

ERP release notes

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Release notes

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.

Release notes

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.

Release notes

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.
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- 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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2026-06-17

Changelog

- **Advanced Currency Handling:** Added a "Price Lists and Currencies" section to Quotes, featuring automated exchange rate updates and support for transfer price conversions.
- **Enhanced Invoicing:** Redesigned the invoice creation window to allow for selecting specific item quantities and syncing previously invoiced totals from the original order.
- **Improved Lead Management:** Added column sorting to the "Open Leads" dashboard widget and improved the display for when no leads are available.
- **New Production & PDF Options:** Introduced a "Single piece flow" setting for CNC work orders and a new option to hide the "Scope of Supply" on PDF documents.
- **User Experience Improvements:** Enabled the ability to copy SKUs and document titles to the clipboard by clicking on them, and added a "Delivery Expected" date field for service upgrades.

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2026-06-18

Improvements & New Features

- **Task Management Update:** The "My Tasks" dashboard now features separate tabs for ERP and Process Manager tasks, including a new option to show or hide completed tasks.
- **Enhanced Product Details:** Added new fields to product forms to track "Cable Length" and identify the original source when a product is duplicated.
- **Expanded Activity Logs:** The "Activity Log" timeline is now available on Lead and Account Department pages, allowing you to track history across more modules.
- **Improved Unreservation Tasks:** Fixed an issue where unreserving items would fail if multiple serial numbers were associated with the task.
- **Navigation & Layout Enhancements:** Standardized the appearance of detail pages and added quick navigation options to order menus for a more consistent user experience.

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Release notes

2026-06-19

- Fixed an issue where the activity count badge failed to display correctly on sales orders and quotes.

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2026-06-22

Here is the changelog for version 1.691.0:

- **Redesigned User Profile:** Overhauled the profile page with a fresh layout, easier profile picture management, and simplified access to settings and integrations.
- **Enhanced Promo Requests:** Added page navigation (pagination) and improved search filters, while introducing real-time stock and "rebook" availability for products.
- **Family Member Updates:** Improved the selection menus for gender and relationship types and added a new export tool for children of active employees.
- **Clearer Error Messaging:** Updated VAT ID validation to show specific feedback from the system and added helpful alerts when HR profile information is missing.
- **Improved Mobile Layouts:** Refined the Stock Market dashboard and various page tabs to display more effectively on smaller screens and mobile devices.

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2026-07-03

Here are the updates for version 1.692.0:

- **Custom Tagging System:** You can now add, search, and create custom tags across all major modules, including Accounts, Contacts, Leads, Opportunities, and Orders.
- **Enhanced Task Management:** The task list now includes a search bar, the ability to filter by status (Open/Closed), and options to sort tasks by name, due date, or creator.
- **Improved Serial Number View:** Added a dedicated CRM view for serial numbers that displays associated customer details, contact persons, and sales history.
- **Opportunity Tracking:** Added new "Won Date" and "Lost Date" fields to opportunities to better track when deals are finalized.
- **Smart Shipment Dates:** Quotes now automatically suggest the first available shipment date and prevent the selection of invalid dates based on the items ordered.

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2026-07-06

Changelog 1.692.1

- **Improved Financial Accuracy:** Fixed profit margin calculations for sales orders and corrected total amount tracking when importing sales forecasts.
- **Enhanced Work Order Planning:** Added a "Wanted Date" field to work orders, allowing for better scheduling and prioritization of internal tasks not linked to a sales order.
- **Redesigned Goods Receipt View:** Updated the product display during receipts to show current product status and provide easier access to packaging weights, tariff codes, and origin country details.
- **Task Management Updates:** Added a new "Final Check" task for serial numbers and included a "Description" column in the main task list for better clarity.
- **Improved Table Filtering:** Added the ability to filter by solutions and solution areas within the Opportunities section.

