any changes on the item detail screen on the audit log. >OBP has #HO1100291 whose List Price was updated to $16 an need to know who changed it or how it was changed, They are th that there might be a bug in our system that updates their list pr without their knowledge and we don't have an audit log for the It detail screen.
25.0212.09	05/30/25	32520	Update	Invoice	(ANDREWS) INVOICE DETAIL>PRINT --Remove 4x5 LABEL and add 4x6 Label.
25.0212.09	05/29/25	32330	Bug	Credit Memo	CREDIT MEMO REFUND: The payment info is not showing on the Payment Info tab after is refund. When deleting the refund the total fields shifts to the left. Then w refresh the screen, the PAID mark still shows on the screen.
25.0212.09	05/29/25	32501	Update	Sales Order	SALES ORDER LABELS >Add barcode option for the Sales Order f labels. >Make the barcode look similar to the OneSource barcode where lines are not stretched out.
25.0212.09	05/29/25	32197	Update	Printing	Printing > Instead of server time it should be the time of the use printed it.
25.0212.09	05/28/25	32505	Update	Reports	INVOICES/CREDITS > INVOICES/CREDITS BY CUSTOMER (Open): I date selection dropdown and make make a design look like abov
25.0212.09	05/28/25	32520	New	Invoice	INVOICE DETAIL>PRINT --ADD a 4x2, 4x3, 4x5 LABEL
25.0212.09	05/27/25	32321	Bug	Invoice	PRINT > Invoice 3: The word INVOICE on the top right is missing, the same as the Co Logo, even though it was enabled in the print settings. The Printe Options are not saving, you need to choose them again wheneve print an invoice.
25.0212.09	05/27/25	32515	New	Invoice	Print > Show in the Audit log which user printed an Invoice.
25.0212.09	05/27/25	32250	Bug	Shipping and Receiving	When clicking the Refresh button, an error message pops up - AJ Error: parsererror. The same issue occurs when selecting the "Sh button for the Closed status. If clicking the "Ok" button, the page become unresponsive.
25.0212.09	05/22/25	32463	Bug	Shipping and Receiving	WAREHOUSE - SHIPPING & RECEIVING - CLOSED Tab: Clicking the 'Show All' button does not work and will just load en
25.0212.09	05/22/25	32323	Bug	Sales Order	Status: After the PO for the BO line item was received, the status did not automatically update from "Waiting to be Purchased" to "Closed. set to be moved to Closed status. If the USER tries to REMOVE the Status then give this popup: TITI STATUS ERROR MSG: You cannot leave the Status field empty or lose visibility of the item on the Shipping & Receiving screen.
25.0212.09	05/22/25	32406	Bug	Reports	Items: Total Sales By Item (Best to Worst Qty), Total Sales By Item (Best Worst) When running these reports, Search filters (Today, This m

					This month-to-date, This Quarter, This Quarter-to-date, Yesterday results in undefined error when running report.
25.0212.09	05/21/25	32471	Update	Interface	(KSI/PPC) Tab browser names should contain the sub tab name. E On the Item List screen, when the Item Vendor tab is open, the b tab should show Item Vendor tab. (Applies to all screens with Tab **Do for ALL record types, including Custom Tabs, but chan TASK to A5.**
25.0212.09	05/21/25	32512	Update	Settings	Modules: 1PLACE > AR > Commissions - Remove all tabs related Commissions, including the main Commission page from the nav panel as per Steve's instruction.
25.0212.09	05/20/25	32405	Bug	Reports	Items > Inventory Count Sheet (By Category / SubCategory with Bin Locations, Inventory Count Sheet (By Fixed Bin Locations), In Count Sheet (By Item Receipt Bin locations) - The reports always the prompt asking if you want to download even though the repo not have any data beyond 5000 records or none at all.
25.0212.09	05/20/25	32510	Update	Import Wizard	ITEM IMPORT WIZARD: Add length, width, height on the import wizard's database colum
25.0212.09	05/20/25	32509	Bug	Reports	QUOTATION LINE ITEMS REPORT: Error occurs when downloading report for the month of May.
25.0212.09	05/19/25	32508	Bug	Item Details	25.0212 (PLASTIC) ITEM QTY IN BACKORDER > They have items t shows backorders even though there's no backorders for uninvoi sales orders or open sales orders. Clicked on recalculate all Quar stock button but it did not remove the backorders.
25.0212.09	05/19/25	32505	Bug	Reports	REPORTS > INVOICES/CREDITS > INVOICES/CREDITS BY CUSTOM (Open): Custom date range is not working properly. Whether you select 3 days, previous year, it will not filter properly and will show results oldest Invoice in 1place. Similar issue with AR Tab > Customer Statements. Check to see if totals are correct as well.
