



intact

Release 27

Sprint 3

iQ - Community

Feature Preview Build

Release Notes

 **intact**

Contents

Summary

Release 27 Sprint 3: 6

New Features

CliQx

TFS #44919 (FD #1214438) – Pick delivery address (delivery contact) - v4.2. 7

Company Configuration

TFS #43971 (FD #1210401) – Enable iQ to print just a selection of pending product label requisitions at the quantity required. 7

TFS #44104 (FD # N/A) – Add support for Clickatell One API. 7

TFS #44734 (FD #1213740) – Custom Validation Rules – Support for Multiple Credentials and Users. 7

TFS #45112 (FD # N/A) – Add an option to reduce the number of times products are refreshed when checking for negative stock. 8

TFS #45324 (FD # N/A) – Action search enhancements. 8

Sales

TFS #44642 (FD # N/A) – Creating Project from Sales order with split jobs. 8

TFS #45025 (FD # N/A) - Product Assembly Production Schedule. 8

TFS #45026 (FD # N/A) - Product Assembly Sales Order Enhancement. 8

TFS #45194 (FD #1211297) – Feedback Item on TFS #44238 - Sales order line write off routine required. 9

TFS #45360 (FD # N/A) – Transport Scheduler amendments. 9

Purchasing

TFS #45164 (FD # N/A) – Improve performance on loading large numbers of related GRN Items when matching purchase invoices. 9

TFS #45208 (FD # N/A) – Improve performance of large delivery notes where last costs are not changing. 9

TFS #45211 (FD # N/A) – Improve the performance of large purchase delivery note reconciliations. 9

Stock Control

TFS #44793 (FD # N/A) – Mobile warehouse ABC StockTake Function enhancements. 10

Bank and Cash

TFS #42975 (FD #1190880) – Account analysis. 10

TFS #45023 (FD # N/A) – Handle Customer changing on a Financial Receipt. 10

CRM

TFS #45035 (FD # N/A) – Contacts on Interactions or Activities. 10

Customisation

TFS #44646 (FD # N/A) – Allow the standard F3 edit keyboard shortcut to work when an object is in View mode. 11

Resolved Issues

CliQx

TFS #42327 (FD #1201836) – Product Management upload not creating commerce extension - v3.8. 12

TFS #45176 (FD #1215810) – Cliqx 4.20- Payment on Account not bringing down all data from website. 12

TFS #45258 (FD #1214918) – Cliqx integration where web orders that are automatically created by the iQ do not get automatically allocated and cannot be manually allocated by a User. 12

Company Configuration

TFS #44193 (FD #121176) – iQ crashes when creating a Customer when no default Price List is assigned. 12

TFS #44831 (FD # N/A) – Customer Item List Presenters - Can only configure security policy against first one created if multiple is setup against the same 'Target Type'. 12

TFS #45142 (FD #1213604) – Feedback item on TFS #44649 - Defaults and Property Connectors are not validating on saving of a Cash Drawer Reconciliation. 12

Sales

TFS #34361 (FD #374928) – Contact details for a customer display incorrectly when printed from a copied sales quotation. 13

TFS #36860 (FF #1020423) – Investigate - “Outstanding Sales Orders Allocated to Bin” property wrongly calculated. 13

TFS #37801 (FD #1189866) – Prevent rule for changing Allocated stock when being picked not working properly. 13