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2026-07-07

- **Improved Work Order Planning:** Added a "Wanted Date" field to work orders, allowing for better scheduling of internal items that are not linked to a specific sales order.
- **Enhanced Goods Receipt Interface:** Redesigned the product display in Goods Receipts to show more detail (like packaging weights and product status) and added automatic warehouse selection for items requiring modification.
- **Task Management Updates:** Added a "Description" column to the My Tasks view and introduced a new "Final Check" workflow for verifying product serial numbers.
- **Financial Accuracy:** Fixed errors in the calculation of gross profit margins on sales orders and corrected total amount summaries when importing sales forecasts.
- **Data Validation and Filtering:** Added new search filters for solutions in Opportunities and enforced mandatory calibration fields when they are required for a product's warranty.

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2026-07-08

- **Financial Calculations:** Improved the accuracy of margin and profit calculations in sales orders and sales forecast imports.
- **Work Order Planning:** Added a "Wanted Date" field to work orders to help the planner schedule items that are not directly linked to a sales order.
- **Task Management:** Added task descriptions to the "My Tasks" overview and introduced a new "Final Check" workflow for verifying product serial numbers.
- **Goods Receiving:** Enhanced the goods receipt process with a clearer layout, visible product statuses, and improved automatic warehouse selection.
- **Filters & Validation:** Added new filtering options for solutions in opportunities and implemented stricter validation for warranty and calibration settings.

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2026-07-09

Changelog

- **New AGV Cart Interface:** Introduced a dynamic visual interface for managing and viewing robot cart layouts.
- **Improved Navigation:** Added direct links to work orders within the AGV control panel, allowing users to jump to details quickly.
- **Enhanced Service Tracking:** Updated the system to more accurately identify and display "Upgrade" service types in external service records.
- **Goods Receipt Improvements:** Refined the warehouse location selection process when receiving items for purchase orders to ensure better data accuracy.
- **Form Stability:** Fixed a bug that could cause data entry forms to crash when certain expected information was missing.

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2026-07-10

Changelog

- **Enhanced AGV Robot Control:** Added a new dynamic visualization for robot carts and introduced direct links to Work Orders within the AGV Control Panel for easier navigation.
- **Improved External Service Tracking:** Updated the system to more accurately identify and handle "Upgrade" service types based on document categories.
- **Refined Goods Receipts:** Improved the warehouse location selection process for purchase orders and corrected various typos in system alerts.
- **Data Form Reliability:** Fixed a bug that caused errors when forms encountered unexpected empty items during data loading.
- **UI Consistency:** Launched an internal component catalog and documentation system to ensure a more consistent user experience across the entire application.

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2026-07-13

- **New Form Fields:** Added "Intrix department" to contacts, "Default shipping cost" to country settings, "External invoice number" to delivery notes, and "Incoterm location" to shipping lists.
- **Quote & Sales Enhancements:** Improved financial summaries with new VAT and Net Total displays, and added a feature to show or hide software options on quotes.
- **CRM Dashboard Updates:** Introduced a new "Pipeline by stage" widget and updated reporting tools to support custom date ranges and performance comparisons against previous periods.
- **AGV & Production Improvements:** Redesigned the AGV Control Panel with more detailed delivery tables and improved cart views for better warehouse tracking.
- **User Interface Refinements:** Enhanced account selection lists to display city names and updated the invoicing process to prevent selecting items that have already been fully invoiced.

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2026-07-14

- **Enhanced Financial Tracking:** Added VAT and Net Total fields to quotes and sales orders for more detailed pricing visibility.
- **New Dashboard Features:** Introduced a "Pipeline by stage" widget and expanded date filters to include weekly and custom ranges for better performance tracking.
- **AGV Control Panel Upgrades:** Improved the robot control interface with more detailed delivery tracking tables and adjustable cart display sizes.
- **Improved Document Management:** Added a toggle to show or hide software options on quotes and introduced a field for external invoice numbers on delivery notes.
- **User Interface Refinements:** Account selection dropdowns now display the city for easier identification, and country settings now include a field for default shipping costs.

