Spire Business Management Solution

Version Release Notes

NOTE: Spire Server / Spire Desktop 3.6 or higher, require Windows 2012R2, Windows 8.1 or higher

Due to the significant database reorganization tasks that happen in the 3.8 database upgrade, the upgrade from Spire 3.7 and lower, may take some extra time to complete on a large database, during which the Spire server will not be accessible.

3.9 September 6, 2022

New Features;

- Improve Employee Payroll Schedules for 52/53 weekly and 26/27 biweekly pay periods
  *Note: All Payroll Schedules must be checked and recreated as required
- New email engine;
  - Emails sent are now retained as part of communications
  - Email batches can be generated, saved and edited before sending
  - Email no longer requires a document to be generated to create an email in Spire
  - Email is now a list, where emails can be filtered, edited, sent and resent
  - Email now supports adhoc attachments
  - Integrate contact group selection when creating an email batch
  - Included SendGrid as an option in addition to SMTP in Spire Server Admin, Integrations
  - Moved SMTP settings to Spire Administration

  *Note: All non Admin users will need to be given permission to Send Email in User Settings

  *Note: Selectable email account during sending will be available shortly

- Allow additional vendor invoices to be added to a purchase order even when no accrued amount is outstanding on the Purchase Order
- Show committed serial numbers in Inventory Count
- Show hostname in Spire Desktop logon Server List
- Install newer Postgres version during a new Spire Server installation, supporting current generation CPUs
- Add Sales Order fields for Inventory Labels
- Enhance Account Reconciliation when using Bank File
- Allow foreign currency taxes to be posted to foreign accounts if they exist
- Default Job Items to the same Job Accounts as the Job Header
- Remove Last Billing number field from Job Accounts, Details
- Add User Permission for Inventory Transfer
- Add Expiry date to Quotes, Add default expiry days to Company Settings
- Add Standard Carrier Alpha Code to Shipping Methods

- Expand address fields to support larger address fields for other countries
- Add Buyer and Receiver contacts to main Sales Order screen to Save with the Sales Order
- Add ability for additional Sales Order contacts to be added or selected in sales orders, and persisted in Sales history
- Add Weight Unit to Company Settings, Inventory, Miscellaneous. Display in Edit Inventory, Sales Order footer, Purchase Order footer
- Add support for Multi Division Payroll Posting
- Add Comment field to Timecard import
- Add Intuit QuickBooks Desktop to Import Data options in Spire Server Administration
- Add a confirmation dialog and automatically create a snapshot when deleting a company in Spire Server Administration
- Add ability to send a SPS 810 Freeform Invoice from a Sales Order not created by a 855 Order

Spire Desktop Improvements and corrections;

- Maintain carriage returns in Sales Order comments
- Correct size of Notes field on Sales Order header
- Correct edit ability on Customer Notes field in Edit Sales Order
- Allow part number to be cleared on a Sales Order line
- Correctly fill all customer fields on a Sales Order that has been populated with a Service Equipment item
- Clear Ship Date and Tracking number after Invoicing for the remaining order
- Prohibit Invoicing of a Deleted Sales Order
- Transfer Sales Order Item Vendor number from Sales Orders to Sales History while posting
- Correct error displayed when over committing Serialized Inventory with Serialize on receipt disabled and Prohibit overshipping enabled in Company Settings, Inventory
- Make Job Header groups consistent when navigating through Sales Orders
- Include sub-assemblies when using Replace Components
- Add Not Secure message on Spire Desktop logon if there is a problem with the SSL Certificate, or SSL certificate use is being bypassed
- Maintain width of auto complete list when the auto-complete list is repeatedly edited
- Correctly import records that have a blank value in the first mapped column
- Prohibit invalid payment terms during Customer Import
- Treat Excel formulas as values during Import
- Correctly respect User Permission to Edit Customer, Salesperson
- Make Contact Name a required field
- Do not require a prefix of 1 to search by phone number in Sales History
- Clarify Label for User Permission, Inventory Adjustment
- Improvements to SPS EDI 810 Invoice document
- Correct error adding first currency record
- Display carriage return in Communication Alerts
- Retain decimal values entered in Company Settings, Sales Orders, Processing/Invoicing, Freight
- Allow Company Settings, Customer, Terms to be cleared when invalid
- Improve Vendor Chooser on Purchase Orders to warn about Inactive

- Do not automatically put Exempt in Vendor Taxes when a new non-base currency Vendor is saved
- Correct error typing base currency amount in foreign payment field in AP Payment
- Correct error creating a ROE for Timecards without a Timecard Entry Code
- Use the latest version of a report without requiring the user to Exit and Re-logon Spire Desktop

Spire Server Improvements and corrections;

- Correctly update expired SSL certificates
- Enhance Integrations to store more configuration information
- Add ability to restore snapshot directly from Spire Server Administration Snapshots page
- Show an informative error if an Archive file is selected for Restore Snapshot
- Remove snapshots from List in Import Archives
- Add ability to Search on Company List
- Automatically create a snapshot when deleting a company
- Improve confirmation screen when deleting a company
- Allow Spire API Service to start even if invalid company records exist
- Improve error when an Invalid company exists on the Company List
- Improve display of Company status and add tooltips on Company List
- Suggest a unique file name when performing a restore from snapshot
- Rename Company settings on Company List to Database Settings
- Mark addresses phone, fax and email fields as deprecated in the Data Dictionary

Webapp Improvements and corrections;

- Add support for Incoterms to Web Sales Orders
- Allow Sales Order Comments to be edited
- Separate warehouse and part number on Sales Order Items line
- Add French and Spanish locale support to Spire Web
- Remember column locations and sizes
- Respect Price Matrix Promotion Code colours
- Respect freight charges when selecting a Ship Via
- Correct Order Types display when adding a new Order on a mobile device
- Add Company Settings to drop down menu beside company name

Database Changes;

- *address_contacts – add field source_contact_id*
- *email_attachments – new table*
- *email_batches – new table*
- *email_batch_recipients – new table*
- *email_messages – new table*
- *email_message_associations – new table*
- *email_recipients – new table*
- *email_templates.body – replace NULL with ‘’*
- *email_templates.subject – replace NULL with ‘’*

- *inventory_lables – add fields order_no, customer_no, customer_name*
- *inventory_requisitions.src_type – replace 'IMP' with NULL*
- *jobs – remove field last_refno*
- *payroll_schedules – add fields year, week_day*
- *sales_history – add fields quote_expires, bill_contact_id, ship_contact_id*
- *sales_history – remove fields contact_name,contact_phone, contact_cell, contact_fax, contact_email*
- *sales_orders – add field quote_expires, bill_contact_id, ship_contact_id*
- *sales_orders – remove fields contact_name,contact_phone, contact_cell, contact_fax, contact_email*
- *shipping_methods.tracking_url – add to v3 views*
- *shipping_methods – add field SCAC*
- *v3.inventory_images – add fields storage_path, _db_version, _created, _created_by, _modified, _modified_by*

New Reports;

- *Shipping Label – new report*

Report Changes;
All reports – verify database for new fields added to v3 views

- *AR Payment Receipts – Set keywords for Batch Email, add company email address*
- *Balance Sheet – report Retained Earnings in Base Currency only*
- *Comparative Financial Statement – report Retained Earnings in Base Currency only*
- *Customer Price Matrix – Set keywords for Batch Email*
- *Customer Statement – Set keywords for Batch Email*
- *Disbursements Journal – rewrite details section to show all links made at payment time*
- *Employee Ledger Detailed – sort on timecard date*
- *Employee Ledger – sort on timecard date*
- *Financial Statement by 12 Periods – report Retained Earnings in Base Currency only*
- *Financial Statement by 13 Periods – report Retained Earnings in Base Currency only*
- *Historical Comparative Statement – support comparing to leap years*
- *Inventory Bar Code Label 5160 – verify database*
- *Inventory Label 2X1 – verify database*
- *Inventory Label 5160 – verify database*
- *Invoice Batched – Set keywords for Batch Email, add clickable Tracking number, improve French text, add Buy and Receiver contact information, suppress all details for kit components not toggled to show*
- *Invoice Posted – Set keywords for Batch Email, add clickable Tracking number, improve French text, add Buy and Receiver contact information, suppress all details for kit components not toggled to show*
- *Order Confirmation – Set keywords for Batch Email, add clickable Tracking number, improve French text, add Buy and Receiver contact information, suppress all details for kit components not toggled to show*

- *Packing Slip – add clickable Tracking number, add weight unit, improve French text, add Buy and Receiver contact information, suppress all details for kit components not toggled to show, calculate item count for kit components only if shown*
- *Payment on Account B – add ?locale support for French and Spanish*
- *Payment on Account P – add ?locale support for French and Spanish*
- *Payment on Account Receipt – add ?locale support for French and Spanish*
- *Payroll Direct Deposit – Set keywords for Batch Email, add Pay Period text, improve French text*
- *Payroll Cheque-Bottom – add Pay Period text*
- *Payroll Cheque-Centre – add Pay Period text*
- *Payroll Cheque-Top – add Pay Period text*
- *Pick Ticket – add clickable Tracking number, add weight unit, improve French text, add Buy and Receiver contact information*
- *POS Receipt – improve French text*
- *POS Receipt Reprint – improve French text*
- *Process Slip – add clickable Tracking number, improve French text, add Buy and Receiver contact information, suppress all details for kit components not toggled to show*
- *Purchase Order – Set keywords for Batch Email*
- *Quote – Set keywords for Batch Email, add clickable Tracking number, add Expiry Date, improve French text, add expiry date, add Buy and Receiver contact information*
- *RMA Order – Set keywords for Batch Email, add clickable Tracking number, improve French text, add Buy and Receiver contact information, suppress all details for kit components not toggled to show*
- *Sales Order – Set keywords for Batch Email, add clickable Tracking number, add Buy and Receiver contact information, suppress all details for kit components not toggled to show*
- *Ship Slip – add clickable Tracking number, add weight unit, add Buy and Receiver contact information, suppress all details for kit components not toggled to show, calculate item count for kit components only if shown*
- *T4-14b-employee – Set keywords for Batch Email*
- *T4A – Set keywords for Batch Email*
- *T5018 – Set keywords for Batch Email*
- *Trial Balance – report Retained Earnings in Base Currency only*
- *Work Order – Set keywords for Batch Email, add clickable Tracking number, add Buy and Receiver contact information, suppress all details for kit components not toggled to show*

3.8.7 August 8, 2022

Spire Desktop Improvements and corrections;

- Improve Customer, Vendor and ShipTo address lookup speed when creating a new Sales Order or Purchase Order
- Allow AR Payments from the Sales Order List when the default Order Type is set to Quote
- Correctly populate v3.addresses.phone with the Customer/Vendor main phone number when creating a new Sales Order or Purchase Order
- Correctly support Salesperson/Territory restrictions in Customer, Contacts list

Database Changes;

- *v3 views – update for addresses.phone*

3.8.6 August 2, 2022

Webapp Improvements and corrections;

- Resolve issue with button responses when using Spire Web on mobile platforms

3.8.5 July 12, 2022

Spire Desktop Improvements and corrections;

- Correct batch posting of an invoice when a back order and remainder deposit exists, and trial posting is used
- Improve speed on reports that access the addresses table

Report Changes;

- *Batch Journal – support use of Tax3 in Canadian databases*
- *Batch Journal Reprint – support use of Tax3 in Canadian databases*
- *Sales Order List by Ordered – support use of Tax3 in Canadian databases*
- *Sales Order List – support use of Tax3 in Canadian databases*
- *Sales and Taxes 4 – support use of Tax3 in Canadian databases*
- *Sales and Taxes – support use of Tax3 in Canadian databases*

3.8.4 June 16, 2022

New Features;

- Add July 2022 Payroll Changes
- Add respect for Unit Of Measure when scanning UPCs in Point of Sale

Spire Desktop Improvements and corrections;

- Improve creation of Production Order Full Text index when upgrading or restoring a snapshot
- Improve GL Transaction rounding for Inventory Transfers with added amounts

3.8.3 May 24, 2022

New Features;

- Add ability to set SPS Commerce to use Sandbox for testing

Spire Server Improvements and corrections;

- Improve integrations associations migrations
- Correctly refresh license when button has been clicked
- Correctly refresh expired certificates

Spire Desktop Improvements and corrections;

- Correct ability to change Company name in Company Settings, Company, Address
- Correct credit authorization on Payfirma
- Clarify customer associations and inventory associations user interface
- Correct Part number auto complete drop down width on Sales Order line
- Improve Spire fields label text on Sales Order Import, Item Job fields
- Correct Delete behavior in Sales Order, Contact List
- Use Customer Payment Terms when no Payment Terms match found on Imported SPS Commerce Orders
- Make item matching more flexible when importing Orders from SPS Commerce
- Improve 810 Invoice for SPS Commerce EDI creation
- Allow Created by, Modified by filters to use lowercase initials
- Automatically populate Line Reference field from Header Reference while adding lines to Inventory Adjustments
- Use rate on Transaction when Voiding foreign AP transactions
- Do not leave an unbuilt Production Order when creating a new Production Order and immediately building it
- Only update the Location for the Item’s received UOM, when receiving a Purchase Order
- Correct Total when receiving a new PO that was never Issued
- Allow a UDF Page to be deleted
- Correct Customer Import, Discount field
- Allow tracking URL to be removed from a Shipping Method
- Do not show Inactive GL Accounts in Budgets List
- Respect user permission in Edit GL Account, History tab
- Correct label for User Setting, Inventory, Adjust Inventory
- Correctly respect User Setting, Edit Profit Center in Edit Sales Order
- Correct respect permissions settings for Deleted Sales Order access though Open Related buttons
- Check for related records when deleting Price Matrix Promotions
- Prevent leading or trailing spaces when creating an Inventory UOM code
- Allow 9 digit Transit or ABA Routing number for US Bank accounts
- Correct error when created an EFT for a Customer with a Bank Account number that is too long
- Ensure Company Settings, Company, Banking, File Creation number is set correctly
- Add reference to Data Dictionary for customers tax_id_type and tax_id
- Correct database lock situation where a batch of un-Invoiced Sales Order is being created while other users are Invoicing Sales Orders

Webapp Improvements and corrections;

- Correctly save an edited Sales Order with previously populated fields
- Correctly show Customer List when Show Prospective Customers is not enabled

Report Changes;

- *Cash Balance Details – Show Deposits when company set to Live Invoice*
- *Customer Payments List – do not start details on a new page*

- *Customer Statement – centre “Current” label*
- *Historical Trial Balance – correctly support different end periods*
- *Income Statement compared to Budget – do not hide rows with budget values*
- *Invoice Batched – clean up right vertical line intersections, edit tax fields to support 4 taxes in Canada*
- *Invoice Posted – clean up right vertical line intersections, edit tax fields to support 4 taxes in Canada*
- *Order Confirmation – clean up right vertical line intersections, edit tax fields to support 4 taxes in Canada*
- *Packing Slip – clean up right vertical line intersections*
- *Pick Ticket – clean up right vertical line intersections*
- *Payroll Cheque-Bottom – always show * disclaimer text*
- *Payroll Cheque-Centre – always show * disclaimer text*
- *Payroll Cheque-Top – always show * disclaimer text*
- *Payroll Direct Deposit – always show * disclaimer text*
- *POS Receipt – improve form alignment, correct payments translation, edit tax fields to support 4 taxes in Canada*
- *POS Receipt Reprint– improve form alignment, correct payments translation, edit tax fields to support 4 taxes in Canada*
- *Process Slip – clean up right vertical line intersections*
- *Production Build – match sort order of Edit Production Order*
- *Production Order – match sort order of Edit Production Order*
- *Production Trial Build – correct UOM and group by part number*
- *Quote – clean up right vertical line intersections, edit tax fields to support 4 taxes in Canada*
- *Receipts Order fulfilment – show non requisitioned Sales Orders after Requisitioned ones*
- *Receiver General by Payroll Dates – add non-taxable deductions to Gross Payroll, correct Grand total Federal Tax when a Quebec group exists*
- *RMA Order – correct payments translation, clean up right vertical line intersections, edit tax fields to support 4 taxes in Canada*
- *Sales Order – correct payments translation, clean up right vertical line intersections, edit tax fields to support 4 taxes in Canada*
- *Ship Slip – clean up right vertical line intersections*
- *T4-Summary – calculate total Employer EI from timecards*
- *Transfer Packing Slip – support Price Selected*
- *Work Order – correct payments translation, clean up right vertical line intersections, edit tax fields to support 4 taxes in Canada*

Database Changes;

- *address_contacts – change index*

3.8.2 February 9, 2022

New Features;

- Add ability to add unlimited number of Contacts to Addresses
- Add Budgets and Forecasts module
- Add options to Copy Order from Sales History
- Add Total Current Cost to Edit Inventory Components tab
- Add Tracking support to Sales Orders Shipping, add tracking URL to Shipping methods
- Show Inventory colour in Sales Orders and Sales History Items tabs
- Add ability to Select All or none in Inventory copy

Spire Desktop Improvements and corrections;

- Consistently use the year timecard period to determine the payroll year to post timecards to during Recalculate Employee Amounts
- Populate RSP contributions and Union dues on Timecard list
- Allow dates to be made blank in Record of Employment, 17C
- Improvements to GL Accounts Import, to support updating Budgets and Forecasts fields
- Introduce ability to sort on columns in Inventory Adjustments and Transfers
- Move EFT File Creation number to Company Settings, Sequence Numbers, General
- Handle logon error when spire-cloud is not available
- Correct Requisition Permission Error during Sales Order, Invoice
- Correct Open Related button in Edit Inventory, Serial numbers, Count
- Do not populate Terms and Due Date on AP Payments
- Remove the requirement to set Phone and Fax number formats in Company Settings and Contacts

Spire Server Improvements and corrections;

- Adjust size of horizontal scroll bar
- Reposition progress bar to centre

Webapp Improvements and corrections;

- Correctly save a Sales Order without a lock on it

Database Changes;

- *address_contact_types – new table*
- *address_contacts – new table*
- *addresses – remove fields phone, phone_type, fax, fax_type, email, contact_name, contact_phone, contact_phone_type, contact_fax, contact_fax_type, contact_email*
- *sales_order.location – make non null*
- *sales_history.location – make non null*

New Reports;

- *Budgets and Forecasts – new sample report*
- *Income Statement compared to Budget – new report*
- *Income Statement compared to Forecast – new report*

Report Changes;

All reports – verify database for new fields added to v3 views, replace contacts in applicable reports to use new address_contacts table

- *Income Statement – suppress subgroup footer when no subgroup is set*
- *Invoice Batched – add currency support to footer fields, improve order by phone number*
- *Invoice Posted – add currency support to footer fields, improve order by phone number*
- *Order Confirmation – add currency support to footer fields, improve order by phone number*
- *Payroll Cheque-Bottom – use various on pay rate as needed, suppress vacation pay remark when not required*
- *Payroll Cheque-Centre – use various on pay rate as needed, suppress vacation pay remark when not required*
- *Payroll Cheque-Top – use various on pay rate as needed, suppress vacation pay remark when not required*
- *Payroll Direct Deposit – use various on pay rate as needed, suppress vacation pay remark when not required*
- *POS Receipt – add ?Locale support, respect currency settings, show total discount*
- *POS Receipt Reprint – add ?Locale support, respect currency settings, show total discount*
- *Packing Slip – improve order by phone number*
- *Pick Ticket – improve order by phone number*
- *Process Slip – improve order by phone number*
- *Quote – add currency support to footer fields, improve order by phone number*
- *Receiver General by Payroll Dates – correct Quebec totals*
- *RMA Order – add currency support to footer fields, improve order by phone number*
- *Sales Order – add currency support to footer fields, improve order by phone number*
- *Ship Slip –improve order by phone number*
- *Work Order – add currency support to footer fields, improve order by phone number*

3.7.6 June 20, 2022

New Features;

- Add July 2022 Payroll changes
- Add ability to set SPS Commerce to use Sandbox for testing

Spire Server Improvements and corrections;

- Improve integrations associations migrations

Spire Desktop Improvements and corrections;

- Correct credit authorization on Payfirma
- Correct error creating an EFT file with an invalid Transit or File Creation number
- Clarify customer associations and inventory associations user interface
- Make item matching more flexible when importing Orders from SPS Commerce
- Use Customer Payment Terms when no Payment Terms match found on Imported SPS Commerce Orders
- Improve Invoice support for SPS Commerce

Report Changes;

- *Transfer Packing Slip – support Print Selected*

3.7.5 February 8, 2022

Spire Desktop Improvements and corrections;

- Improve XML Parsing for SPS Commerce
- Correct city, state error creating an ACH file
- Correct error Transferring Payment amount on a foreign EFT Payment Batch

3.7.4 January 11, 2022

Spire Desktop Improvements and corrections;

- Add Statutory Pay Totals to Edit Employee Earnings tab, this Year, Last Year
  *note: Payroll, Recalculate Employee Amounts needs to be run to populate the values
- Include Statutory Pay - Pay Type and Custom - Pay Type in T4, to Employment Income Box 14 (a custom pay type is one where a timecard entry code is used, but no "pay type" is set)
- Add ability to Select All/None in TD1 Update screen when selecting 'automatic' as a TD1 value
- Do not allow Provincial TD1 Update to be set to Automatic unless the province is NS or YK
- Correct error adding /editing an Employee when logged into a year for which payroll tables are not available
- Correctly reset Bonus amount during Payroll, Recalculate Employee Amounts
- Correctly include Bonus in Edit Employee, Earnings, Net Pay amount
- Allow timecard import of hours, rate and pay amount in a single sheet (supports mixed pay types in one sheet)
- Do not include non-taxable benefits in Payroll, Change Remit Source Deductions, Gross Period Payroll
- Correctly update Vendor Statistics when performing Year End Close or changing Fiscal Periods
- Correct error and present warning when changing Fiscal Periods, Current Year End where transactions would exist outside the new fiscal years
- Correctly retain Sales Order, ShipTo ID added on an Order in Spire Web

Spire Server Improvements and corrections;

- Ensure database connection is released after API call for Company List

Database Changes;

- *employees – add fields ytd_statutory, lst_statutory*

Report Changes;

- *AP Payment Remittance – Correct logo from underlying following section*
- *Employee Ledger Detailed – correctly reset Bonus amount, add Statutory and Custom Pay to All Other Column, remove Pension column, add CPP and RRSP columns*

- *Employee Ledger – correctly reset Bonus amount, add Statutory and Custom Pay to All Other Column, remove Pension column, add CPP and RRSP columns*
- *Payroll Cheque-Bottom – add Year to Date Statutory Pay if it exists*
- *Payroll Cheque-Centre – add Year to Date Statutory Pay if it exists*
- *Payroll Cheque-Top – add Year to Date Statutory Pay if it exists*
- *Payroll Direct Deposit – add Year to Date Statutory Pay if it exists*
- *Receiver General Report – Use Taxable amount for Gross Payroll Amount*
- *Remittance List-Detailed – rename column to Gross Period Deductions*

3.7.3 December 17, 2021

New Features;

- Add January 2022 Payroll changes

Spire Desktop Improvements and corrections;

- Correct attribute error after backspacing and deleting an account while creating a GL Transaction
- Correct attribute error creating a ACH Payment file
- Correct occasional duplicate error when Processing a Requisition that should create multiple Production Orders
- Do not allow a user without edit company settings access, to view company settings
- Extend SPS Commerce part number mapping to use buyer_part_number and allow mapping of a customer as well as an item id
- Correct Spire version name on Spire Desktop installer

Spire Server Administration Improvements and corrections;

- Ensure that file does not upload when performing a Report Upload with an invalid file
- Improve Company List refresh after migrating a company
- Correct Spire version name on Spire Server installer

Database Changes;

- *integration_associations – change constraints*

New Reports;

- *1099-NEC 3-UP – New report*

Report Changes;

- *AP Payment Remittance – add support for logo and company address info*
- *Bank Disbursements List – remove duplicate hidden records skewing payment amount*
- *Customer Statement – add support for French and Spanish*
- *Financial Statement by 12 Periods – reset totals unconditionally on section change*
- *Financial Statement by Period – reset totals unconditionally on section change*
- *Historical Inventory Status report – add support of Onhand quantity parameters selected to filter report*

- *Lot Number Trace – remove shading on first record, add totals*
- *Receipts Order Fulfillment – remove stored printer driver from report*
- *Receiver General by Payroll Dates – add more totals to Group Footer*
- *T4-14b-CRA – 2021 changes*
- *T4-14b-employee – 2021 changes*
- *T4-14b-employer – 2021 changes*
- *T4-Summary – 2021 changes*
- *T4A – 2021 changes*
- *T4S Summary – 2021 changes*
- *T5018 – 2021 changes*
- *T5018 Summary – 2021 changes*