TFS #38176 (FD # N/A) – Back-Sales order status does not change when back to back document is written off.	13
TFS #41220 (FD #1200623) – SL not creating SDN when SO WOFF.	13
TFS #42167 (FD #1204237) – Bank Journal Import Schema – Collation property not working.	13
TFS #44683 (FD #1210398) – Copy Sales Order Does Not Work When a Product Has Related Items Set.	14
TFS #44684 (FD #1213743) – Transport Scheduler - Deleting Source Document can cause an exception.	14
TFS #44838 (FD #1214326,1214714) – Delivery Note Posting Properties To Set screen does not have Design Layout anymore.	14
TFS #44882 (FD #1214499) – Exception when adding a new customer.	14
TFS #44908 (FD #1214590) – Unable to change Cost Price in the same way as Sales Orders.	14
TFS #44938 (FD #1214680) – SCN not showing the Linear Length Allocation that came from SCR.	14
TFS #45057 (FD # N/A) – Supplier QTY Break Price Lists and Customer Default Price Index.	15
TFS #45082 (FD #1215330) – Delivery Charges not being applied to invoices on trade counter transactions in certain cases.	15
TFS #45134 (FD #1215199 / 1215315 / 1215738 / 1215081) – Workflow Status of Written off Orders not changing correctly after writing off.	15
TFS #45156 (FD #1208455) – Invoice run output as email and as an export file which was not expected.	15
TFS #45159 (FD #1215687) – Zero quantity free stock items being allocated equals negative stock.	15
TFS #45239 (FD #1215682) – Invoicing "Journal in not balanced and cannot be stored".	15
TFS #45320 (FD #1216092) – Delivery Contacts disappearing from orders/delivery notes.	16

Stock Control

TFS #44806 (FD #1214222) – Copying a product throws an error when switching to the Costings smart part, relating to ActualSellingCost.	16
TFS #45085 (FD #1215220) – Product displaying extra pictures.	16
TFS #45193 (FD # N/A) – Issues With SQL Replenishment Rules for Linear Items.	16

Bank and Cash

TFS #44988 (FD # N/A) – Receipt Type Choice For Customer Receipt Is Not Filtered.	16
TFS #45178 (FD #1215828) – Unable to reconcile Cash Drawers.	16

Customisation	17
TFS #45288 (FD # N/A) – Include any base original filter in Free Text searching	17
Reporting	
TFS #44943 (FD #1214688) – SQL Stored Procedure based Reports are not passing parameters and therefore fail to run.	17
Integration	
TFS #45007 (FD # N/A) – Excel Connector Setup.	17
TFS #45113 (FD # N/A) – Prevent adorning for managing badges being created if no badges have been setup.	17
TFS #45390 (FD # N/A) – SagePay payment is not recorded in iQ when the browser window is explicitly closed.	17
Performance	
TFS #43386 (FD #1208284) – Executing the Global Search from an object window can be slow.	17
TFS #45279 (FD # N/A) – Improve performance of charts when scrolling through lists.	18

Summary

Release 27 Sprint 3:

The following community feature preview document details the features the development team has completed as part of the third Sprint in Release 27 – R27S3 build.

As with previous Sprints, the code will be branched at this point and over the following 2 weeks any issues that arise from both internal testing and any user acceptance testing carried out by the community will be addressed.

For project governance, new builds containing these fixes over the subsequent 2 weeks will have the same name and release -> sprint number.

Note: - This build is intended for those who have requested new features to preview them while the development team perform regression and functional tests. It is not intended to be used on live sites. It is for user acceptance testing only.

Author:	Gary Brodigan
Product:	iQ
Release:	27
Sprint:	3 of 6
Development Period:	06/07/2020 to 17/07/2020

New Features

CliQx

TFS #44919 (FD #1214438) – Pick delivery address (delivery contact) - v4.2.

Added a new webservice call to the iQCommerce plugin that retrieves the customer delivery contacts and presents these in the new B2B card in the CliQx dashboard. The selected delivery address is then returned to iQ as part of the order. This is an iQCommerce plugin and nopCommerce plugin change.

Company Configuration

TFS #43971 (FD #1210401) – Enable iQ to print just a selection of pending product label requisitions at the quantity required.

A modification request was made to add a command on 'ProductLabelRequisitions' list to print the selected Product labels with the required quantity.

A new command '**Print Selected Pending Requisitions**' has been added on the ProductLabelRequisitions List screen, which will print only the selected product labels with the quantity specified to print.

TFS #44104 (FD # N/A) – Add support for Clickatell One API.

iQ now includes support for Clickatell's One API mechanism for sending SMS messages.

There is also beta support for sending WhatsApp messages.

Please see the accompanying documentation (44104.docx) for detail.

TFS #44734 (FD #1213740) – Custom Validation Rules – Support for Multiple Credentials and Users.

