

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.