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2026-07-15

New Features & Improvements

- **Upgraded CRM Dashboard:** Added a new "Pipeline by Stage" widget and introduced flexible date filtering across all widgets, allowing you to view data by week, month, quarter, or custom date ranges.
- **Enhanced Quote Management:** You can now toggle the visibility of "Software Options" on quotes and view detailed financial breakdowns including VAT and net totals.
- **Expanded Logistics Data:** Added new fields for "External Invoice Number" on delivery notes, "Incoterm Location" on shipping lists, and the ability to set "Default Shipping Costs" per country.
- **Improved Search & Selection:** Parent account lookups now display the city name alongside the account name to help you identify the correct record more easily.
- **AGV & Production Updates:** Refreshed the AGV control panel with more detailed delivery tables and added an "Intrix Department" field to contact records.

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2026-07-17

Here is the changelog for version 1.692.4:

- **Enhanced Customs Management:** Added new fields for tracking numbers and shipping partners, and introduced tools to generate, preview, and email "Import Disposition" documents directly to forwarders.
- **HR Reward Adjustments:** Introduced a new system for managers to apply individual reward adjustments, including a detailed breakdown showing how rewards are calculated based on attendance and working hours.
- **Advanced Table Filtering:** Added a "Match All" toggle to filters (allowing you to search for items matching multiple criteria simultaneously) and improved how filters are saved in the web address for easier link sharing.
- **Improved File Uploads:** The file manager can now require specific document types during upload and verify that files are in the correct format (such as PDF or XML) for customs records.
- **General Improvements:** Salesperson selection lists now only show active employees, product weight fields now support higher decimal precision, and actual delivery dates are now visible in production views.

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2026-07-21

- **Enhanced Address Selection:** Introduced a new "tree view" for selecting billing and shipping addresses, allowing users to easily pick addresses from related parent companies, child accounts, or specific departments.
- **New Language Support:** Added Dutch and Czech language options for voice-to-text notes.
- **Attendance Management Improvements:** Added new configuration options for attendance event types, including lunch tracking, specific request requirements, and synchronization with external services.
- **Lead Transfer Requirements:** When transferring a lead to another office or tenant, users are now required to provide a reason for the transfer in a new confirmation window.
- **Sales Order Tracking:** Added a "Days in Status" filter to help track how long an order has remained in its current stage, and increased currency rate precision to support smaller fractional values.

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2026-07-24

Changelog

- **AI-Powered Partner Filtering:** Introduced a new search tool for Partners that allows users to filter lists using natural language descriptions (e.g., "partners with red sanctioned status").
- **Enhanced Order & Partner Details:** Added company name fields to shipping and billing addresses on orders, and included new contact fields for email and mobile numbers in partner address records.
- **Improved Currency Visibility:** Shipment documents now display total amounts in their original currency, featuring a detailed tooltip for currency breakdowns.
- **Smart Activity Categorization:** Activities and tasks are now automatically organized into "Upcoming" and "Past" sections based on their specific due dates.
- **Permission-Based Visibility:** Updated the system to hide the "Opportunity" field on orders for any users who do not have the required viewing permissions.
- **AI-Powered Partner Filters:** Added a new search tool that allows you to find partners by simply describing what you are looking for in plain English.
- **New Contact Fields:** Partner addresses now include dedicated fields for contact email and mobile phone numbers.
- **Enhanced Currency Display:** Shipment documents now show total amounts in their original currency via a hoverable tooltip, alongside the default currency.
- **Improved Activity Tracking:** Fixed an issue where tasks and activities were being incorrectly categorized as "Past" instead of "Upcoming."
- **Field Permissions:** The "Opportunity" field is now automatically hidden for users who do not have the specific permissions required to view it.

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2026-07-28

- **AI-Powered Filtering:** Introduced a new AI filter for Partners that allows you to search by describing what you want to see in plain English (e.g., "partners with red sanctioned status").
- **Enhanced Order Documents:** Shipment documents now display total amounts in their original currency via tooltips, and company names are now included in shipping and billing layouts.
- **Expanded Partner Information:** Added new fields for contact email and mobile phone numbers within partner address records.
- **Improved Permission Controls:** The "Opportunity" field on orders is now automatically hidden for users who do not have the required permissions to view it.
- **Dashboard & Activity Updates:** Improved the accuracy of "Upcoming" vs. "Past" activity categorization using due dates and added a requirement to select specific records when setting up certain KPI widgets.