More than one Credential on a Custom Validation Rule

A Custom Validation Rule can now have more than one credential associated with it.

Credentials are used as part of the authorisation process when the rule's Authorisation Type is set to 'Use Credential'.

Now when enforcing authorisation, in addition to checking the rule's Credential property, also checked will be the list of credentials held in 'Additional Credentials'.

More than one User on a Credential

A credential can now have more than one user associated with it.

Now when enforcing authorisation, and the Credential's 'Authentication Method' is set to 'User and Password', in addition to checking the Credential's 'User' property, also checked will be the list of users held in 'Additional Users'.

Custom Validation Rules are configured via 'Agility'.

TFS #45112 (FD # N/A) – Add an option to reduce the number of times products are refreshed when checking for negative stock.

When checks for negative stock are turned on either at order type or company level the system would aggressively refresh product stats to make sure they are up to date as part of validation. In many cases this is unnecessary if the notification service is correctly configured. A new option has been added to Company.StockOptions called Product Stock Level Concurrency Handling which will allow you to rely on the notification service and improve performance especially on larger transactions.

TFS #45324 (FD # N/A) – Action search enhancements.

An enhancement was made in relation action search. The changes are as follows:

- Configurator only applied if command is enabled,
- Agility only applied if command is enabled,
- Changed colour to black background for easier visibility,
- Custom shortcuts now search correctly,
- Slashes and Numeric Keypad keys now supported,
- Shortcut now on security policy and company.

Sales

TFS #44642 (FD # N/A) – Creating Project from Sales order with split jobs.

Added a new sales order list command called 'Create Jobs for Assembly Products'. This command adds a new project and a new job for every assembly product on a sales order. So if there is a sales order that contains a line with an assembly product for a quantity of 2, then this command will prompt the user to create a project and once that is saved it will prompt to create 2 separate jobs through the sales order job creation args. Note in this case that args screen will be prompted for twice. If the sales order contains multiple lines with different assemblies then the user will be prompted to add a job for each assembly product. Non assembly products on the order will be skipped.

TFS #45025 (FD # N/A) - Product Assembly Production Schedule.

A new type has been added to iQ called a Product Assembly Production Schedule which is used to mass generate product assembly builds for assembly products on Sales Orders.

TFS #45026 (FD # N/A) - Product Assembly Sales Order Enhancement.

A new property has been added to the Company Sales Ledger Options called "Assembly Revision Selection Control". This property gives users the option to have the Assembly Revision on a Assembly product by automatically selected on sales document lines if the product only has a single active revision.

There are two options available with the property. The Default is "Always Select Assembly Revision To Use". This is the existing behaviour. The second is "Automatically Select Assembly Revision When Only One Revision Is Active" and this option does as it describes. An active revision is one where the Revision State value is not set to "Design" or "Inactive".

TFS #45194 (FD #1211297) – Feedback Item on TFS #44238 - Sales order line write off routine required.

Based on the feedback on initial testing of a new 'Write Off' (Product List view -> Write Off) command, the following changes have now been made:

1. Args Screen still has 'Sales Order Allocation' – This is now changed to 'Sales Order Write Off Args'.
2. When Cancelling Write off – message displayed is 'Sales order Allocation Args ' – This is now changed to "Changes to this Sales Order Write Off Args will be lost, continue?".
3. When the Args screen is shown, the developer notes say it is to show any unallocated order lines for the product. It seems to show them when they are allocated also. – This now only shows Sales Order line's where the line's 'Quantity Allocated' is set to zero. This will also avoid the issue where user attempts to write off allocated lines.

TFS #45360 (FD # N/A) – Transport Scheduler amendments.

A requirement was made to add 3 new features to Journeys and the Transport Scheduler. The features are:

1. A new company/User setting is now available that allows the Transport Scheduler to only show documents for the current branch
2. Document line descriptions are now available to add to grids on the Transport Scheduler
3. You can now reduce the quantity on a document line that has already been scheduled on a Journey. (previously this was prevented).

See attached document 45360.docx for more information on these features.

Purchasing

TFS #45164 (FD # N/A) – Improve performance on loading large numbers of related GRN Items when matching purchase invoices.

