ACCTivate! 7.2.3 Release Notes (QuickBooks Edition)

Create Company
- "Not enough memory. May not complete this operation." error while Deactivating QuickBooks inventoried items - #55478

Custom Fields
- "Item cannot be found in the collection..." exception received when saving Customer record - #56576

EDI
- "Unable to cast object of type ACCTivate.Connections" during Purchase Order import - #56580
- EDI Orders may be imported in with a 'Booked' status, but the line items may be scheduled - #56621

Email
- Text for email messages with attachments may not appear properly in ACCTivate! - #56622

Import
- "Operation is not allowed in this context." message may be received when importing Customers - #56613

Inventory
- Inventory Transfer window reverts new warehouse location to default - #53827

Mobile
- Entering a location for a Lot number in Mobile Picking may revert back to the Primary Location - #56618

Purchasing
- Ordered Quantity is not highlighted when selecting a Product on a Purchase Order - #56550

Sales Order
- Sales Order Scheduled Quantity may not be calculated for Assortment/Matrix product until you save the Sales Order. - #56358
- Sales Order grid may not stay focused on the proper column when typing in the Class on line item - #56579
- Unable to change product warehouse on sales order for kits and assortment/matrix - #56586
- "Order Quantity not Entered" message may be received when saving a Sales Order - #56591

Shopping Cart
- Timeout Expired error may occur when importing web orders containing kits for certain scenarios - #56205

ACCTivate! 7.2.2 Release Notes (QuickBooks Edition)

Business Activity
- Business Activity Review may refresh every 15 seconds, regardless of settings - #56493

Create Company
- Default Warehouse is WH1 on final page of Create Company Wizard - #54998
- Product Type list is not being created when selected on the Product Import options screen - #55968
- No blank option for default warehouse for branches created from QuickBooks - #55969
- Remove "In progress" flag for Create Company wizard once the standard Sync with QuickBooks begins - #56199

Email
- "Invalid column name 'OrderCount'" error when filtering Broadcast Email Messages on Sales Order count - #55454
- Text for email messages with PDF attachments may not appear properly in ACCTivate! - #55903
- ACCTivate! email should not be sent if attachment file is locked - #56377

Import
- Import Data function may allow beginning quantity on hand for lot or serial-numbered items without a lot/serial number - #29970
- Import Data should accept Marketing Code ID or Description - #52700
- Updating Customer information using the Import Data (Excel) wizard does not support Customer Jobs - #53044
- Import Data (Products) allows non-inventoried products to be imported with Average cost method - #55853
- Bill of Materials not set for new products when using the Import Data (Excel) utility - #55957
- Import Data (Customer) may create blank Contact records if contact fields are mapped - #56013
- Product Import may not properly import in Sales Tax Code. - #56175
- "Unit 'Ea' with Base Unit 'Ea' is not configured" error may occur in Import Data (Excel) function - #56526

Installation
- "Error running database update" for tbImportConversion table may occur if using Web Orders Import module - #56546

Inventory
- Added Cost transaction following Balance Adjustment may not be included in FIFO/LIFO layer - #55262
- COGS Update may calculate differently when starting with different transactions - #55858
- Cost of a Credit may be incorrect when Added Cost Transactions have same Transaction Date as the prior Sales transaction - #55863
- Divide by zero error on component of added cost assembly - #56145
- Original Location may appear for a Lot or Serial number after location/bin transfers - #56462

Login
- "Default transaction date adjusted from 12/30/1899..." message may appear on ACCTivate! login window - #56392
- Splash screen should focus User ID field if it's blank - #56482

Mobile
- "Subquery returned more than 1 value" error in Mobile Picking when a kit or assortment contains the same component more than once - #56294

Product
- Function to rename the Unit of Measure code in Configuration Management - #56117
- "By" column is blank on History tab of Product Information window for Purchase Orders - #55805
- Changing Control Type to Lot or Serial Numbered may cause problems if there are previous transactions - #56150
- Product Availability user default is ignored when opening Find Product - #56421
- Quantity Available for Non-Inventoried items in Product Lookup appears incorrectly - #56524