3.7.2 November 16, 2021

New Features;

- Add ability to include Foreign Accounts in GL Allocations

Spire Desktop Improvements and corrections;

- Do not delete serial records when Ship Qty is changed to 0 in a Sales Order Credit (RMA)
- Improve behavior prior to 'QCloseEvent' error while editing a Sales Order
- Correct error Saving a Sales Order after editing the Serial quantity
- Correct Sales Order Levy amount during UOM conversion
- Correctly use current prices on Inventory lines when a Sales Order is copied from Sales History Note; non inventory prices are retained
- Correct occasional error displaying Serial number list in a Sales Order
- Correct occasional error deleting Sales Order lines with nested kits
- Correctly post Payments to General Ledger when posting a Sales Order batch and printing a Trial Posting report in the process
- Change label in Special Accounts, Layaway Deposits to Sales Order Deposits
- Do not reassign Equipment when creating a Work Order for another customer's equipment
- Display Equipment number in Sales History, Invoice
- Allow Equipment to be deleted even if it has a Note
- Correct occasion error in Requisitions when default Inventory, Default Vendor is invalid
- Do not allow a ShipToID to be changed in Edit Customer
- Hide Price Matrix Margin column for user without View Cost enabled
- **Multi Edit Price Matrix no longer creates new records**
- Correct error running Price Matrix update twice in succession on the same records
- Do not allow GL Transaction for Purchase Order Receipt to post beyond period 12/13 Next Year
- Allow Purchase Order return without over shipping message when UOM conversion is used
- Correct calculate Min Qty on a Purchase Order line using UOM conversion
- Correct error in Scan items on a Purchase Order with serialized items
- Do not allow a Purchase Order to be closed if lines items have a receive quantity but the Purchase Order has not been Received

- Correct error when resizing a column in Inventory, Bill of Materials and then clicking < or >
- Retain component details when copying an Inventory Kit
- Correct error Scanning serialized Inventory in Inventory Count
- Use Inventory UOM by default on Inventory Transfer
- Receive correct part number after editing an item on an Inventory Transfer line to a part number that does not exist in the destination warehouse
- Correct Inventory ReAllocate to use Production Order UOM conversion
- Improve rounding calculations for landed freight and duty in Purchase Orders
- Correct Ontario WSIB maximum insurable earnings calculation in Ontario timecards
- Improve GL Transaction posting using values with more than 2 decimals
- Do not allow failed GL Transaction posting to update GL Account values
- Correct error deleting a GL Subgroup
- Correctly support foreign accounts in AR Batch Payments Transfer to Bank Account
- Correct occasional error changing User Settings
- Improve Customer import for Price Code, Special Code, Last Invoice Date, Last Invoice Number
- Correct data dictionary for ap_transactions

Spire Server Administration Improvements and corrections;

- Add icons to show companies that need a database upgrade
- Correct Spire Desktop installer filename when downloaded from Spire Server Administration
- Correctly support search, sort and number of records per page in Reports tab
- Correct the ability to set the Next snapshot date and time
- Do not add a snapshot schedule for another company when adding a company to the list
- Refresh Company List after BV Import adds a company

Webapp Improvements and corrections;

- Correctly show Sales Order List for non admin users
- Correctly populate Terms on Sales Order
- Correctly respect Items Tax flags when added to a Sales Order
- Allow Sales Order Invoice Date to be edited if user has permission
- Correct Totals shown on Quotes

Report Changes;

- *V3 views – make slight changes to make them exactly the same as Spire 3.6*
- *AP Payment Remittance – suppress Details sub-report when no linked records exist*
- *Disbursements Journal – improve report description, improve grouping when multiple records exist with the same transaction number*
- *Inventory Movement by Source Date – ensure multiple transactions with the same date are presented in the right sequence*
- *Inventory Transfer – respect Selected records*
- *Lot Number Trace – include transactions created by Inventory Adjustments and Transfers*
- *Material Requirements by Inventory – removed subassemblies from main report and add a sub-report for subassemblies that need to be built first*

- *Receiver General by Payroll Dates – remove benefits from Gross Pay*
- *Total Payroll for Date Range – improve province, benefits and deductions totals*

3.7.1 September 1, 2021

- Improve Build and Deploy process

3.7 August 31, 2021 Internal Release

New Features;

- Add SPS Commerce EDI integration
- Add support for Avalara VAT in Europe
- Add ability to override Avalara Entity Code on a Sales Order line
- Add Integration Association to Imports
- Add Sales Tax Entity Code column to Customer List
- Add POS Terminal support for Payfirma (Payfacto)
- Add ability to create a new company with an empty GL Chart of Accounts
- Add AR Aged Tooltip to the Sales Order screen when hovering over AR Balance
- Add Hold button inside Edit, Sales Order
- Add Vendor Payment and Expense accounts to Accounts Payable List
- Add Product Code to Inventory Count
- Add Product Code to Inventory Adjustments and Transfers
- Add email address to Employee List
- Add date column to AP and AR List shown when making a Payment
- Add currency field to Price Matrix to store foreign currency pricing records

Spire Desktop Improvements and corrections;

- Move Sales Order Info tab fields onto Main tab
- Do not lock second user trying to Invoice a Sales Order when another user has Sales Order Invoice, Review GL screen open
- Correctly display Company Settings, Banking, Company Long Name
- Show UDF field label with an * when it is set as "required"
- Remove unused "Convert Selling Prices from Base Currency" and currency rounding settings from Edit Currency

Spire Server Administration Improvements and corrections;

- Improve message when no Spire license is located, add ability to Refresh the License or Setup a new one
- Improve behavior when attempting to delete the current user
- Replace spinning wheel with skeleton screen
- Change Italics font with indicator icons

Webapp Improvements and corrections;

- Respect Company Settings, Customer, Defaults when creating a new customer

- Add Sales Order sort on ShipTo name
- Set default FOB on a new Sales Order

Database Changes;

- *currencies – remove fields selling_conversion, sell_price_rounding, sell_price_level01, sell_price_level02, sell_price_level03, sell_price_level04, sell_price_level05, sell_price_level06, sell_price_level07, sell_price_level08, sell_price_level09, sell_price_level10, sell_price_level11, sell_price_level12, sell_price_level13, sell_price_level14, sell_price_level15, sell_price_level16, sell_price_level17, sell_price_level18, sell_price_level19, sell_price_level20*
- *customers – add fields tax_id_type, tax_id, remove fields payment_provider_id, sales_tax_provider_entity_code*
- *integration_providers – new table*
- *integration_associations – new table*
- *inventory –remove field sales_tax_provider_code*
- *inventory_levy_codes – remove field sales_tax_provider_code*
- *inventory_price_matrix – add field currency*
- *inventory_product_codes – remove field sales_tax_provider_code*
- *payment_terminals – new table*
- *sales_history – remove field sales_tax_provider_id*
- *sales_orders – remove field sales_tax_provider_id*
- *shipping_methods – remove field sales_tax_provider_code*
- *sales_order_credit_authorizations – add fields auth_no, terminal_id*
- *sales_tills – new table*

New Reports;

- *Employee Income Graph – new report*

Report Changes;

- *Purchase Order – add page number*
- *Purchase Order Reprint – add page number*

3.6.10 December 21, 2021

New Features;

- Add January 2022 Payroll changes

Report Changes;

- *T4-14b-CRA – 2021 changes*
- *T4-14b-employee – 2021 changes*
- *T4-14b-employer – 2021 changes*
- *T4-Summary – 2021 changes*
- *T4A – 2021 changes*
- *T4S Summary – 2021 changes*
- *T5018 – 2021 changes*

- *T5018 Summary – 2021 changes*

3.6.9 August 26, 2021

New Features;

- Add ability to print a Payment Remittance rather than a cheque in AP Payment screen

Spire Desktop Improvements and corrections;

- Correct error importing foreign currency GL Transactions
- Show Sales Location for Inventory Sales UOM on a Sales Order line
- Correct error editing Sales Order, Service fields
- Do not add a surcharge to an Invoice being reversed from Sales history, which did not have a surcharge
- Ensure Serial number records retain Closed status during Invoicing
- Correct Surcharge calculation when the UOM is changed on the Sales Order line
- Do not allow Payment Terms record to be deleted if it has been used in Sales or Purchases
- Correctly import overriding Sales Order item descriptions
- Correct error when posting Inventory Transfers created in Spire 3.5 or earlier
- Correct error in date fields when the year 0001 is typed
- Correct Inventory, Receipts, View for Inventory Adjustment records
- Respect Company, Inventory, Receiving/Transfers, Update current cost from transfer enabled even if Post adjustments to GL is disabled
- Correct Inventory On Order when posting Inventory Transfers
- Correct error creating a Quantity Break Price Matrix record for a part number that exists in multiple warehouses
- Refresh Vendor Part number when the part number is changed on a Purchase Order line
- Allow Purchase Order ShipTo customer to be removed
- Correct error when filtering Purchases by Job No
- Correct Lot Number quantity required when building a Production Order with UOM conversion
- Correctly commit Lot Number quantity when building more than the Required Quantity of the Finished Goods
- Limit Timecard, Comment entry to 60 characters
- Ensure that Spire transposes https:// in a server url even if the user enters a http://
- Correct error deleting a UDF field after a recent Edit

Report Changes;

- *AP Payment Remittance – renamed from AP Cheque Remittance since this report now also respects payments other than cheque*
- *AP EFT Payment Remittance – remove from AP Payments, Cheques report list*
- *Financial Statement by 12 Periods – reset GL Group Total after Liabilities section*
- *Financial Statement by Periods – reset GL Group Total after Liabilities section*

3.6.8 August 12, 2021

New Features;

- Add ability to add a File link as well as a URL link to a communication

Spire Desktop Improvements and corrections;

- pgAdmin 32 bit has been deprecated and has been removed from Spire Server installer
- Link to install 64 bit pgAdmin is shown in Spire Server Administration
- improve saving a main record with many linked records by not validating all linked UDF records even if UDF structures have recently changed, only added or edited UDF records are validated
- retain AP entry populated fields when clicking Dismiss after a data entry error
- ensure that EFT File Creation number is not duplicated with AP and Timecard Payments
- re-evaluate Sales Order cumulative prices when a quantity is changed
- correct memory error running Inventory ReAllocation on data with many UOMs
- change the warning when adding a duplicate inventory code, to be the same as customers, vendors, etc.
- do not copy the Location field from the source warehouse inventory record to the destination warehouse inventory record during Inventory Transfer. Changing the value of the Location field in the Inventory Transfer now updates the Location in the destination warehouse
- correctly import Tools, Import, Inventory, Image File
- rename Tools, Import Files to Tools, Migrate Files and show detailed information
- show all serial numbers in Sales History Invoice screen
- retain created date/time/user in Production History when building a Production Order
- correct error printing Customer Product Sales Report when many records are listed
- correct error when a Communication Attachment has a very long filename
- correct error inserting a web url in Inventory Images, where a file path is expected
- improve End key behavior in Chooser field
- improve error message shown when communication between the Spire Server and Spire Central is blocked
- show company just restored from snapshots when uploading reports

Report Changes;

- *Accounts Payable List – show Expense and Payment Account for each Vendor on Details version, remove occasional blank page*
- *Account Reconciliation Detailed – correct hyperlink*
- *Account Reconciliation – correct hyperlink*
- *AP EFT Remittance – make report available for reprint inside a Posted AP Batch*
- *Employee Summary – add employee email address*
- *Financial Statement by 12 Periods – respect GL Group Total flags*
- *Financial Statement by Periods – respect GL Group Total flags*
- *Financial Summary – correct Liabilities Totaling and Asset page management*
- *General Ledger Account Activity – improve formatting of group headers*
- *Inventory Adjustments – add Product Code, print all serial numbers*
- *Inventory Transfer – add Product Code, print all serial numbers*
- *Invoice Batched – improve Incoterms*
- *Invoice Posted – improve Incoterms*

- *Material Requirements by Inventory – correct Required*
- *Order Confirmation – improve Incoterms*
- *Packing Slip – improve Incoterms*
- *Pick Ticket – improve Incoterms*
- *Process Slip – improve Incoterms*
- *Production Build – correct subcomponent sorting*
- *Production Order – correct subcomponent sorting*
- *Production Template – correct subcomponent sorting*
- *Purchase Order Reprint – improve Incoterms*
- *Purchase Order – improve Incoterms*
- *Quote – improve Incoterms*
- *Receiver General by Payroll Dates – remove printer driver causing double sided printing*
- *RMA Order – improve Incoterms*
- *Sales Order – improve Incoterms*
- *Ship Slip – improve Incoterms*
- *Work Order – improve Incoterms, add Deposits*
- *Transfer Packing Slip – print all serial numbers*
- *Transfer Pick Ticket – print all serial numbers*

3.6.7 June 17, 2021

New Features;

- Add July 2021 Payroll changes
- Enable Web Apps for all users with Software Assurance on Spire 3.6.7 and higher
- Create options for CIBC (1464 byte) and NACHA ACH (94 byte) in Company Settings, Company, Banking, File Format
- Add ability to Import attachments from local file system method to Spire managed storage, in the Tools, Import menu item

Spire Desktop Improvements and corrections;

- Correct credit check on Standing Orders after original has had Override Credit Limit performed
- Update Customer prices when a Sales Order is Invoiced without a Save, if enabled
- Correctly show applicable Calendar entries
- Correctly show required Pay Periods on Employee ROE for salaried employees
- Correctly populate ?PurchaseHistoryID parameter when running Post Inventory Receipts report
- Improve error logged in spired.log if Spire Server is uninstalled and re-installed with a new programdata\spire folder causing the loss of the secret key
- Correct Recovery of a Deleted Sales Order with Serial numbers attached
- Improve rounding when posting an Inventory Transfer
- Correct respect User permission for Add Inventory Transfers
- Allow a serial/lot number to be removed from an Inventory Adjustment or Inventory Transfer
- Correctly show Allocated quantities for Serial numbers after posting Inventory Adjustments and Inventory Transfers

- Correctly set Approved By and Approved Date for Credits when creating a new customer
- Remove In Progress and Pending Production Orders from List to be updated from a Template with Update Orders button
- Do not allow Production Orders set to In Progress or Pending, to use Pull from Template
- Respect User, Production Orders, Automatically Commit permission when changing a Production Order from Open to Pending or In Progress
- Correct Data Dictionary for inventory.type
- Send ISO-2 Country code to Payfirma
- Correct error Voiding a Payfirma payment

Report Changes;

- *Account Reconciliation – Remove details from Historical Unreconciled sub-report, report on foreign currency values < .50*
- *Account Reconciliation Detailed – Show details on Historical Unreconciled sub-report*
- *Disbursements Journal – support null reference numbers*
- *Financial Statement by Period – correct Period 9 totals*
- *Historical Balance Sheet – Respect end period selected*
- *Historical Income Statement – Respect end period selected*
- *History Production Build – ensure sub-components are printed directly below the parent sub-assembly*
- *Inventory Count Sheet – force report to sort hyphens like Spire does*
- *Inventory Count Review – force report to sort hyphens like Spire does*
- *Item Allocations – remove posted Inventory Adjustments and Inventory Transfers*
- *Payroll Cheque-Bottom – support Vacation Pay and un-retained Vacation Pay on the same timecard*
- *Payroll Cheque-Centre – support Vacation Pay and un-retained Vacation Pay on the same timecard*
- *Payroll Cheque-Top – support Vacation Pay and un-retained Vacation Pay on the same timecard*
- *Payroll Direct Deposit – support Vacation Pay and un-retained Vacation Pay on the same timecard*
- *Post Inventory Receipts – correctly show previous receipts on the report*
- *Production Template – ensure sub-components are printed directly below the parent sub-assembly*
- *Production Order – ensure sub-components are printed directly below the parent sub-assembly*
- *Purchase Order – Print Customer Shipto communication for Drop Ship Customer, Show Standing status*
- *Receiver General by Payroll Dates – remove unposted timecards, show totals group*

3.6.6 April 20, 2021

Spire Desktop Improvements and corrections;

- Correct Inventory, Import Inventory Images for skipped records
- Correct Blank Report Preview screen experienced on some Video drivers

- Respect Sales Order currency when using a Price Matrix record when the Price Matrix record is populated with a Customer code that is set to a foreign currency
- Correctly save Sales Order, Equipment, Notes information
- Ignore Company Settings, Sales Orders, Always Ship option in Booking Orders
- Correct Part no lookup in Purchase History, Items tab
- Correct Manage Company Access for Payfirma when multiple companies are integrated
- Allow Inventory Import to update weight field even when On Hand > 0
- Remove trailing spaces from Vendor No, Vendor Part No and UOM during Vendor Price Import
- Do not Import Price Matrix records for non-existent Part numbers
- Correctly update purchase receipts part no when running Inventory Code Change
- Improve YearEnd selector in General Ledger, Reports, Historical Financial Report
- Automatically refresh the date in the Spire Desktop Status bar automatically, at midnight when left logged on
- Add test for infinite loops in sales_order_items when creating Sales Order Lists
- Correct support for GL Allocations in Payroll Posting

Spire Web Improvements

- Remove deleted Sales Orders from Sales Order List query

Settings Changes

- *User – Add Purchase Orders, Create Standing Purchase Orders*

Report Changes;

- *AP Cheque Remittance – Ensure report fails email check*
- *Invoice Batched – Group by Order number if no Invoice number exists*
- *Order Confirmation – tweak page footer size to allow for more subtotals*
- *Payroll Cheque-Bottom – show paid un-retained Vacation Pay, improve Pay Type grouping*
- *Payroll Cheque-Centre – show paid un-retained Vacation Pay, improve Pay Type grouping*
- *Payroll Cheque-Top – show paid un-retained Vacation Pay, improve Pay Type grouping*
- *Payroll Direct Deposit – show paid un-retained Vacation Pay, improve Pay Type grouping*
- *Quote – tweak page footer size to allow for more subtotals*
- *RMA Order – tweak page footer size to allow for more subtotals*
- *Sales and Taxes 4 – Remove Tax rebate from Tax 3 for US Companies*
- *Sales and Taxes – Remove Tax rebate from Tax 3 for US Companies*
- *Sales Order – tweak page footer size to allow for more subtotals*
- *Work Order – tweak page footer size to allow for more subtotals*

3.6.5 March 31, 2021

Spire Desktop Improvements and corrections;

- Replace Reports Preview screen to improve support for Search and Zoom
- Allow penny rounding in Sales Orders and POS when a credit payment is applied first and cash used on the balance

- Present a warning if new a Serial number is created at Sales Order time and it is a duplicate of previous Serial number
- Guard against QCloseEvent and NoneType errors in Sales Orders
- Do not automatically focus position on Job Headers when opening a Sales Order
- Maintain Sales UOM with migrated Sales Orders that have used an alternate UOM
- Allow completed date/time to be cleared on a Communication record
- Copy Price Factor during Inventory Copy
- Do not allow an Inventory UOM record to be deleted if it has been used
- Correct banner display of duplicate PO number in a Sales Order
- Store scanned UPC on Sales Order when Scan items feature was used
- Correct double allocation of returned Lot numbers on a Sales Order Credit
- Correct double popup of Levy list when using Sales Order Levy lookup
- Allow user with User Selectable Invoices number enabled, to edit a typo in the Invoice number field before saving the Sales Order
- Ensure that Trial Post on a Sales Order Batch creates a unique temp file for the report, when two people create a Trial Post at the same time
- Prohibit user without permission to add non-inventory items from importing Sales Orders with non-inventory items
- Filter Equipment List to current customer on a Sales Order
- Correct Tax Code filter on Address List
- Ensure all lines show Lot numbers received on Purchase Order after Receive All is used
- Improve Lot Cost calculation with Serialized Costing enabled, when a Lot number is received on a Purchase Order and then returned on a Purchase Order
- Correctly open Purchase History record in Inventory, Lot Trace, Open Related
- Correctly open Purchase History record in Inventory, Movement, Open Related
- Correctly post Inventory Location to receiving warehouse during Inventory Transfer and Adjustment
- Avoid loop when trying to create a Payable EFT file when a Vendor does not have banking information set up
- Do not allow a blank Vendor Price record to be created while adding a new Inventory item
- Correctly import Accessory field during Inventory Import
- Correctly import Expense account during AP Import
- Improve tax validation when importing AR and AP
- Add CIBC required fields to AR EFT file
- Change Employee TD1 amount when Province is changed while adding a new Employee
- Support Serialized Costing when building Production Orders
- Correctly Commit Production Order sub-assembly components when editing the Required quantity of the Manufactured item
- Correctly show created and modified information in Production History
- Do not create Production Orders from Requisitions if there is no Production Manager license
- Do not display YearEnd warning after changing companies to one where it is not relevant
- Support not completed Communications in filters
- Correct ‘superuser’ error when changing companies or after a YearEnd Close has been done

Spire Web Improvements

- Remove Salesperson and Territory from Vendor List
- Correct error while adding a ShipTo address to a Customer
- Add ability to set a ShipTo address as the default
- Allow Country to be populated in ShipTo address
- Allow Customer On Hold to be removed
- Correctly Save a new customer record with one click
- Show only address line 1 on Customer List, Address column
- Allow a Sales Order to be removed from the Customer's Sales Order List
- Support 3 character province/state codes in address screens
- Allow negative discount field in Customer screen

Settings Changes

- *User – Add Inventory, Modify Product Code*

Report Changes;

All Spire 3.6.5 reports verified and changes done, with Crystal Reports 2020 Patch 1

https://support.spiresystems.com/support/solutions/articles/13000088663-crystal-reports-2020-64-bit-and-odbc

- *Customer Activity – Improve line alignment and fonts for readability*
- *Inventory Bar Code Label 5160 – force blank labels to the top*
- *Inventory Count Review – change linking and selection criteria to improve speed*
- *Inventory Count Sheet – change linking and selection criteria to improve speed*
- *Inventory Label 2X1 – force blank labels to the top*
- *Invoice Batched – do not underlay Levy Total, support payment method 8*
- *Invoice Posted – print line with part number "SURCHARGE" if it was created with Spire 3+, support payment method 8*
- *Payment on Account B – support payment method 8*
- *Payment on Account P – support payment method 8*
- *POS Receipt - support payment method 8*
- *Production Order – correct reset of > level on page break*
- *Production Template – correct reset of > level on page break*
- *Receiver General by Payroll Dates – add separate totals for CRA and Revenue Quebec if needed*
- *RMA Order – support payment method 8*
- *Sales Order – correct vertical line extending to bottom of page, support payment method 8*
- *Vendor Activity – Improve line alignment and fonts for readability*
- *Work Order – support payment method 8*

3.6.4 March 15, 2021

New Features;

- Add Contact 2 and Contact 3 information to Customer, Address List

Spire Desktop Improvements and corrections;

- Do not add Accessories to Sales Order if Cancel is clicked in Accessory dialog
- Do not change price on a Sales Order line when a Serial number is selected if Serialized Sell Price is not enabled
- Improve error when trying to establish an Order suffix when the order number will not accommodate the required suffix position “-0”
- Improve link to Sales Order, in a Production Order created from a Sales Order Requisition
- Correct error in Sales Order, Scan Item dialog
- Ensure Serial/Lot numbers are fully Received before allowing them to be Committed
- Allow Sales History Invoice inline comment to be edited
- Correct error in Production menu, Replace Component
- Do not allow a GL Account to be deleted if it has been referenced in any other table
- Improve use of rounding code to avoid Unbalanced Transaction in Trial Post Sales Order Batch
- Improve text on Timecard Batch, change Periods dialog
- Sort benefits and deductions in Timecards
- Improve amount distributed to Job Cost in a Timecard with multiple payment lines
- Correctly Import Vendor Status field
- Correctly support Inventory Adjustments and Transfers in Inventory Movement, Open Related
- Correct Inventory Lot Trace process when an Inventory Adjustment is encountered
- Correctly respect user cost permissions in Inventory Adjustments and Transfers
- Correct ability to Freeze Inventory in Inventory Count with Filters applied
- Remove unused option for Customer Specific Prices from Inventory Copy options list
- Truncate 20 character Vendor No to 19 characters while creating EFT file
- Correct error creating a Note Type when adding a note through the Calendar

Spire Server Administration Improvements and corrections;

- Clear next snapshot date/time and Interval when # Snapshots to Keep is set to 0 on Snapshot schedule

Spire Web Improvements

- Correct Status Code 400 error adding Customers or assigning them to Sales Orders