25.0212.09	05/19/25	32470	Bug	Settings	User > Cloud Document: Error occurs when signing in to google c account.
25.0212.09	05/19/25	32506	Bug	Import Wizard	25.0212.04 (Houston Auto) Imported PartsLink data to 1place. Ge stuck error when trying to import initially.
25.0212.09	05/15/25	32489	Bug	Reports	INVOICE/CREDITS VENDOR, ITEMS report: The report showing on plastic waterlines is different from the orig design created on the dev server.
25.0212.09	05/15/25	32502	Update	Tax	TAX drop down for all screens including Customer Portal> Need t the tax codes on the drop down.
25.0212.09	05/14/25	31768	Update	Quotes, Sales Order	Add a new option to calculate the Sales Taxes based on Bill To Ad (related to Task#31178) When user is entering the order on the Quote/Sales order and ch the ship to a taxable customer, the Missing zip code is showing u
25.0212.09	05/14/25	32491	New	Reports	ITEMS --Create a new release 24.0122.63 from 0122 --Add the fields QTY on PO and QTY on BO in the ITEMS Report ar please make sure it can be sorted by Item# --Update Vaillant company server so they can use it right away.
25.0212.09	05/14/25	32492	Bug	Reports	Items Doesnt work to download the report using ABC company. Please also add the 2 new column options on the Items report.
25.0212.08	05/13/25	32492	New	Reports	Items --Create a copy of the Items Report and call it "Items (Inventory)" --Add the fields QTY on PO and QTY on BO in the ITEMS Report ar please make sure it can be sorted by Item# --Only show items where the TYPE = Inventory --Add this new report on the new version release
25.0212.08	05/13/25	32494	Bug	Sales Order	25.0212.04 (KSI/PPC) Sales Order >Ship to field> When changing ship to address on the Sales order, it does not turn the Save butt red and it is not saving the changes and reverts back to old Custo entered.
25.0212.08	05/12/25	32488	Bug	Import Wizard	VENDOR ITEMS (1 vendor or all) > IMPORT WIZARD: The Update function is not working. It's not updating the QIS for V

25.0212.08	05/12/25	32473	Bug	Replenish Stock	ITEM STOCK >REPLENISH STOCK: OBP has an issue raised that the Qty fields on the item details wo update automatically if they have received or incoming stocks. T wondering if it will affect the replenish stock calculation. QO on B use SOLI table. QIS, is ITEM fields only. LETS CHANGE the QTY in to be a CALC of ITEM Stock.
	05/12/25	32487	Bug	Item Detail	Qty in Stock, Qty in PO, Qty Backorder fields > Data synchronizat issues/Out-of-sync.
25.0212.08	05/08/25	32415	Bug	Sales Order	SALES ORDER > ALL LINE ITEMS: Sales Date - Found an issue wh you sort the data, it will just keep on loading and nothing happer
25.0212.08	05/08/25	32433	Update	Reports	ITEMS: INVENTORY VALUATION - CURRENT (CATEGORY/SUB-CATE When running the Report, Qty Received is inconsistent. Some ite shows zero even though there are item(s) in Stock. Also the head Qty Received on the report is spelled incorrectly.
25.0212.08	05/08/25	32482	Update	Credit Memo	(UAB) CREDIT MEMOS >Close all credit memos that begins with C These were old CMs that should be closed.
25.0212.08	05/07/25	32402	Bug	Reports	The Report for Items appears twice and the contents of Item Rep section are all the same.
25.0212.08	05/07/25	32397	Update	Pricing Templates	PRICING TEMPLATES >Update all Customers Using This Template to be fixed. (IT WILL UPDATE THIS PRICING TEMPLATE, WHICH CUSTOMERS A HAVE A PRICING TEMPLATE)
25.0212.08	05/07/25	32481	Update	Item Details	(KSI/PPC) ITEM DETAIL > There's no option to show the Pictures t
25.0212.08	05/07/25	32343	Bug	Reports	ITEM STOCK REPORT/INVENTORY VALUATION - HISTORICAL: Som are not showing on the reports. (WE WILL SHOW A RECORD B ON NET DIFF > 0)
25.0212.07	05/06/27	32351	Bug	Reports	INVOICES / CREDITS BY DATE (TOTALS) and INVOICES / CREDITS MONTH (TOTALS): Same date range, showing the same # of Invoices and credits, bu different %Credits, Net of Invoices/Credits, Total Cost, Profit, and Margin.