Purchasing
- Purchase Order Detail grid columns are not aligned when using large fonts / DPI - #56229

Sales Order

- Status Changed By and Date are not updated when Invoice voided and order is re-scheduled - #55927

- Unit column on Sales Order Detail tab may not include full unit text - #56399

- Invalid Discount Type '€' treating it as '%' - #56420

- Product Popup notes may display when opening Sales Order without selecting the Product - #56437

- Price Code lookup button may not display for Sales Order Drop Ship lines. - #56438

- Changes to QuickBooks Class are lost when saving a sales order - #56459

- "Order quantity not entered" message when modifying a sales order - #56471

- Serial Number can be scheduled and invoiced for more than one line on a single sales order/invoice - #56494

- Popup Warning is repeatedly displayed when entering a quantity into the Assortment/Matrix scheduled field for a component - #56528

- Confusion when selecting a Sales order line item to add/modify Lot/Serial numbers or Assortment/Matrix quantities - #56529

Shipping

- TAB sequence incorrect on Print / Export Shipments window - #55887

- Opening Shipment in Package Shipments window, after processing shipment, may not display Tracking Information - #55989

- Invalid Use of Null error may be received opening a Shipment in Package Manager - #56045

- 10,000 carton warning appears in Package Shipments based on stocking unit instead of packaging unit - #56533

Shopping Cart

- In QB US edition, Tax Code should come from product record instead of order header if product has a non-taxable sales tax code - #56463

Synchronization

- "Only one a/r or a/p account allowed per transaction." during Sales or Purchase Invoice synchronization - #29845

- QuickBooks company file verification fails if the QBW file path is blank in the ACCTivate! configuration file - #56481

User Interface

- "Run-time error '58'. File Already Exists" error may be received after changing the columns in a data grid - #56466

ACCTivate! 7.2.1 Release Notes (QuickBooks Edition)

Business Activity
- "Illegal data value" error may be received entering in time on a Business Activity - #56373

Configuration
- Resize tax category grid to full width - #56375

- Selection Prompts side arrows cause ACCTivate! to close when clicked - #55819

- "Document Numbers" grid in Configuration Management doesn't resize properly - #55890

- Issue when adding new Unit of Measure in configuration option - #56314

Create Company
- Initial Product Import during Create Company Wizard does not set the Cost Layer for FIFO/LIFO products - #56231

- Out of memory error when importing a very large number of invoices from QuickBooks - #56270

Customer
- Special Order Product does not display on Customer Products tab - #56140

EDI
- Disable "Receive ACCTivate! Orders" button after initial click - #56431

- EDI Manager may crash on 64-bit machines if system is not licensed for EDI Manager - #56434

Email
- "Multiple-step operation generated errors..." may occur in Broadcast Email Messages tool for lengthy contact names - #56423

Installation
- "Error running database update" for tbImportConversion table may occur if using Web Orders Import module - #56297

- "File not found" errors may occur when opening certain windows after upgrading from ACCTivate! 6.4.x or an earlier version - #56359

Inventory
- "Subscript out of range" error when posting transactions for inactive warehouses - #30721

- "Invalid character value for cast specification" error may be received when posting negative lot/serialized Assembly - #56148

- Transferring a Lot between warehouse locations will impact the Received and Issued fields on the Lots tab - #56256

- "Either BOF or EOF is True..." error may be received when posting an inventory transaction if Document Date is selected - #56329

- Location on in Lot/Serial reports may be blank when using Multiple Location Control module - #56427

License
- "LICENSE TAG FILE NOT FOUND" error may occur due to Windows security configuration problems on ACCTivateData shared folder - #56396

Lookup
- Ambiguous column name 'GUIDSalesperson' in Invoice lookup for users with "Restrict by Salesperson" permission - #56366

Mobile
- Duplicate count lines may be created by ACCTivate! Mobile when using the Blind Count option without the Multiple Location Control add-on module - #55586

- Inventory Transfer may return "Product does not exist in Database" error if product isn't stocked in both From and To Warehouses - #55946