Report Changes;

- *Inventory Movement by Posted Date – Correct # flag, improve sorting and column spacing*
- *Inventory Movement by Source Date – Correct # flag, improve sorting and column spacing*
- *Invoice Batched – Set Use Index options to improve speed*
- *General Ledger Journal Transactions – Support multiple divisions on the report*
- *Payroll Cheque - Bottom – Improve pay type groups when more than 2 exist*
- *Payroll Cheque - Centre – Improve pay type groups when more than 2 exist*
- *Payroll Cheque - Top – Improve pay type groups when more than 2 exist*
- *Payroll Direct Deposit – Improve pay type groups when more than 2 exist*

3.6.3 February 24, 2021

New Features;

- Add Preferred Vendor to Requisition List if not specified by Source
- Add Find Price button in Inventory Requisitions to select another Vendor's Price record

Spire Desktop Improvements and corrections;

- Correctly calculate Payroll Taxes when Commission or Advanced used on an Irregular Timecard
- Allow import of Timecards without pay rate, use Employee's default
- Remove Salary, Regular Rate, Overtime Rate, Premium Rate columns no longer used, from Employee List
- Correctly sort Benefits and Deductions on List
- Correct error when two users attempt to open the same Sales Order at the exact same time
- Allow Control Accounts to be removed from GL Transaction if GL Integration is disabled
- Correctly display Kit costs in Sales History, Details
- Prohibit editing Sales Taxes in Sales History Invoice view
- Correct error when Overriding a Credit Limit on a Sales Order more than once
- Correct error when adding a Sales Order to the Calendar
- Correctly round Sales Order taxes when Posting Invoice
- Correct error Selling a Lot numbered Item when Serialize on Receipt has been disabled
- Allow Account Reconciliations to be deleted
- Correctly respect when user click Cancel during Post Account Reconciliation
- Do not allow base currency record to be deleted
- Update information in Job Details when updated in Job Accounts
- Revert File Creation number on a failed EFT creation due to Inactive Customer or Vendor
- Allow Customer ShipTo address records to be created with Unique ShipTo setting enabled
- Improve Export of Customers to handle invalid characters pasted into a field
- Improve speed adding a UOM record to Edit Inventory, Prices and Units tab
- Improve display of Price Factor field in Edit Inventory, Prices and Units tab
- Correct Sell Price column on Inventory Movement List
- Correctly populate Vendor Cost on Requisition
- Correctly support Vendor Quantity Break Prices on Purchase Order when they are out of order on the Quantity Break List
- Correctly display History number in Edit Inventory, Production History
- Correctly show Phone Number Formats available when a blank record exists on the Format list

Report Changes;

- *Invoice Batched – Add Contact email address, eliminate "Outstanding 0.00" on payment sub-report*
- *Invoice Posted – Add Contact email address, eliminate "Outstanding 0.00" on payment sub-report*
- *Order Confirmation – Bold Order Quantity to show it is being used to calculated the Extended Amount, add Contact email address*
- *Packing Slip – Bold Ship Quantity to show it is being used to calculated the Extended Amount, add Contact email address*

- *Pick Ticket – Bold Ship Quantity to show it is being used to calculated the Extended Amount, add Contact email address*
- *Process Slip – Bold Ship Quantity to show it is being used to calculated the Extended Amount, add Contact email address*
- *Quote – Add Contact email address*
- *RMA Order – Add Contact email address*
- *Sales Order – Add Contact email address*
- *Ship Slip – Bold Ship Quantity to show it is being used to calculated the Extended Amount, add Contact email address*
- *Work Order – Add Contact email address*

3.6.2 February 16, 2021

New Features;

- Add ability to move a ShipTo address from one customer to another customer
- Add columns Employee, Job No, Job Account to Sales Order Items and Sales History Items Lists
- Add "contains" support to Invoice No and Order No Filters on Sales Order List
- Include current Customers' email address in Sales History when emailing
- Include current Vendors' email address in Purchase History when emailing

Spire Desktop Improvements and corrections;

- Improve speed creating Invoice batches
- Improve speed posting an AR Payment batch
- Respect local time when setting filters on Date columns
- Refresh Costs when Toggling Production Order sub-assemblies
- Save changes when clicking Print in Edit Inventory, Bill of Materials tab
- Correct error clicking Open Inventory button on non-inventory line in Bill of Materials tab
- Correctly set Cash in Bank GL Account as a Bank Account when creating a new company
- Correct error copying Sales Orders with linked attachments
- Correct error creating a Sales Order for a Customer that has an invalid Default warehouse
- Respect Toggled state for Kits during Copy Sales Orders
- Do not suppress all Accessory lines on a Sales Order when suppressing one Accessory line
- Correctly remove Discount from a Sales Order when Customer is changed to one without a Price Matrix record
- Correctly import Sales Order Item Required Date
- Post an Overpaid Deposit on a Sales Order to Credit on AR Account when the Invoice amount is less than the Deposit and is Posted
- Limit Sales History Invoice Edit Job Header to 80 characters
- Correct error doing a Search for a Kitted Part number in POS
- Allow user to change warehouse in POS F9 lookup
- Correctly create 12 Pay periods with a Start Date of January 31, 2021 in Payroll Schedule
- Create Inventory Adjustment posting when returning an Item set for FIFO and the FIFO cost is different than the PO Cost

- Allow a GL Account with Allocations to be selected in Edit Customer, Vendor and Add AR/AP Invoice
- Do not allow a Customer to be saved with a Base Currency code set, Blank = Base
- Re-label Customer column to This Year Sales
- Correct error clicking on Open Related after adding a Communication to a GL Account
- Correct error adding a new GL Subgroup
- Correct error scrolling past the Reconciled column GL Transaction History
- Correct lock condition when a GL Account Reconciliation has been posted twice and error displayed
- Correct error tabbing past Rate column in a Foreign GL Transaction
- Improve the migration of Inventory Images and Communications attachment links

New Reports;

- *Customer Product Sales – new report in Sales History, Reports, Customer Sales History*

Report Changes;

- *Historical Balance Sheet – improve PeriodDates sub-report*
- *Historical Income Statement – improve PeriodDates sub-report*
- *Historical Trial Balance – improve PeriodDates sub-report*
- *Invoice Posted – change template to remove from Sales History, Reports, Customer Sales History*
- *POS Receipt Reprint – change template to remove from Sales History, Reports, Customer Sales History*

3.6.1 February 2, 2021

- Allow more than 6 Other Boxes in Edit T4 screen

Report Changes;

- *Employee Ledger Detailed – Sort on employee number*
- *Employee Ledger – Sort on employee number*
- *Inventory Sales in Base Currency – hide cost columns based on user permission*
- *Inventory Status – remove premature page break with a lot of serial number records*
- *Order Confirmation – Include Tacking number in Ship Via*
- *Payroll Ledger by Department – Sort on employee number*
- *Payroll Ledger by Employee – Sort on employee number*
- *Payroll Ledger – Sort on employee number*
- *Pick Ticket – Include Tacking number in Ship Via*
- *Process Slip – Include Tacking number in Ship Via*
- *Receiver General by Payroll Dates – Sort on employee number*
- *RMA Order – Include Tacking number in Ship Via*
- *Payroll Ledger by Department – Sort on employee number*
- *Ship Slip – Include Tacking number in Ship Via*
- *T4-14b-CRA – Support second T4 when more than 6 Other Boxes are used*
- *T4-14b-employee – Support second T4 when more than 6 Other Boxes are used*

- *T4-14b-employer – Support second T4 when more than 6 Other Boxes are used*
- *Workers Compensation Remittance – Sort on employee number*

3.6 January 25, 2021

New Features;

- Add ability for Spire Partner to license a Spire Server (3.6 or higher) without requiring the license owner to authenticate using email
- Add support for Spire Server to be hosted on spire-cloud.com
- Add Browser module to Spire
- Add ability to add and modify Pay Types in Payroll
- Add Bonus Pay Type with improved tax calculation when on same Timecard as Regular pay
- Add Days Since Last Pay field in Timecard to assist with Tax on Commission calculation
- Post Payroll comments to Job Cost and GL Memo
- Add support for Employee Communication Alerts when adding a Timecard
- Show red Communication tab in Edit Employee when Notes exist
- Add report to assist with calculating Temporary Wage Subsidy for CRA
- Show most recent Payroll Tables supported in Help, About
- Add ability to use Incoterms for Sales Order and Purchase Orders, enable in Company Settings
- Separate Inventory Adjustments and Inventory Transfers and improve both functions
- Add support for multiple Inventory Images
- Add Menu Item in Inventory to Import all Images to Spire managed data folders on the server
- Auto Generate serial/lot numbers will now start at 1 if no initial serial number is set as base, and remember last created serial/lot number
- Add ability to see and change the UOM Warehouse Location during Inventory Count
- Add Open Inventory button in Requisitions
- Add Sync customer details button to Credit Card screen to update address and phone number info at Payfirma
- Add ability to Preauthorize credit cards in Payfirma
- Add Inventory Quantities to Kit Option Dialog
- Show yellow background for user edited costs on a Sales Order
- Add Original Quote number to Sales Order List
- Add Country column to Sales Order List and Sales History List
- Show Levy column on Sales History, Items List
- Add Toggle button for Kits in Sales History, Invoice view
- Add Open customer and Open Inventory buttons to Sales History Invoice view, respect colours
- Add support for Alternate and Vendor Part numbers to Inventory Search
- Add Foreign Currency button to Edit General Ledger Account, Historical Periods
- Add Approaching Year End warning when logging into the last period of Next Year
- Warn when performing YearEnd Close where unreconciled transactions exist in GL Accounts marked as Bank Accounts
- Add ability to Import Exchange rate in AR and AP Import
- Improve error when a non UTF-8 encoded CSV file with non asci characters is imported
- Restrict user access to bank accounts in Customers, Vendors and Employees

- Add “Upload to web” column to Customer and Inventory List

Spire Desktop Improvements and corrections;

- Correct Windows error closing Spire with multiple screens open, on Windows Remote Desktop Server 2012R2
- Improve Spire dialogs appearing off screen using Remote Desktop with single monitor
- Improve display of Report Preview screen
- Correct error selecting Annual on Recurring GL entries
- Use Current Exchange rate when posting Recurring GL entries
- Do not allow Currency Revaluation with 0% Exchange rate
- Improve code that allowed the same Account Reconciliation to be posted twice
- Improve speed loading and posting Accounts Reconciliation
- Make Column Headers and Column Header Selection List consistent in GL Transaction screen
- Improve Available indicators in Edit Inventory, Bill of Materials tab
- Delete UPC record when Inventory record is deleted
- Improve speed and accuracy of Inventory, Lot numbers, Lot Trace screen and report
- Improve button labels in Inventory Labels dialog
- Correctly import Price Factor in Inventory Import
- Show Location segment in AP Payment, Payment GL Account field
- Correct Search feature in Sales Order, Comments, Lookup List
- Correct ShipToID column in Sales Order, Items List
- Correctly attach Communication to a Sales Order when changing from a Quote to Sales Order at the same time as adding a new Communication record
- Improve speed creating many serial numbers on a Sales Order, add progress indicator
- Improve message when adding a Kit or Macro with serialized components to a Sales Order
- Correctly populate Kit items only once on a Sales Order when Show Options is enabled
- Retain Territory in Sales Order when selecting a ShipTo address with no default Territory
- Improve Fill Backorders behavior in a Sales Order if new Inventory has been received since Sales Order was opened
- Do not allow Requisitions from a Sales Order that is Read Only
- Correct Open Target button in Sales Order screen when Purchase Order has been closed
- Correctly maintain UDF tab selection while Navigating through Sales Orders
- Ensure Warehouse, Division and Location is set correctly on Backorder when Order suffix is enabled
- Do not copy Price from Sales History, Invoice View, Copy Sales Order
- Improve error posting a Sales Order with an invalid Location set
- Correctly retain Equipment link when changing a Quote to a Sales Order (Service Manager)
- Correct Sales Order FOB Import
- Correct Edit Customer Address, Update Orders to ignore deleted Sales Orders
- Correct tab behavior in Customer ShipTo screen when adding a new address
- Save New Customer if adding a new Customer and a Sales Order for them at the same time
- Support Open Related on a Customer ShipTo Note in the Calendar
- Correct error when filtering by “Created By” in Sales Order List

- Correct sort on ShipTo ID in Sales, Items List
- Show ShipTo ID in Sales History, Invoice view
- Remove Territory Description when clearing Territory Code in Edit Customer
- Correct Address filter in Sales History List
- Disable Pull from Template icon in a Production Order, if it has been edited
- Allow a Production Order with an attachment to be copied
- Do not duplicate Kits populated on a Production Order from a Template
- Correct error in Production Order when clicking Switch to Alternate
- Update Production History part numbers with Inventory Code Change
- Correct error editing a previously entered Part Number in Inventory Code Change
- Show Inventory Description colour on Purchase Order line
- Correctly round Inventory Cost to a possible 5 decimals when receiving a different UOM
- Commit Inventory that has been Saved in an Inventory Adjustment
- Add ability to update Inventory Current Cost during Inventory Adjustment and Inventory Transfer with Company setting
- Support 20 character Reference number in Inventory Adjustments
- Add ability to remember last used Default UOM for Inventory Transfers
- Disable Delete button on Posted Inventory counts
- Improve speed using Expand All and Collapse All in Inventory Count screen
- Add Tooltips to Company Settings, Company, Numbers
- Improve Save and Delete Filter terminology
- Import GL Transaction sort on Source column
- Improve Vendor Credit Limit settings
- Correct Ship Method Description column in Customer, Address List
- Allow Female, Male, Not Specified for employee gender
- Support Job Name in Job Search field
- Correctly set Current Location as Default in F10 Change Location screen
- Correctly print only filtered records or selected records on Price Matrix report
- Correct column name on Price Matrix Promotion column
- Correct User Type Lookup to display all records
- Improve Click-ability of ‘Show : Open’ Filter button in Accounts Receivable and Accounts Payable
- Respect GL monthly exchange rate for a transaction when posting outside the current period
- Allow a GL Transaction from a Locked Period to be reversed in an Unlocked Period
- Correct error attempting to clear a Due Date on a Communication record
- Improve organization of top Edit menus
- Improve autocomplete in Equipment unit number and license number fields (Service Manager)
- Improve message when the correct payroll tables for Timecard date are not installed
- Increase Timecard Cheque number to 25 characters
- Allow Timecard to be Printed or Voided even if Benefit or Deduction no longer exists
- Include Void Cheques when calculating T5018 amounts
- Correct error sorting timecards on Job Account
- Correct Search feature in T4 List
- Support “+” and “-“ characters in user passwords

- Support Search in Inventory Adjustments and Inventory Transfer Lists
- Expand all Bank Transit fields to 9 characters in Company Settings, Customer, Employee, Vendor
- Correct navigation in Cash Out screen
- Add Tooltip for General Ledger Module
- Improve support for Credit Card Payments in POS
- Correct Print Selected for user ID with an embedded "/"
- Improve speed with YearEnd Close on a company with large amount of UPCs or Vendor Prices
- Improve time to restore for companies with large amount of UPCs or Vendor Prices
- Check for Locked Purchase Order when Processing a Requisition
- Correct text on Recurring Journal Entries, Quarterly
- Correct error when Void an Accounts Payable Transaction where the GL Transaction is in history

Spire Server Administration Improvements and corrections;

- Improve Company snapshot icon
- Set default snapshot schedule adding/restoring a company database, Daily @ 23:59 Keep 1
- Automatically populate database name when restoring a snapshot
- Improve Saving of Snapshot Schedule and Logo settings
- Automatically create a snapshot before performing a database upgrade
- Correct Spire License expiry date, off by 1 day
- Add ability to upload multiple Reports at once
- Automatically refresh Browser screen after clicking Connect in Spire Server Administration, Integrations page
- Add ability to download Spire Desktop installer
- Add ability to reset another User's Password in Spire Server Administration
- Add ability to Export to and Import from an archive file of all Accounting data, User Accounts, Reports, Images and Attachments to easily move all data to another server

Settings Changes

- *Company Settings – Inventory, Receiving / Transfers, Update current cost from adjustment*
- *Company Settings – Inventory, Receiving / Transfers, Update current cost from transfer*
- *User – Remove Purchase Order, Default Order Status*
- *User – Customer, Employees and Vendor-Access Bank Accounts*
- *User – Improve Tooltip for Inventory, View Summary*

Database Changes

- *addresses – increase field prov_state to 3 characters*
- *browser_tabs – new table*
- *employees – add fields ytd_bonus, lst_bonus, remove fields salary, regular_rate, premium_rate, overtime_rate, increase bank_transit to 9 characters*
- *customers – increase bank_transit to 9 characters*
- *gl_reconciliations – remove field start_date*
- *inventory – remove field image_path*
- *inventory_adjustment_items – add field inventory_id, remove fields adjustment_id, freight_by_pct, freight_amt, transfer_pct, whse, part_no, adjustment_no, adjustment_mode,*

src_whse, dst_whse, src_location, markup_pct, required_date, rename field dst_location to location

- *inventory_adjustments – add fields notes, posted, trans_no*
- *inventory_transfer_items – new table*
- *inventory_transfers – new table*
- *note_attachments – new table*
- *notes – remove fields attachment_path, attachment_type, attachment_flag*
- *payroll_dept_entry_codes – new table*
- *payroll_employee_entry_codes – new table*
- *payroll_timecard_entries – add fields entry_code_id, description, drop field code*
- *payroll_timecard_entry_codes – new table*
- *payroll_timecards – add field days_since_last_pay, increase field cheque_no to 25 characters*
- *purchase_history – add fields incoterms, incoterms_place*
- *purchase_orders – add fields incoterms, incoterms_place*
- *sales_history – add fields incoterms, incoterms_place*
- *sales_order_credit_authorizations – new table*
- *sales_orders – add fields incoterms, incoterms_place*
- *system_settings – remove deprecated last_version record*
- *vendors – increase bank_transit to 9 characters*
- *zip_codes – remove table*

New Reports;

- *1099-NEC 1-UP – add new report*
- *1099-NEC 2-UP – add new report*
- *Inventory Adjustments – new Report*
- *Inventory Packing Slip – new report*
- *Inventory Pick Ticket – new report*
- *Inventory Transfer – new report*
- *PD27E – new report to assist with calculating Temporary Wage Subsidy for CRA*
- *RL-1 Worksheet – new report*
- *Sales Order List by Ordered – new report to report values by Ordered Quantity*

Report Changes;

NOTE: All reports changed to use static v3 schema to protect reports when database changes happen

- *AP EFT Remittance – Show selected Vendor credits or previous payments on report*
- *Cash Balance – improve grouping on payment methods when no sequence number is used*
- *Cash Balance Details – add Payment date and reorganize columns for readability, improve grouping on payment methods when no sequence number is used*
- *Comparative Statement – show Last Year negative balances in brackets*
- *Employee Ledger Detailed – support new payroll changes*
- *Employee Ledger – support new payroll changes*
- *Employee ROE – support new payroll changes*
- *Employee Summary – support new payroll changes*

- *Employee Termination – support new payroll changes*
- *GL Account Activity – remove Balance column when not applicable*
- *Historical Inventory Status – remove Kits and non-physical items*
- *Invoice Batched – add support for Incoterms, reduce font on long Company Name, set order to invoice_no*
- *Invoice Posted – add support for Incoterms, reduce font on long Company Name*
- *Item Components – add Location column*
- *Order Confirmation – add support for Incoterms, reduce font on long Company Name*
- *Packing Slip – add support for Incoterms, show tracking number, reduce font on long Company Name*
- *Payroll Cheque-Bottom – add support for new Pay type*
- *Payroll Cheque-Centre – add support for new Pay types*
- *Payroll Cheque-Top – add support for new Pay types*
- *Payroll Direct Deposit – add support for new Pay types*
- *Payroll Ledger by Department – support new payroll changes*
- *Payroll Ledger by Employee – support new payroll changes*
- *Payroll Ledger – support new payroll changes*
- *Pending Inventory Adjustments – remove report*
- *Pick Ticket – add support for Incoterms, reduce font on long Company Name*
- *Post Inventory Adjustments – remove report*
- *Post Inventory Receipts – show Serial/Lot number discrepancy*
- *Process Slip – add support for Incoterms, reduce font on long Company Name*
- *Purchase History – remove filter text from top of report*
- *Purchase Order – correct Ship Via description, add support for Vendor and Customer Communications, add support for Incoterms, reduce font on long Company Name*
- *Purchase Order Reprint– correct Ship Via description, add support for Vendor and Customer Communications, add support for Incoterms, reduce font on long Company Name*
- *Quote – add support for Incoterms, reduce font on long Company Name*
- *Receipts Order Fulfillment – add support for non inventory items*
- *Receiver General by Payroll Dates – support new payroll changes*
- *Remittance List Detailed – suppress 0 subsidy numbers*
- *Remittance List – suppress 0 subsidy numbers*
- *RMA Order – add support for Incoterms, reduce font on long Company Name*
- *Sales Order – improve payments not overlapping footer text message, add support for Incoterms, reduce font on long Company Name*
- *Sales Order Details List – improve Foreign currency*
- *Sales Order List – improve Foreign currency*
- *Ship Slip – add support for Incoterms, reduce font on long Company Name*
- *T4-14b-CRA – 2021 changes*
- *T4-14b-employee – 2021 changes*
- *T4-14b-employer – 2021 changes*
- *T4- Summary – 2021 changes*
- *T4A-Summary – 2021 changes*

- *T4A – 2021 changes*
- *T5018 – 2021 changes*
- *Vendor Ledger – sort on transaction date*
- *Work Order – improve payments not overlapping footer text message, add support for Incoterms, reduce font on long Company Name*

3.5.13 February 13, 2021

- Support CRA's uniqueness for entire second T4 record in T4 XML on 7+ Other Boxes

3.5.12 February 8, 2021

- Create second T4 record in T4 XML upload for 7 or more Other Boxes

3.5.11 February 2, 2021

- Allow more than 6 Other Boxes in Edit T4 screen

Report Changes;

- *T4-14b-CRA – Support second T4 when more than 6 Other Boxes are used*
- *T4-14b-employee – Support second T4 when more than 6 Other Boxes are used*
- *T4-14b-employer – Support second T4 when more than 6 Other Boxes are used*

3.5.10 January 8, 2021 PLEASE review all Employee TD1 Amounts and flags!

- Change for Edit Employee , Amounts, Federal TD1 Amount
  - Use Automatic Checkbox for Automatic base calculation as provided by CRA Tax Tables
  - Use amount from Employee TD1 Total Claim Amount for employees that qualify for more than basic amount
  - Use 0.00 for employees that are using their TD1 amount at another place of employment
- Change for Edit Employee , Amounts, Provincial TD1 Amount for Nova Scotia and Yukon
  - Use Automatic Checkbox for Automatic base calculation as provided by CRA Tax Tables
  - Use amount from Employee TD1 Total Claim Amount for employees that qualify for more than basic amount
  - Use 0.00 for employees that are using their TD1 amount at another place of employment
- Add ability to set Federal and Provincial TD1 claim to automatic in TD1 Update List
- Remove Temporary Wage Subsidy calculation for March – June 2020 on Payroll Remittance
- Improve Payroll Schedule calculation for 12 periods with start date other than January 1
- Correct behavior on Sales Order, Store Prices button
- Allow a non-discountable item to be sold on a Sales Order even if a Price Matrix Discount record applies (force discount to 0 on Sales Order)
- Correct Fractional Quantity not allowed message when Process Requisitions with a UOM conversion happening on the Purchase Order
- Add Tooltip to Edit Inventory, Statistics, Average Cost column

3.5.9 December 22, 2020

- January 2021 Payroll tables added.
- Correctly respect Location segment in GL Transaction for foreign AP and AR Payments

- Ensure AP transaction balances to Payment when Voiding an AP Payment
- Correctly make Job entry negative for when posting a Vendor Credit Memo
- Display correct Location while editing a Sales Order
- Show Income for 4 COVID subsidy periods on T4
- Correctly Save Cash Out Other Payments

Report Changes;

- *Payroll Cheque-Bottom – add QPIP for Quebec timecards*
- *Payroll Cheque-Centre – add QPIP for Quebec timecards*
- *Payroll Cheque-Top – add QPIP for Quebec timecards*
- *Payroll Direct Deposit – add QPIP for Quebec timecards*
- *T4-14b-CRA – 2020 T4 changes*
- *T4-14b-employee – 2020 T4 changes*
- *T4-14b-employer – 2020 T4 changes*
- *T4-Summary – 2020 T4 changes*
- *T4A – 2020 T4A changes*
- *T4S Summary– 2020 T4A changes*

