Release Notes for Version 7.0.5162

App	Feature	Type	Comments	Settings/Required Changes
SPOT	Activity Log	Addition to Existing Feature	**As a SPOT manager user, I would like Activity Log to tell me what presentation was selected when a report was created.** The "Report Created" activity log entry will now record the name of the presentation the user selected as well as the name of the report.	
SPOT	AR	Fix	Fixed a possible crash when generating statements after separating databases.	
SPOT	Configuration	Change	Fixed - Mobile Settings - If any field was alerted as invalid, the form would close with no save. This is now updated, so that most 'invalid' errors will alert the user and remain in the form. The image field, if left blank, will alert the user and prompt to save anyway or return to form.	
SPOT	Configuration	Fix	Fixed an error when attempting to edit a promised date table for the first time.	
SPOT	Configuration	Fix	Fixed a problem where cutoff times were not being stored correctly in the promised date table, causing incorrect promised dates to be assigned to orders.	
SPOT	Credit Cards	Fix	Fixed - CCOF Retrieve Tokens are generated at customer save for those systems that do not use terminals for CC processing. The "Retrieve Token" control was mistakenly placed on the Customer View > AR/CC tab. This is now removed.	
SPOT	Credit Cards	Change	**As a SPOT user, I would like to prepay a pickup total with my credit card, so I can use another card to pay the rest** Order Pickup - If a partial amount is paid by card (credit, debit, gift), the transaction will now be immediately submitted (with a user warning/alert) for processing. Orders that can close, will. Orders that cannot close with a complete payment will remain open, but will have the remainder partial payment applied as a deposit. The Order Pickup view will reset with the remaining orders listed in the view, ready to receive the next portion of the payment.	
SPOT	Credit Cards	Fix	Fixed - Making a payment from the Order View would process the payment, then fail the save, if, after loading on the current workstation, an invoice was modified by another workstation. Additionally, the 'Route Post Orders'	

			and the batch prepay functions has also been updated to help prevent the concurrency error following payment processing.	
SPOT	Credit Cards	Addition to Existing Feature	***Engineering - Print a slip with transaction information when 'Transaction Status Unknown' shows up on screen.*** Failed Card Transactions, or failed payment saves, will cause the system to print a register slip detailing the issue. This provides a hard-copy record, so owners/managers may have a reference or reminder from which to research the transaction results.	Company Settings > Cashier Settings > Print Register Slip with Card Failure (Check-box, defaults to checked).
SPOT	Customer Connect	Fix	Fixed an issue where Web Requests were not properly storing the state if the user doesn't open the "More Addresses" form while processing.	
SPOT	Customer View	Change	***As a SPOT user, I would like the searchable 'Other Contacts' to be formatted for better consistency on searches*** The "Other Contacts" grid in the Details tab of Customer View, now requires a separate last name and first name.	
SPOT	Customer View	Fix	New selection screen for multiple matches on a customer search was not displaying the Address1 field.	
SPOT	Customer View	Addition to Existing Feature	***As a SPOT user, I would like the QC flags added to customer reminders/memos*** Pre-defined customer memos can now be configured as quality control flags.	Company Settings > Customer Settings > Memos > (Memo) > Quality Control Flag Settings
SPOT	Email	Change	***As a SPOT user, I would like the failed column to be hidden from campaign details.*** The failed column is now hidden since it is unused.	
SPOT	Email	Addition to Existing Feature	***As a SPOT user, I would like printable reports for the email campaign tracking*** Added a print button to the Campaign Tracking menu option. The summary, and details are now able to be printed.	
SPOT	Email	Addition to Existing Feature	***As a SPOT user, I would like the batch email template HTML editor.*** An HTML template editor has been added to the Batch Messaging screen.	
SPOT	Exports and Utilities	Fix	The Sales Export service was terminating without creating an export file if it encountered an invoice with a NULL department group.	
SPOT	General	Fix	Fixed - Setting an "additional" CCOF entry as "primary" will now switch the entries correctly.	