- Selected Assortment/Matrix component items do not appear in ACCTivate! Mobile Picking - #56327

- Error opening Inventory Count sheet after upgrading to ACCTivate! 7.2 - #56451

Product
- Allow Product to be changed from 'Drop Ship' Item Type to be 'Inventoried'. - #56397

- Allow Bill of Materials type to be changed from None to Assembly or Variable Build/Batch - #56409

- Allow Item Type changes between Inventoried and Special Order Only for products with transactions - #56428

- Copy Product function does not copy List Price to new product - #56027

ACCTivate! 7.2.1 Release Notes (QuickBooks Edition)

Product
- "Cannot delete warehouse referenced by purchase orders" message when attempting to remove a product from a warehouse - #56241

Purchasing
- Stocking Unit should always be used for Inventory Receipts for Lot/Serial-numbered items - #56249
- Amounts on Purchase Order window and reports may show as $0.00 for existing purchase orders - #56317
- Purchase Invoice Approved Amount may be incorrectly recalculated after changes are made - #56371
- "Item cannot be found in the collection..." error from Create POs button in the Special Order wizard - #56374
- "Application uses a value of the wrong type for the current operation" error may occur in Drop Ship wizard - #56376

Reports
- Quantity may appear as #### on Sales Order forms for large quantity values - #56384
- Inventory Receipts report no longer displays the Vendor ID. - #56389

Sales Order
- "Override Price Code" user permission does not prevent users from modifying price code on sales quote/order - #53973
- Copy Sales Order function resets Sales Tax Loc to customer default - #54515
- "Invalid use of NULL" exception when using Refresh Prices function for sales order with note line(s) - #56026
- Change Order Workflow Status utility excludes Service Orders. - #56057
- QuickBooks Class on Sales Order may not be updated when changing Customer - #56076
- Sales Order Number may be saved as a space and may cause Sales Orders to be blocked from being created. - #56280
- Price Unit drop-down is blank on first line of sales order if it's a drop shipment - #56351
- Sales Quote (2nd Button) reports cannot be printed due to a "scheduled quantity" warning - #56352
- "Invalid Warehouse" message may appear on sales quote, order or credit memo - #56353
- "Invalid class string" error when entering a missing sales quote, order or credit memo number - #56379
- Sales Order Total Amount field initially appears as "0,00" - #56381
- Payment amount may be incorrect from Web Orders Import for certain currency formats - #56395

Shipping
- "Object reference..." or "Object variable... not set" errors when importing void records from shipping workstation - #56388
- Prepare shipments picks up order with Packaging workflow status - #56394

Synchronization
- "Use Customer Tax Code" is not set error may occur during Invoice synchronization - #56367
- Purchase Invoices may not be synchronized to QuickBooks and "Object doesn't support this property or method" error may be returned. - #56400

ACCTivate! 7.2 Release Notes (QuickBooks Edition)

Business Activity
- Remember previous filters, columns and groups when re-opening the Business Activity Review - #53402
- Drop-down to select unit of measure for Time and Materials tabs for Service Billing - #55111
- Changing Business Activity number then tabbing does not open the new Activity - #55970

Business Alerts
- Workflow status included in both grid and drop-down filter on Sales Order Mgmt tab - #53013
- Support for Vendor's Unit of Measure on Reorder function on Inventory Mgmt tab - #55266

Configuration
- Improvements to Unit of Measure setup in Configuration Management - #54990
- Block changes to Units of Measure that are referenced by products and/or transactions - #49928
- Type Mismatch or Overflow error when creating new inventory transactions if a Prefix or Suffix is configured for Session Numbers - #53857
- Warning that changes to Mobile configuration options require ACCTivate! to be restarted on device(s) - #54799
- "Print Packing List" Mobile Picking option label may be cut off with large DPI setting - #56167