25.0212.07	05/02/25	32472	Update	Settings	show report module like, Customers, Vendors, Items, Quotes, Sal Orders, Invoices/CM, AR / Collections, Sales Taxes, Purchase Orde Jobs, Tasks, Exception Reports
25.0212.07	05/02/25	32233	New	Sales Order	Print > Picking Ticket(s) - With ALL Bin Locations, that will show A inventory Bin locations (from the ItemStock table for the item) UI the Item pick line,
25.0212.07	05/02/25	32461	Bug	Shipping and Receiving	25.0212.03 (BICHUN) WAREHOUSE - SHIPPING & RECEIVING - IN tab: When doing batch action for the sales order on the In Route tab t closed, not all on the list will be changed to closed. A few numbe left and have to Redo the step until 1 or 2 remains and it no long you perform the batch action and will need to manually change t
25.0212.07	05/02/25	32468	Update	Item List	Item List screen > Change the header names in item list-> ALL-> Subcategory 3 and Subcategory 4 -> Change these names to Ma Model and YearsListing and Year Range
25.0212.07	05/02/25	32465	Bug	Customer Statements	AR - CUSTOMER STATEMENTS: The data shown this tab is not ma with the information under Reports - Invoices/Credits - Invoices/C by Customer (Open). There's a discrepancy with the totals shown some missing data from the Customer Statement under the AR ta
25.0212.07	05/02/25	32466	Bug	Invoice	25.0212.03 (BICHUN) INVOICES: Reported a bug wherein invoice would show 0 totals both on the list and after opening the invoice though there are item(s) on the invoices. PO # on the invoice als either blank or Null. Some samples are SS160867, SS160869, SS SS161343.
25.0212.07	04/30/25	32233	New	Sales Order	Print > Picking Ticket(s) - With ALL Bin Locations, that will show A inventory Bin locations (from the ItemStock table for the item) UI the Item pick line,
25.0212.07	04/30/25	32448	Bug	Purchase Order	PO List - A lot of the POs that shows a negative values is incorrec for reference. If the PO is opened, it will show the correct value o order. The amounts does not match either. Check all POs that sh negative values (enclosed in parenthesis) and correct the inform

					shown to match what exactly is in the PO.
25.0212.07	04/29/25	32459	Bug	Item Catalog	I uploaded the Item Search Catalog but it doesn't work on Find Pa sure it doesn't work even though it was properly imported. (No b user error).
25.0212.07	04/29/25	32443	Update	ALL Transactions	Need to restore POlineItems,SOLineItems,Invoice LineItems,ItemStock,Item catalog from dev backup server (This happened in middle of night, by accident, but restored before the morning).
25.0212.07	04/29/25	32401	Bug	Purchase Order	User reported: When I receive and item and enter the bill, I must close, get out of the PO, then go back into the same PO and sync not sync without getting out and back in again
25.0212.07	04/28/25	32336	Update	Settings	INVOICES/CMS > Custom terms and Conditions > Invoices >Desi with a huge space in between phrases but the design did not refl the invoice print preview. Please refer to the screenshot providec
25.0212.07	04/28/25	32448	Bug	Purchase Order	PO List - A lot of the POs that shows a negative values is incorrec for reference. If the PO is opened, it will show the correct value o order. The amounts does not match either. Check all POs that sh negative values (enclosed in parenthesis) and correct the inform shown to match what exactly is in the PO.
25.0212.07	04/25/25	32455	Bug	Sales Order	SALES ORDER PURCHASE ORDER SCREEN >On the Summary Pre window, the drop down for Existing POs are disabled, not showin drop down for existing POs.
25.0212.07	04/25/25	32449	Bug	Shipping and Receiving	WAREHOUSE - SHIPPING & RECEIVING - The In Route and Closed only shows (0) items even though there's orders processed.
25.0212.07	04/25/25	32448	Bug	Purchase Order	PO List - A lot of the POs that shows a negative values is incorrec for reference. If the PO is opened, it will show the correct value o order. The amounts does not match either. Check all POs that sh negative values (enclosed in parenthesis) and correct the inform shown to match what exactly is in the PO.
25.0212.07	04/25/25	32450	Bug	SO, Invoice	SALES ORDER and INVOICE - The tax and discount values are not updating correctly/automatically mostly on the recently importec invoices/SOs. The values were set to 0.4% which was meant to b
25.0212.07	04/25/25	32454	Bug	Reports	ITEMS - ITEMS STOCK > Report loads for a long while then results undefined error.
25.0212.06	04/24/25	32442	Bug	Sales Order	When a user generates a PO from an SO, the SOPO screen shows empty line item, preventing the user from creating a PO.
