

Release notes

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2026-04-20

Security & Authentication

- **New Login System:** Introduced "Clerk" as a secure sign-in provider for the application.
- **Sign-Out Improvement:** Updated the logout process to ensure all security sessions are properly cleared.

AI Features

- **AI Sweet Assistant:** Launched a new AI-powered chat assistant to help you analyze and manage your sales pipeline.
- **Chat History:** You can now save and revisit previous conversations with the AI assistant.
- **Quick Access:** Use the shortcut `Ctrl + I` to open the AI assistant from anywhere.

Sales & Quotes

- **HQ Shipping Control:** Added a toggle to individual quote items to specify if they should be shipped directly from HQ.
- **PDF Customization:** You can now choose to hide tariff codes or child item details (prices and quantities) on PDF documents.
- **Automatic Translation:** PDF delivery notes and invoices now support automatic translation based on the destination country.
- **Email Attachments:** Added options to include HS activation codes, licenses, and e-invoices as attachments when sending emails to customers.
- **Invoice Syncing:** You can now sync billing addresses and payment dates directly from a sale order to an issued invoice.
- **New Version Tool:** Improved the "Create New Version" button for quotes to streamline the revision process.
- **HQ Order Info:** Subsidiaries can now view detailed HQ status information, production notes, and shipping/billing addresses for external orders.

CRM & Account Management

- **Dun & Bradstreet (DUNS) Integration:**
 - Search for companies using DUNS data.
 - Create new accounts directly from DUNS records.
 - Link existing accounts to DUNS to keep information up to date.
 - View company hierarchies and family trees.

- **Flexible Opportunities:** You can now select multiple "Solutions" and "Solution Areas" for a single opportunity.
- **Sales Visibility:** Sales orders are now visible directly within the Opportunity details page.
- **Tenant Linking:** Super-admins can now link partners to specific subsidiary "tenants" for better cross-organization data flow.
- **Improved Contact Creation:** When creating a contact from a department, the department's primary address is now automatically filled in.

Production & Inventory

- **Modification Checklists:** Added "Required Modification" checklists for serial numbers to ensure all necessary unit updates are completed during assembly.
- **Operator Ratings:** Production managers can now rate assembly tasks (1-5) to track quality and performance.
- **Stock Service Improvements:**
 - Added a "Whole Goods Receipt Faulty" shortcut to mark all items in a shipment as damaged.
 - System now prevents closing a service entry until an "Issue Solution" is selected.
- **Statistics Control:** Resources can now be marked to be ignored in performance statistics.
- **Tariff Code Management:** Added a dedicated section to manage and update system tariff codes.

Forecasting & Reports

- **Advanced Forecast Imports:** Sales forecasts can now be imported from orders across different subsidiaries and tenants.
- **Data Export:** Added the ability to export product hierarchy sales data to Excel.
- **Statistics Queries:** Introduced a tool for administrators to create and schedule custom data queries for internal reporting.

General Improvements

- **Smart Language Detection:** New notes now automatically default to the language of the partner's country.
- **Conference Check-in:** The QR scanner now displays participant apparel sizes and gender to speed up gift distribution.
- **Timeline Optimization:** Improved the activity timeline to load faster and handle large amounts of history more smoothly.
- **Refined Search:** The "Go To" menu now filters results more accurately based on your specific permissions.

2026-04-23

- Added "Stock in finishing" tracking to product inventory and parts lists.
- New user profile setting allows you to receive email notifications whenever a task is assigned to you.
- Redesigned the Changelog viewer to organize general, technical, and API updates into separate tabs.
- Improved table management tools to easily link, view, or remove filters associated with scheduled jobs.
- Simplified the conference check-in tool to automatically handle voucher prefixes during manual entry.

2026-04-29

- **New Custom Pages Feature:** Added the ability to create and manage static HTML pages directly within the administration menu.
- **Enhanced CRM Records:** Added new tracking fields to Sales Orders, including "Total Net Amount" and "Open Invoice Amount," and introduced a "Request Partial Delivery" option.
- **Improved Activity Timeline:** Notes and tasks now display "source badges" to show which linked account or opportunity they originated from, and users can now detach linked emails directly from the timeline.
- **Smarter Selection Menus:** Selection lists for payment terms, delivery conditions (incoterms), and other predefined values now automatically hide disabled options to simplify data entry.
- **New Update Notifications:** Added a "New update" badge to the navigation bar that alerts users when a new version is available, prompting a page refresh to access the latest features.

2026-05-05

- Fixed an issue where the search functionality was not correctly disabled on the Stock page.