Create Company
- Options for importing Inactive Items from QuickBooks - #53161
- Item Hiearchy option in Create Company wizard should default to Product Type, not Sales Category - #54442
- Convert Unit of Measure list from QuickBooks 2007 or later if multiple Units of Measure option is enabled - #55112
- Import Item Purchase Cost from QuickBooks as Vendor Price in ACCTivate! - #56325
- Sales Category list should not appear if migrating QuickBooks Item Hierarchy as Product Types - #54441
- Hide "Synchronize with QuickBooks before continuing" option unless re-opening the wizard - #54492
- Set Component Quantity to 1 for QuickBooks Item Groups that do not include a Component Quantity - #54495
- "Warehouse ID is required" message when adding Additional warehouses in Create Company Wizard - #54931
- Tabbing is erratic when Creating Warehouse Records in Create Company Wizard - #54995

Custom Fields
- "Multiple-step operation..." error may occur when saving a custom field with a long Caption - #54146

Customer
- Expanded length of Name and Title for Customer Contacts - #33626
- Include Unit and Quantity for both Sales Order and Stocking Units on Products tab of Customer Information window - #55214
- Deleted customer records in QuickBooks without invoices are re-created with option configured to only synchronize customers with invoices - #48243
- Contact Phone / Email description fields only display first 30 characters - #52712
- "Row cannot be located for updating" error when saving a customer after changing a custom field drop-down value - #52759
- Custom Field data is not saved when creating a new customer - #52899
- "Sort order cannot be applied" error when sorting on Message field on Email tab - #55113

Dashboard
- Improved performance by only loading/refreshing visible panels - #54779
- Refresh on each Dashboard panel to independently refresh specific report widgets - #55144
- Increase Auto-Refresh list to include 1 Hour option - #55145
- Include last refresh time for each dashboard widget - #55397
- Resize Dashboard window to fit, when located within main ACCTivate! window - #55486
- Dashboard should not shrink contents below stored size on smaller screens - #56034
- "Problem getting printer information from the system." when opening dashboard if no default printer is set - #56284

EDI

ACCTivate! 7.2 Release Notes (QuickBooks Edition)

EDI
- Include Product Specifications (Length, Height, Width, Weight and Volume) in EDI Invoice and ASN Item rows - #56250
- "Columns in the order by list must be unique" error when exporting ASN - #56242

General
- Use single field for company address in Config Mgr and Register windows to better support international addresses - #56112
- ACCTivateAppDotNet reads ACCTivatePath from 64-bit registry tree when on 64-bit OS - #51846
- Improvements to dropped network connection(s) to ACCTivate! server - #56074
- Mobile and EDI Manager crash if Alterity registry key doesn't exist - #56275
- "There was a problem sending your error report." may occur when sending an error report - #56347

Import
- Include "Vendor Price Unit" for vendor prices in the Import Data (Products) field list - #55455
- "Permission Denied" error when selecting a file in the Import Data function that is open in Microsoft Excel - #53666
- "Invalid Use of Null" exception may occur during Lot Number import if any records contain a blank quantity - #54647
- "Marketing Code exceeds maximum length of 15 characters" error during Import Data (Customers) - #55040

Installation
- Windows 2000 editions are no longer supported - #55747
- ACCTivate installer doesn't go Back when hitting [< Back] on the "Select Program Folder" window. - #55267

Inventory
- Enter inventory receipts in alternate units of measure (default to PO unit) - #52148
- Support for multiple forms (reports) for unposted Inventory Transfers - #53099
- "Update Inventory?" prompt should be "Post inventory transaction?" - #54589
- Default Inventory Transfer form (report) to accompany shipment of goods between warehouses - #55304
- Availability for lot/serial numbers for components in unposted assemblies is not correct - #52890
- Available quantity for Location may be incorrect for lot or serial-numbered items when using the Multiple Location Control module - #54748
- "Non-nullable column cannot be updated to Null" error when printing count sheets - #55114
- Inventory Transaction reports may not print items in original sequence - #55712
- Sales Order lines may be fully scheduled if deprecated "Maintain Inventory" warehouse option is set - #56014
- Tabbing through Amount column on Inventory Receipt may not be properly round Unit Cost based on the Max Decimals for Costs configuration setting - #56097
- Inventory Assembly unit of measure is always displayed as "Ea" instead of stocking unit for assembly item - #56106
- Vendor Last Price, Quantity and Date should not be updated by Added Cost transactions - #56324