3.5.8 November 4, 2020

- Correctly respect line discount % during Sales Order Refresh Prices
- Correct error editing Sales Order, Phase tab, start / end date information
- Improve speed calculating Cumulative Prices on large Sales Orders
- Do not allow duplicate email addresses when adding credit cards to Payfirma, allowing multiple customers with shared credit cards. Note: Linking customers initially added on the Payfirma Portal to the Spire customer record, is no longer supported
- Correctly show Avalara tax totals on Sales Quotes
- Correctly show Avalara tax totals on Sales Order, Totals by Order Quantity
- Correct error Order Save or Toggle in a Production Order on Orders converted from BVEssentials
- Support TD80 byte EFT file in Accounts Payable
- Correctly assign GL location segment to payment posting on AP and AR Payment (revaluation)
- Correct error printing Inventory Labels from Purchase History

3.5.7 September 29, 2020

- Remove Windows Server 2012 / Windows 8.0 installation restriction from Spire Server and Spire Desktop installer

Note: This does not correct any of the issues where Spire Server will not install correctly on Windows Server 2012 due to missing Microsoft DLLs nor the display problems experienced by Spire Desktop on Windows Server 2012 Remote Desktop and Windows 8.0, or lower

3.5.6 September 23, 2020

Spire Desktop Improvements and corrections;

- Display warning and prohibit Spire Server and Desktop from installing on anything less than Windows 8.1/Server 2012R2
- Correct occasional ‘shipID’ error when reprinting an Invoice from Sales history, Invoice view
- Correctly post terms information from Sales Order to Sales History
- Allow Sales History Comments to be edited even if they were part of a group
- Correct error Copying a Customer that has a ShipTo address
- Correct error Importing Customer User Defined 1 and User Defined 2
- Set Credit Approved fields when importing Customers with Credit Limits
- Correct Approved Date when changing the Credit Limit in Edit Customer, Billing tab
- Correctly populate Quotes with Avatax values with Avalara enabled
- Correctly show Sales Order Deposits Total when more than one deposit exists
- Correctly respect ShipTo address, default warehouse on a Sales Order
- Allow the customer code on a Sales Order to be set by selecting the ShipTo ID
- Correct error when the user Orders more than the available Lot numbers, where the Lot numbers are set to auto consume and the On Hand is more in Inventory, than in Lot numbers
- Retain Original Quote number on Sales Orders created from Backorders
- Correct occasional error using F9 in the Contact field in Sales Orders, and pressing Enter without selecting a Contact
- Correct error when setting a 0.00 Retail Price in POS
- Correct error when Description is edited in POS
- Correctly remove all Sales Order Items records when posting a POS Invoice
- Respect Show Options for Kits when adding a Sales Order from the Inventory List
- Allow a foreign Customer to be selected when creating a Sales Order from the Inventory List
- Allow a foreign Vendor to be selected when creating a Purchase Order from the Inventory List
- Allow AP Invoice to be posted without requiring a Vendor, Payment Account
- Post AP Invoice Taxes into a base currency for Foreign Invoices
- Correctly Refresh Purchase Order Total display when Receiving and Printing
- Check for Locked Purchase Order when Processing a Requisition
- Correctly remove Requisition link when deleting a Purchase Order line
- Correct occasional attribute error Applying AR and AP Payments
- Correctly remember column setting in Inventory Count screen
- Correct Vendor Price export file type error
- Show correct number of decimal places in Edit Inventory, Prices and Units tab, Sell Prices, as set in Company settings
- Correctly save changes to Company Settings, Sales Orders, Orders, Day before an Order is required
- Correctly respect UOM conversion in Edit Inventory, Vendor Prices tab, Variance column
- Correctly remember column setting in Inventory, Bill of Materials tab
- Correct error setting Yield % to 0 in Edit Inventory, Bill of Materials
- Do not restate order quantities for Kit part numbers when using Inventory ReAllocate
- Allow UPC codes to be imported even if they already exist, support UOM change on UPC record
- Correctly post Payfirma Refunds as negative payments
- Do not set default tax accounts in Special Accounts when creating a new company

- Support 2 digit year in date fields
- Support single digit month and day in date fields
- Correctly save Report Security when setting to Disabled
- Correct occasional "x not in list" error during logon
- Force focus on Company List, on Logon screen, so that arrow keys can be used to scroll the list
- Correct error when using "is not one of" Location Filter in GL Account List
- Correct error when attempting to delete a Payment Method

Report Changes;

- *Disbursements Journal – remove discount amount from Void payments*
- *Comparative Statement – show negative balances in brackets*
- *Financial Summary – show negative balances in brackets*
- *Income Statement – show negative balances in brackets*
- *Inventory Status – show discrepancies between Inventory On Hand and Serial/Lot numbers available*
- *Purchase Order Reprint – only use receive_qty on report*
- *Purchase Order – correct @quantity formula*

3.5.5 August 7, 2020

Spire Desktop Improvements and corrections;

- Allow Tax flags to be changed on Sales Order and Purchase Order lines
- Show comments in Sales History Items, Description tab
- Correct error opening Edit Inventory, Vendor Prices tab when list has previous been sorted by currency
- Correctly show UDF Date fields in Lists when fields was not set to Default to blank date
- Correctly save changes made to Edit user, Lock Process/Shipped Orders

Report Changes;

- *Historical Accounts mprove report description*
- *Invoice Batched – correct Levy and Job subtotals overlap*
- *Invoice Posted – correct Levy and Job subtotals overlap*
- *Order Confirmation – correct Levy and Job subtotals overlap*
- *Quote – correct Levy and Job subtotals overlap*
- *RMA Order – correct Levy and Job subtotals overlap*
- *Sales Order – correct Levy and Job subtotals overlap*
- *Work Order – correct Levy and Job subtotals overlap*

3.5.4 July 15, 2020

Spire Desktop Improvements and corrections;

- Display Kit Cost values on Sales Order line after reloading a Sales Order
- Respect user's lack of permission to Edit Sales Order and prohibit adding lines
- Ensure that Sales Order, Phases tab is showing the latest Phase change

- Correct occasional “Transient” error in Sales Order Batch posting
- Correctly retain Customer PO number on a Sales Order when adding a Comment immediately after populating Customer PO field
- Correct error in Fill Orders if a non-numeric value is entered followed by the multiplier character
- Correct “Maximum Recursive” error opening a Purchase Order where the Inventory warehouse location has been edited
- Only update Inventory Sell Price when Receiving a Purchase Order, if the Sell Price in the Purchase Order has been changed by the user
- Correct error on Purchase History Print button when an Inventory Adjustment is selected
- Do not request a Save again after adding a warehouse location in Edit Inventory and saving it
- Allow blank Warehouse field in a new Price Matrix record
- Show Vendor colour in Accounts Payable List
- Allow unit number to be selected after customer in Sales Order, Equipment tab and allow user to select from the list to populate Equipment information
- Correct tooltip for Edit Customer, Set Service Charge Default Example option
- Allow Tax code to be removed from Edit Customer, Addresses, Update Tax codes
- Correctly import Terms code, Account No, Buyer, Notes, Currency in Vendor Import
- Allow Inventory Import to import records with no primary Vendor code when the linked column has no data
- Update Data Dictionary information for purchase_orders

Report Changes;

- *Financial Statement by 12 Periods – print sub-totals for Gross Profit, Operating Income and Income before Taxes*
- *Financial Statement by Period – print sub-totals for Gross Profit, Operating Income and Income before Taxes*

3.5.3 June 30, 2020

Spire Desktop Improvements and corrections;

- Improve speed Invoicing large Sales Orders
- Correctly display Custom Recurring Rules for Invoice Date in Standing Orders
- Correct error when clicking Cancel during Create Invoice batch
- Correct occasional “Inactive State” error while posting Invoice Batch
- Correct occasional Ship Via codes being removed during Invoice posting
- Correctly show Ship To Address Communications records in Edit Customer
- Correctly show Inventory Adjustment Notes in Purchase History
- Show Created and Modified info in View History Purchase Order

Report Changes;

- *Balance Sheet – print GL segments selected by user*
- *Comparative Statement – print sub-totals for Gross Profit, Operating Income and Income before Taxes, print GL segments selected by user*
- *Financial Statement by 12 Periods – print GL segments selected by user*
- *Financial Statement by Periods – print GL segments selected by user*

- *Financial Summary – print GL segments selected by user*
- *Historical Inventory Status – show warehouse on header if multi warehouse is enabled*
- *Income Statement – print sub-totals for Gross Profit, Operating Income and Income before Taxes, print GL segments selected by user*
- *Invoice Batched – change selection criteria in CustomerCommunication sub-report*
- *Invoice Posted – change selection criteria in CustomerCommunication sub-report*
- *Order Confirmation – change selection criteria in CustomerCommunication sub-report*
- *Packing Slip – change selection criteria in CustomerCommunication sub-report*
- *Pick Ticket – change selection criteria in CustomerCommunication sub-report*
- *Process Slip – change selection criteria in CustomerCommunication sub-report*
- *Production Order – improve Unit Cost field for items using an alternate UOM*
- *Purchase Order – print footer fields and total without issuing Purchase Order*
- *Quote – change selection criteria in CustomerCommunication sub-report*
- *Remittance List - Details – show totals even when only one employee is on report*
- *RMA Order – change selection criteria in CustomerCommunication sub-report*
- *Sales Order – change selection criteria in CustomerCommunication sub-report*
- *Ship Slip – change selection criteria in CustomerCommunication sub-report*
- *Trial Balance – print GL segments selected by user*
- *Work Order – change selection criteria in CustomerCommunication sub-report*

3.5.2 June 18, 2020 (Not published)

Spire Desktop Improvements and corrections;

- Correct Vendor error in the API, Sales Order endpoint
- Allow a unused GL Account to be deleted from the consolidated division after it has been deleted from all other divisions

Report Changes;

- *Comparative Statement – print a subtotal of the profit in Gross Profit and Operating Income group footers*

3.5.1 June 16, 2020

Spire Desktop Improvements and corrections;

- Payroll Tables update for July 1, 2020
- Correct Income tax calculation on timecard where CPP maximum is reached
- Add ability to see Top Level Manufactured Items in Edit Inventory, Production Tab
- Do not allow a Control account to be typed into a GL Journal Entry screen
- Correct “country” error when attempting to email a Purchase Order
- Do not allow a foreign vendor to be set on a Purchase Order created from selecting items on the Inventory List and clicking Create Purchase Order
- Use Serial/Lot cost on Purchase Order Returns when Serial/Lot costing is enabled so no variance posting is created
- Do not receive Lot numbered items in Purchase Order, Receive Order tab without an expiry date if Expiry Date Required, is set on the item
- Correctly import Required Date in Purchase Order Import

- Correctly set currency on imported Purchase Orders for foreign Vendors
- Correctly import Print Cheque Flag on Vendor Import
- Display UDF columns in Serial/Lot number list
- Only attempt to ship available items when Ship Available is clicked in a Sales Order ribbon
- Do not trim Sales Order Type/Status field in Compact View
- Correct error deleting a nested Kit in a Sales Order
- Correct blank Sales Order screen after Toggling a kit multiple times
- Correct error scanning lot number in Inventory Count when the kit has Auto Consume enabled
- Correct error trying to edit an Inventory Warehouse record automatically created by BV Import
- Correct error trying to delete an Inventory Product Code automatically created by BV Import
- Correct occasional attribute error double clicking a Sales Order on the Sales Order List
- Correct error double clicking on a record in Purchase History that was created by an Inventory Adjustment/Transfer
- Make Remit To contact information available when emailing Vendors

Report Changes;

- *Comparative Statement – correct inverted Variance % when Last Year is negative*
- *Purchase Order – correctly print total after PO has been issued*
- *Work Order – correct header and footer text messages*

3.5 May 28, 2020

New Features;

- Add support for Avalara tax service integration
- Add Sales OrdersCreated, Created by, Modified, Modified by columns to Address lists
- Add support for Quebec Health Services Fund
- Add Accounts Payable tab to Purchase Orders and Purchase History
- Add ability to set default warehouse in Sales Order, Info tab
- Add support for serial/lot cost to Inventory Adjustments and Transfers
- Add User Defined Fields to serial/lot numbers
- Add ability to see committed and pending receipt serial/lot numbers separately in Edit Inventory, Serial Numbers
- Add ability to edit expiry date and sell prices on selected lot numbers
- Add ability to export serial/lot numbers and records returned by Trace function
- Record serial/lot cost during customer return when serialized cost is enabled
- Add Expiry Date required flag and default expiry days to Edit Inventory
- Add support for TD Bank 80 byte EFT file
- Add columns for Average Days to Pay and Credit Limit to Customer List and Accounts Receivable List, as well as user settings to enable them
- Add columns for Freight and Weight to Sales Order Lists and Sales History Lists
- Add Special account for non-inventory in Company Control Accounts
- Add setting to Company Settings, Company, Numbers to set number of decimal places to use in Sell and Cost price calculations
- Add setting for Price Matrix Margin to use Average, Current or Standard Cost to calculate Price
- Automatically calculate hours on ROE when Timecards don't have it.

- Add Updates Hours button to ROE Edit screen
- Add Multi Edit capability for Sales Tax codes in Customers menu, Customer Addresses List
- Add Group By in Import in order to state items that should be included on a document
- Add max_wal_size tuning settings when the Spire Server installer is performing a new PostgreSQL installation
- Add View Source and View Target buttons to Requisition List

Spire Desktop Improvements and corrections;

- Improve speed accessing and saving Sales Orders, Customers and Inventory
- Do not change Salesperson when a suffixed Sales Order is created for a backorder
- Correctly refresh Sales Order price when changing UOM with Price Matrix Margin pricing
- Retain Order Quantity when changing a Sales Order back to a Quote
- Correctly copy Sales Order UOM conversion factor from Sales Order to Sales History
- Set non-inventory costs on Sales Order during Sales History Copy process
- Do not allow Processed or Shipped Sales Orders to be deleted if Lock Process/Shipped Orders is enabled
- Replace “A PO number is required for this customer” dialog with a ribbon in Sales Orders
- Respect Address On Hold flag when added to a Sales Order
- Correctly support Kit being added to a Sales Order copied from Sales History
- Allow user to edit Total Weight on Sales Order and Purchase Order footer, stop automatic calculations once the user has edited the value
- Show Lot number expiry date when a Lot numbered item is returned on a Sales Order
- Do not allow serial/lot number to be sold before being fully received
- Correct condition where 0 available quantity serial numbers, is shown as available
- Do not leave serial/lot number allocated if Sales Order fails to Save or Invoice
- Allow user to override Sales Order Ship Quantity of a Lot number that is set to auto consume
- Retain Inventory Current and Standard Cost when selling serial/lot numbers with serialized cost enabled *** Note this will affect Price Matrix margin pricing Sales Orders and commission reporting on these Sales History records.
- Do not show Serial number dialog twice in POS
- Correct UOM display in serial/lot number screen when UOM conversion is being used
- Only show Lot Consume Type on Lot numbered items on Inventory List
- Correctly respect user permissions in Edit Inventory, Vendor Prices
- Correct error removing Default Vendor in Edit Inventory
- Reset Inventory On Order quantity when Closing a Issued Purchase Order
- Ensure Inventory Variance is posted in base currency on a Foreign Purchase Order
- Correctly store On Order quantity for Inventory UOM on a Purchase Order created by a Requisition
- Show Vendor name in History Purchase Order screen
- Correctly set Sales Order Current Cost on a Requisition for a non-inventory item
- Correctly calculate customer Average Days to pay posting an AR Payment and with Discounts
- Refresh Prices on a Purchase Order when the Vendor is changed to one with Vendor Pricing

- Improve which Total is being shown as Purchase Order is being Received, change fields used to track Purchase Order totals when Open, Issued and Received
- Reset Required Date when copying a Purchase Order from Purchase History
- Add Created, Modified and Modified By columns to Purchase History List
- Improve Purchase Order import
- Correctly import a blank Product Code field in Price Matrix Import
- Do not import blank Inventory Prices as NULL
- Allow Inventory records to be copied by a user without permission to modify Vendor prices
- Allow Edit Inventory, Serial/Lot tab view even if Inventory record is locked by another user
- Correct error trying to select a segmented GL Account in Vendor, Expense
- Use POinv in GL Transaction Type when Invoice is posted from Purchase Orders
- Refresh screen after changing serial/lot quantity in Inventory Adjustments
- Retain Reference and Comment values during Inventory Transfer, in Purchase History
- Correct error deleting a manual Inventory count record after it has been Saved
- Do not include Quebec Provincial Tax in Box 22 on T4s
- Improve field spacing in Company, Payroll, Contact screen
- Allow Equipment Followup date to be made blank
- Show Job status in Job Account lookup
- Correctly populate audit fields in inventory_uoms when the record is changed
- Replace Customer ID with Customer number in Payfirma when adding a Credit Card to a profile

Spire Server Administration Improvements and corrections;

- Improve Date/Time chooser
- Set default Database name while restoring a snapshot

BV Import 2.0.3

- Improve speed migrating BV Data

Database Changes

- *customers – add field sales_tax_provider_entity_code*
- *customers – rename field provider_id to payment_provider_id*
- *inventory – add field sales_tax_provider_code, expiry_required*
- *inventory_levy_codes – add field sales_tax_provider_code*
- *inventory_price_matrix – add field cost_method*
- *inventory_product_codes – add field sales_tax_provider_code*
- *inventory_serial_numbers – add field pending_receipt, udf_data*
- *purchase_history – add field user_weight*
- *purchase_orders – add field user_weight*
- *sales_history – add field user_weight, sales_tax_provider_id, whse*
- *sales_orders – add field user_weight, sales_tax_provider_id, whse*
- *sales_taxes – add field integrated*
- *shipping_methods – add field sales_tax_provider_code*

New Reports;

- *Payroll Ledger by Employee – add report*

Report Changes;

Database Verify on all reports for recent table changes (Not required since no destructive changes were made)

- *Account Reconciliation- improve sort*
- *AP EFT Payment Remittance – align top of Company info with top of logo*
- *AR Payment Receipt – add logo support*
- *Cash Balance Details – sort payment methods on sequence*
- *Cash Balance – sort payment methods on sequence*
- *Cheque-bottom – set default detail lines to 15*
- *Cheque-centre – set default detail lines to 15*
- *Cheque-top – set default detail lines to 15*
- *Customer Sales History Details – suppress date range when no Invoice Date filter is used*
- *Customer Sales History – suppress date range when no Invoice Date filter is used*
- *Inventory Sales History Details – sort by Invoice number, suppress date range when no Invoice Date filter is used*
- *Inventory Sales History – suppress date range when no Invoice Date filter is used*
- *Inventory Sales History in Base – Remove Customer and ShipTo ID column headers, suppress date range when no Invoice Date filter is used*
- *Invoice Batched – Show either Paid in Full, Balance Due, or Change at the bottom of the Payment methods, limit footer messages to two lines on shorter Invoice footers, improve white background display on logos, align top of Company info with top of logo*
- *Invoice Posted – Show either Paid in Full, Balance Due, or Change at the bottom of the Payment methods, limit footer messages to two lines on shorter Invoice footers, improve white background display on logos, align top of Company info with top of logo*
- *Job Revenue and Expenses – add memo to the description, improve sort*
- *Order Confirmation – improve white background display on logos, align top of Company info with top of logo*
- *Packing Slip – improve white background display on logos, align top of Company info with top of logo*
- *Payment on Account B – add logo support*
- *Payment on Account P – add logo support*
- *Payment on Account Receipt – add logo support*
- *Pick Ticket – improve white background display on logos, align top of Company info with top of logo*
- *POS Receipt Reprint – improve sort*
- *POS Receipt – improve sort*
- *Post Inventory Adjustments – add sort on inventory_receipts.id, round cost price to 5 decimals as needed*
- *Process Slip – improve white background display on logos, align top of Company info with top of logo*
- *Purchase Order Reprint – align top of Company info with top of logo*

- *Purchase Order – align top of Company info with top of logo*
- *Quote – improve white background display on logos, align top of Company info with top of logo*
- *RMA Order – improve white background display on logos, align top of Company info with top of logo*
- *Sales Order – improve white background display on logos, align top of Company info with top of logo*
- *Ship Slip – improve white background display on logos, align top of Company info with top of logo*
- *Work Order – improve white background display on logos, align top of Company info with top of logo*

3.4.2 June 16, 2020

Spire Desktop Improvements and corrections;

- Payroll Tables update for July 1, 2020
- Correct Income tax calculation on timecard where CPP maximum is reached
- Correct occasional problem with Spire Server Administration not able to logon after installation

3.4.1 April 21, 2020

New Features;

- Add Location and Profit Centre tracking to Accounts Receivable and Accounts Payable

Spire Desktop Improvements and corrections;

- Improve speed saving changes to a Standing Order on a large database
- Allow unused Payroll Subsidies to be used on future Remittances
- Add tooltip to Date payment made to employees to match the one from the Can-Pay website

Database Changes

- *ap_transactions – add fields location, profit_center*
- *ar_transactions – add fields location, profit_center*

Reports Changes;

- *Payroll Cheque-Bottom – show Provincial tax for period*
- *Payroll Cheque-Centre – show Provincial tax for period*
- *Payroll Cheque-Top – show Provincial tax for period*
- *Payroll Direct Deposit – show Provincial tax for period*
- *Remittance List Detailed – add column totals*
- *Comparative Statement – correct inverted group totals for Expense accounts*

3.4 April 6, 2020

New Features;

- Add Source Deduction Remittance to Payroll

Spire Desktop Improvements and corrections;

- Add Created, Modified and Created By columns to Purchase History List
- Allow users without Modify Inventory permission to Print Reports in Edit Inventory screen
- Correct UDF Allow Blank Date being inverted, during upgrade to Spire 3.2.x or higher
- Improve error message when invalid UDF data causing an upgrade failure
- Correct problem creating a Territory filter in Add User, then no user was Saved but Territory filter was applied for all users
- Correct User, Reports, Development tools changing all users
- Copy only the first 40 characters of Employee Job Title to ROE Occupation
- Correct error when forcing a Sales History matview rebuild
- Release serial/lot number allocations when an Order errors and does not Save
- Correct Fill Backorders button on Sales Order List
- Correct error clicking Edit Inventory Print tab when in Communications tab
- Add support for red Communications tab to more modules, Job Cost, Employee, Purchase History
- Correct tab order in Accounts Payable Invoice entry
- Add UDF and audit columns to Warehouse List
- Do not allow a GL Account to be deleted if it has an opening balance value
- Show co-branded Diners Club as Mastercard in Payfirma

Spire Server Administration Improvements and corrections;

- Add confirmation to Delete Companies
- Allow Company settings to be changed without having to set snapshot schedules
- Automatically refresh Snapshot List in Spire Server Administration after creating a new snapshot
- Show Country List with Canada, USA, and then the rest in alphabetical order when adding a new Company and setting the country

Database Changes

- *employees – add field temp_wage_subsidy*
- *payroll_pd7a_details – new table for Payroll Remittance details*
- *payroll_pd7as – new table for Payroll Remittances*

New Reports;

- *Remittance List Detailed – new report*
- *Remittance List – new report*
- *Remittance – new report*
- *Total Payroll for date range – report to assist in calculating Provincial Health Tax*

Report Changes;

- *1099-MISC 1-UP – change to use payments*
- *1099-MISC 2-UP – change to use payments*
- *Cash Balance.rpt – correct AR Payments total*
- *Cash Balance Details.rpt – correct AR Payments total*
- *Cheque – Top* – remove report from GL Transaction Print
- *CPRS-T5018 IRS-1099 – add ability to report on T5018 and 1099 Vendors at once*

- *Customer Statement – improve report when Show Details is selected*
- *Inventory Bar Code Label 5160 – replace SQL Expression retail_price01 with sell_price_01*
- *Inventory Movement by Posted Date – remove duplicates when multiple receipts exist for the same PO line*
- *Inventory Movement by Source Date – remove duplicates when multiple receipts exist for the same PO line*
- *Payroll Cheque-Bottom – show Provincial tax when required in Advice section*
- *Payroll Cheque-Centre – show Provincial tax when required in Advice section*
- *Payroll Cheque-Top – show Provincial tax when required in Advice section*
- *Payroll Direct Deposit – show Provincial tax when required in Advice section*
- *Purchase Order Reprint – correct suppression statement on Total label*
- *Purchase Order – correct suppression statement on Total label*
- *T4A – Correct Box 12 when no SIN exists*