25.0212.06	04/24/25	32440	Bug	Reports	ITEMS STOCK REPORT > Vendor Column: It does not show the vendors in the vendor column.
25.0212.06	04/24/25	32396	Update	Sales Order	SALES ORDER DATE >Need to lock the date/make it uneditable.
25.0212.06	04/24/25	32374	Bug	Purchase Order	Magnifying glass isn't working when looking up vendors
25.0212.06	04/23/25	32230	Bug	Shipping and Receiving	24.0122.62 (QUALITY) ITEMS TO RECEIVE > IN ROUTE/ TO DISPAT DISPATCH (Multi-Drivers) Sales Orders > When orders are being transferred from the Items to Receive (In Route) to main warehou Dispatch screen and printing and updating the status using the D (Multi-Drivers) Sales Orders, the orders that were transferred goe to Items to Receive (In Route).
25.0212.06	04/23/25	32361	Update	Invoice	INVOICE 3 >>it does not have the Bill to and Ship to
25.0212.06	04/23/25	32432	Bug	Purchase Order	The Vendor name and Warehouse name are not showing on the I preview.
25.0212.05	04/22/25	32353	Bug	Sales Order	SALES ORDER BACKORDER >When Invoicing sales orders w backorders linked to a PO, the PO is not transferred over to tl sales order. It causes duplicate ordering of the same backorde
25.0212.05	04/22/25	32428	Bug	Import Wizard	SALES ORDERS (IMPORTED SOs) - There's an issue with the impo data where the recent open sales orders are not automatically u the customer info (Taxable/Tax Exempt) as well as the default Warehouse setting (Bichun) Actual customer profile shows correc settings and creating new Sales Orders in 1place does not have a issues aside from the imported ones from OneSource
					Status > Imported SOs > Imported sales orders that have been f

25.0212.05	04/16/25	32428	Bug	Sales Order	shipped and invoiced are not updating their status to "Closed." T status field remains empty. If all items in the sales order are ship the order is invoiced, then set the status to "Closed".
25.0212.05	04/16/25	32352	Bug	Purchase Order	AUTO LINK SALES ORDERS - When a PO is received, the Auto Link Sales Order does not show the related SO back order line items. SOPO - Even when the PO was received, the Sales Order Back Or not deleted, and the original SO was not changed.
25.0212.05	04/16/25	32239	Bug	Find Parts	FIND PARTS Standard screen bugs. --The Decimal field should default to x % (with no decimals). If th discount is 40% then it should show 40%. --Make the relationship between the List Price, Unit Price Discour Net Price work the exact same way as the Find Parts (Auto Parts) so they all stay in sync with each other. For Example, if the Unit I field is changed to $80 and the Discount % field has X % discoun the Net Price field should get updated and the LINE TOTAL field s update to the Qty x Net Price. Etc....
25.0212.05	04/16/25	32427	Bug	Purchase Order	SALES ORDER BACKORDER > When deleting Sales Order backord with items linked to a PO, the screen loads endlessly and lags the 1place then creates a bad request screen for the SOBO. Please c S250415-0032-B1
25.0212.05	04/16/25	32416	Bug	Sales Order	Find parts -->Sales order: when the user creates a sales order fro Find Parts' screen; however, the line items are not retrieved.
25.0212.05	04/15/25	32409	Bug	Credit Memo	Give Cash back>Payment details Payment method is not showing on CM detail and CM Print
25.0212.05	04/15/25	32407	Bug	Reports	Sales Tax Liability - Detail > Jan 1, 25 - Jan 31, 25 ALL totals in 1place are incorrect because credit memos (negativ not getting deducted. When downloaded to excel file, ALL totals are incorrect because getting duplicated, credit memos (negatives) are not getting ded and some cells are in different format (have more than 2 decima
25.0212.05	04/14/25	32315	Update	All Transactions	Quote/SO/CM >Other Info tab >Created By etc. the same as the Other Info tab >QUOTE> Add the info tab after the Comments tab. >Sales Order >Add the info tab after the Payment Info Tab. Move Custom Field at end, part after the Other tab. >Credit Memo >Add the Info tab after the AP Bill Info tab and mo Custom Field tab at the end after the Other tab.
25.0212.04	04/14/25	32395	Bug	Catalog Management	CATALOG MANAGEMENT > It does not show the table for Part Ty Filter To Exclude From Find Parts Searches. When exporting the Ptypes, it downloads a file with 0 KB and has message that the file format or extension is not valid. (Missing da KSI db.)
