

December 2017 Newsletter

Your site has been updated to version 3.0.7 with various bug fixes and improvements as well as the enhancements listed below. This is a combined update which includes 3.0.6 and 3.0.7 tickets.

Features and Enhancements in this release:

- (1139) "Misc Items" appears on Pro Forma document prints. Due to changes made for printing the pro form using the "Summarized by group" option, the text "Misc Items" was appearing when the document was printed showing line item detail. This has been corrected.
- (1138) Punch Delivery Ticket print.
Line item details were not appearing for punch purchase orders. The "Include Punch" and "Punch Only" print options were also added. These two prompts are for when the "Consolidate POs" prompt was added, (see ticket 159 in this newsletter)
- (1137) "Misc Items" appears on Proposals prints. Due to changes made for printing the proposal using the "Summarized by group" option, the text "Misc Items" was appearing when the document was printed showing line item detail. This has been corrected.
- (1130) "Finishes and Options" detail on line item edit.
For line items that are imported from a specification tool application, the "Finishes and Options" detail will automatically be displayed when a line item is viewed in the Edit Line item window. This detail will be displayed below the normal View/Edit window text.
- (1119) "Ghost" invoices on direct bill proposals.
The issue was that in some rare cases on direct bill proposals, customer/vendor invoices were being created that had no line items associated. This has been corrected.



- (1109) Customer Statement report update.
Customer deposits that have been received are now displayed on the customer statements.
- (1099) Entering a vendor deposit after the payable has been entered.
The ability to enter a vendor deposit after the vendor payable was entered has been added from the Vendors - View & Pay Bills view. Previously, this option only existed on the Proposals - Payables tab.
- (1097) Error messages on Proposal custom fields.
The error messaging has been corrected for custom proposal fields that are flagged as "required" fields when they are left blank.
- (1096) Proposal Clone feature and Proposal Restrict View permission.
The Proposal Clone feature now checks to see if the Restrict Proposal View permission is in effect before allowing a proposal to be cloned.
- (1095) Customers, Edit Payment Info permission.
The Customers - Edit Payment permission was being overridden by the Customers - Edit Detail permission. This has been corrected.
- (1094) Proposal Summarized by group prints \$0.00.
The sub total amount printed for the "Misc" group was \$0.00 even though the line items had sell pricing. This has been corrected.
- (1093) Display tax rules when adding a new customer location.
The sales tax rules now display for a new customer location once the State has been selected.
- (1092) Add "Do Not Include List Price" to purchase order print options.
A new prompt called "Do Not Include List Price" has been added to the purchase order print. If selected, the list price for line items will not be printed on the purchase order.
- (1091) Pro forma invoice summarized by group print not working.
When printing a pro forma invoice that contained groups and when using the "summarize by group" print option, the group name as well as the line items were printing. This has been corrected to only the group names print.

(1077) Sales Tax report, re-printing old reports.

We found that the sales tax report would use the current sales tax rules for printing pre-dated reports. The report has been corrected to use the tax rules in affect at the time for the date ranges selected.

(1076) Cash Requirements now highlights payables when discount exists.

When the "Show opportunities to take discounts?" option was selected on the report, the due date displayed was altered to show the date the payable needed to be paid by to take advantage of the early payment discount. This has been changed. The actual invoice date and due date are displayed now and we highlight the amount field.

(1074, 1073, 1070, 159) Delivery Ticket print options updates.

The proposal line number and the quantity now appears in the line specific selector section as well as the full item description text. You can now print all purchase order line items on a single ticket and you can print selected line items only. To print all purchase order line items on a single Delivery Ticket, select the "Consolidate PO's" checkbox and select the line items to be included.

(979) Line Items tab scrolling region.

Now, when editing a line item regardless of where the line falls on the Item Details tab, the edited line will remain in the viewing scroll region. The page will no longer refresh and start with the first line item.

(655) Sales Tax report, add "Print All" option.

A Print All option has been added to the sales tax report so you no longer have to print each state's tax report individually. This applies to the spreadsheet export as well.