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2026-07-31

Changelog

- **AI Sanctions Analysis:** Added AI-powered analysis for sanction screenings to help identify likely matches and false positives with detailed reasoning.
- **Field Review System:** Introduced a "Review Status" for important product details (like Tariff Codes), allowing users to verify values and track who confirmed them and when.
- **Service Task Work Orders:** Added a new Service Task work order type, including the ability to sync material and labor costs directly to sales orders.
- **Email Enhancements:** Added "Reply All" functionality to the mail client and improved how recipients are handled.
- **Improved Quotes and Customs:** Added a "Related Sale Orders" section to Quote pages and introduced a "Start Process" button for customs import tracking.

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2026-08-04

- **AI-Powered Screening:** Added AI analysis for sanction screening to help identify "likely hits" or "false positives" and provide decision support.
- **Email Enhancements:** Added "Reply All" functionality to the mail client and improved how recipient lists are handled.
- **Work Order Updates:** Introduced a new "Service Task" work order type and the ability to manually attach serial numbers to items via barcode scanner or manual selection.
- **Data Verification:** Added a "Review Status" system for important product data (like Tariff Codes), allowing users to verify and confirm values with visual badges.
- **Customs & Sales Tracking:** Added the ability to start customs processes directly from the imports list and introduced a new "Related Sales Orders" section on quotes.

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2026-08-05

Here is the changelog for the recent updates:

- **Work Order Enhancements:** Added support for Service Task work orders, allowing users to attach serial numbers and sync material and labor values directly to sales orders.
- **AI Sanction Analysis:** Introduced AI-assisted screening to help analyze and verify potential sanction hits with automated recommendations.
- **Mail Client Improvements:** Added "Reply All" functionality and improved how the system handles multiple recipients in the internal email tool.
- **Customs Automation:** Users can now start automated processing for customs imports directly from the tracking number (AWB) group.
- **Improved Data Visibility:** Enhanced tables and forms to show more detail on hover (such as city names) and added a new review system to track when important fields have been confirmed or updated.
- **New Altium BOM Import Wizard:** Introduced a tool to import Bill of Materials (BOM) directly from Altium export files (HTML, CSV, or Excel), including column mapping and a preview of changes.
- **Product Alternatives:** Added support for managing and confirming alternative parts for items within a Bill of Materials, including the ability to set "alternative policies."
- **Enhanced Goods Receipts:** Improved stock booking with a new "Notify Purchasing" feature for quantity mismatches and added checks to prevent duplicate serial number scans across different items.
- **Stock-Taking Adjustments:** Added an "Adjust All" feature to stock-taking, allowing users to quickly process missing or surplus serial numbers found during counts.
- **Expanded Sales and Configurator Details:** Sale orders now display issued Proforma invoices, and the Product Configurator includes new options for managing counter-type (CNT) output variants and custom labels.

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2026-08-10

[1.695.0]

- **Account Management:** Added a "Replaced Account" field to track account successions and a new option to display department names on PDF documents.
- **Dashboard Enhancements:** KPI widgets can now display target goals (e.g., "/ €2M"), and the Overdue Opportunities widget now includes a "Value" column.
- **Announcements:** Introduced a toggle to enable or disable user interactions (likes and comments) for individual announcements.
- **Improved Serial Scanning:** The serial number scanner now supports pasting multiple numbers at once and provides clearer error summaries for bulk entries.
- **User Interface Updates:** Added a button to expand hierarchy tree views into a larger window and standardized PDF filenames to include the partner's name.

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2026-08-12

- **Delivery Notes:** You can now quickly fill in shipping details by selecting an address directly from a partner's profile.
- **Email Client:** The subject line is now a required field when composing new messages.
- **Credit Notes:** Added the ability to include a handling fee when generating a credit note from an invoice.
- **Data Tables:** Added a toggle feature in table headers that allows you to switch between showing only the date or both the date and time.
- **Stock Bids:** Updated the confirmation message to clarify that payments for share bids are due by the end of the trading window.