3.3.4 January 21, 2020

Improvements and corrections;

- Change default Federal TD1 amount to 13,229 when adding a new employee, to comply with CRA changes released January 9, 2020
- Add confirmation to Mark Remitted in T4 screen when T4 has already been remitted
- Allow Recalculate Employee Amounts to work even if Employee Benefits and Deductions have been deleted
- Correct occasional date error when clicking on snapshots in Spire Server Administration
- Show snapshot created time in local time in Spire Server Administration

Report Changes;

- *Invoice Batched – show Lot quantity*
- *Invoice Posted – show Lot quantity*
- *Order Confirmation – show Lot quantity*
- *Packing Slip – show Lot quantity*
- *Pick Ticket – show Lot quantity*
- *POS Receipt – show Lot quantity*
- *POS Receipt Reprint – show Lot quantity*
- *Process Slip – show Lot quantity*
- *Quote – show Lot quantity*
- *RMA Order – show Lot quantity*
- *Sales Order – show Lot quantity*
- *Ship Slip – show Lot quantity*
- *Work Order – show Lot quantity*
- *Inventory Status UDF Sample – update SQL Expressions*

3.3.3 December 18, 2019

New Features;

- Add support for January 1, 2020 Payroll tax tables
- Add support for Booking Order, RMA and Work Order Header and Footer messages
- Add ability to import Job entries
- Add message to Spire Server Admin Download Update page to remind user to do perform update on the Spire Server computer

Improvements and corrections;

- Respect Payment currency while posting the transfer of AR Payment batch from Clearing Account to Bank Account
- Correctly auto populate NB for postal code starting with "E" while adding a Customer Address
- Correctly respect Edit Orders permissions when editing a Customer address and clicking Update Orders
- Correctly populate Sell OUM when printing Inventory Labels from a Sales Order
- Correct Batch number showing as "0" to show as ""
- Correct Batch by Closed Orders for an Invoice Date
- Correct occasional UDF error while adding a Customer to a Sales Order
- Allow AR Payment records to be Imported
- Correctly import Freight and Duty values in Inventory Import
- Only show Items returned by a credited Sales Orders once, in Inventory Movement tab
- Correctly use Default categories on new Production Templates
- Remove Edit Company, Reports, Development tab
- Remove Edit User, Reports, Messages tab
- Properly limit field length of Price Matrix Promotion description to 35 characters
- Ensure that Customer, Vendor and Inventory Code Change only post uppercase values for New Code
- Correct link to customers in Data Dictionary
- Correct link to ar_batch_items in Data Dictionary
- Add database information for new kit fields in sales_order_items and sales_history_items in Data Dictionary
- Remove link to inventory_conversion_factors in Data Dictionary
- Correct Unable to connect to database error when using BVImport on some servers
- Correct blank Report Preview screen when Windows user profile has a space in the name

New Reports;

- *Historical Financial Statement by 12 Periods – new report*
- *Historical Financial Statement – new report*

Report Changes;

- *AP EFT Payment Remittance – add logo, French and Spanish*
- *Financial Statement by Period – improve Current Earnings calculation when report run for Last Year or This Year dates*
- *Invoice Batched – correct extended Levies to support UOM conversion*
- *Invoice Posted – correct extended Levies to support UOM conversion*

- *Order Confirmation – correct extended Levies to support UOM conversion, add support for Booking Order Header/Footer message*
- *POS Receipt Reprint – correct extended Levies to support UOM conversion*
- *POS Receipt – correct extended Levies to support UOM conversion*
- *Quote – correct extended Levies to support UOM conversion*
- *RMA Order – add support for RMA Order Header/Footer message*
- *Sales Order – correct extended Levies to support UOM conversion*
- *T4-14b-CRA – changes for 2019*
- *T4-14b-employee – changes for 2019*
- *T4-14b-employer – changes for 2019*
- *T4-Summary – changes for 2019*
- *T4A-Summary – changes for 2019*
- *T4A – changes for 2019*
- *T5018 – changes for 2019*
- *Work Order – correct extended Levies to support UOM conversion, add support for Work Order Header/Footer message*

3.3.2 November 27, 2019

Improvements and corrections;

- Correct error when selecting multiple Sales Orders and clicking Process if one or more Orders need credit override
- Correctly populate Sales Order lines for Kits migrated from Spire 2.x
- Use Invoice Date for Inventory Receipts done with a Sales Order Credit (product return)
- Correct Modified Date on Sales Order, Items list
- Correct occasional “Multiple results found” error in Edit Phases
- Correct error while creating fulltext index for an inventory record with many thousand linked serial numbers
- Correct memory error posting an Inventory Count
- Correct occasional ‘reduce’ error posting an Inventory Transfer with freight
- Correct error during Void AR Payment with Payfirma
- Correct error in Company settings, Edit Customer/Vendor when segment delimiter is missing
- Correct occasional “Multiple results found” error in Company Settings
- Correctly post Job Costs stated on Sales Order Import
- Improve Database name validation in Spire Server Admin

Report Changes;

- *Customer Statement – improve date sort in Detailed version*
- *Inventory Re-order – sort hyphenated part numbers as expected*
- *Inventory Statistics – sort hyphenated part numbers as expected*
- *Inventory Status – sort hyphenated part numbers as expected*
- *Inventory UPC List – sort hyphenated part numbers as expected*
- *Invoice Batched – improve text footer position*
- *Invoice Posted – improve text footer position*

- *Payroll Cheque-bottom – correct page format on multiple cheque run*
- *Purchase Order – correctly print manual typed Ship Via description, correct watermark*
- *Receipts Order Fulfillment – improve linked to backorders*
- *Quote – improve text footer position*
- *Work Order – add French and Spanish version of approval text by signature, improve text footer position*

Database Changes

- *addresses – add SLSP to data dictionary description*
- *improve fulltext index*

3.3 November 6, 2019

New Features;

- Add Spire Server Administration with new features
    - Add ability to upload a maximum 4cm x 4cm Logo in gif, png or jpg format
    - Add ability to read and download log files
    - Add ability to download and upload custom reports
    - Add ability to make stock and custom reports Inactive so that users do not see them
    - Add ability to download snapshots
    - Add ability to add/maintain user accounts and give access to desired companies
    - Add ability to change password for the user currently logged into Spire Server Administrator
- **Add User permission settings to create different Order types – *(review Edit User, Sales Order, Add or Edit Sales Orders for all users)***
- Allow serialized Inventory to be Shipped on a Sales Order without assigning Serial Numbers
- Add ability to drill down to Purchase Order or Production Order from Sales Order target field when Requisitions have been used
- Add ability to drill down to Sales Orders from a Purchase Order or Production Order source field when Requisitions have been used
- Add Movement tab to Inventory List
- Add ability to create a Purchase Order for selected items on the Inventory List
- Add ability to Select All/Select None on column right click menu
- Add freight component to Inventory Transfer
- Add ability to remember when user has done a cost override in Sales Order Current Cost and Standard Cost
- Add User permission settings for Edit Sales Order Current Cost and Standard Cost
- Add ability to add more lines to the bottom of a Sales Order Job group
- Allow the insertion of an item into an expanded Sales Order Kit or Accessory group
- Add ability to see other users' calendars if permission has been enabled in Edit User, General, View All Calendars
- Add ability to set Header and Footer messages for reports in Company Settings, Reports, Messages
- Create separate BV Import utility with download link in Spire Server Administrator

- Replace Report PDF viewer with one that supports Search
- Create Data Dictionary at https://localhost:10880//doc/database/ on the Spire Server, also accessible from Spire Desktop, Help, Spire Server Documentation, Database Documentation

Improvements and corrections;

- **Change all Import and Export functions to support Excel xlsx file format, drop support for xls format**
- Improve speed opening a Sales Order for a customer with many associated records (AR, ShipTo IDs and Price Matrix)
- Correct issue of a Backorder warning occasionally causing the program to close
- Correct issue of creating a Job Header occasionally causing the program to close
- Correct recursive error when a Kit contains the same component multiple times
- Correctly retain Contract Cost when editing a previously saved Sales Order
- Correctly refresh all Cost fields on new Sales Order when copying a Sales Order
- Set Sales Order Total Weight field to read-only
- Retain original Salesperson when doing a Sales History Invoice, Credit
- Use UTC for system_settings audit dates
- Improve error reported while opening a Spire record containing invalid UDF data
- Improve Search behavior on Shipping Method list
- Correct Shipping Methods, Description filter to support Contains
- Improve speed while presenting auto complete list as the user types into a code field
- Refresh Inventory Cost when opening a saved Inventory Adjustment / Transfer
- Correct Customer, Address List, Address filter to support Contains
- Make GL Transaction Source column consistent with Production Order
- Allow Template to be changed on a Production Order using the Lookup button
- Correctly show status indicators in Inventory, Bill of Materials
- Correctly refresh screen after clearing Search field in Edit User and Company settings
- Attempt to reconnect SMTP Server if a disconnection error is detected
- Drop legacy Search Key field from Customer Import field list
- Update database engine to PostgeSQL 10.9
- Update pgAdmin to 4.13

Database Changes

- *sales_history_items – add fields user_current_cost, user_standard_cost*
- *sales_order_items – add fields user_current_cost, user_standard_cost*
- *system_settings.type – change field from smallint to configdatatype*

New Reports;

- *Inventory Movement by Posted Date – new report for Inventory, Movement tab*
- *Inventory Movement by Source Date – new report for Inventory, Movement tab*

Report Changes;

- ***All Reports** – verify database to recognize table changes to sales_order_items, sales_history_items, system_settings*
- *Customer Statement – add support for logo, header and footer messages*
- *Invoice Batched – support kits and accessories within a job group, add support for logo, header and footer messages*
- *Invoice Posted – support kits and accessories within a job group, add support for logo, header and footer messages*
- *General Ledger Account Activity – reset balance of foreign revenue and expense accounts on fiscal year change*
- *Historical Inventory Status – correct the double adjustment for past historical date, credit sales*
- *Order Confirmation – support kits and accessories within a job group, add support for logo, header and footer messages*
- *Packing Slip – add support for logo, header and footer messages*
- *Pick Ticket – add support for logo, header and footer messages*
- *POS Receipt – add support for header and footer messages*
- *POS Receipt Reprint – add support for header and footer messages*
- *Process Slip – add support for logo, header and footer messages*
- *Production Build – add test for divide by zero*
- *Production Order – add test for divide by zero*
- *Purchase Order – add support for logo, header and footer messages, add support for Canadian English, French and Spanish in text fields*
- *Purchase Order Reprint – add support for logo, header and footer messages, add support for Canadian English, French and Spanish in text fields*
- *Quote – Make references to Quote rather than Sales Order in labels, remove Shipped and Back Order columns, support kits and accessories within a job group, add support for logo, header and footer messages*
- *RMA Order – support kits and accessories within a job group, add support for logo, header and footer messages*
- *Sales Order – support kits and accessories within a job group, add support for logo, header and footer messages*
- *Ship Slip – add support for logo, header and footer messages*
- *Work Order – support kits and accessories within a job group, add support for logo, header and footer messages*

3.2.9 October 1, 2019

Improvements and corrections;

- Improve AR and AP account view screen for AR and AP accounts with many records, add ability to turn off sorting with a system setting for more speed
- Allow Discount to be unchecked when paying a Vendor Debit memo
- Improve recovery when a Purchase Order Receipt posting fails with an error and the user ignores it
- Correct error using Change Vendor Code when Inventory Preferred Vendor needs to be changed in the process

- Correctly import Sales Department during Inventory Import
- Correctly import multiple price records during Inventory Import
- Correctly show Contract Cost on Sales Order line
- Retain current cost and standard cost when posting a Sales Order with Contract Cost to Sales History
- Correctly respect Company Settings, Sales Order, Process/Invoicing, Reset phase when invoicing Standing Orders during Invoicing
- Limit employee information shown on Employee Lookup List

New Reports;

- *Bank Disbursement Journal – add new report for Bank Accounts to General Ledger, Transactions*
- *Historical Comparative Statement – add new report to General Ledger, Reports, Historical Financial Report template*

Report Changes;

- *AP EFT Payment Remittance – add report to cheque reports dialog*
- *Account Reconciliation – separate reconciled and unreconciled items, add user initials*
- *Last Year's totals and compare to previous year from GL History*
- *Historical Comparative Statement – add support for Start Date*
- *Payroll Cheque-Bottom – correct union dues amount*
- *Payroll Cheque-Centre – correct union dues amount*
- *Payroll Cheque-Top – correct union dues amount*
- *Payroll Direct Deposit – correct union dues amount*

3.2.8 August 21, 2019

New Features;

- Add ability to select a Base Currency Bank GL Account when paying foreign Vendors and allow the exchange rate to be set for the payment

Improvements and corrections;

- Correct error trying to Save a Preset Filter without a name
- Correct error adding a new Employee with out of date Payroll Tables
- Correct error adding a new Employee without a Default Payroll Department set
- **Set default Sales Departments and GL Accounts on new Sales Order created from Sales History Invoice, Copy. (Sales History Invoice, Credit retains original Sales Department and GL Accounts)**
- Populate all Sales Order Line Cost fields when user types in one cost field, only on non-inventory items
- Correctly allow Cost to be edited on Sales Order lines for non-physical inventory items
- Correct Fill Backorders on Sales Orders with non-physical items
- Correctly post a Refund Payment to Payfirma when paying a Credit Sales Order
- Correctly post a USD Payment to Payfirma
- Calculate Service Charges based on Due Date, on AR Records without Payment Terms
- Allow ShipTo ID to be set on a Price Matrix record

- Respect Company Settings, Special Accounts, Bank Account as needed when paying Foreign Vendors
- Check for transactions in all Division before allowing the GL Account Group to be changed
- Allow more than 99 labels to be printed
- Correct error when clicking Set Quantity to BOH on a non-inventory in a Purchase Order, Print Labels
- Populate Sequence # column in Purchase Order immediately
- Correct error changing the cost on a subsequent receipt, on a Purchase Order

New Reports;

- *GL Account Foreign Balance – add new report to General Ledger Reports tab*

Report Changes;

- *Comparative Statement – invert Net Profit (Loss) percentage*
- *Components Usage – remove accessories from Kit section*
- *Customer Sales History Details – use Kit Cost in calculating GP*
- *Customer Sales History – use Kit Cost in calculating GP*
- *Receipts Order Fulfillment – correctly print report even when no Inventory Requisition records exist for the inventory item*
- *Receiver General by Payroll Dates – correct grouping and totals*

3.2.7 July 30, 2019

New Features;

- Add record locking to Timecard Batches so that only one user can work in a batch
- Add column Amount Remaining Ordered to Sales Order List
- Add the ability to store Kit, and Kit Component flags to Sales Order Items table as well as Kit Costs to improve Gross Profit Reporting

Improvements and corrections;

- Respect Currency Exchange Rate from Main tab for records dated same as logon date, otherwise respect monthly rate as per document date
- Post an Inventory Variance to the GL when the user modifies the cost on a Purchase Order Return (negative receipt)
- Correctly respect Inventory tax settings on Purchase Order lines
- Correctly update Purchase Order Issued Amount without requiring the user to click Save before Issue in a PO
- Do not change Current Cost when performing a positive Inventory Adjustment
- Correct Customer, Sales History, Items list after Customer Code change
- Correct occasional Errors in Update Sales Orders after changing Customer Credit Limit
- Correctly allow Override Credit Limit on a Sales Order that is failing Check Credit on Save
- Correctly show Extended Levy on Quotes
- Correct error privileges error when a user without permission to Modify UOM, Invoices a Sales Order
- Correct Sales Order, Store selected price when focus is not moved from Unit Price

- Correct occasional Price Matrix error when adding a part number to a Sales Order which uses cumulative pricing and quantity break pricing at the same time
- Correct issue adding a part number to a Sales Orders with Show Options checked in Edit Inventory, Components and yet no Accessories have been set up
- Correct error when entering a PO number ending with a backslash, in a Sales Order
- Correctly blank Sales Order, Terms field on invalid entry
- Correct error when Invoicing a Service Order with backorders
- Correct auto allocate on a Lot number with negative available quantity
- Correct error when performing Credit in Sales History Invoice for serialized items
- Correct permission error when performing Credit in Sales History Invoice with a Kitted item
- Correctly copy cost values when performing Credit in Sales History Invoice (Reverse the Invoice)
- Correctly populate Kit current Cost when performing Credit in Sales History Invoice (Reverse the Invoice)
- Correct problem causing POS to show Kit options when it has not been set to do so on a Kit
- Correct error when attempting to Email Statements to customers who have no email address in their profile
- Correct Price Matrix Import for items with a Product Code defined
- Correct Customer ShipTo Import with Salesperson defined
- Do not allow GL account for bank to be changed in Review GL Transaction in Payables Cheque
- Correctly show recently voided payments in a new Account Payable Payment Batch
- Refresh bank account when AP Payment Batch currency is changed
- Correct error during Inventory Item copy with Components
- Correctly show Inventory part numbers containing a “+” in auto complete, searches and filtered lists
- Correct divide by 0 error when User Serial/Lot costing is enabled in Company settings and bad serial number data exists
- Improve message when changing Product Code in Edit Inventory
- Correctly show all records in Edit Inventory, Purchasing, History tab
- Put user back into the already open Timecard batch is they try to open it again
- Correctly auto assign Vendor Number if Company Settings, Sequence Numbers, Vendor No > ‘0000000000’

Database Changes

- ***sales_history_items*** *– add fields kit, kit_component, kit_average_cost, kit_current_cost, kit_standard_cost*
- ***sales_order_items*** *– add fields kit, kit_component, kit_average_cost, kit_current_cost, kit_standard_cost*

Report Changes;

- *AP Payments Batch – sort on reference number*
- *Inventory Sales History – use kit_cost for Top Level Kits , use component cost = 0 for Kit Components*
- *Inventory Sales History Details – use kit_cost for Top Level Kits , use component cost = 0 for Kit Components, remove test condition from selection criteria*

- *Inventory Sales History in Base – for use in Inventory Reports tabs, use kit_cost for Top Level Kits , use component cost = 0 for Kit Components*
- *Packing Slip – print the first date field with a value; ship_date, pack_date, required_date, order_date*
- *Payroll Ledger by Department – replace employee ID with employee number*
- *Payroll Ledger – replace employee ID with employee number*
- *Receiver General by Payroll Dates – replace employee ID with employee number*
- *Ship Slip – print the first date field with a value; ship_date, pack_date, required_date, order_date*
- *Workers Compensation Remittance – replace employee ID with employee number*

3.2.6 July 3, 2019

Improvements and corrections;

- Correct error voiding an AR Payment in a different Division than the payment was posted in
- Immediately recalculate Purchase Order total after adding a Macro
- Right align Inventory Cost column in Purchase Order Items
- Allow Receive date to be changed while working on a quick Purchase Order
- Allow Non Physical Items to be returned (negative received) on a Purchase Order
- Correctly adjust Inventory On Order quantity when closing a PO with some items not received
- Correctly set inventory_order_qty on a Purchase Order when UOM is changed after Quantity Ordered
- Remove non-inventory receipts and sales, in Edit Inventory, Purchases and Sales tabs if part number is added to Inventory, after being put on a Purchase Order or Sales Order
- Correct error when trying to add a Sales Quote to a Batch
- Correct occasional Null error opening Sales Order with hidden UDF page
- Retained Sales Order Created by User, Date/Time in suffixed Sales Order, created by backorder
- Retain Sales Order Created by User in Sales History Invoice
- Do not respect Customer Default warehouse setting in the POS screen
- Improve serial number management in Purchase Order Receive so that the same serial number can't be used twice on different lines
- Allow AR and AP transactions with an exchange rate = 0 to be Voided
- Improve tooltip on Accounts Payable Batch, Select All Due button
- Remember sort order set on Timecard, Details
- Correctly display multi-edit dialog in Price Matrix
- Correct error toggling a sub-assembly in an Open Production Order
- Show all warehouses in warehouse lookup in Change Location dialog

Report Changes;

- *Balance Sheet – Improve Account Balance reset on page break*
- *Historical Trial Balance – remove multiple records for each account*
- *Inventory Sales History – correct divide by 0 error*
  - *Calculate cost columns for Kits and Components*
  - *add indicators for Kits and Components*
  - *correct selection criteria*

    - *improve linking*
    - *move report to Sales History, Reports tab*
- *Inventory Sales History in base – correct divide by 0 error*
    - *Calculate cost columns for Kits and Components*
    - *add indicators for Kits and Components*
    - *correct selection criteria*
    - *improve linking*
    - *move report to Sales History, Reports tab*
- *Inventory Sales History Details – calculate cost columns for Kits and Components*
    - *add indicators for Kits and Components*
    - *correct selection criteria*
    - *improve linking*
    - *move report to Sales History, Reports tab*
- *Sales Order – correct F.O.B. in translate() function*

3.2.5 June 13, 2019

Improvements and corrections;

- Correctly recreate Inventory and Sales History List Views when migrating Spire 3.2.x databases

3.2.4 June 12, 2019

Improvements and corrections;

- Correct occasional ‘function "hstore_to_jsonb" already exists’ error when restoring snapshots

3.2.2 June 4, 2019

New Features;

- Add ability to edit Company Access flag from User List

Improvements and corrections;

- Correct occasional QEvent error creating a Sales Order
- Correctly populate Subtotal Ordered column on Sales Order List
- Put initial focus in Customer Code when creating a new Sales Order in Compact Mode
- Correct pop Communication Alert when creating a Sales Order from Edit Customer, Sales tab
- Do not clear Salesperson or Territory fields on Sales Order when lookup is closed with Validate settings enabled
- Show part number that is not returnable on error that is displayed when performing a Sales History Invoice, Credit
- Correct error using Add to Order with an On Hold item
- Correctly allow Credit Limit to be set in Customer multi-edit
- Add locked records support multi-edit
- Do not allow a negative currency exchange rate in GL Transactions
- Improve GL Account selection in AP Payables batch for multi-currency companies
- Correct error Applying records with empty audit dates in AP and AR
- Correct occasional error when adding a Note to the Communications module

- Display invalid login date error only once when logging in with an invalid date
- Correct error deleting a blank line on a Purchase Order
- Correct error exporting Price Matrix when blank audit fields exist
- Correct error importing Price Matrix UOM
- Correct date error purging Price Matrix records
- Correct error importing Inventory Primary Vendor field
- Correct error creating accounts table on a new Spire installation where the first company is created with a BV conversion that has database errors

Database Changes

- ***system_record_locks*** ***–*** *remove field link_table, link_no*
- ***system_record_locks*** ***–*** *add field record_table, record_id*

Report Changes;

- *Pick Ticket – always print Kit components*
- *Ship Slip – Restore version with multi language support*

3.2.1 May 21, 2019

Improvements and corrections;

- Correct issue when selling to a migrated customer whose credit limit has never been set
- Correctly create Backorders for Kit Components not shipped on original Sales Order
- Remove Company Settings, Inventory, Miscellaneous, Use permissive FIFO setting
- Correctly allow 20 character reference numbers on a Purchase Order line
- Correct occasional migration error regarding hstore to JSONB during database upgrade
- Allow 40 character Customer Type (User Defined 2) field to contain 40 characters during Customer import

Report Changes;

- *Customer Sales History Details – respect Admin user permissions on Cost columns, use Current Cost on Inventory Kitted items*
- *Customer Sales History – respect Admin user permissions on Cost columns, use Current Cost on Inventory Kitted items*
- *Inventory Purchase History – respect Admin user permissions on Cost columns*
- *Inventory Sales History Details – respect Admin user permissions on Cost columns, use Current Cost on Inventory Kitted items*
- *Inventory Sales History – respect Admin user permissions on Cost columns, use Current Cost on Inventory Kitted items*
- *Inventory Sales History in Base – respect Admin user permissions on Cost columns, use Current Cost on Inventory Kitted items*
- *Purchase History – respect Admin user permissions on Cost columns*

3.2 May 8, 2019

Critical Actions required

- AP and AR User permissions must be reviewed for each user that has access to Accounts Payable and/or Accounts Receivable
- Custom Reports using UDF fields must edited
- Customized Invoice Batch Reports must use ?SalesOrderID in the selection criteria for emailing
- pgAdmin 4.x needs the server added

New Features;