25.0212.04	04/10/25	32398	Bug	Import Wizard	Encountered lots of issues when doing the import process in 1pla When importing data, either the progress bar will be stuck at a c percentage or it will get completed but a lot of data would still be missing. Files requested to be imported were Item list, ItemQtyIn Invoice Headers and Line items, and requested to delete duplicat POs for reimportation for their GoLive.
25.0212.04	04/09/25	32327	Update	Printing	QUOTE, SALES ORDER, INVOICE, CREDIT MEMO> PRINT SETTING >Add Created By checkbox on the Customer Print Settings. >Also please add Created by on the Sales order list screen.
25.0212.04	04/09/25	32348	Update	Credit Memo	When user selects Credit Card for payment type of refund, the Gi Refund button disappears. Referance # update to Reference # (update spelling)
25.0212.04	04/08/25	32377	Update	Credit Memo	Please analyze the code of what the Refund screen does (as it pe Payments and QBO affect). --Add the same button to the Invoice screen and make it work th way, but for the Invoice, rather than a Credit Memo payment/refu --Let Steve, Sy, and Thiru know when you are done so Thiru and implement the Credit Card refund process.
25.0212.04	04/08/25	32251	Update	Item Detail	Stock > Financial: Items in Stock with $0 will be updated based o 1st transaction (1st receipt). If there is no cost on the 1st transac create an Excel file to send to Waleed for checking.

25.0212.04	04/08/25	32381	Bug	Quotation	Total amount not calculating correctly. Q1962 was duplicated to Q1963 but showed a different Total. Th showing on the created quote was $637.00, but when it was dup it showed the correct amount, which is $293.00. When printing tl Quote, the Total shown is incorrect ($637.00) instead of $293.00 in the Quotation List, the total shown is incorrect.
25.0212.04	04/08/25	32288	Bug	Shipping and Receiving	SHIPPING AND RECEIVING > DISPATCH SCREEN > SHIPPED VIA F Change the buttons filters from auto SELECT. (4/1/25). Please make ALL of the columns sortable, by Ascending first clicked and desc if clicked again. Then ascending if clicked a etc... (4/1/25--Undo some code completed below). When the user click Shipped Via FILTER just create a new Filtered recordset showing Shipped Via selected. But do NO SELECT the select and do not ch the Stop #. (If you find any code that tries to auto fill a Stop # pl remove the code, except where the user or scanner enters the S Order # in the Find order field. When the Refresh Sort Order button is clicked it should not requi other actions by the user to select a Driver, etc but just refresh s the Orders by Stop # in ascending order. The # showing to the right of each Shipped via doesn't appear to accurate. On ABC company when enter a Sales Order # in the Find Order fi press enter, getting a popup error.
25.0212.04	04/07/25	32382	Bug	Invoice	Invoice #I34937-B1: The total amount on the invoice is incorrect. line items has a subtotal of $38.00, no taxes. However the total a is $76.03.
25.0212.04	04/07/25	32384	Bug	Catalog Management	CATALOG MANAGER: Takes FOREVER to open.
25.0212.04	04/07/25	32383	Bug	Customer	Add New: Doesn't work in v 25.0327. Getting error.
25.0212.04	04/03/25	32370	Bug	Find Parts	GP field incorrect. Always shows 100%
25.0212.04	04/03/25	32368	Bug	Receive Payment	When user enters a CK/CC number and apply the payment to a customer, when the user go to the Invoice Detail>Payment info, CK/CC number is not showing.
25.0212.04	04/03/25	32350	Bug	Reports	C15043049 appeard 2x on the report as Credit Refund and Credi (Credit Memo line is incorrect)
25.0212.04		32348	Update	Credit Memo Detail	Referance # update to Reference # (update spelling)
25.0212.04	04/02/25	32356	Bug	Import Wizard	BICHUN (25.0212.03) IMPORT WIZARD: Update wizard not working properly. The function is not reflectin updated information (Customer, Vendor list etc.) Needs to be fixe as we aim to have them GoLive by April 4.
25.0212.04	04/02/25	32354	Bug	User Settings	Security Type > NO ACCESS: Users with No Access as security type have a full access to all se when they log in in 1place.
25.0212.04	04/01/25	32351	Bug	Reports	INVOICES / CREDITS BY DATE (TOTALS) and INVOICES / CREDITS MONTH (TOTALS) Same date range, showing the same # of Invoi credits, but have different %Credits, Net of Invoices/Credits, Tota Profit, and Profit Margin.
25.0212.04	04/01/25	32355	Bug	Settings	General Sales Settings: Undefined Error. Please check all settings if they are having the s issue.