When using 'Match Delivery Note' on a purchase invoice where potentially 1000s of PDN lines are outstanding there could be a substantial delay loading the PDN Rec. This has been improved.

TFS #45208 (FD # N/A) – Improve performance of large delivery notes where last costs are not changing.

When storing a PDN the Last Cost Transaction Date will be updated even if the cost does not change. In this case the whole product was being loaded and updated. This change picks up that only the date is changing and uses a statistic update instead to improve performance.

TFS #45211 (FD # N/A) – Improve the performance of large purchase delivery note reconciliations.

The FirstPurchase and LastPurchase dates on product statistics were being updated by setting the product stat properties causing all products to be added to the transaction. This has been changed to statistics updates.

Stock Control

TFS #44793 (FD # N/A) – Mobile warehouse ABC StockTake Function enhancements.

This is feedback on changes made to allow ABC Stock Count on MWH in TFS #44725. Small change needed for the caption on the initial screen and need to remove the 'Create New' function. Please see the document (44793.docx) on the deployment site for details.

Bank and Cash

TFS #42975 (FD #1190880) – Account analysis.

Added a new property to sales documents called "Net Sales Account Override". When this is populated it will be used to populate the net sales account on the sales document lines. So, it will be overriding the setting on the customer posting map. This general ledger account is then used in the sales documents general ledger posting to the sales account.

TFS #45023 (FD # N/A) – Handle Customer changing on a Financial Receipt.

Changes have been made to extend the functionality of TFS 44879 (Add a Customer Condition to Receipt Type).

We now validate the Receipt Types on saving.

This means that if the user changes to Customer on a Financial Receipt then the system will ensure that all Receipt Types are still valid for the *new* customer. (Note that the validation is done on saving).

Please see the accompanying documentation (45023.docx) for further detail.

CRM

TFS #45035 (FD # N/A) – Contacts on Interactions or Activities.

It is now possible to create an interaction or task without the need to have at least one contact on the entity before proceeding.

Also, now possible, is the ability to leave contact 'blank' when creating and not have it default to the first or default contact.

These enhancements are controlled by two new company settings Company -> CRM -> Default Contact Selection Control:

- Take Default - As per existing behaviour, populate contact on task or interaction to default / first contact found,
- Leave Blank - Do not auto-populate, leave blank.

Company -> CRM -> Activity Creation Control:

- Must Have at Least One Contact - As per existing behaviour, at least one contact must exist before proceeding,

No Contact Required - Able to create a task -> interaction without the need of an existing contact being present.

Customisation

TFS #44646 (FD # N/A) – Allow the standard F3 edit keyboard shortcut to work when an object is in View mode.

A requirement was requested to have an F3 keyboard shortcut added to the Edit Item control menu command (bottom left of an object view). This new feature has been added so the Edit Item command on the main control menu has an F3 keyboard shortcut.

Resolved Issues

CliQx

TFS #42327 (FD #1201836) – Product Management upload not creating commerce extension - v3.8.

The product management upload was failing to update the commerce extension on the product with the selected availability. A change to the plugin has resolved this issue. This was an iQCommerce plugin modification.

TFS #45176 (FD #1215810) – CliqX 4.20- Payment on Account not bringing down all data from website.

Two properties needed to be added to the data being passed to iQ from nopCommerce. This was a nopCommerce plugin change.

TFS #45258 (FD #1214918) – CliqX integration where web orders that are automatically created by the iQ do not get automatically allocated and cannot be manually allocated by a User.

Added a branch property to the commerce object as you cannot set a branch in the object templates. This was an iQCommerce change.

Company Configuration

TFS #44193 (FD #121176) – iQ crashes when creating a Customer when no default Price List is assigned.

An exception was raised setting property 'Description'. The message was 'An exception occurred after setting property Description' error was reported when creating a new customer and no default price list was assigned.

A change has been made within the Evolution X Integration Plugin to prevent this.

TFS #44831 (FD # N/A) – Customer Item List Presenters - Can only configure security policy against first one created if multiple is setup against the same 'Target Type'.