- Add cancel button to Add UDF
- Add ability to drag fields up and down in UDF setup
- Add Last Receipt Date and Last Sales Date columns to Inventory List, populate values at Inventory Receipt and Sales Order time
- Display Company name on Window Title bars
- Refactor Inventory to improve database speed with all objects that use Inventory
- Add Production, Templates tab to Edit Inventory
- Add Create Sales Order button to Inventory List to use for highlighted Inventory rows
- Add Total Current Cost, Current Margin, Current Margin %, Total Standard Cost, Standard Margin and Margin % to Sales Order footer and Sales History Invoice footer
- Add Cost columns to Sales Orders, Items List
- Add Standard Cost column to Sales History, Items List
- Add Reference and Memo columns to Inventory Adjustments
- Add ability to Receive a new Purchase Order without the requirement for Issue process
- Add ability to look up Currency rate and adjust the rate from anywhere that Currency is displayed
- Add ability to set and Edit Base Currency without requiring Multi-Currency to be enabled
- Add ability to Void selected Payments from an Accounts Payable Payments batch, Requires User, Accounts Payable, Void Transaction enabled
- Show Communication Notes with blank times in the Calendar as All Day
- Add option to install pgAdmin 4 in Spire Server Installer
    - pgAdmin 4 runs in a Web Browser
    - pgAdmin 4 requires that a Server be added to the menu

Improvements and corrections;

- Change udf_data fields to store JSONB – requires slight change to all Crystal Reports SQL Expressions reading UDF fields. Replace “>” with “>>”.
- Improve speed opening Lists and Dialogs
- Improve speed adding rows to a Production Order
- Improve Phase filters to allow the selection of available Phases
- Correctly respect number of decimal places set in UDF numeric setup
- Allow <blank> to be an option in UDF field drop down as applicable
- Place cursor in Field Name when adding a new UDF
- Validate UDF data immediately after tabbing off the field rather than waiting for Save

- Improve the ability to set UDF as “Required”
- Improve filters to treat blank and null the same
- Allow a non Admin user to set a Company Filters as their Default Filter
- Correct occasional error clicking on Sales Order, Fill Order tab and Purchase Order, Receive Order tab when serial numbers are involved
- Correctly respect Salesperson and Territory on Sales Order Billing Address when User settings have Restrict Users’ Customers/Sales Order by Salesperson and/or Restrict Users’ Customers/Sales Order by Territory enabled
- Recalculate total weight on Sales Order after deleting an item from the Order
- Correctly show Part Number in On Hold banner warning in a Sales Order
- Correct occasional error “MessageBox has been deleted” error adding a line to a Sales Order
- Remove plural from Sales Order, Updates Prices dropdown text to say Refresh Selected Price and Store Selected Prices
- Correctly post Sales Order to Base GL Accounts if no Location is specified on the Sales Order when Location Accounting is enabled
- Correctly retain multiple Communication links when changing a Quote to a Sales Order
- Allow Kits with negative quantity components to be added to a Sales Order
- Correctly display Kit cost in Sales Order when Components have multiple quantities
- Correctly display the effect of UOM conversion on Kit Component cost in a Sales Order
- Correctly display Kit Costs on the Sales Order after being copied from a Sales History Invoice
- Allow users without Modify Prices permissions to add Kits that contained priced components, to Sales Orders
- Allow a Credit Sales Order (Return) to be created without validating customer credit limits
- Correct occasional ‘maximum recursion depth exceeded’ error adding a Kit to a Sales Order
- Maintain Macro items within a Job Header on a Sales Order
- Correctly stamp UTC time on Sales Order batch created date
- Correctly group attachments when emailing Invoices from an Invoice Batch – ensure customized Invoice Batched Reports use ?SalesOrderID in selection criteria
- Correct occasional errors using POS multiplier with no quantity or negative quantity
- Change T5018 process to use Payments rather than Invoices
- Correctly display user list on a newly created company
- Do not close Purchase Order screen when UnIssue is clicked
- Use correct Exchange rate for Freight and Duty when receiving a foreign Purchase Order
- Correctly respect Company settings, Inventory, Enforce Product Codes when adding a new Inventory item
- Correct issue removing a newly added Kit component to Edit Inventory, Components tab
- Correct occasional error clicking on Expand triangle in Production Template in Edit Inventory, Bill of Materials tab
- Do not commit both sub-assembly and it’s components when the sub-assembly is toggled in a Production Order
- Correctly display Margin in Price Matrix for non-default UOM
- Correctly advance Last Serial number for the part number after using Auto Generate to create new Serial numbers when receiving or creating new Inventory items

- Improve speed loading Inventory Count during Freeze operation
- Do not allow an Inventory User Type value to be deleted when in use in Inventory Items
- Correctly zero Employee This Year and Last Year Benefits and Deductions total during Recalculating Employee Amounts before re-adding timecard values
- Support Print All and Print Selected in Employee, Timecards tab, Print
- Allow user to click Ignore Lock if record is reported to be locked by another user
- Do not allow a particular Edit Window to be opened multiple times from multiple places, ie. Open the same Sales Order twice from two different places
- Correct GL Segment sort in General Ledger, Reports, Base Segment dropdown
- Correct issue if Paying an Invoice in Accounts Receivable Batch which gets paid by another process before Batch is Posted
- Correct issue clicking on Browse button in Mail Merge
- Allow a Job Account to be selected on an AR or AP entry without requiring the user to have Edit Job permissions
- Do not allow discounts on AR Credit Memos and AP Vendor Credits
- Correct occasional UnApply, not unlinking amounts in AR and AP
- Cleanup some A/R and A/P User Permissions defaults
  This may need to be reviewed for each user that has access to these modules
- Allow user to correct an invalid date when posting an A/R or A/P Invoice
- Support cheque number field in AP Payment only when GL Account is set as a Bank Account, otherwise present Reference Number field
- Write AP Payment Reference number to GL Transaction memo
- Correct field spacing in Company Settings, General Ledger, Special Accounts
- Removed Un-postable status from Recurring Journal Entry screen
- Improve Employee Calculated Net Pay total during migration from BV data
- Correct Customer, Salesperson import
- Correctly remember the Export path for each module's Export button
- Spanish and French word translations improved
- Do not close Spire Desktop on Connection refused error, try connection again
- Install pgAdmin 4.3 with Spire Server, will require user to add server the first time they launch it

Database Changes

- ***addresses*** ***–*** *remove field native, billto_csp*
- ***ap_batch_items –*** *add field payment_id, payment_trans_no, void_id, void_trans_no*
- ***ap_batches –*** *add field status,*
- ***ar_transactions –*** *remove field link_trans_no, link_date, upload_flag*
- ***bom_item_replacements –*** *remove field uuid*
- ***currencies – add*** *field date_format*
- ***currencies –*** *remove field cheque_text, cheque_date_format*
- ***customers –*** *remove field tax_prompt, last_sale_amt, open_ord*
- ***employees –*** *remove field notes, td1_line_6_9, ytd_munic_tax, lst_munic_tax, image_path, direct_deposit_method*
- ***equipment –*** *remove field engine, irp_no*

- ***gl_accounts –*** *remove field browse*
- ***gl_history_accounts –*** *remove field browse*
- ***gl_history_tansactions –*** *remove field job_cost_flag*
- ***gl_recurring_pending –*** *remove field mc_revise*
- ***gl_recurring_transactions –*** *remove field template_mc_revise, template_posted*
- ***gl_transactions –*** *remove field job_cost_flag*
- ***inventory –*** *add field last_sale_date, last_receipt_date*
- ***inventory –*** *remove field tax_code, chgn_int, chgn_date, non_standard*
- ***inventory_adjustments –*** *remove field currency, received_date*
- ***inventory_adjustment_items –*** *add field reference, comment*
- ***inventory_adjustment_items –*** *remove field duty_by_pct, duty_pct, duty_amt*
- ***inventory_conversion_factors –*** *remove table*
- ***inventory_price_matrix –*** *remove field cust_price_code*
- ***inventory_product_codes –*** *remove field sub_category, top_category_code, code_sequence_no, code_page_size, code_display_type, discount_code, discount_mode, discount_pct, discount_amt*
- ***inventory_uoms –*** *remove field break_qty, break_qty_price*
- ***notes –*** *remove field alert_flag*
- ***payroll_timecards –*** *remove field munic_tax*
- ***production_history –*** *remove field assemble_qty, user_type*
- ***production_history_items –*** *remove field yield_pct, expected_yield_pct, phase_id*
- ***production_order_items –*** *remove field yield_pct, expected_yield_pct, phase_id*
- ***production_orders –*** *remove field user_type*
- ***production_template_items –*** *remove field user_flag*
- ***purchase_history –*** *remove field invoice, customer_ship_id, customer_ship_type, user_type*
- ***purchase_history_items –*** *remove field template_no, template_guid, revision*
- ***purchase_order_items –*** *remove field date*
- ***purchase_orders –*** *remove field customer_ship_id, customer_ship_type, user_type*
- ***sales_history –*** *remove field status, last_inv_no, last_inv_date*
- ***sales_history_items –*** *remove field last_invoice_no, last_invoice_date*
- ***sales_order_equipment –*** *remove field order_type*
- ***system_record_locks –*** *add field link_table, link_no, acquired*
- ***system_record_locks –*** *remove field file_id, file_key*
- ***system_report_permissions –*** *remove field default_email01, default_email02, default_email03, default_email04, default_email05, default_email06, default_email07, default_email08, default_email09*
- ***vendors –*** *remove field fob_desc, po_type*

New Reports;

- *AP Payments Batch – replace Pending Payment report in AP Payments Batch List Print and AP Payments Batch dialog to support Closed Batches and Void Payments*
- *Inventory Lot Trace – add report to Inventory, Lot number tab*

Report Changes;

Custom Reports reading udf_data will need to have the SQL Expressions changed to conform to JSONB standards using two greater than signs. ie. ((inventory.udf_data)->>'GlutenFree')::Boolean

- *1099-MISC 1-UP Report – verify database to recognize table changes*
- *1099-MISC 2-UP Report – verify database to recognize table changes*
- *Accounts Payable List – verify database to recognize table changes*
- *Accounts Payable by Due Date – verify database to recognize table changes*
- *Accounts Receivable List – verify database to recognize table changes*
- *Accrued Payables Summary – verify database to recognize table changes*
- *AP Cheque Remittance – replace ap_transactions.link_transno with ap_transaction.trans_no, remove unused numberVar date_format, verify database to recognize table changes*
- *AP EFT Remittance – replace ap_transactions.link_transno with ap_transaction.trans_no, remove unused numberVar date_format, verify database to recognize table changes*
- *AR Payment Receipt – verify database to recognize table changes*
- *Backorder Details by Customer – verify database to recognize table changes*
- *Balance Sheet – suppress subgroup horizontal line for blank subgroups, verify database to recognize table changes*
- *Batch Journal – verify database to recognize table changes*
- *Batch Journal Reprint – verify database to recognize table changes*
- *Cash Balance Details – verify database to recognize table changes*
- *Cash Balance – verify database to recognize table changes*
- *Cheque Deposit List – verify database to recognize table changes*
- *Cheque-bottom – replace ap_transactions.link_transno with ap_transaction.trans_no, respect changes for currencies.date_format, correctly count detail records and show "Please see attached Remittance advice" as required, verify database to recognize table changes*
- *Cheque-centre – replace ap_transactions.link_transno with ap_transaction.trans_no, respect changes for currencies.date_format, correctly count detail records and show "Please see attached Remittance advice" as required, verify database to recognize table changes*
- *Cheque-top – replace ap_transactions.link_transno with ap_transaction.trans_no, respect changes for currencies.date_format, verify database to recognize table changes*
- *CPRS-T5018 List – verify database to recognize table changes*
- *Communication – verify database to recognize table changes*
- *Comparative Statement – verify database to recognize table changes*
- *Components Usage – verify database to recognize table changes*
- *Consolidated GL Activity – verify database to recognize table changes*
- *Customer Activity – verify database to recognize table changes*
- *Customer Payments List – verify database to recognize table changes*
- *Customer Price Matrix – verify database to recognize table changes*
- *Customer Sales History Details – verify database to recognize table changes*
- *Customer Sales History – verify database to recognize table changes*
- *Customer Statement – verify database to recognize table changes*
- *Daily Fill Rate by Invoice – verify database to recognize table changes*
- *Daily Fill Rate by Item – verify database to recognize table changes*
- *Deleted Sales Orders – verify database to recognize table changes*
- *Disbursements Journal – verify database to recognize table changes*
- *Employee Ledger – verify database to recognize table changes*

- *Employee Ledger Detailed – verify database to recognize table changes*
- *Employee ROE Info – remove unused numberVar date_format, verify database to recognize table changes*
- *Employee Summary – remove the use of employees.ytd_munic_tax field*
- *Employee Termination – verify database to recognize table changes*
- *Invoice Posted – remove the use of sales_history.status field to set the Report label, correct labels for F.O.B., Tax, Unit and Net Amount*
- *Equipment Information – verify database to recognize table changes*
- *Equipment Service History – verify database to recognize table changes*
- *Financial Statement by 12 Periods – verify database to recognize table changes*
- *Financial Statement by Period – verify database to recognize table changes*
- *Financial Summary – verify database to recognize table changes*
- *GL Chart of Accounts – verify database to recognize table changes*
- *GL Foreign Balance – verify database to recognize table changes*
- *GL Historical Transactions – verify database to recognize table changes*
- *GL Open Balance Check – verify database to recognize table changes*
- *GL Transactions by Month – verify database to recognize table changes*
- *General Ledger Account Activity – verify database to recognize table changes*
- *General Ledger Journal Transaction – verify database to recognize table changes*
- *Historical Accounts Receivable List – verify database to recognize table changes*
- *Historical Balance Sheet – verify database to recognize table changes*
- *Historical Income Statement – verify database to recognize table changes*
- *Historical Inventory Status – verify database to recognize table changes*
- *Historical Trial Balance – verify database to recognize table changes*
- *Income Statement – verify database to recognize table changes*
- *Inventory Bar Code Label 5160 – verify database to recognize table changes*
- *Inventory Count Review – verify database to recognize table changes*
- *Inventory Count Sheet – verify database to recognize table changes*
- *Inventory Label 2X1 – verify database to recognize table changes*
- *Inventory Label 5160 – verify database to recognize table changes*
- *Inventory Purchase History – verify database to recognize table changes*
- *Inventory Re-order – verify database to recognize table changes*
- *Inventory Sales History Details – verify database to recognize table changes*
- *Inventory Sales History in Base – verify database to recognize table changes*
- *Inventory Sales History – verify database to recognize table changes*
- *Inventory Statistics – verify database to recognize table changes*
- *Inventory Status UDF – verify database to recognize table changes, change SQL Expressions for UDF structure change*
- *Inventory Status – verify database to recognize table changes*
- *Inventory UPC List – verify database to recognize table changes*
- *Invoice Batched – add "Invoice Batch" to template, verify database to recognize table changes*
- *Item Allocations – verify database to recognize table changes*
- *Item Components – verify database to recognize table changes*

- *Job Accounts List – verify database to recognize table changes*
- *Job List – verify database to recognize table changes*
- *Job Revenue and Expenses – verify database to recognize table changes*
- *Materials Requirements by Inventory – verify database to recognize table changes*
- *Order Confirmation – verify database to recognize table changes*
- *Packing Slip – verify database to recognize table changes*
- *Payment on Account B – verify database to recognize table changes*
- *Payment on Account P – verify database to recognize table changes*
- *Payment on Account Receipt – verify database to recognize table changes*
- *Payroll Cheque-Bottom – remove the use of payroll_timecards.ytd_munic_tax field, respect changes for currencies.date_format*
- *Payroll Cheque-Centre – remove the use of payroll_timecards.ytd_munic_tax field, respect changes for currencies.date_format*
- *Payroll Cheque-Top – remove the use of payroll_timecards.ytd_munic_tax field, respect changes for currencies.date_format*
- *Payroll Direct Deposit – remove the use of payroll_timecards.ytd_munic_tax field, respect changes for currencies.date_format*
- *Payroll Ledger – remove the use of payroll_timecards.ytd_munic_tax field*
- *Payroll Ledger by Department – remove the use of payroll_timecards.ytd_munic_tax field*
- *Pending Inventory Adjustments – verify database to recognize table changes*
- *Pending Payments – remove report, replace with AP Payments Batch*
- *Pending Purchase Order Receipts – verify database to recognize table changes*
- *Pending Receipts – verify database to recognize table changes*
- *Pick Ticket – verify database to recognize table changes*
- *POS Receipt Reprint – verify database to recognize table changes*
- *POS Receipt – verify database to recognize table changes*
- *Post Inventory Adjustments – verify database to recognize table changes*
- *Post Inventory Count – verify database to recognize table changes*
- *Post Inventory Receipts – verify database to recognize table changes*
- *Price Matrix List – verify database to recognize table changes*
- *Process Slip – verify database to recognize table changes*
- *Production Build – verify database to recognize table changes*
- *Production Order – verify database to recognize table changes*
- *Production Schedule – verify database to recognize table changes*
- *Production Template – verify database to recognize table changes*
- *Production Trial Build – verify database to recognize table changes*
- *Purchase History – verify database to recognize table changes*
- *Purchase Order Details – verify database to recognize table changes*
- *Purchase Order Reprint – verify database to recognize table changes*
- *Purchase Order Summary – verify database to recognize table changes*
- *Purchase Order – verify database to recognize table changes*
- *Quote – verify database to recognize table changes*
- *Receipts Order Fulfillment – verify database to recognize table changes*

- *Receiver General by Payroll Dates – verify database to recognize table changes*
- *Requisition List – verify database to recognize table changes*
- *RMA Order – verify database to recognize table changes*
- *Sales History Reports tab Sample – verify database to recognize table changes*
- *Sales Order – verify database to recognize table changes*
- *Sales Order Details List – add support for foreign currency Sales Orders, verify database to recognize table changes*
- *Sales Order List – add support for foreign currency Sales Orders, verify database to recognize table changes*
- *Sales and Taxes 4 – verify database to recognize table changes*
- *Sales and Taxes – verify database to recognize table changes*
- *Sales by Payment Method – verify database to recognize table changes*
- *Sample Address Label – verify database to recognize table changes*
- *Sample Customer Address Label-5160 – verify database to recognize table changes*
- *Sample Customer Address Label – verify database to recognize table changes*
- *Sample Vendor Address Label – verify database to recognize table changes*
- *Ship Slip – verify database to recognize table changes*
- *T4-14b-CRA – verify database to recognize table changes*
- *T4-14b-employee – verify database to recognize table changes*
- *T4-14b-employer – verify database to recognize table changes*
- *T4-Summary – verify database to recognize table changes*
- *T4A – verify database to recognize table changes*
- *T5018 – verify database to recognize table changes*
- *Trial Balance – verify database to recognize table changes*
- *Trial Post Transactions – verify database to recognize table changes*
- *Vendor Activity – verify database to recognize table changes*
- *Vendor Ledger – verify database to recognize table changes*
- *Workers Compensation Remittance – verify database to recognize table changes*
- *Work Order – verify database to recognize table changes*

3.1.4 April 2, 2019

Improvements and corrections;

- Correct problem starting Spire API Service after installing Spire to a drive other than “C:”
- Correctly present Serial/Lot dialog during Sales Order entry even when Lot number set to Consume by Expiry Date
- Correct Profit Centre posting to 3rd segment even if GL Account has a blank 2nd segment
- Respect User Phase permissions settings on Next Phase button in Sales and Purchases
- Respect User, Accounts Payable, Create Entry permission on Accounts Payable List, Create button
- Correct Build Date on Productions Orders where more than one record was highlighted on the Production Order List and built
- Correct occasional error when posting an Inventory Transfer to a warehouse where the item does not exist

- Correctly import Inventory Status field during Inventory Import
- Correctly retain none standard port (other than 10880) during Spire upgrade

Report Changes;

- *Pick Ticket – add support for Canadian English, French and Spanish in text fields*
- *Process Slip – add support for Canadian English, French and Spanish in text fields*
- *Ship Slip– add support for Canadian English, French and Spanish in text fields*
- *RMA Order – add support for Canadian English, French and Spanish in text fields*
- *Work Order – add support for Canadian English, French and Spanish in text fields*

3.1.3 March 21, 2019

Improvements and corrections;

- Restrict initials to 3 characters when creating the original Spire administrator user account
- Do not allow a Spire Administrator user account to be copied
- Correctly save field changes in Edit Company settings, General Ledger, General, Contract Cost, Differential account
- Allow large Purchase Orders with more than 400 lines to be opened in Edit mode
- Allow Inventory Count to increase the count on Serialized Inventory that shows 0 On Hand
- Do not count Serial number records when Serial on Receipt is disabled
- Allow Tax codes to be removed from Company Settings, Vendors and Customers
- Do not allow two users to edit the same AR Payment batch
- Correct ability to select a contact field and email a group of Invoices from Sales History List
- Correct the ability to highlight a Comment in Sales Order, Sales History and click Add to Order
- Correct ability to edit Sales Taxes in Edit Levy
- Correct Spire Auto update when database is on alternate drive (not c:\programdata)
- Correctly save column locations when saving a Default Filter in a module
- Correct error after Requisitioning a subassembly in a Production Order
- Improve Job lookup behavior to remove completed Jobs
- Improve Job lookup to include Job number
- F9 in Job lookup defaults to typed text in browse

Report Changes;

- *Invoice Batched – correct customer ShipTo address communication, add support for Canadian English, French and Spanish in text fields*
- *Invoice Posted – correct customer ShipTo address communication, add support for Canadian English, French and Spanish in text fields*
- *Order Confirmation – add support for Canadian English, French and Spanish in text fields*
- *Packing Slip – correct customer ShipTo address communication, add support for Canadian English, French and Spanish in text fields*
- *Payroll Direct Deposit – add page break after each timecard*
- *Pick Ticket - correct customer ShipTo address communication*
- *Process Slip - correct customer ShipTo address communication*
- *Purchase Order – keep comments in Description column*

- *Quote – correct customer ShipTo address communication, add support for Canadian English, French and Spanish in text fields*
- *RMA Order - correct customer ShipTo address communication*
- *Sales Order - correct customer ShipTo address communication, add Sales Order communication*
- *Ship Slip - correct customer ShipTo address communication*
- *Work Order - correct customer ShipTo address communication*

3.1.2 March 7, 2019

New Features;

- Add View History button to AR and AP screens to show all Applied records in a historical folio group

Improvements and corrections;

- Correctly calculate the change due using the <enter> key in POS payments
- Remove comment and serialNo as columns in Edit Sales Order Details column selector
- Correctly display Kit Component cost values on a Sales Order
- Correctly prohibit the editing of Standard Cost on a Sales Order line
- Correctly store and show Original Quote No in Sales History List
- Correctly write Currency field as ‘’ for base currency records in Sales and Purchases tables
- Correctly respect change to Cheque number in AP Batch Payment screen without having to tab off the field
- Correct revaluation error making a foreign AP payment and taking the discount
- Allow the 1099 to be set in Edit Vendor, General, Report type, in a Canadian company database
- Correctly remember column widths in Edit Vendor, Vendor Prices
- Correct issue when shift tabbing from a date field, in a transaction screen
- Correct date error opening Calendar when Windows date format is set to dd/MM/yy
- Correct error when attempting to copy Inventory to an invalid warehouse
- Correct occasional ‘recNo’ error in Inventory, Lot numbers, Trace
- Correct occasional ‘wrapped C/C++’ error adding prices in Edit Inventory
- Improve speed in Timecards, Job Account field
- Correct error clicking on Remove UDF page when there is no page to remove
- Improve Filter button behaviour when Saving and Removing Preset Filters
- Correctly support postgres user passwords which contain spaces
- Remove unused Company settings, Sequence numbers, Inventory, Inventory Receipts setting
- Remove unused Edit User, General, Manage Active User setting
- Make Toggle Active button on User List available only to Spire Server Admins
- Correctly migrate non default API Server Port from Spire 2.10 during upgrade
- Correctly show Release Notes in Spire Tray on a Windows 7 / Server 2008 R2 computer
- Add error handling to process that creates the Spire Server Admin user during the initial installation of Spire 3.x
- Correct error changing Spire to use English on a computer with French Windows installed

Database Changes

- ***ap_transaction_links – populate null folio fields***
- ***ar_transaction_links – populate null folio fields***
- ***purchase_history – replace currency with '' on all base currency and null records***
- ***purchase_orders – replace currency with '' on all base currency and null records***
- ***sales_history – replace currency with '' on all base currency and null records***
- ***sales_orders – replace currency with '' on all base currency and null records***

New Reports;

- *1099-MISC 1-UP Report – add new US IRS report to Vendor, Reports tab*
- *1099-MISC 2-UP Report – add new US IRS report to Vendor, Reports tab*
- *Price Matrix List – add new sample report*

Report Changes;