License
- Confusing license message after moving ACCTivate! folder to new computer - #56224

Login
- Nothing happens when attempting to log in to ACCTivate! with an invalid User ID - #55197

Lookup
- Select button should be disabled on Lookup windows when no records are displayed in grid - #53557

Mobile
- Users without the "Inventory transactions" permission are able to process inventory transactions in ACCTivate! Mobile - #52121
- "Restrict Access by Salesperson" user permission is not honored in Mobile Order Entry - #54744

Pricing
- Kit and Matrix/Assortment items should support last cost-based prices - #38590

ACCTivate! 7.2 Release Notes (QuickBooks Edition)

Pricing
- Special Order only items do not support Last Cost + % (or amount) pricing - #54988

Product
- Improved default options in Configuration Management for new products - #30892
- Display Color and Size on the Components tab for Assortments - #52042
- Expand length of Sales Category ID from 5 to 8 characters - #53164
- Don't allow changes to Item Type if the product has any transactions - #53226
- Support for alternate units of measure for Price on Vendors tab - #55217
- Include Unit and Quantity for both Stocking and Order unit on History tab of Product Information window - #55265
- Include Alternate Description field in Product Lookup by Alternate Product ID - #55295
- Include alternate units in standard Product report - #55297
- Include Price Unit on History tab of Product Information window - #55450
- Improvements for products no longer stocked or available in a specific warehouse - #55729
- Warning regarding existing transactions when changing the alternate unit factor quantity - #56235
- External Document field doesn't work for local files with file:// protocol - #34896
- Location should be labeled "Last Location" on Lots tab - #54590
- "Object variable or With block variable not set" errors may occur when loading a product - #54782
- Vendor appears on Transactions tab for Receipts for users without "Product Vendors" permission - #55079
- Don't allow changes to the Stocking Unit on Product Information window when existing transactions exist - #55134
- Support for multiple product-specific alternate units of measure per product - #55135
- Last Purchase Qty and Date are not updated by new purchase orders on Vendors tab - #55394

Purchasing
- Abililty to enter purchase orders in an alternate, related unit of measure - #20240
- Unit of Measure drop-down on Detail tab of Purchase Order for non-standard ("N") lines - #53801
- New Display Quantity, Unit, Price and Amount fields for standard Purchase Order reports - #55156
- Synchronize and use Supplier VAT Code override from QuickBooks UK and Canada editions - #56065
- Include SalesOrderNumber in PODetail view for Special Order reports - #56082
- Price for PO should default from first of Vendor Price, Last PO, Last Receipt then Warehouse Unit Costs - #56265
- Sales Order number does not appear on PO for drop shipments - #43587
- Total Outstanding amount on Drop Ship PO is not updated by partial PO Invoice - #56064

Reports
- Report Parameter drop-downs for Warehouse, Product Class, Product Type, Customer Type, Salesperson, Branch, Marketing Code - #27083
- Drilldown to related entities from Crystal Report preview window - #33300
- Include Notes for each report when selecting a report in the list - #52837
- Support for barcodes using ID Automation UPC font - #53580
- Report relation filters for "in" and "not in" a comma-separated list - #54584
- Include Thumbnail for each report when selecting a report in the list - #55143
- "RefNumber" and "Account" fields in JournalLine data view for reports on Journal Entries synchronized to QuickBooks - #56033
- Report Parameter drop-down filters for Business Activity Type, Code, Status, Priority and Resolution - #56046
- Report Parameter drop-down filters for Sales Order Status, Type and Workflow Status - #56047
- Report Parameter drop-down filters for Purchase Order Status and Type - #56048
- CompanyTaxNumber field in Orders and PO data views for reports - #56128

ACCTivate! 7.2 Release Notes (QuickBooks Edition)