25.0212.04	04/01/25	31861	Bug	Find Parts	When you search up HO1206100 on the find parts screen, HO12(comes up also which are 2 different parts.
25.0212.04	03/31/25	32335	Update	Invoice	INVOICE PRINT PREVIEW >Need to adjust the logo and the Bill to margin.
25.0212.04	03/31/25	32339	Bug	Find Parts	When applying a discount on this screen, the Net Price calculatio incorrect. Pressing the ENTER key after entering the discount doe save the value. However, clicking the mouse cursor elsewhere or screen after entering the discount saves the value.
25.0212.04	03/31/25	32342	Bug	Customer	AR > Customer Statements > Preview not working: Undefined Er

25.0212.04	03/31/25	32342	Bug	Statements	AR > Customer Statements > Preview not working. Undefined Er
25.0212.04	03/28/25	32340	Bug	Item Detail	Item detail screen, we can't see the Item vendor tab
25.0212.04	03/28/25	32334	Bug	Customer Detail	Sales History > Not updated. Some deleted transactions are not
25.0212.04	03/28/25	32332	Bug	Quote	When deleting the SO from a quote, the SO number still shows e after refreshing the page. Clicking the SO # results in a bad requ
25.0212.04	03/28/25	32288	Update	Shipping and Receiving	Update on UI and function
25.0212.04	03/27/25	32331	Bug	Item Catalog	Add new items > The page is just loading, or leads to a bad requ
25.0212.04	03/27/25	32333	Bug	AR	Customer Statements > Page not working.
25.0212.04	03/26/25	32328	Update	Item Catalog	Item Catalog Description - add another option for the description YY-Make-Model-Partslink Description, Partslink Variables. Exampl Partslink Item #: 1999-2000 HONDA CIVIC-Front bumper cover (2 coupe/2dr hatchback; prime)
25.0212.04	03/26/25	32274	Update	Reports	REPORTS screen changes: Update the report names for AR - Payments Received to Account Receivable - Payments Received. Update the report names for AR - Payments Received (End of Da Accounts Receivable - Payment Received (End of Day) In 1place report screen, PDF and Excel downloads. Report Criteria > Group By >Change the Type to Payment Type When invoicing Sales Order with prepayment, the Sales Order sh removed from the report and show the invoice instead. The repo only show UNINVOICED Sales Order Payments
25.0212.04	03/25/25	32274	Update	Reports	REPORTS screen changes: Rename the Report called Invoices/Credits Payments Received to Payments Received (also make it also show the Sales Order depo this report as well).
25.0212.04	03/19/25	32143	Bug	Import Wizard	File Validation: During the export process, rather than getting the specifically required for validation, the entire import file is export
25.0212.04	03/19/25	32302	Bug	Import Wizard	Customers > Import not working, just stuck on the progress bar.
25.0212.04	03/19/25	32274	Update	Reports	REPORTS screen changes: Remove the Item Catalog Category and move the single report o the Items category. Make a new REPORT Category called AR / Collections - not updat Remove 50% of the VERTICAL SPACE between all of the Category make them more concise), including the All Reports, My Favorite Frequently Run and Custom Reports. DELETE the new report you created for this task (below). Rename the Report called Invoices/Credits Payments Received to Payments Received (also make it also show the Sales Order depo this report as well). - **IP** Move the report called: Invoices / Credits Payments Summary (E Day) to the AR / Collections Report Category. Also rename the re the list of reports and the actual report name to: AR - Payments Received (End of Day) **IP** Move the report called Sales Exception: Items Not Sold to the Ex Reports report category. - **IP**
25.0212.03	03/18/25	32296	Update	Import Wizard	IMPORTING CREDIT MEMOS >when we import CMs to 1place, we don't have a field for Qty Re the Returned field for these CMs are zero as for invoices we have ordered and Qty Shipped, the Qty Shipped column does not fill in returned field. >When importing line items to the CM, it recalculates the total li items, payments and subtotal
25.0212.04	03/17/25	32298	Bug	Import Wizard	Found an issue wherein if you imported a file for ItemQtyInStock, warehouse ID/Name does not autofill if you only have 1 Warehou warehouse information will become blank instead once imported 1place.

25.0212.04	03/17/25	32282	New	Reports	CREATE REPORT called 'Invoices / Credits Line Items by Vendor, I Item' This report will look for the Invoice/CM line items. If the line item has no vendor, it will still show on the report Custo (Ship to Filter), Report Period Filter The Item Vendor is the default Vendor of the item. If it has a spec order, it will take the vendor where it was ordered.