SPOT	General	Fix	The A/R payment deletion tool was presenting the wrong payment for deletion because it was not ignoring deleted payments.	
SPOT	General	Fix	Fixed - Issue with CCOF token migration where the system would not update the CCOF record if the entry was disabled.	
SPOT	Gift Cards	New Feature	**_As a SPOT user, I would like to sell gift cards at a discounted rate._** Gift Card Manager - Added the ability to specify a list of preset gift card values, each with a redemption value, and a sale value. If the list of preset values contains any entries, the "Amount" field in the "Sell & Activate Card" selection is replaced with an option to select the card value. This will be used instead of the free-form amount entry.	Company Settings > Gift Card Settings > Gift Card Preset Values
SPOT	Home Page	Addition to Existing Feature	**_As a SPOT Mobile user, I would like the pickup request alert to play the notification sound every minute until it is addressed_** The mobile pickup request alert sound will now continue to play each 60 seconds even if the clerk has left the prompt on the screen without making a selection.	
SPOT	HSL	Fix	Editing HSL definitions - Fixed a memory leak, one that could cause SPOT to crash eventually if a large number of HSL definitions was updated.	
SPOT	HSL	Change	**_As a SPOT user, I would like to deactivate a HSL and flag users why it is deactivated._** Added - Ability to disable HSL, from within the View/Edit view. This is an extension of the HSL Notes, and allows a user to disable an HSL with a notation as to why. HSL's with notes (not disabled) scanned at detail will prompt the user, as before, asking if the user wishes to accept or reject the HSL. A disabled HSL scanned at detail will simply notify the user and reject the scan.	Company Settings > HSL Settings > HSL Notes > Default to Disabled (checkbox). Selecting this option will cause the system to disable the HSL (by default) when the note is selected at run time.
SPOT	Inventory	Fix	Fixed: Cells in the inventory balancing screen were allowing users to change the displayed value. Some cells would display the $ symbol even if not correct for the locality.	
SPOT	Inventory	Fix	Paid PNP orders caused the Change In Inventory report to be out of balance.	
SPOT	Merchandise	Addition to Existing Feature	**_As a SPOT user, I would like a prompt whether to return a merchandise item back to inventory._** Setting to prompt whether to return a merchandise item back to inventory.	Company Settings->Merchandise Settings->Prompt to Return Merchandise Item to Inventory.

SPOT	Order View	Fix	Fixed - Order View, if the order is updated Route/Counter, and exited, then immediately re-entered for another change (promised date, payment, etc), the new update failed to save with a concurrency error.	
SPOT	Pricing	Fix	Customers assigned to discount groups with trailing spaces in the name were not receiving the discount.	
SPOT	Pricing	New Feature	***As a SPOT user, I would like support for an automatic discount % for price levels.*** Support for automatic discount % for price levels.	Company Settings->Mark-in Settings->Price Tables->Price Level Auto Discount A/B/C/D/E
SPOT	Pricing	Addition to Existing Feature	***As a SPOT user, I would like support for price levels for an alteration*** Support for price levels for alterations.	Company Settings->Markin Settings->Alteration Tables->(Item)->Price A, Price B, Price C, Price D, Price E.
SPOT	Pricing	Addition to Existing Feature	***As a SPOT user, I would like support for price levels for an upcharge*** Support for price levels for upcharges.	Company Settings->Markin Settings->Alteration Tables->(Item)->Price A, Price B, Price C, Price D, Price E.
SPOT	Printing	Fix	Additional item disclaimers would print after the clerk had refused to print the first one when prompted.	
SPOT	Printing	Addition to Existing Feature	***As a SPOT user, I would like to configure the invoice template so sold invoices have noticeable SOLD wording on the reprint.*** Added a ClosedDateTime node to invoice templates. This can be used directly or used as an Evaluate-If condition on a text node.	
SPOT	Production	Fix	Fixed - The search corresponding to the advanced production commitment sometimes would show duplicate invoices.	
SPOT	Reports	Fix	Fixed - The production commission flat rate report was not working according to expectations. It is now fixed to use the production cost.	
SPOT	Reports	Change	***As a RouteTrac Mobile user, I would like the RouteTrac Screen in SPOT to show up in stop order by order, then location and location differential*** Updated RTM to better track the customer vs event (action) location, and to track the location disparity. Updated the 'RouteTrac' view in SPOT to reflect these changes, and show the distance from the expected address and the actual location. If the distance is greater than a specified threshold, it will be flagged in red. Updated the SPOT RouteTrac export, as well, to show the customer address, action address, and the GPS coordinates of both, as well.	The setting for flagging the threshold is located at "Store Settings > Route Settings > Mobile - Verify Scans with GPS"
SPOT	Reports	New	***As a Route user, I would like to have an 'On Demand***	