Fixed an issue that was occurring when multiple Custom List Item Presenter Commands are added for the same type. When multiple commands are added in Agility -> Custom List Item Presenter Commands for the same Target Type, the commands would display correctly on the list, but when you click the security policy command only the first command would be listed.

TFS #45142 (FD #1213604) – Feedback item on TFS #44649 - Defaults and Property Connectors are not validating on saving of a Cash Drawer Reconciliation.

The calculation of totals on Cash Drawer Reconciliations has been modified to occur after default values on the reconciliation have been set by property connectors or custom calculators so they can be used to default in the withdrawal and actual values on the summary items of the reconciliation.

The previous version of the calculation would require the user to manually change a value on the reconciliation before everything would be recalculated so it is more flexible now.

Sales

TFS #34361 (FD #374928) – Contact details for a customer display incorrectly when printed from a copied sales quotation.

An issue was reported where editing a Sales Quotation and changing the customer was showing an incorrect Delivery Address on the quote when printing. This has now been resolved.

TFS #36860 (FF #1020423) – Investigate - “Outstanding Sales Orders Allocated to Bin” property wrongly calculated.

A change was made to the Sales Order Line Stock Bin Allocation Screen to show Quantity Supplied. This allows user to create Custom Validation Rules in Agility to prevent users allocating less than the Quantity Supplied. This applies to non-batch tracked products.

TFS #37801 (FD #1189866) – Prevent rule for changing Allocated stock when being picked not working properly.

Fixed an issue where the prevent rule for changing allocated quantity on a sales order that was being picked was failing to kick in if the allocation quantity was changed to zero.

The validation will now kick in if the allocated quantity is changed to zero and the Quantity being picked is greater.

The below company setting will also have to be set:

- Company.salesPickingNoteOptions.salesOrderAllocationControlOptions.PreventPickingUnallocatedQuantities.

TFS #38176 (FD # N/A) – Back-Sales order status does not change when back to back document is written off.

An issue was occurring which was leaving a sales order with an incorrect workflow status if the order was a back to back and the related purchase order was fully written off. This issue has now been resolved and the sales order now updates with the correct workflow status.

TFS #41220 (FD #1200623) – SL not creating SDN when SO WOFF.

Fixed an issue where stock bin allocation quantity validation was failing when saving a sales order when the sales order line was partially written off. The quantity remaining calculation was not taking the written off quantity into account.

Note that if the stock bin allocation item quantity is populated before the write off then the quantity written off will be populated on the stock bin allocation item line. This means that the quantity actually allocated is the quantity less the quantity written off. If that allocation item line is zero, then only the sales order line "Quantity Written Off" will be populated.

TFS #42167 (FD #1204237) – Bank Journal Import Schema – Collation property not working.

A modification request to add an Import helper to add the General Ledger Analysis Items under a single Bank Account Journal using the import collation property name.

Please see the document (42167.docx) on the deployment site for details.

TFS #44683 (FD #1210398) – Copy Sales Order Does Not Work When a Product Has Related Items Set.

Fixed an issue with related items added to a new sales order and the related items are added as additional lines, the sourceline property is populated on the related item lines with the line that that was originally entered by the user. If this order is subsequently copied, the sourceline property remains with the original order line, not the copied orderline. This change to core iQ resolves this issue by attempting to match the original sourceline with a line in the newly copied order, matching on the index (location) of the line within the list of lines and the product. If a match is found, the sourceline property is changed, otherwise the sourceline property is reset to empty.

TFS #44684 (FD #1213743) – Transport Scheduler - Deleting Source Document can cause an exception.

An exception could occur from the Transport Scheduler if you deleted a document that was scheduled on a Journey and then tried and re-schedule it. This was caused by an error in the code which resulted in the source document showing up as available for scheduling even though it had been deleted.

A fix has been made to correct this.

TFS #44838 (FD #1214326,1214714) – Delivery Note Posting Properties To Set screen does not have Design Layout anymore.

An issue was reported that the "Design Layout" option now longer appears on the Delivery Note Posting Property Setting Screen. We have reintroduced the ability to redesign the layout which can be saved and loaded.