25.0212.03	03/13/25	32290	Bug	Find Parts	Calculate (and maintain) Sales Taxes based on the 'Bill To Addres instead of the (Default) Ship To Address. >When a Ship to custom linked with a tax exempt Bill to, the Tax setting for the Bill to cus does not auto populate at the Fed Tax ID and Tax Exempt checkb
25.0212.03	03/12/25	32292	Bug	Invoice	Create Credit Memo: When clicking the create credit memo, it will ask for the reason, b when the Invoice page is refreshed, the pop-up fails to reappear, proceeds in creating a credit memo without asking for a reason. Credit Memo - The system is generating duplicate credit memos contain no line items.
25.0212.03	03/12/25	32291	Bug	Reports	User hirdemarp@orlandobp.com does not show any reports in he account. Tried all settings available.
25.0212.03	03/12/25	32288	Update	Shipping and Receiving	DISPATCH SCREEN > SHIPPED VIA FILTER: Change the buttons filters from auto SELECTS all for whichever s via is clicked to change that to give a popup that says: 'Do you w Auto Select all Sales Orders for Shipped Via [X]?' Then if the user YES then it can select them all and then put them all up on the to green. But if they click NO then it can just FILTER for all of those select them.
25.0212.03	03/12/25	32228	Update	Reports	(Branch/Master) Design a better way to keep ALL reports in sync, making a new master table of reports OR making the existing wa it stay in sync automatically.
25.0212.03	03/11/25	32197	Update	Printing	Redo: Time should show the USER'S Timezone and not server tim
25.0212.03	03/11/25	32167	Bug	Reports	Reports>Invoice/Credit Received Payments Downloaded excel does not show the credit memo as negative.
25.0212.03	03/11/25	32146	Bug	Reports	Invoice/Credit Payment Details: DOWNLOADED EXCEL FILE DID N HAVE ANY CONTENT
25.0212.03	03/11/25	32232	Update	Import Wizard	ITEM IMPORT WIZARD: On the option to Import Vendor Items Num for 1 vendor, add the option to UPDATE any of the fields, so long spreadsheet used has a matching Item # (and vendor selected).
25.0212.03	03/10/25	32256	Bug	Item Detail	REPLACING ITEM PICTURE: When replacing the picture for item GM1000907 and click on Save, an error message popsup.
25.0212.03	03/10/25	32274	New	Reports	Create report called 'Sales - End of Day Reconciliation' >Group by: Payment Type, Sort by Payment Date, Sort it by Cust >Please refer to the sample format in the dev list spreadsheet. > pad
25.0212.03	03/10/25	32277	Bug	Sales Order	Bill to dropdown: When opted to SEARCH IN OTHER FIELDS, the dropdown data gets mixed up where the address is displayed und Name column.
25.0212.03	03/10/25	32285	Update	ALL	HELP BUTTON POPUP Form. When clicking the HELP button, on an it displays a popup screen. Please REMOVE the popup form and j whatever the code would do when clicking View Knowledge Base for this screen. In other words, when the user clicks the Help butt have it auto display the table drive help topic for that form. If non please default it to http://kb.onesourcesoftware.com/support/kb
25.0212.03	03/06/25	32254	Update	Purchase Order	STATUSES: When all items are received for PO, the status should automatically change to Received Make the PO statuses name change based on the user defined
25.0212.03	03/06/25	32273	Bug	Sign Up	Clicking the 'Sign Up' button opens a new tab directing users to t OneSource website. However, selecting 'Buy Now' does not open sign-up page. New customers should be able to open the sign-up page in 1Plac without going to the website.
25.0212.03	03/05/25	32185	Update	Credit Memo	On Credit Memo Screen, Show the Credit memo applied amount of Invoice amount in Payment Info tab
					Users: Alter email function to send an activated email when a ne

25.0212.03	03/05/25	32278	Bug	Settings	Users: Alter email function to send an activated email when a ne created.
25.0212.03	03/05/25	32272	Bug	Integrations	CCC True: Delivery Area Zip Codes, exporting the Zip Code Temp shows a blank file.
25.0212.03	03/05/25	32263	Bug	Integrations	CCC True: FTP Files, exporting FTP files using the Download (Defa option results in empty files.
25.0212.03	03/04/25	32185	Bug	Receive Payments	Receive payments --> SO-->When a user makes a payment on a order, the payment does not have a receipt number. Receive payments -->When the user checks and unchecks the op credits table, the Previous Amount Applied and Remaining Credit are showing incorrectly. Receive payments -->When the user changes the payment terms the default option, the discount percentage and discount amount calculated or updated properly.