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2026-08-19

Here are the latest updates for version 1.697.0:

- **Expanded AI Filtering:** AI-powered search is now available on more lists across the system, with improved feedback messages when filters are applied.
- **Filter Syntax Help:** Added a new help guide (accessible via a question mark icon) that explains how to use advanced search symbols for dates, ranges, and comparisons.
- **Email Client Update:** Added the Gmail logo to the email client for better visibility when using Google integration.
- **Improved Quote Pricing:** Enhanced the automatic selection of currencies and exchange rates when creating quotes linked to specific price lists.
- **Flexible Table Presets:** You can now save your table view presets even if you only changed the visible columns.

Changelog

- **New Companies Management:** Introduced a dedicated section to manage multiple companies and link them to specific countries, invoices, and orders.
- **Country-Based Defaults:** Account forms now show helpful hints for settings like price lists and payment terms based on the default values of the account's country.
- **Automatic Activity Tracking:** Emails sent through the system are now automatically recorded as completed activities in the CRM.
- **Enhanced Activity Details:** Added a new field to include additional participant email addresses when creating or editing activities.
- **Improved Table Links:** Phone numbers and web links in list views are now clickable, even when multiple entries are listed in the same column.

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2026-08-24

Here are the updates for version 1.698.1:

- **Added an AGV Inbound Buffers section** to the control panel to monitor production station workload, worker presence, and incoming deliveries in real-time.
- **Improved the "Finish" button on tasks** to display specific error messages when requirements are not met, such as missing serial numbers or incomplete modifications.
- **Added a "Recalculate Stock" feature** to the products page, allowing users to manually refresh stock levels for selected items.
- **Enhanced dropdown menus** with helpful search hints like "Start typing..." or "List is empty," and updated the display of country flags throughout the system.
- **Updated the "Move Work Order Item" tool** to support nesting items under specific parent work order items and fixed issues with saving delivery addresses on purchase orders.

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2026-08-27

Here are the updates for the latest version:

- **Invoice Autofill:** Added a new feature to automatically fill in invoice amounts by reading attached XML files.
- **Work Order Improvements:** Enhanced the tool for moving work order items with better filtering, clearer labels, and fixed an issue where some lists appeared empty.
- **Upgrade Workflow:** Updated the upgrade request process to include new confirmation steps for declining requests and submitting them for pricing approval.
- **Product Categories:** Updated selection logic to ensure only the final (most specific) category in a hierarchy can be chosen for products.
- **Service History:** Added a print button for internal service records to allow for easier record-keeping.

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2026-08-31

What's New in Version 1.701.0

- **Enhanced Vacation Tracking:** A new "Employee Vacation Details" page provides a clear breakdown of available, used, and transferred leave days, including a visual summary graph.
- **Smart Address Filling:** Introduced a contact selector for quotes and orders that automatically fills in contact details (name, email, and phone) for billing and shipping addresses.
- **Improved Lead Management:** Added a dedicated "Company Name" field for leads and redesigned the layout for linking contacts, accounts, and opportunities to make the workflow clearer.
- **Cross-Record File Access:** The file manager now allows you to view documents from related records (for example, viewing Opportunity files directly while working on a Quote).
- **Detailed Quote Overviews:** Quote tables now display both Net and Gross total values, and you can now choose to show the order creator's name on official Order Confirmations.

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2026-09-01

- Fixed an issue on the HR dashboard where vacation data was displayed incorrectly and vacation requests could not be submitted.
- Added "previous" and "next" navigation buttons to Invoice detail pages, allowing you to browse records without returning to the main list.
- Introduced new options when exporting Price Lists to include production prices and the quantity of items sold in the last year.
- Improved the Serial Number management view by adding helpful tooltips for actions like copying, opening, and restocking items.
- Simplified the Workflow Approvals page by removing the help instructions section and updating the layout.

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2026-09-03

- Fixed bugs in the HR dashboard that showed incorrect vacation balances and prevented users from submitting vacation requests.
- Added "Previous" and "Next" navigation buttons to invoice detail pages, allowing you to browse through records sequentially.
- Added new options to include "Production Price" and "Sold Quantity" when exporting data from the Price List Manager.
- Added helpful tooltips to serial number actions (such as copying, restocking, or removing items) to clarify what each button does.
- Improved the layout and navigation of the Workflow Approvals and HR Dashboard pages for better clarity.

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Release notes API