Note: this option was initially removed due to a side effect that exposes the properties of the Dynamic Properties

The properties are added dynamic to the control from a company setting and does not match the properties in the layout item chooser.

When a property is added from the Layout Item Chooser this results in the following handled error if a layout is saved with this issue then can be resolved by removing the layout from Agility – View Configuration, deleting all views for Target Type “Sales Picking Note Delivery Note Posting Dynamic Object” resetting to the default layout.

TFS #44882 (FD #1214499) – Exception when adding a new customer.

Fixed an issue where an exception was occurring when creating a new Customer and selecting either the Customer Department or Customer Product Swaps smart parts. These smart parts should only have been available when editing an existing Customer.

TFS #44908 (FD #1214590) – Unable to change Cost Price in the same way as Sales Orders.

Fixed an issue where the cost price on a trade counter line was not editable for the direct order processing method when the company sales order option 'Sales Order Line Direct Fulfilment Cost Control' is set to 'Allow Edit Of Cost Price'.

TFS #44938 (FD #1214680) – SCN not showing the Linear Length Allocation that came from SCR.

Fixed an issue that was occurring with Linear product when creating a Sales Credit Note from a Sales Credit Request. The Linear Tally property was not copied from the Sales Credit Request Line to the Sales

Credit Note Line.

TFS #45057 (FD # N/A) – Supplier QTY Break Price Lists and Customer Default Price Index.

This item resolves issue introduced under TFS #40060. As a result of these changes if the supplier had a default price index greater than zero, the supplier would never get a price index lower than this when applying quantity breaks on a product or price list. The default price index or Purchase document price index override should only be considered the minimum band for quantity breaks if the setting Company -> Pricing Options -> Quantity Break Price IndexHandling is set to "Use Price Index As Minimum Band".

If set to "Ignore Price Index" then the supplier default price index and the document price index override should be ignored as min for quantity breaks.

TFS #45082 (FD #1215330) – Delivery Charges not being applied to invoices on trade counter transactions in certain cases.

Fixed an issue where the delivery charge was not getting saved on a sales invoices when the invoice was added through the trade counter along with another line that had a processing method of 'Delivery Order (invoiced)'. Note this was only an issue when the sales invoice line was added before the delivery order line.

TFS #45134 (FD #1215199 / 1215315 / 1215738 / 1215081) – Workflow Status of Written off Orders not changing correctly after writing off.

When writing off a sales order the workflow status was not changing to the specified company setting for fully written off orders.

TFS #45156 (FD #1208455) – Invoice run output as email and as an export file which was not expected.

Fixed an issue that was occurring which caused PDF attachments that were created for attaching to emails during a Sales Invoice Run to be left in the Generated File Location after processing. This issue has now been resolved and the temporary attachments will be deleted after the invoice run completes.

TFS #45159 (FD #1215687) – Zero quantity free stock items being allocated equals negative stock.

A User reported that they are now able to allocate products with 0 Free Stock level when they should not have.

This is causing the product to go to negative stock level. Sales Order items with 0 Free Stock level should not be allowed to be allocated when the stock is not there. When the product is a Kit item, then user should not be able to complete it with its component items missing.

After investigating it was identified that this is caused by a bug which was introduced when attempting to skip validation on Sales Order line's Quantity Allocated property when a related Back to Back order is received and subsequently allocated.

The bug is fixed, and the issue is now resolved.

TFS #45239 (FD #1215682) – Invoicing "Journal in not balanced and cannot be stored".

Fixed an issue that was occurring which could cause a Sales Delivery Note to fail to invoice due to small rounding errors. This issue was caused by discount amounts that had not been rounded.

TFS #45320 (FD #1216092) – Delivery Contacts disappearing from orders/delivery notes.

Fixed an issue where a Delivery Contact could be removed when Cancelling an Edit of a Delivery Contact from Within the Customer Object. This has been resolved to Ensure any Persistent contacts are not removed when cancelling an edit.

Stock Control

TFS #44806 (FD #1214222) – Copying a product throws an error when switching to the Costings smart part, relating to ActualSellingCost.