		Feature	**Request Reconciliation Report' that would allow us to see detailed information for reconciliation** Added - Report to the 'Route' suite of reports, called "On-Demand Request Reconciliation". This report prompts for a store, date range, and shows (grouped by route) all on-demand requests, with request date, type, customer name/phone/address, and the detail date/pieces/price of any orders that result from the visit request.	
SPOT	Reports	Change	**As a SPOT user, I would like the 'Route Mileage Entered at Post' report to be available for internal use** Report - Route Dashboard - Revised to include the mileage (starting, ending, total driven) for each route on the report.	
SPOT	Restoration	New Feature	**As a SPOT restoration user, I would like to handle non-salvageable items** A "Non-Salvageable Items" screen has been added to the F3 Menu . This will enable users to flag specific items in a restoration job as non-salvageable, which can then be excluded from or included in the restoration manifest. F3 Menu > Order Management > Restoration Non-Salvageable Items	There must be a department named "Non-Salvageable" (or "Non-Restorable") in the price table associated with the restoration orders. That department must point to a department group of the same name. When non-salvageable items are split into new orders, they will be mapped into the "Non-Salvageable" department if a full matching Category > Item mapping exists, or if not they will be created in the department as describe-and-price items.
SPOT	Rewards	Addition to Existing Feature	**As a SPOT user, I would like to set a price level for a customer rewards program** Price Level for customer rewards profile.	Company Settings->Customer Rewards Settings->Customer Rewards Profiles->Price Level dropdown.
SPOT	Rewards	Addition to Existing Feature	**As a SPOT user, I would like to require ACH info for certain rewards programs.** Option to require ACH info for customer rewards program (note - applies to rewards programs which require purchase via a price table item).	Company Settings->Mark-in Settings->Price Tables->Department->Category->Item->Rewards Require ACH Info.
SPOT	Rewards	Addition to Existing Feature	**As a SPOT user, I would like to require birthday and email address at rewards signup.** Options to require birthday and/or email address on rewards signup. The customer rewards dialog now includes email address and birthday fields.	Company Settings->Customer Rewards Settings->Rewards Profile->Require Email Address Company Settings->Customer Rewards Settings->Rewards Profile->Require Birthday
SPOT	Routes	Fix	Fixed - The 'Alphabetize Route' option didn't deal correctly with duplicate names. This is now fixed.	
SPOT	Routes	Fix	Fixed - Defining Route Zones with the Telogis	

			component.	
SPOT	Routes	Fix	Fixed - Route Post Orders - When selecting "Unmark All", the system will no longer prompt, for each customer, whether or not to select one or all orders. The system will also no longer prompt for non-delivered reasons, if enabled. If non-delivered reasons are required, customer-by-customer selection will allow for this option, as expected.	
SPOT	Search	Fix	The "Force Customer Selection" screen will now display customers that match on secondary phone number in addition to primary phone number.	
SPOT	Search	Addition to Existing Feature	***As a SPOT user, I would like to look up a customer using their rewards membership id*** Include customer rewards membership id in extended lookup.	
SPOT	Setup	Change	Company Settings->Customer Settings->Notification Settings - Show "[Hidden]" on notification type name, accept double-click to edit.	
SPOT	Setup	Fix	SPOT-supplied customer notification type later set to "Cannot Select" were being re-added after a SPOT update.	
SPOT	SMS	New Feature	***As a SPOT user, I would like an SMS message sent to the assigned manager's telephone number when first employee clocks in.*** Added sending SMS messages to one or more phones on the first clock in for the store. Message is in the format: "First Clock In - STORE - LAST, FIRST - TIME"	Store Settings > Time Clock Settings > Send SMS on First Clock In Store Settings > Time Clock Settings > SMS Destination
SPOT	SPOTMap	Fix	Google Maps Verify Address - The system will now show the route when a mouse-click is recorded within the boundaries of a visible zone. Fixed geocoding issue that failed to correctly deal when a named subdivision was returned.	
SPOT	SPOTMap	Fix	Fixed - Google Maps, customer address verify would not show all route zones. This is now corrected. Also corrected the ability to click and select an address that may lie within a visible zone.	
SPOT	SPOTMap	Fix	Fixed - Telogis - Verify address, when 'Show Route Zones' is selected, will now correctly zoom the view to show all route zones	
SPOT	Timeclock	Fix	The "Time Clock Employee Detail" report was incorrectly including time assigned to non-wage labor categories in	