25.0212.03	03/04/25	32266	Bug	Reports	In Invoice payment details report ,when group by is set to none a rows are more than 5000 then excel is downloaded with zero row
25.0212.03	03/04/25	32249	Bug	Receive Payments	Even if all refunds are deleted, the cost will not revert to the unrefunded cost or the original amount.
25.0212.03	03/04/25	32229	Bug	Sales Order List	When users void an order and zero out items, the sales order tota doesn't update in the sales order screen.
25.0212.03	03/04/25	32264	Update	Quotation	Quotation: (24.0122.62) DUPLICATE QUOTE BUTTON >When user clicks on t duplicate quote button, it updates the Entered By field with the u name of the logged in user. We should retain the same informati the original quote. Also, the Created By should be the same person who originally cr the Quote.
25.0212.03		32259	Update	All Transactions	When using pricing levels on an item, the Discount % field does r on the Find Parts screen, Quote line item, or Sales Order line iten
25.0212.03	03/03/25	32250	Bug	Shipping and Receiving	When clicking the Refresh button, an error message pops up - AJ Error: parsererror. The same issue occurs when selecting the "Sh button for the Closed status. If clicking the "Ok" button, the page become unresponsive. Remove the Moved to Back Order Status.
25.0212.02	02/28/25	32185	Bug	Receive Payments	* Issue : Remaining Credit Calculation * Issue : Amount Applied is accepting more than the Remaining C * Add / Remove the amount when changing the invoice amount f Credit memo amount
25.0212.03	02/28/25	32255	Update	Reports	REPORTS LEFT PANEL MENU > Reduce the space between the re categories on the Reports screen and be equal with the MAIN left bar.
25.0212.03	02/28/25	31377	Update	Shipping and Receiving	DISPATCH SCREEN > MANIFEST >Remove extra spaces in the box, or make the customer column so we can maximize the space, and or make the font smaller? >Add a new column in between the Your Order # and Amount Pr Received called Total # of Pieces.(The Total # of Pieces will be th Qty Shipped per order, only the ready to be shipped) >At the bottom table, add Total # of Pieces after the Total No. of and move the other 2 tables to the right. (The Total # of Pieces w the total Qty Shipped for the entire manifest, only the ready to b shipped) >Change the name Total No. of Orders to Total # Orders.
25.0212.02	02/27/25	32062	New	Sales Order	* Right Menu to Open Lot Tracking Screen
25.0212.03	02/27/25	32223	Bug	Reports	INVOICES/CREDITS BY SALES REP (TOTALS) >REPORT CRITERIA: REP FILTER >When selecting names aside from Luis and Ana, the sales reps are not auto populating the report.
25.0212.03	02/27/25	32192	Bug	Purchase Order	The Recalculate button is grayed out for some POs.
25.0212.03	02/27/25	32253	Bug	All Transactions	Sales Tax Code - The sales tax code for the city of MARRERO is n calculating the correct tax.

25.0212.02	02/26/25	32062	New	Sales Order	* Lets add a button called: Ship from Different Lot or Bin to the p form to re-display the change options. * Make the Bin and Lot columns inherit the Label settings for thos columns, like on the Item Detail screen. * The Qty will have a - button on the left of the QTY and a + butt the right of the Qty to allow the user to quickly change the Qty U DOWN. * Don't allow the user to ship more or less than what is in the Qty Shipped field. Display a standard, editable popup if they try to.
25.0212.02	02/26/25	32249	Bug	Credit Memo	Payment Info > Give Cash Back or Apply Credit: --When giving a refund, it creates a duplicate transaction. --If the duplicate is deleted, the refund info will not show in the P Info Tab even when the page is refreshed.
25.0212.02	02/26/25	32187	New	Receive Payments	--Change the title Payment Reference # to Check /CC# --Add a new field below called Authorization # this is the same Authorization # field in the Payments Info tab on the Invoice/CM screen --handled the tab function in the inputs.
25.0212.02	02/21/25	32192	Bug	Purchase Order	PURCHASE ORDER: When user click Recalculate button weight is calculated.
25.0212.02	02/21/25	30808	Bug	Reports	Exception Report - Sales Order Item Price Changes: Shows error running.
25.0212.02	02/21/25	32197	New	Printing	Add the time when a document was printed on All Document Prir
25.0212.01	02/20/25	32193	Bug	Shipping and Receiving	Not showing the correct values based on the status.
25.0212.01	02/20/25	32191	Bug	Purchase Order List	PO List - When sorting the column for the Vendor Number an und error pops up. PO List - Vendor Number Column should be named as Vendor Na Vendor number is different.