- *Accounts Receivable List – add contact information, payment terms, salesperson, correct format phone/fax numbers, move column totals in Detailed mode*
- *AR Payment Receipt – show credits selected at payment time*
- *Cheque-bottom – add memo entered for customer refund, correct customer name*
- *Cheque-centre add memo entered for customer refund, correct customer name*
- *Cheque-top – add memo entered for customer refund, correct customer name*
- *Customer Payments List – remove applied records for Voided Payments*
- *Income Statement – do not show group Revenue totals as negative*
- *Invoice Batched – improve page footer when printing multiple pages*
- *Invoice Posted – support emailing of report from Sales History, improve line spacing*
- *Item Allocations – remove deleted Sales Orders, suppress blank PO sub-report*
- *Payment on Account Receipt – show credits selected at payment time*
- *Packing Slip – improve page footer when printing multiple pages*
- *Pick Ticket – improve page footer when printing multiple pages*
- *Process Slip – improve page footer when printing multiple pages*
- *POS Receipt – display tax 1 on small amounts*
- *POS Receipt Reprint – display tax 1 on small amounts*
- *Sales Order – add support for Canadian English, French and Spanish in text fields*
- *Ship Slip – improve page footer when printing multiple pages*
- *Trial Balance – show company name*

3.1.1 February 5, 2019

New Features;

- Add ability to set the Language for Spire to use in File, Options
- Add ability to create a Refund Cheque for a Customer in the AR Ledger

Improvements and corrections;

- Correct index error when deleting a newly added line to the bottom of a Production Order
- Allow user to change cost of non inventory items in a Production Order regardless of permission
- Correctly roll up non inventory cost during build of a Production Order
- Correctly display all costs when adding a subassembly to Edit Inventory, Bill of Materials tab
- Correctly refresh screen after Toggle subassembly

- Correct error when changing a part number on a Production Order during Replace Components, Toggle All
- Correct occasional 'pending trigger events' error while migrating a database from Spire 2.x to 3.x
- Suppress Margin warning on Sales Order lines containing Kit Components
- Correctly Reload Payables in AP Batch when changing a filter and clicking Load
- Prohibit posting of a Timecard containing a Benefit or Deduction that has been deleted
- Correctly include Benefits and Deduction when performing an Recalculate Employee Amounts
- Reduce time for Spire API Service to respond to shutdown request
- Correct error changing the Spire License to the same License in Spire Tray
- Correctly display login screen when performing Right Click, Show Company List on the Spire icon in the System Tray
- Allow Reports Preview to scroll to the bottom of the last page of long reports

Report Changes;

- *Cheque-bottom – renamed from AP Cheque-bottom, rewritten to support Customer cheques*
- *Cheque-centre – renamed from AP Cheque-centre, rewritten to support Customer cheques*
- *Cheque-top – renamed from AP Cheque-top, rewritten to support Customer cheques*
- *T4-14b-CRA – populate Box 54 Business Number*

3.1 January 23, 2019

New Features;

- Add ability to create All timecards for a Payroll Department or Pay Period
- Add Vacation Pay expense account to Payroll Department to allow Vacation Expense to post to a separate GL Expense Account
- Add default Benefit and Deduction settings to Payroll Department
- Enhanced Benefits, Deductions and Vacation Pay management on Timecards
- Add "Process payment date" prompt when creating a Payroll EFT file.
- Add T4A and T5018 processes for Contract Vendors, print forms and upload to CRA supported
- Add ability to set Routing Record in Company Settings, Company Banking
- Add Employer, Contractor and Contact tabs to Company Settings, Payroll
- Replace Company Settings, Company, Tax Info, Employer Account number with Company Settings, Payroll, Employer, Payroll account number
- Do not charge CPP to employees less than 18 years old or over 70 years old, regardless of CPP Exempt flag
- Add Direct Deposit column to Timecard list
- Add UDF support and Comments to Timecard Entries
- Add columns to the Employee List – Advance Balance, Alimony Credit, Direct Deposit, Other Tax Credit, Overtime Rate, Periods, Premium Rate, Provincial Tax Credit, Regular Rate, Remote Credit, Salary, Sex, Tax Credit, Tax Table, Vacation Owed, Vacation Rate
- Reset WCB Assessable to 0.00 during TD1 update, Provincial Maximum will be used as default
- Add employee email address as available when emailing T4s
- Performing Payroll Year End now prompts for a TD1 Escalation

- Add Payroll Year End message box explaining changes about to happen
- Add ability to create a AP Payment batch for selected Vendors on the Accounts Payable List
- Allow AP Payment batch to be filtered to reduce the Outstanding List
- Add ability to post an EFT AP Payment batch to bank as one transaction for simpler Account Reconciliation
- Add Default payment account to Edit Vendor, Billing, GL Accounts
- Add user permission settings for Manage Payroll Departments
- Create utility to read report meta data, Crystal Reports is no longer required by Spire Server and now only used by Spire Desktop
- Add Localization support for Spanish

Improvements and corrections;

- Correctly calculate 26/27 and 52/53 Pay Periods in Payroll Schedule for any start date
- Show only the current employee's timecards in Edit Employee, Timecards tab
- Correctly show QPIP and HSF Timecard columns for Quebec employees
- Do not allow Division 000 to be used in Payroll Department setup up if Multi Division is enabled
- Set default Pension payable, Union dues payable accounts in Payroll Department
- Handle error when creating a Timecard for an employee with invalid Benefits or Deductions
- Do not assign a cheque number or allow timecard to add an EFT record, when Net Pay <= 0.00
- Do not allow an Employee to be deleted if the Employee is being referenced on a Sales Order
- Provide employee email address when Emailing T4 Report
- Correct error opening a Sales Order contain a none existent employee number
- Correct Gross Profit display on Sales Orders with Kits
- Correct issue when Saving a Sales Order with more than 20 characters in FOB
- Correct error when change an Inventory from Manufactured to Kitted
- Correct error during Update Production Orders from Template when some items no longer valid
- Correctly display components when adding a manufactured item to a Production Order
- Allow foreign GL Account to be copied to a Base Account
- Improve details displayed on calendar when the calendar has been reduced to a smaller size
- Correct error manually changing a calendar date
- Allow a line to be deleted from a Standing Purchase Order
- Allow non-physical Inventory to be imported with "V" flag
- Improve support for user permissions in Edit Inventory, Vendor Pricing tab
- Correct occasional "permission denied for relation ar_transactions" error applying Foreign AR Credits to Debits
- Correct snapshots problem with unexpected date values in filename

Database Changes

- ***employees -*** *rename fields dept_code to dept_id*
- ***employees –*** *change fields from arrays to totals ytd_benefits, lst_benefits, ytd_deductions, lst_deductions*
- ***employees -*** *remove field benefit_ei_flag, benefit_coo_flag, benefit_wcb_flag, benefit_tax_flag, benefit_type, benefit_amount, deduction_ei_flag, deduction_coo_flag, deduction_wcb_flag, deduction_tax_flag, deduction_type, deduction_amount, ytd_bebefits*

- ***payroll_depts –*** *add field _dbversion, _created, _created_by, _modified, _modified_by*
- ***payroll_depts –*** *remove field deduction_names, deduction_accounts, benefits*
- ***payroll_timecard_entries –*** *add field comment, udf_date*
- ***payroll_timecards –*** *add field dept_id, employee_id, wcb_rate, ratina_vacation_pay, reversal, net_pay, total_deductions, total_benefits*
- ***payroll_timecards –*** *rename field tc_union to union_dues,*
- ***payroll_timecards –*** *remove field employee_no, reversal_flag, deductions, benefits*
- ***payroll_depts -*** *add field vacation_expense, _dbversion, _created, _created_by, _modified, _modified_by*
- ***payroll_dept_additions -*** *add new table*
- ***payroll_employee_additions -*** *add new table*
- ***payroll_timecard_additions -*** *add new table*
- ***timecard_entries –*** *renamed to payroll_timecard_entries*
- ***timecards –*** *renamed to payroll_timecards*
- ***vendors –*** *add field tax_report_type*
- ***vendors –*** *drop field vend_1099*
- ***vendors –*** *rename field vend_1099__id_type to tax_id_type*
- ***vendor_t4as –*** *add new table*
- ***vendor_t2018s –*** *add new table*

New Reports;

- *T4A – new report*
- *T4A-Summary – new report*
- *T5018 – new report*
- *T5018-Summary – new report*

Report Changes;

- *#10 Vendor Envelope* ***–*** *verify database for changes to vendors*
- *Accounts Payable by due date* ***–*** *verify database for changes to vendors*
- *Accounts Payable List* ***–*** *verify database for changes to vendors*
- *AP Cheque Remittance* ***–*** *verify database for changes to vendors*
- *AP Cheque-bottom* ***–*** *verify database for changes to vendors*
- *AP Cheque-centre* ***–*** *verify database for changes to vendors*
- *AP Cheque-top* ***–*** *verify database for changes to vendors*
- *AP EFT Payment Remittance* ***–*** *verify database for changes to vendors*
- *Communication* ***–*** *verify database for changes to vendors*
- *CPRS-T5018 List* ***–*** *verify database for changes to vendors, add support for 1099s in US databases*
- *Disbursements Journal* ***–*** *verify database for changes to vendors*
- *Employee Ledger - verify database for changes to employees, payroll_timecard_entries and payroll_timecards, add support to select by Payroll Department*
- *Employee Ledger Detailed- verify database for changes to employees, payroll_timecard_entries and payroll_timecards, add support to select by Payroll Department*
- *Employee ROE Info - verify database for changes to employees*
- *Employee Summary - verify database for changes to employees*
- *Financial Summary – invert group totals for expenses*

- *General Ledger Journal Transaction – show GL Memo on each detail if different*
- *Employee Termination - verify database for changes to employees*
- *Income Statement – invert group totals for expenses*
- *Inventory Purchase history* **–** *verify database for changes to vendors*
- *Inventory Re-order* **–** *verify database for changes to vendors*
- *Payroll Cheque-Bottom – verify database for changes to employees, payroll_temcard_entries*
- *and payroll_timecards, do not print cheques for timecards without a cheque number, make changes to support new benefits and deductions*
- *Payroll Cheque-Centre – verify database for changes to employees, payroll_temcard_entries and payroll_timecards, do not print cheques for timecards without a cheque number, make changes to support new benefits and deductions*
- *Payroll Cheque-Top – verify database for changes to employees, payroll_temcard_entries and payroll_timecards, do not print cheques for timecards without a cheque number, make changes to support new benefits and deductions*
- *Payroll Direct Deposit – verify database for changes to employees, payroll_temcard_entries and payroll_timecards, make changes to support new benefits and deductions*
- *Payroll Ledger - verify database for changes to employees, respect changes to Benefits and Deductions*
- *Payroll Ledger by Department- verify database for changes to employees, respect changes to Benefits and Deductions*
- *Pending Payments* **–** *verify database for changes to vendors*
- *Post Inventory Adjustments* **–** *verify database for changes to vendors*
- *Purchase History* **–** *verify database for changes to vendors*
- *Purchase Order* **–** *verify database for changes to vendors*
- *Receiver General by Payroll Dates - verify database for changes to employees, respect changes to Benefits and Deductions*
- *Requisition List* **–** *verify database for changes to vendors*
- *Sample Vendor Address Label* **–** *verify database for changes to vendors*
- *T4-14b-CRA – verify database for changes to employees*
- *T4-14b-employee – verify database for changes to employees*
- *T4-14b-employer – verify database for changes to employees*
- *T4- Summary – verify database for changes to employees*
- *Vendor Activity* **–** *verify database for changes to vendors*
- *Vendor Ledger* **–** *verify database for changes to vendors*
- *Worker Compensation Remittance* – change report to use WCB rate from timecard

3.0.4 January 15, 2019

Improvements and corrections;

- Allow interaction with Print Preview during AP Payments
- Correctly support User Selectable Invoice Numbers
- Do not allow a Vendor to be deleted with Post to Accounts Payable disabled and Purchase History records exist for the Vendor
- Correct issue when clicking on Conv Factor column header in a Production Template

- Correct issue when click on Open Inventory Item in a Production Order when a non-inventory item is selected
- Reduce time to present Reports List after Print button is clicked

Report Changes;

- *Post Inventory Receipts – correct printing when PO was closed during Receipt*
- *T4-14b-CRA – remove lines on page 2 for T4(18)*
- *T4-14b-employee – remove lines on page 2 for T4(18)*
- *T4-14b-employer – remove lines on page 2 for T4(18)*
- *T4- Summary – update link at bottom of page*

3.0.3 December 19, 2018

New Features;

- 2019 CRA Payroll tax tables added
- Update WCB amounts for 2019
- Remove requirement for specific date login for Payroll yearend
- Show a Caps lock indicator at the end of the Password field during Spire Login
- Add Items tab to Vendor, Purchasing, Orders and History tabs
- Add default payment account to Edit Vendor, Billing tab, GL Accounts and use when adding a new Vendor Payment

Improvements and corrections;

- Correct error changing a new Standing Order, Repeat from none to Weekly
- Correctly respect Company Settings, Sales Orders, Process/Invoicing, Customer Credit, Check credit when saving. Note: Do not enable this if your client does any Cash Sales!
- Improve code creating custom recurring rules in Standing Orders
- Do not allow a Sales Order to be changed from a CAD customer, to one with another currency
- Do not update Sales Order Modified date when using Fill Backorders on Sales Orders that had no change to Ship Quantity
- Correctly retain Serial Number links on partially shipped Sales Order lines during Fill Backorders
- Correct “Item number cannot be overshipped” message in Fill Order tab, on second shipping of a part number, that appears twice on the Sales Order
- Do not show Low Margin indicator on Sales Order Kit Component lines
- All users without Sales Orders, Create Batch permission to Post Invoices when Batch Posting is not in use
- Improve field spacing on Sales Order footer
- Allow a Customer with Deleted Sales Orders to be marked InActive
- Improve Search on customer List to work on all ShipTo addresses even with recent changes
- Correctly respect Purchase Order line discount after Refresh Prices is clicked
- Correctly calculate Vendor Invoice amount on a Purchase Order with discount and freight
- Do not reset freight and duty percent to zero on Purchase Order line after partial receipt
- Do not add a new line when adding a Comment on a Purchase Order line
- Improve error message when attempting to open a Purchase Order with an invalid UOM
- Do not allow a Purchase Order to save with a deleted Part Number

- Correctly do not Close a Purchase Order if the an error happens during posting
- Correct occasional error receiving a Purchase Order with Landed Duty and Freight
- Correctly populate Inventory Label quantity in Purchase Order depending on PO state
- Correct occasional error "Unable to round list correctly" while doing subsequent Receipt on PO
- Correct migration of previously received Inventory to be visible in Inventory, Purchase Receipts
- Correctly save Windows size and position for Inventory Statistics, Serial numbers, Components, Vendor Prices
- Improve Location filter on Inventory List
- Correct error changing a text based filter to a numeric based filter, i.e. warehouse to backorder
- Correctly respect User permission for Modify Inventory in Edit Inventory, Units and Prices tab
- Improve speed and reliability of creating a new warehouse and using Copy From
- Allow 10 character UOM field in Inventory multi-edit
- Correctly copy Tax rebate flags during Inventory Copy
- Correct error importing Inventory records with a 0.00 price
- Correctly update Inventory Location when posting an Inventory Adjustment
- Correct Alternate Part number display on Inventory List
- Correct error during Inventory Copy with UOM unchecked
- Improve default Window size of Inventory Count screen
- Do not allow a Kit to be Toggled in a Production Order
- Correct F9 behaviour in Accounts Payable, Terms field
- Correct error creating an EFT file in AP Payment batch with wrong Banking information in Company settings
- Correct the Vendor Prices list to display only prices for this Vendor
- Remove unused Automatically delete price after expiry flag in Vendor Price
- Correct Account filter on Vendor List
- Improve tab order and set initial focus in Price Matrix dialog
- Correctly copy a Job record on the Job cost List
- Show Job name on Job lookup screen
- Do not allow a Territory record to be created without a Territory code
- Do not allow a GL Account to be created with both Sales Account and Bank Account checked
- Correct 'year' error when navigating through Historical GL Transactions
- Improve sort order in Period selector in General Ledger, Reports tab
- Improve sort order in Year End selector in General Ledger, Reports, Historical Financial Reports
- Improve field widths in General Ledger, Reports, GL Transactions
- Correctly perform reverse GL Entry for multi division Revaluation posting
- Improve error message when attempting to post a Timecard will invalid Payroll Department
- Correctly refresh the Timecard Batch screen and Batch List after Post All
- Correct Department column on Employee List
- Correctly display an error when creating EFT for an employee with a name more than 30 characters long
- Correct occasional 'QFocusEvent' error after displaying a tooltip while entering data
- Correct occasional error reopening a previously Saved Account Reconciliation
- Add tooltip to Employee, WCB Assessable field

- Adjust Locked Periods after performing Year End Close
- Show automatic bcc address in Email dialog
- Improve validation and acceptance of a manually typed Email address
- Improve support for Unicode characters in Email name (ie. long dash)
- Improve the ability to save a current filter as the default filter
- Allow Customer type to be 40 characters in Price Matrix Import
- Remove trailing spaces from new code field in Customer Code Change, Vendor Code Change and Inventory Code Change
- Uninstall Spire 2.x during Spire 3.x installation
- Correct occasional reinstall of Postgres during Spire 3.x update
- Correct BVmigrate to transfer Attachment links

Database Changes

- ***inventory_labels*** *– create table schema if it does not exist (only used for report development)'*
- ***inventory_uoms*** *– replace null values with ''*
- ***sale_orders –*** *replace null values with 0.00 in cr_approve_amt field*

New Reports;

- *#10 Vendor Envelope – new report*

Report Changes;

- *Comparative Statement – correct group totals when Revenue Accounts exist that are set to Normally Debit*
- *Component Usage – correctly show parent part number for Kits*
- *Invoice Batched – improve change in Payments section*
- *Invoice Posted – improve change in Payments section*
- *Inventory Sales History in Base – add new report*
- *Receipts Order Fulfillment – remove deleted Sales Orders*
- *Sales by Payment Method – show Payment date when different than Invoice date, improve description*
- *Sales Order – remove double payment description*

3.0.2 December 5, 2018

New Features;

- Show non-inventory item in grey on Sales and Purchase Order/History lines
- Add Vendor Part number to Edit Inventory, Purchasing, history tab and Purchase History, Items tab
- Allow Job Address or Warehouse address, to be chosen as a ShipTo in a Purchase Order
- Add a User setting Job Costing, Add Entries

Improvements and corrections;

- Correctly display UOM column content on Inventory List
- Do not allow an Inventory Item to be pushed to a negative On Hand Quantity with a Purchase Order return if Company Settings, Inventory, Prohibit Overshipping is Enabled

- Correctly post Sales Orders with Location and/or Profit Centre – do not override GL Segment with Location or Profit Center, if it is already specified in the GL Account fields, with Sales Order Location and/or Profit Center segment
- Correctly refresh Purchase Order line item cost fields when the Refresh Prices button is clicked
- Correct maintain Purchase Order Item GUID when closing to Purchase History
- Correct “GetSerialLinkType” error posting a non-inventory Sales Order line where the part number has subsequently been added to Inventory and made serialized. The Inventory record is now correctly ignored since this was a “non-inventory” line
- Correctly auto consume Lot Numbers when quantity changes on a Sales Order line
- Correct Sales Order Total Cost Ordered (Average) and Total Cost Ordered (Current) fields on Sales Order List
- Correct Sales Order, Contact lookup list
- Correctly refresh Discount % when changing a the part number on a Sales Order Line
- Correctly respect User, General, Can change warehouse permission on Sales Order line
- Improve detection to Save or Discard changes when Navigating through Sales Orders
- Correctly respect user permissions for Ship Order on Sales Order, Ship button
- Present email addresses in Email dialog after clicking Ship button in a Sales Order
- Correctly post Sales Order Line Discount and Retail Price to Sales History
- Ensure that Sales Order and Sales History currency is never set to null
- Correctly populate payment terms on a Credit Memo created from Sales History Invoice, Credit button
- Disable Trial Post button in Sales Order batch if no batch is selected
- Correct Inventory ReAllocate for Backorders when the original Sales Order is still in the Order List
- Do not consider Sales Quotes during Inventory ReAllocate
- Correct migration of Kit Components, backorder field, on Quotes
- Correct label in Edit Employee, Amounts tab to “Additional Tax (TD1 page 2)”
- Do not allow a Deleted User to be Activated in the User List
- Correct behavior when Enabling / Disabling Company Access in User Settings
- Improve lookups in User Settings
- Improve Admin userID maximum length to 30 characters from 12 characters
- Correctly set address default in a One Time Vendor record
- Correct Date format drop down in Edit Currency
- Do not show Job column in GL Entry review screen when presented from AR and AP
- Do not import Accounts Payable records if Expense account matches Vendor’s Payable account
- Remove ability to import Period values into the General Ledger table
- Correctly respect User Permission to Add/Modify in Import Tool
- Correct “smallint” error while Importing Vendors
- Improve error when attempting to import an Inventory record with an invalid Product Code
- Correct error importing Salesperson in Sales Order import
- Correctly post data when editing a field and posting the batch without leaving a detail line
- Improve migration of BV Payroll Benefits and Deductions configuration in BVMigrate
- Correctly migrate On Accounts payments (originally type 7) in BVMigrate

- Show error in Spire Tray when connection to Spire API service is not possible
- Correctly abort changes when using an Open Related, making changes and cancelling
- Validate Retained Earnings GL account is a credit account before performing Year End
- Correct GL Account display in Edit Currency, Gain/Loss
- Correctly display HTML dialogs on Windows Server 2008R2
- Do not prompt to save when exiting empty edit screens (Employee, Inventory, GL Account, Sales Tax)

Database Changes

- ***sales_history*** *– replace null currency with ''*
- ***sales_orders*** *– replace null currency with ''*
- ***system_user_base –*** *expand username column to 30 characters*

Report Changes;

- *Accounts Receivable List – correctly respect nonstandard aging periods*
- *Cash Balance – include AR payments for companies not using Location Accounting*
- *Cash Balance Details – include AR payments for companies not using Location Accounting*
- *Comparative Financial Statement – align columns for cleaner export to Excel*
- *Customer Statement –force detailed section to order by date*
- *Employee Ledger – move report to Payroll, Reports tab and Employee, Timecards tab*
- *Employee Ledger Details– move report to Payroll, Reports tab and Employee, Timecards tab*
- *Financial Statement by 12 Periods – correct Current Earnings*
- *Historical Accounts Receivable List – correctly respect nonstandard aging periods*
- *Item Allocations – Show Quotes in italic font*
- *Item Components – correctly show Kit components*
- *Production Trail Build – correctly respect committed quantity from this Production Order when calculating Shortage*
- *Receipts Order Fulfillment – removed unused tables*

3.0.1 November 21, 2018

New Features;

- Add Historical Financial Reports template to General Ledger, Reports tab
- Add Required Date field to Inventory Transfer screen
- Protect against brute force password attempts
- Enforce password score = 2 when changing a password
- Add ability to use Alt-S for Post button in Accounts Receivable, Accounts Payable and General Ledger Transactions
- Add email address column to User List
- Add Select all / Deselect all in Copy to Warehouses dialog, while creating a new Inventory item
- Provide commented spire.ini on migration from Spire 2.x and new installations
- Add Localization support (currently testing French)

Improvements and corrections;

- Correct occasional connection error telling user "Unable to communicate with Spire server. Please check your network and try again."