Reports

- Support for "_Edition" Crystal Report parameter based on ACCTivate! Edition (ie International) - #56215
- Type is not set based on known fields (ie Customer Name) on Selection Prompts tab - #41545
- User friendly message when attempting to view/print a report without a printer installed - #51796
- "File not found" error when Crystal Report file is missing - #52044
- New database fields may not be available for Selection Prompts in Report Catalog - #52942
- Invalid Use of Null error when opening a report with a blank parameter - #54593
- Confusing message when entering an invalid date value for a report filter - #54617
- Lookup window from Report Selection Criteria places value in the Filter column instead of Value 1 - #54764
- Uncategorized misspelled in Sales Category reports - #55322
- "This field name is not known" when filtering on Priority on various business activity reports - #56058
- Sales Order Summary By Period and Chart reports include cancelled sales orders - #56071
- Local Currency symbol does not appear on Inventory posting reports, based on Windows Regional Settings - #56301

Sales Order

- Allow sales orders on credit hold (with approval) to be released in Prepare Invoices wizard - #35188
- Display Color and Size for components on the Select Assortment window during Sales Order entry - #52041
- Abililty to enter sales orders in an alternate, related unit of measure - #52153
- Include Sales Order unit of measure in Select Assortment / Matrix popup window - #55125
- New Display Quantity and Unit fields for standard Sales Order reports - #55157
- Workflow status in Sales Order, Service Order and Credit Memo lookup - #55254
- Re-label "Qty" as "Pr Qty" for price unit quantity on Sales Order Detail tab - #56238
- "Replace existing contact information?" message may appear when opening a sales order - #52971
- Order workflow status should be reset when backorder is scheduled. - #53503
- Class drop-down is not required, but has a yellow background - #54540
- Copy Sales Order does not include assortment / matrix quantities - #54837
- "Multiple-Step Operation..." exception may be received when opening or saving Sales Order. - #54978
- Invalid Line Type errors creating Sales Orders - #55213
- Price Unit does not drop down when editing a sales order - #55399
- Cannot find Sales Category when adding Shipping on Create Invoice - #55891
- "Either BOF or EOF is True ..." error when saving sales order after "Cannot locate order" message appears - #56008
- Pick Ticket should not be available when no items are scheduled - #56221
- Multiple-step operation generated errors when saving sales order when product Tax Code is blank - #56246
- Changes to the Product Tax Code on Sales Order or Credit Memo may not be saved. - #56290
- Error processing credit cards with 4 digit security codes when using the QuickBooks Merchant Service - #56293
- Invalid use of NULL error when copying Sales Order - #56316

Shipping

- Filter sales orders by workflow status and update to new "Packaging" workflow status - #55882
- Sales Order Workflow Status is not set to "Shipped" when using the Import Data (Excel) function to import tracking numbers for all cartons in a shipment - #53156
- "Package Tracking Website cannot be displayed" message if Carrier is inactive in Configuration Management - #54374
- Overflow error may occur when packaging a shipment with more than 32,000 cartons - #55569
- Default Carton "Packaging" code is not set for new Cartons - #55756

Shopping Cart

- Product selection based on Customer Product ID, Alternate Product ID or UPC - #33606

Shopping Cart

- Sales order import order number set to yes doesn't save - #54257

- Sales orders imported for Customer Jobs are created without any customer information - #55298

Synchronization

- Synchronize the ACCTivate! PO number to the Memo field on the vendor bill in QuickBooks - #47938

- Configuration option to only synchronize customers with sales invoices to QuickBooks - #48367

- Due Date for Purchase Invoice is not synchronized with Due Date on QuickBooks Bill - #52875

- Voiding a Sales Invoice with a QuickBooks Merchant Services Payment may return a sync error. - #55013

- The multi-part identifier "c.CustListID" could not be bound exception during customer synchronization - #55307

- QuickBooks Account descriptions are truncated when synchronized to ACCTivate! - #55775

User Interface

- Save changes to grid columns (position and width) per user for future sessions - #47512

Click here to view release notes from prior version, ACCTivate! 7.1