			its calculations for overtime.	
SPOT	Utilities	Change	**As a SPOT user, I would like the customer import utility to flag blank 'Lastname' as 'unresolved'** The customer import utility will now mark rows as unresolved if name fields are present but blank.	
Conveyor Client	General	Change	MP Storage Conveyor - Store Offload, has the ability to sort/group by name. Added a new setting (OptimizationKeyStoreChars) to limit the number of characters in the last name, offering a faster-but-less-precise alphabetic mode.	
Conveyor Client	General	Fix	Fixed - MP assembly conveyors using BAM did not split/print correctly when utilizing SPOT Split Monitor.	
Conveyor Kiosk	General	Change	**As a SPOT Kiosk user, I would like the kiosk server to be time-zone aware** Time zone awareness has been added to the Kiosk Server so that orders will be sold out using the local time instead of the time where the Kiosk Server is running.	
Conveyor Kiosk	General	Change	**As a new SPOT Kiosk user, I require a clearer phone number button layout.** The phone number/PIN lookup screen in SPOT.Kiosk now has a clearer layout, and the Enter button is more prominent.	
CustomerConnect	General	Fix	Trailing slashes when first loading the site will now properly load all file dependencies.	
CustomerConnect	General	Fix	If an account fails to load, then it is no longer kept in cache as an uninitialized account.	
CustomerConnect	General	Fix	A direct link to the signup page will no longer redirect to the login page.	
CustomerConnect	General	New Feature	**As a CustomerConnect developer, I would like to be able to preview with themes without changing settings.** Added support for previewing theme changes without having to save settings. Append the following to the URL: ?theme=(THEMENAME) or ?themeurl=https://domain/stylesheet.css	
CustomerConnect	General	New Feature	**As a CustomerConnect developer, I would like to be able to integrate a custom header/footer.** Added support for a header and footer template.	
CustomerConnect	General	Change	**As a CustomerConnect developer, I would like an additional stylesheet for overrides.**	

			Added the ability to specify an url for an additional stylesheet for any overrides or additions.	
CustomerConnect	General	Change	Main menu is now a component. All states now inherit from a parent state that initializes all app settings if they have not already been initialized.	
Email Services	General	Change	Added "" to disable marketing CRM entry if the subject is blank.	
OTS	General	Change	Improved the performance of the query for the Route Reminders campaign. This should no longer time out on large customer databases with dozens of routes.	
ProductionTrac PC	General	Fix	Fixed - Isolated cases where the production steps would not load into ProductionTracPC.	
SPOT API	General	Addition to Existing Feature	Added to SPOT API developer site: Notices for discontinuation of old endpoint. User Agent being required. GET Actions page describing all possible actions. Updated SaveCustomer documentation to note that the ClientAccountID must match the logged in user.	
SPOT API	General	Fix	Fixed an issue with saving a signup when using Web Requests.	
SPOT API	General	Change	Standard result failures will now return as a 200 - OK.	
SPOT API	General	Change	Added "Cell/Mobile" phone type when using signup or account update with Web Requests.	
SPOT API	General	Change	Addresses can now have the PostalCodeMask provided to override the default setting value.	
SPOT API	General	Fix	Fixed API documentation to correctly indicate that the request type must be "Signup" for new customer signups rather than "SaveCustomer".	
SPOT API	General	Fix	When an user attempts to login, if they use a bad password the response is now correctly using HTTP Status 200 - OK with a body of "Login Failed."	
SPOT API	General	Fix	"RememberPasswordRequest" will now only return a RememberKey if the email address exists in the database.	
SPOT API	General	New Feature	***As a SPOT API developer, I want to be able to login using Single Sign On providers (Facebook, Google, etc.)*** Added support for 3rd party authentication providers. Facebook and Google are currently supported.	
SPOT API	General	Change	***As an API developer, I would like to be able to change the route or store of a customer.***	

			"ConvertToDelivery" now allows transferring an existing route customer to a different route. Existing in process orders that are assigned to the old route will be moved to the new route.	
SPOT API	General	Addition to Existing Feature	***As an API developer, I would like a function to recommend a store/route tuple based on lat/long.*** ADDED - New function "GetRecommendedRoute" that will return the route id for the specified latitude and longitude coordinates provided. CHANGED - "Signup" and "ConvertToDelivery" will now check for the best route if latitude and longitude fields are provided and there are route delivery zones set up. Providing a RouteID field overrides this functionality. This will fall back to the "Default Route Name" setting.	