2026-05-12

- Fixed an issue where Excel and PDF exports failed to download correctly due to authentication errors.
- Added new "Calibration Partner" and "Ordered Calibration" fields to ISO Calibration forms.
- Added a document scanner shortcut directly to the Received Invoices list for quicker access.
- Improved table readability by optimizing column widths and adding sticky headers for item details.
- Updated various labels for clarity, such as shortening "Business Central" to "BC" and refining accounting terms.

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2026-05-13

- **Improved Exports:** Fixed an issue where Excel and bank file exports would fail to download; these now work reliably across all modules.
 - **ISO Calibrations Update:** Added new fields for "Calibration Partner" and "Ordered Calibration" to the calibration forms and details view.
 - **Document Scanner Access:** You can now access the document scanner directly from the Received Invoices list to view or upload attachments quickly.
 - **Table Enhancements:** Improved table layouts with optimized column widths and a new "sticky" feature that keeps details visible even when scrolling horizontally.
 - **Label Clarifications:** Simplified various labels throughout the app, such as shortening "Business Central" references to "BC" and updating accounting terms for better clarity.
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2026-05-14

Here are the updates for version 1.678.0:

- **Competitor Tracking:** Added a new module to manage and track competitors, including the ability to record competitive products and link them directly to sales opportunities.
- **Flexible View Switching:** Introduced a "View Switcher" for Sales Orders, allowing users to toggle between different layouts (such as CRM-focused or ERP-focused views) based on their needs.
- **Enhanced Support Tickets:** Improved the help desk integration to display full conversation histories and requester details directly within the ticket window.
- **CRM Sales Enhancements:** Added functionality to create credit notes for issued invoices and integrated a new "Non-Standard Request Form" for complex sales opportunities.
- **Improved Table Layouts:** Optimized column spacing and labels across several modules—including Production, Work Orders, and Inventory—to make dates and status information easier to read.

2026-05-15

- Increased currency rate precision to four decimal places for more accurate entries.
- Improved the page view switcher to ensure it strictly follows user permissions and access rights.
- Standardized how different views are loaded across the system for a more consistent user experience.

2026-05-19

Here are the updates for this version:

- **Sanction Screening System:** Added a new compliance feature for partners that includes color-coded status badges (Cleared, Pending, or Blocked) and a detailed screening results dashboard.
- **Compliance Restrictions:** Invoicing and packing are now automatically blocked if a partner's sanction status is unconfirmed or if an End User Certificate (EUC) is pending review.
- **Navigation Fixes:** Resolved an issue where links in the Sales Orders and Opportunities tables were redirecting users to the incorrect pages.
- **Work Order Improvements:** Streamlined the rebooking process to automatically mark associated tasks as complete and added a "sticky" action bar for easier access to buttons on long pages.
- **Language & UI Updates:** Added Danish language support and improved the visibility of the "Last Note" column in purchase item tables.

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2026-05-21

- Fixed display issues where shipping addresses were pulled from the wrong fields on delivery notes and contact persons were missing from printed invoices.
 - Added the ability to select and auto-fill shipping contact details, such as name, email, and phone number, on delivery notes.
 - Introduced a new option to synchronize the shipping address from a shipment directly to its related invoice.
 - Updated Sales Orders to make shipping and billing name fields visible and editable.
 - Added a "Preview not available" notification for document types that do not support instant PDF previews.
 - Fixed an issue in the Partner section where information could be lost or overwritten during the sanction screening process.
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- Added the ability for users to reset or remove Multi-Factor Authentication (MFA) from their profile settings.
 - Enabled administrators to reset MFA for other users.
 - Improved the "Expense Event" selection in received invoices to display both account codes and names.
 - Updated the default visibility of items within the Sales Order table.
 - Implemented general security enhancements to better protect system information.

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2026-05-22

Changelog

- **Required Production Tags:** Added the ability to use and view tags within the Required Production module.
- **External Services Calculations:** Updated the way material totals and profit margins are calculated for external services to ensure accuracy.
- **Improved Partner Selection:** Enhanced the display and labeling of partner information when selecting them in forms.
- **Sales Order Fixes:** Resolved an issue where copying a partner in sales orders failed to include all of their information.
- **Product Table Fix:** Fixed a display bug where columns in the quality control recalibration table were not working correctly.

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2026-05-25

- Added clear instructions during the two-step verification login process to guide users to their authenticator app.
- Fixed an issue where the data sorting in stock statistics PDF exports was incorrect.
- Added the ability to include and group by specific Work Order items within stock transactions and adjustments.
- Simplified the Product Documentation editor interface by streamlining how documents are displayed and selected.
- Updated warehouse selection in stock adjustments to filter for more relevant locations.