An exception was occurring when copying or creating a new product if the Default Supplier was set. The exception occurred when switching to the Purchasing -> Costings tab for a new product that has a Default Supplier, iQ was trying to load applicable Supplier Price Rules for the Supplier/Product combination. A fix has been made to correct this, so for new unsaved products it will only look for applicable Supplier Price Rules using the Supplier.

TFS #45085 (FD #1215220) – Product displaying extra pictures.

An issue was occurring where incorrect images could be displayed when using the Image File Paths property of a product. The issue would occur if multiple products shared a similar code which only different in the last few characters. This issue has now been resolved.

TFS #45193 (FD # N/A) – Issues With SQL Replenishment Rules for Linear Items.

When using replenishment rules to generate purchase documents for linear products, the linear length allocation would be incorrect on the generated documents in situations where documents were being generated per individual branch. Each document was being given the total combined length allocation quantity for all branches instead of the specific branch on the document. This has been fixed.

Bank and Cash

TFS #44988 (FD # N/A) – Receipt Type Choice For Customer Receipt Is Not Filtered.

A fix has been made for the "Split Value List" handling of Customer ReceiptTypes:

This issue was found during development of TFS 44879.

Previously, clicking the ellipsis to select a Receipt Type for a Customer Receipt would return all Receipt Types.

Now, clicking the ellipsis to select a Receipt Type for a Customer Receipt now returns the Receipt Types that satisfy the configured settings (i.e. Company Condition and Customer Condition).

TFS #45178 (FD #1215828) – Unable to reconcile Cash Drawers.

Fixed an issue when saving a cash drawer reconciliation if the User was set to use receipt type locking. The cash drawer journal record was being prevented from being saved with validation warning about mismatched Receipt Types. This issue has now been resolved and the validation will no longer fire incorrectly for cash drawer reconciliations.

Customisation

TFS #45288 (FD # N/A) – Include any base original filter in Free Text searching

The Free Text search, when activated from a list, did not consider the underlying filter applied to that list. So, for example, if a special product list were displayed and it was filtered by supplier, the free text search would include all items, regardless of any core or base filter applied to the underlying list. This has been changed. If the list on which you activate the free text search has a base filter this will be applied too.

Reporting

TFS #44943 (FD #1214688) – SQL Stored Procedure based Reports are not passing parameters and therefore fail to run.

Fixed an issue that would cause an error message or exception to occur when trying to Execute or Design a SQL Stored Procedure based report where the Stored Procedure takes parameters. This issue has now been resolved and iQ will now prompt for the Stored Procedure parameters before Executing or Designing the report.

Integration

TFS #45007 (FD # N/A) – Excel Connector Setup.

Fixed an issue where the excel connector was not connecting to IQ. New 32 bit and 64-bit versions attached.

TFS #45113 (FD # N/A) – Prevent adorning for managing badges being created if no badges have been setup.

On some RDP Remote App sessions, it was noticed that some views stopped refreshing. The adorning for badges is now only enabled when any workflow query commands have been configured to evaluate if this was the issue.

TFS #45390 (FD # N/A) – SagePay payment is not recorded in iQ when the browser window is explicitly closed.

It seems that iQ Users are closing the SagePay CNP window by using the X close button.

Problem Summary, a customer is running into difficulty with SagePay Cardholder Not Present processing. We create a browser window in iQ, and the end User should click on a JavaScript button to close this window at the end of the process.

Note: that the browser window's Close ('X') button is deliberately not disabled on window creation – this is so that the user can close the window if it was opened in error).

Consequently, of the User closing the window via X, iQ does not receive SagePay response details. Namely, payment has been received by SagePay but iQ does not know about this.

Performance

TFS #43386 (FD #1208284) – Executing the Global Search from an object window can be slow.

Improvements have been made to speed up the global search from an object window.

Please see the accompanying doc (43386.docx) for further detail.

TFS #45279 (FD # N/A) – Improve performance of charts when scrolling through lists.

The chart control interactor was listening to the chart data source Data Refreshed event, but this would mean that CurrentPropertyValue needed to be called in the UnBind method. This could lead to the query to populate the datasource to be run again. This structure has been changed to reduce the number of queries SQL chart datasources can create.