- Prevent a Sales Department from being deleted if it referenced by an Inventory record
- Correctly save UOM record in Edit Inventory without having to tab off UOM field
- Improve speed in Edit Inventory, Vendor Pricing tab for large datasets
- Correctly display Purchase Orders in Edit Vendor, Purchasing, History tab
- Correctly set current Vendor code when adding a Vendor Price in Edit Vendor, Vendor Prices tab
- Respect user permission for See Sell Prices in Edit Inventory, Prices and Units tab
- Pop a message when attempting to pay an AR Account that totals to a negative payment while using discounts
- Improve speed in Account Reconciliation screen
- Correct occasional 'will_post' error during Account Reconcile
- Correctly remove Reconciled Date when un-reconciling a transaction in Account Reconciliation
- Improve field layout in Edit Sales Order, Customer section
- Correctly update Kit cost fields when a component line is deleted from the Sales Order
- Correct new Sales Order with the backordered Kit intact, if it was backordered on a previous Sales Order
- Improve speed opening the Sales Order screen
- Correct matview error while Invoicing a Sales Order after upgrading from Spire 2.9.x
- Correct occasional Sales Order error when working with accessories items
- Remove Total and Base Total columns from Sales, Items tab and add Ext Price column
- Remove Apply to all warehouses checkbox from Update Customer Pricing in a Sales Order in single warehouse companies
- Correctly maintain Job group link to Job Header after the last record on a Kit or Accessory group
- Correct error attempting to view transactions in division 000 after enabling multi divisions
- Correct error deleting a new non-inventory line from a Purchase Order
- Add Extended Cost column to Purchases, Items tab
- Correctly update Production Order line quantity when excess Serial or Lot numbered items selected
- Respect On Order quantity when Requisitioning from a Production Order
- Correct occasional error adding a sub-assembly to a Production Order
- Improve speed in GL Transaction with large Job Cost tables in use
- Correct error when saving a new Currency record without populating all fields
- Show password strength indicator when changing a user's password in Edit User
- Correct error when changing your own password in Edit User
- Correct error clicking Print button when a report has been set to default to a printer that no longer exists
- Correctly remember windows size and position on lookup screens
- Correct silent close when pressing F12 while in Calendar
- Correct periodic interface lags during posting operations
- Prompt for the correct Postgres password if the user performing the upgrade to Spire Server 3.0 entered the wrong password
- Correctly add new firewall rules with new paths, when installing Spire 3.x
- Correct Null item_type error during explode_kits migration
- Correct Invalid Currency string during BVMigrate

- Correct error saving historical periods in Company settings on a newly migrated database
- Warn during Import if an Excel worksheet with an invalid (uppercase) file extension
- Update PostgreSQL ODBC driver to 10.3

New Reports;

- *GL Transactions by month – new report*
- *Historical Balance Sheet – add new report to General Ledger, Reports tab*
- *Historical Income Statement – add new report to General Ledger, Reports tab*
- *Historical Trial Balance – add new report to General Ledger, Reports tab*

Report Changes;

- *Accounts Payable List – add to comment explaining that report must be run from the Reports tab when used with historical dates*
- *Consolidated GL Account Activity – correct typo in alias name*
- *Daily Fill Rate by Invoice – correct parameter names*
- *Daily Fill Rate by Item – correct parameter names*
- *Customer Payments List – add original Invoice amount and change group to sequence + payment method*
- *Financial Summary – correct subscript error occurring on some periods and wrong totals on other periods*
- *Historical Inventory Status – respect user view cost permission setting*
- *Inventory Count Review – respect user view cost permission setting, correct UOM on each count line*
- *Inventory Purchase History – respect user view cost permission setting*
- *Inventory Re-order – respect user view cost permission setting*
- *Inventory Status – respect user view cost permission setting*
- *Item Allocations – add Production Order section to report*
- *Item Components – respect user view cost permission setting*
- *Payment on Account Receipt – improve column headers and add message when credits have been applied during payment process*
- *Pending Inventory Adjustments – respect user view cost permission setting*
- *Pending Purchase Order Receipts – respect user view cost permission setting*
- *Post Inventory Adjustments – respect user view cost permission setting*
- *Post Inventory Count – respect user view cost permission setting, correct UOM*
- *Post Inventory Receipts – respect user view cost permission setting*
- *Production Build – support several Production Orders to be built and printed at once, respect user view cost permission setting*
- *Production Build – improve vertical line alignment*
- *Production Order – respect user view cost permission setting, respect UOM for cost and extended cost*
- *Production Schedule – respect user view cost permission setting*
- *Production Template – respect user view cost permission setting*
- *Purchase History – respect user view cost permission setting*
- *Purchase Order Details – respect user view cost permission setting*

- *Purchase Order Summary – respect user view cost permission setting*
- *Sales by Payment Method – add penny rounding support*

3.0 October 11, 2018

Note: Please ensure that users that exist in more than one company have the SAME email address in each company, so that each user is migrated to the new user table correctly.

Only a Spire Admin user can set the User Active flag on the user list.

It is preferred to migrate the most important company first.

New Features

- Add Calendar module
- Change Edit User Setting, Sales Orders, Modify Sales Orders to have the options of
  - Disallow – not permitted to edit Sales Orders
  - Modify Shipping Fields – restrictive permission to only modify shipping type fields
  - Modify – permitted to modify all fields unless they have separate permissions i.e. Cost
- Move main user settings to Spire database level allowing more flexibility in global settings (across multiple companies) and restrictions on which companies to appear in the logon screen
- Add Sales Orders template to Sales Orders, Reports tab
- Add support for quantity multiplier in all scan dialogs
- Add Search ability to most Lookup Lists including Sales Taxes, Warehouses, Shipping Methods, Payment Terms, Salesperson, Territories, Phases, Promotions, Email templates, Payroll departments, GL Divisions
- Fully support Serialized Costing in Sales and Production when enabled in Company Settings (will be disabled by default)
- Add Purchase Order Receipts auditing for taxes, duty, freight and exchange
- Add temp_view for reporting from Purchase history, Items tab
- Add Sales History, Reports tab with support for reports which contain the template "Sales History"
- Change the report template supported in Sales History List, Print button to "Sales History List"
- Change the report template supported in Purchase History List, Print button to "Purchase History List"
- Replace Report preview with PDF viewer
- New Kits, Macros, Options process on Sales Orders, Macros support on Purchase Orders
- Move User Account management to the Spire database where you can set permission for which companies are presented to the user, improved user count management, improved API security
- Automatically create a snapshot of the Spire database and provide ability to restore it if PostgreSQL is being installed
- Add progress bar and error logging to Spire Desktop update initiated by Auto Update
- Default Salesperson with Username has been removed from Company Settings. User Settings, Salesperson. User Settings, Salesperson, Default Salesperson setting is now used instead

- Archived Quotes and Deleted Sales Orders are now kept in the Sales Orders table with a deleted flag and can be restored back to an Active Quote or Sales Order
- Add ability to use Contains in the Sales History PO number and Reference number filters
- Add Partial Tax column to Sales History Invoice view
- Add Time field Communication Due Date, and Completed Date
- Add Partner recognition to Spire User licensing. If the user’s email address matches the one on the Spire License portal’s Partner email address, then the user’s license is not counted as part of the total active users limit. A warning is popped if the partner’s license is deactivated.
- Support High DPI displays
- Path to Spire Desktop changed to "C:\Program Files\Spire\Desktop\spire.exe". Microsoft RemoteApps definition need to be changed.

Improvements and corrections

- Upgrade development tools Qt, Python, SIP, PyQt and PostgreSQL database version
- Improve speed working with Sales Orders and Purchase Orders
- Improve speed with connection pooling and multi-threading support
- Improve speed displaying multiple companies in Spire Tray and Spire company logon list
- **Spire.exe has been moved to "C:\Program Files\Spire\Desktop\spire.exe" Remote Apps users will need their shortcut changed**
- Improve occasional silent close with no error behaviour
- Improve cursor position and focus when clicking on a chooser field that does not contain multiple fields
- Improve right click, paste operation to insert at cursor location
- Correct tooltips on Delete (Red X) button, i.e. Del key deletes text in selected field or highlighted row in a list, Alt-Del deletes an entire Sales Order from inside Edit Sales Order, Ctrl-Del deletes a Sales Order line from inside Edit Sales Order
- Logon UserIDs now support upper and lower case characters
- Improve Auto Complete reliability when only one character is typed
- Remove orphaned serial number records
- Remove Edit in Excel button from Mail Merge (caused a hang condition)
- Make Sales History tables the same as Sales Orders tables to properly support Copy and Credit Invoices to Sales Orders consistently
- Respect user modified GL Accounts on Sales History items when copying an Invoice to a Sales Order
- Do not create a batch when Archiving a Sales Quote
- Reliably move cursor to next line when the current Sales Order line is deleted
- Respect user permission for Batching Sales Orders while performing Right Click, Batch Sales Order
- Correct Cost Column headers in Sales Orders with FIFO Costing enabled
- Improve Comment and Memo behaviour in Sales Orders and Sales History
- Correct behaviour when opening Sales Order Edit on a Processed Order
- Improve cursor focus after deleting a Sales Order line
- Re-total Sales Order when Partial Tax flag is toggled

- Correctly retain all communication records when a Quote is changed to a Sales Order
- Correctly filter Inventory List after typing a partial part number on a Sales Order line and pressing F9 more than once
- Improve Credit Check behaviour when Customer has no “Over Terms” Invoices
- Respect Sales Order Communication Alert when adding a Sales Order from Edit Customer
- Correctly post single GL transaction when Posting a Sales Order Deposit with Batch Posting and Trial Posting report
- Change User settings, General, POS Only User to a drop down setting
- Correct error when Trial Post is clicked when a Posted Sales Order batch is selected
- Correctly increment quantity when scanning the same part number more than once in the Sales Order, Scan screen
- Add Salesperson field to Sales Order List, AR Payment screen
- Do not allow a Ship Via record to be created without a Code
- Correct error when Posting an AR Payment Batch for foreign payments
- Allow email addresses to be selected to email AR Payment on Account Receipt from Sales Order List
- Improve Accounts Receivable Payment Apply to be able to handle partial payments on Invoices as well as Credit Memos in the same transaction
- Correctly respect removed Discount checkmark in AR Batch Payment
- Copy PO Number to new record when Voiding an Accounts Payable Invoice
- Improve Copy Inventory to copy Kit components as well
- Do not allow changes to Edit Inventory, Kit Components to compromise Committed quantity for Kits already on Sales Orders
- Add On Hand column to Edit Inventory, Components tab
- Kit component sales are now tracked in Inventory Statistics
- Inventory, Statistics now displays data prior to Period 1, Last Year
- Correctly open historical Inventory Adjustment in Inventory, Receipts tab
- Pop error when attempting to save a Vendor Price in Edit Inventory without a Vendor specified
- Enable View Account button in Account Reconciliation without requiring a line to be selected
- Do not allow a user without View GL Transaction permission to view Historical GL Transactions
- Add ability to print Transaction shown in Edit GL Account, History, GL Transactions screen
- Do not allow users to run Transaction based reports on each module’s Reports tab, if they do not have permission for View Transaction for the module
- AP Batch Payment, Post report now supports all 3 contact email addresses
- Correct crash when entering a long URL in the website address field
- Improve “Match expected quantity” behaviour in Inventory Count
- Improve Seek behaviour in GL Transaction list when seeking for Inventory Count
- Correct Promotion field label in Price Matrix screen
- Do not blank Promotion code when lookup is canceled
- Allow Extended Quantity to be edited in a Production Order
- Correct Inventory OnOrder quantity when a Purchase Order line is over received
- Do not adjust On Order for an Non-Inventory part number, when the item been added to Inventory since the item was added to the Purchase Order

- Correct access to Purchase Order line UDF in Purchase History
- Allow Purchase Order to be closed even if an Inventory Items has been marked On Hold since the PO was created
- Improve error trapping and message when Distribute Freight is attempted on an un-roundable amount
- Improve right-click Paste behaviour in UDF fields
- Correct Address UDF validation error when saving an AR or AP Invoice
- Correct UDF Fiscal period validation and improve failure message
- Correct error that is displayed when too many characters or numbers are entered into a field
- Improve field focus behaviour when alt-tab is used to switch away from Spire and then back to Spire
- Improve Search to respect quoted words i.e. “black pipe” will only return results where black and pipe are adjacent in the field
- Auto complete list display on first character typed
- Add error message when attempting to run a report that references Legacy views
- Remove Inventory and Cost of Goods Sold accounts from Company Settings, General Ledger, Special Accounts, AR Accounts
- Correct supported template to “GL Transaction History” in the Print dialog when drilling down and viewing a transaction from the Edit GL Account History tab
- Create temp_views during when Print All is used on a List even if no filters are in use
- Correctly release XLSX file after Import
- Export date/time columns with local time stated
- Add support for parenthesis when performing math calculations in a numeric field
- Improve migration of BusinessVision Invoice Line notes to Spire Comments
- Improve Email dialog
- Ensure that credentials are recreated (spire.ini) when Spire Server is Uninstalled and Reinstalled
- Do not allow create snapshot when multiple companies are highlighted in Spire Tray
- Improve support for duplex printing

Database Changes

- ***addresses –*** *index change*
- ***countries –*** *create a new countries table with current valid data*
- ***crystal_reports –*** *new table added to Spire database, to replace rptcache.json*
- ***employees*** *– index change*
- ***gl_acounts –*** *index change*
- ***gl_periods –*** *index change*
- ***gl_special_accounts –*** *index change*
- ***gl_transactions –*** *index change*
- ***inventory*** *– add field show_options*
- ***inventory*** *– remove fields accessory_whse, accessory_partno*
- ***inventory_kit_items*** *– rename table to* ***inventory_components***
- ***inventory_components*** *– add fields parent_id, inventory_id, price*
- ***inventory_components*** *– remove field kit_id*

- ***inventory_kits*** *– remove table*
- ***notes*** *– add field due_time*
- ***notes*** *– rename field assigned_to to assigned_user_id*
- ***purchase_history*** *– remove field ex_date*
- ***purchase_orders*** *– remove field ex_date*
- ***purchase_receipts*** *– add new table*
- ***sales_history_items*** *– add fields levy_amount, levy_code, levy_tax_applicable, price_matrix_id, price_matrix_score, sell_direct_factor, suppress, uom_sales_factor, user_cost, vendor_no*
- ***sales_history_items*** *– remove fields base_retail_price, generated, serialized_qty, shipped_date, uom_purchase, whse_location, notes*
- ***sales_history_items*** *– rename fields employee to employee_no, inventory_serialized_qty to serialized_qty, comments to comment, record_type (char) to item_type (integer)*
- ***sales_history*** *– add fields total_standard_cost , total_surcharge, user_freight, user_surcharge, was_standing*
- ***sales_history*** *– remove fields deposit_flag, e_download_date, ex_date, last_deposit_amount, last_deposit_date, notepad, payment_gl_account, payment_method, pos_user_id, print_pack, print_ship_lables, serialized_items, ship_labels_date, ship_labels_init, total_deposit, was_quote*
- ***sales_history*** *– rename fields orig_quote_no to was_quote_no, payment_division to division, po_no to ref_no, profit_centre to profit_center, ship_via_code to ship_code*
- ***sales_order_archives*** *– remove table*
- ***sales_order_batches*** *– rename field profit_centre to profit_center*
- ***sales_order_item_archives*** *– remove table*
- ***sales_order_items*** *– add fields _deleted, _deleted_by, suppress*
- ***sales_order_items*** *– remove fields hasmemo, customer_specific_price, uom_purchase, uom_purchase_factor*
- ***sales_order_items*** *– rename fields employee to employee_no, , record_type (char) to item_type (integer), vendor to vendor_no*
- ***sales_order_payment_archives*** *– remove table*
- ***sales_order_payments*** *– add fields _deleted, _deleted_by*
- ***sales_orders*** *– add fields _deleted, _deleted_by, total_standard_cost, total_surcharge_ordered*
- ***sales_orders*** *– remove fields has_serialized_items, skip_validation, user_type, was_quote*
- ***sales_orders*** *– rename fields invoicedbyuser to invoiced_user, orig_quote_no to was_quote_no, processebyuser to processed_user, profit_centre to profit_center*
- ***system_filters*** *– add field user_id*
- ***system_filters*** *– remove field user*
- ***system_record_locks*** *– add field user_id*
- ***system_report_permissions*** *– replace field userid (char) with user_id (integer)*
- ***system_system_record_locks*** *– remove field username*
- ***system_settings*** *– replace field user (char) with user_id (integer)*
- ***system_users_base –*** *new table to replace original system_users but some fields are moved to spire database schema*
- ***system_users –*** *this is now a view, remove field password*
- ***system_users –*** *add field uuid*

New Reports;

- *Employee ROE Info – add new report*
- *Financial Summary – add new report*
- *GL Historical Transactions – add new report*
- *Inventory Purchase History – add new report*
- *Sales History Report tab Sample – add new report*

Report Changes;

All changes made with Crystal Reports 2016 SP5

- *Accounts Payable by Due Date – add "Accounts Payable" to template*
- *Accounts Payable List – add "Accounts Payable" to template, correct Credit Limit column display*
- *Accrued Payables Summary – verify database for changes to purchase_orders*
- *AR Payment Receipt - verify database for changes to addresses, ar_transactions, ar_transaction_links, system_settings*
- *Backorder Details by Customer – verify database for changes to sales_orders, sales_orders_items*
- *Batch Journal – use payment method descriptions, verify database for changes to sales_orders_batches, sales_orders*
- *Batch Journal Reprint – use payment method descriptions, verify database for changes to notes, sales_history, sales_orders_batches*
- *Cash Balance Details – verify database for changes to sales_history, sales_orders*
- *Cash Balance – verify database for changes to sales_history, sales_orders*
- *Communication – verify database for changes to notes*
- *Consolidated GL Account Activity – use correct opening balance for division accounts, move balance labels to right, verify database for changes to system_settings*
- *Customer Sales History Details – verify database for changes to sales_history, sales_history_ite, s system_settings, support ?UserID, correctly calculate foreign currency conversion with header discounts, move totals up from page footer*
- *Customer Sales History – verify database for changes to sales_history, sales_history_items, system_settings, support ?UserID, correctly calculate foreign currency conversion with header discounts, move totals up from page footer, change report template to "Sales History List"*
- *Customer Statement – change template to "Customer Accounts Statement"*
- *Daily Fill Rate by Invoice – verify database for changes to sales_history, sales_history_items, change report template to "Sales History List"*
- *Daily Fill Rate by Items – verify database for changes to sales_history, sales_history_items*
- *Deleted Sales Orders – change report to use deleted records from sales_orders and sales_order_items, verify database for changes to notes, move report to Sales Orders, Reports tab, Sales Orders template, correctly report local time*
- *Employee Ledger Detailed– show hours and total hours when non-zero, verify database for changes to employees*
- *Employee Ledger – show hours and total hours when non-zero, verify database for changes to employees*
- *Employee Summary – verify database for changes to employees*

- *Employee Termination – verify database for changes to employees*
- *Equipment Service History – verify database for changes to notes, sales_history, sales_history_items, sales_order_items, sales_orders*
- *General Ledger Account Activity – move balance labels to right, verify database for changes to system_settings*
- *Historical Accounts Receivable List – change template to “Accounts Receivable”*
- *Inventory Bar Code Label 5160 – verify database for changes to inventory*
- *Inventory Count Review – verify database for changes to inventory*
- *Inventory Count Sheet – verify database for changes to inventory*
- *Inventory Label 2X1 – verify database for changes to inventory*
- *Inventory Label 5160 – verify database for changes to inventory*
- *Inventory Re-order – adjust column headers for cleaner export to Excel, verify database for changes to inventory*
- *Inventory Sales History Details – verify database for changes to sales_history, sales_history_items, system_settings, support ?UserID, correctly calculate foreign currency conversion with header discounts, move totals up from page footer*
- *Inventory Sales History – verify database for changes to sales_history, sales_history_items, system_settings, support ?UserID, correctly calculate foreign currency conversion with header discounts, move totals up from page footer, change report template to “Sales History List”*
- *Inventory Statistics – verify database for changes to inventory*
- *Inventory Status – verify database for changes to inventory*
- *Inventory UPC List – verify database for changes to inventory*
- *Invoice Batched – verify database for changes to inventory, notes, sales_orders, sales_orders_items, show kit components as set by user, show up to 5 decimals on unit price only when required*
- *Invoice Posted – verify database for changes to inventory, notes , sales_history, sales_history_items, add “Customer Accounts Statement” to template, change report template from “Sales History” to “Sales History List”, respect changes to Levies and Surcharges and do not show payment method for migrated Invoices that had no payments (ie. On Account) , show kit components as set by user, show up to 5 decimals on unit price only when required*
- *Item Allocations – verify database for changes to inventory, inventory_item, sales_orders, sales_orders_items, purchase_orders*
- *Item Components – verify database for changes to inventory*
- *Material Requirements by Inventory – verify database for changes to inventory*
- *Order Confirmation – verify database for changes to inventory, notes, sales_orders, sales_orders_items, correctly show Surcharge Total, show kit components as set by user, show up to 5 decimals on unit price only when required*
- *Packing Slip – verify database for changes to inventory, notes, sales_orders, sales_orders_items, show kit components as set by user*
- *Payment on Account B – verify database for changes to notes, sales_orders, sales_order_items*
- *Payment on Account P – verify database for changes to notes, sales_history, sales_history_items, add ?InvoiceNoList for Email test*

- *Payment on Account Receipt – verify database for changes to countries, system_settings, add CurrencyInfo sub-report to support currency symbol*
- *Payroll Cheque – Bottom – verify database for changes to employees*
- *Payroll Cheque – Centre – verify database for changes to employees*
- *Payroll Cheque – Top – verify database for changes to employees*
- *Payroll Ledger by Department – verify database for changes to employees*
- *Payroll Ledger – verify database for changes to employees*
- *Pending Inventory Adjustments – verify database for changes to inventory, notes*
- *Pending Purchase Order Receipts – verify database for changes to inventory, purchase_orders*
- *Pick ticket – verify database for changes to inventory, notes, sales_orders, sales_orders_items, show kit components as set by user*
- *POS Receipt Reprint – verify database for changes to inventory, sales_history, sales_history_items, show up to 5 decimals on unit price only when required, respect kit components suppress flag*
- *POS Receipt – verify database for changes to inventory, sales_orders, sales_order_items, show up to 5 decimals on unit price only when required, respect kit components suppress flag, change report template to "Sales History List"*
- *Post Inventory Adjustments – verify database for changes to inventory, notes*
- *Post Inventory Count – verify database for changes to inventory*
- *Post Inventory Receipts – change report to use purchase_receipts table, change sort order to purchase_receipts.id, add UOM columns, verify database for changes to inventory, notes*
- *Process Slip – verify database for changes to inventory, notes, sales_orders, sales_orders_items, show kit components as set by user*
- *Production Build – correct use of UOM on Cost field, verify database for changes to inventory, notes*
- *Production Order – correct lines values for partial received PO, verify database for changes to inventory, notes*
- *Production Template – verify database for changes to inventory*
- *Production Trial Build – verify database for changes to inventory, notes*
- *Purchase History – verify database for changes to purchase_history, change report template to "Purchase History List"*
- *Purchase Order Details - verify database for changes to purchase_orders*
- *Purchase Order Reprint – show Order Communication if Print flag was set, verify database for changes to inventory, notes, purchase_history, change report template to "Purchase History List"*
- *Purchase Order Summary – verify database for changes to purchase_orders*
- *Purchase Order – show Order Communication if Print flag was set, correct extended amount when Purchase Order is partially received, verify database for changes to inventory, notes, purchase_orders*
- *Quote – verify database for changes to inventory, notes, sales_orders, sales_orders_items, correctly show Surcharge Total, show kit components as set by user, show up to 5 decimals on unit price only when required*
- *Receipts Order Fulfillment – verify database for changes to inventory, purchase_orders, sales_orders, sales_order_items*

- *Receiver General by Payroll Dates – verify database for changes to employees*
- *Requisition List – verify database for changes to inventory*
- *RMA Order – verify database for changes to inventory, notes, sales_orders, sales_orders_items, show kit components as set by user, show up to 5 decimals on unit price only when required*
- *Sales and Taxes 4 – verify database for changes to sales_history, change report template to "Sales History List"*
- *Sales and Taxes – verify database for changes to sales_history, change report template to "Sales History List"*
- *Sales by Payment method – verify database for changes to sales_history, remove ?CompanyName parameter, change report template to "Sales History List"*
- *Sales Order Details List – ignore deleted records in sales_orders, support ?UserID and verify database for changes to sales_orders, sales_orders_items*
- *Sales Order List – ignore deleted records in sales_orders, support ?UserID and verify database for changes to sales_orders, system_settings*
- *Sales Order – verify database for changes to inventory, notes, sales_orders, sales_orders_items, show kit components as set by user, show up to 5 decimals on unit price only when required*
- *Sample Vendor Address Label – add ?VendorNoList parameter to pass email test*
- *Sample Address Label – verify database for changes to sales_orders*
- *Ship Slip – verify database for changes to inventory, notes, sales_orders, sales_orders_items, show kit components as set by user*
- *T4-14b-CRA – verify database for changes to employees*
- *T4-14b-employee – verify database for changes to employees*
- *T4-14b-employer – verify database for changes to employees*
- *Vendor Ledger – change template to "Vendor Accounts Payable"*
- *Work Order – verify database for changes to inventory, notes, sales_orders, sales_orders_items, show kit components as set by user, show up to 5 decimals on unit price only when required*
- *Workers Compensation Remittance – verify database for changes to employees, remove ?CompanyName parameter*