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2026-05-26

- Added clear instructions and prompts to the login page for users completing two-step verification (MFA).
- Fixed an issue where the column order was incorrect when exporting stock statistics to PDF.
- Added the ability to link stock adjustments to specific work order items.
- Updated stock transaction tables to allow grouping and filtering by individual work order items.
- Refined the list of available warehouse locations in stock adjustment forms to focus on relevant waste locations.

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2026-05-29

- Added a new "Related Purchase Orders" section to the detail pages for Opportunities, Quotes, and Sales Orders.
- Improved Lead management by automatically carrying over address information when creating new contacts and adding warnings for missing email addresses.
- Enhanced the Task creation window with better search filters for assigning users and clearer labels for dates and descriptions.
- Updated the Quote summary view to show more detailed shipping and billing address information, including company names.
- Fixed an issue where work order items failed to load when updating shipment dates in the production module.
- Improved the Engraving page by making the table scrollable for easier navigation.

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2026-06-02

- **External Services Enhancements:** Added the ability to link related services together as "Parent" and "Child" items, including a new "System Total" view that shows a cost breakdown of all linked components.
- **Redesigned User Profile:** Updated the profile page with a new sidebar for easier navigation between settings, notifications, and work equipment, plus a new section to view your recent login history.
- **Improved Printing Options:** Added a print menu to Serial number pages, allowing you to quickly print default documents or warranty information.
- **Expanded Search & Comparison:** Added a "Service / Calibration" status filter to Customs Imports and a new option to include specific materials when comparing Bills of Materials (BOM).
- **Excel Export Fix:** Resolved an issue where exporting stock and movement reports to Excel would occasionally fail with an "unauthorized" error.

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2026-06-03

- Improved scrolling behavior for tables, specifically on the Engraving page.
- Fixed an issue where table content could be cut off by enabling horizontal scrolling in detail views.
- Improved the reliability of saving task reservations.

- Improved update notifications with a new button to quickly load the latest version.
- Delivery date change notifications now include both the original and the new expected dates.
- Added business partner selection to additional product-related forms.
- Barcode labels now display warehouse location information for items in the production flow.
- Added sound notifications to alert users when an AGV (Automated Guided Vehicle) arrives.

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2026-06-05

Here are the updates for this version:

- **Enhanced CRM Dashboard:** Added several new widgets to track sales targets, campaign performance, and account hierarchies, providing a more detailed overview of your sales pipeline.
- **Improved Address Selection:** The address selector now includes department-specific addresses and features clear icons to distinguish between billing, shipping, and primary locations.
- **Streamlined Document Handling:** Redesigned the preview interface for invoices and delivery notes, now allowing you to send these documents via email directly from the preview screen.
- **Expanded Voice Notes:** Added voice recording support to more note fields and expanded language support to include Swedish and Norwegian.
- **Real-Time Data Updates:** Quotes and Sales Order pages now refresh automatically when data is changed by other users or systems, ensuring you always see the most current information.

- Removed the automatic document preview when clicking on a row in the shipping documents list.
- Added the ability to link directly to specific sections within your User Profile (such as Notifications, Settings, or Integrations).

- Fixed a bug in product types where the "Use in profitability" setting was incorrectly linked to material costs.
- Added a new "Book" button to the goods write-offs page, allowing users to finalize documents directly.
- Updated the calibration task view to display both the "Short Name" and full "Name" for products.
- Improved the way error notifications are displayed when a data export fails.

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2026-06-08

Here are the updates for version 1.687.0:

- **New Signature Section:** You can now add, edit, and delete signatures (including name, department, and work position) on Invoices, Delivery Notes, and Shipping Lists.
- **Improved Stock Export:** The Excel export on the Stock page now runs as a background task, providing a smoother experience when downloading large reports.
- **Expanded Cost Center Support:** Added a new "Cost Center DW3.0" field to Fixed Assets, Warehouse Locations, and the Promo Request page for better tracking.
- **Automated Transfer Details:** When transferring fixed assets, the system now automatically suggests and displays the relevant cost centers based on the destination warehouse.
- **Table and Label Fixes:** Improved table reliability by preventing column widths from resetting during filtering, and updated various labels (such as "Children total") for better clarity.

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2026-06-11

Here are the latest updates to the ERP system:

- **Fixed Assets:** Added a new "Cost Center DW3" column to the table view for better tracking.
- **Invoices Received:** Improved the accuracy of invoice items by ensuring tax rates and values update automatically when changing accounts or categories.
- **Signatures:** You can now categorize signatures by "Type," specifically distinguishing between "Default" and "Logistics" signatures.
- **Stock Exports:** Added a notification to confirm when an Excel export is being sent to your email instead of downloading directly.
- **Form Notifications:** Updated error messages to appear as clear pop-up alerts, making it easier to see which fields need correction before saving.

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