

Release Notes for Version 7.0.2751

Application	Feature	Type	Comments	Settings
SPOT	Adjustments	Fix	Visit-based manual adjustments were not applying to new orders created during the detail process by using the Split button.	
SPOT	AR	Change	Error message that appears when attempting to view/print statements and all selected customers are configured for email statements is now more informative and helpful.	
SPOT	AR	Addition to Existing Feature	As a SPOT User, I would like Activity Log events for individual statements being deleted or created. "Customer Statement Created" and "Customer Statement Deleted" Activity Log entries have been added to SPOT.	
SPOT	AR	Addition to Existing Feature	As a SPOT user, I would like to have a convenient option on the CCOF payments screen to print out a declined report. A "Declined Report" button has been added to the Generate Statements tab of the Statement Wizard and to the CCOF/ACH Payments screen, so that a report is immediately available that shows declined CCOF payments on account.	
SPOT	Assisted Assembly	Change	As a SPOT user, I would like a warning tone if the item/order is scanned and item has previously been assembled. Assisted Assembly - Added an "Alert" tone to the Assisted Assembly view, if an item is rescanned within the interval time for warning the user of a reprocess.	Store > Process Step Settings > Assembly Profiles > (Profile) > Warn of Item Rescan (Day Threshold) > Default is 1 Setting this value to > 0 will activate a user warning if an item is rescanned through Assisted Assembly with the specified number of days.
SPOT	Assisted Assembly	Fix	Assisted Assembly - An item removed from Assisted Assembly (when "Rescan Item to Remove" is enabled) was not showing as "Off Assembly".	
SPOT	Batch Markin	Addition to Existing Feature	Batch Markin now includes a "Remove Item" button to allow removing an HSL from the batch. NOTE - the HSL is not destroyed during this process; rather, it is simply removed from the current batch.	
SPOT	Batch Markin	Addition to Existing Feature	Batch Markin - Added "Edit Item" button. Double clicking the row also initiates an edit.	
SPOT	Batch Markin	Addition to Existing Feature	As a SPOT user I would like an option to allow reminders to pop-up on the batch mark-in screen Batch Markin, setting to determine whether to pop up customer memos on the batch markin screen. No (Default) - Do not popup memos When Customer Changes - Show memos whenever the	Store Settings->Markin Settings->Batch Markin - Display Customer Memos.

			customer owning the newly scanned item differs from the previously scanned item. Once Per Customer - Show memos the first time a customer's item is scanned.	
SPOT	Batch Markin	Addition to Existing Feature	An explicit file folder may now be set for restoration file exports.	Store Settings->Restoration Settings->Export File Folder
SPOT	Cash Control	Fix	Orders prepaid with cash that were changed in Order View so that their price decreased were not showing the Change Due screen or popping open the cash drawer.	
SPOT	Conveyor	Change	<i>As a SPOT user, I would like to drop all orders from my storage conveyor regardless of cancellation rules or promise dates</i> Storage Conveyor Offload - Added option to the Route & Hotel offloads to ignore the Delivery/Promised/Cancellation dates during the offload. If the option "Ignore Delivery Dates" is "Yes", then the system will offload ALL orders for the selected route or hotel. A user warning prompts for confirmation.	
SPOT	Customer View	Change	<i>As a SPOT user, I would like to use a button if a customer refuses to provide an email.</i> A "Refused" toggle button has been added next to the E-mail field in Customer View. This will replace the use of the special email address "REF" to indicate that the customer refused to give their email address to the cleaner. NOTE: In the future, do not use "REF" to indicate a customer has refused to give their e-mail address -- use the new "Refused" button in Customer View.	
SPOT	Email	Addition to Existing Feature	<i>As a SPOT user, I would like the email address manager to have phone and Customer ID columns.</i> F3 Menu->Email->Email Address Manager, add Customer ID and Phone columns.	
SPOT	Email	Change	<i>As a CSR, I would like to email customer and have the screen go away if it is sent successfully.</i> The "Success" message that popped up after sending an email from Customer View has been removed. The user is simply returned to the Customer View screen after the email is successfully sent.	
SPOT	Email	Fix	Carriage returns when using the manual text entry for an email will now display correctly in the email.	
SPOT	Email	Addition to	<i>On behalf logic for SPOT emails</i>	Store Settings->Email Settings->On Behalf Of

		Existing Feature	<p>Added on-behalf-of support to SPOT emails.</p> <p>If set (and, if the provider supports it), SPOT will send emails from the account on behalf of the address and name specified.</p>	<p>Address</p> <p>Store Settings->Email Settings->On Behalf Of Name</p>
SPOT	Email	Addition to Existing Feature	<p>As a SPOT user, I would like support for more email tokens</p> <p>The following email tokens are now supported: @CUSTOMERGUID, @EMAIL, @EMAIL2, @PHONE, @PHONEMOBILE, @PHONEWORK, @PHONEOTHER, @PHONESMS, and @PHONEPAGER.</p>	
SPOT	Email	Addition to Existing Feature	<p>As a SPOT user, I would like to report on customers who have unsubscribed.</p> <p>Reports Gallery > Web Requests > Notification Changes - Displays customers who have changed their notification preferences through the CustomerConnect unsubscribe link for a specified date range.</p>	
SPOT	Email	Change	<p>As a SPOT user, I would like to include @RACKLOCATION and @LOCKERINVOICES tokens in emails originating from Order Status Notifications</p> <p>Added support for the @LOCKERINVOICES token from the "Order Status Notifications" view.</p>	
SPOT	Email	Addition to Existing Feature	<p>As a SPOT user, I would like to configure what the subject of an A/R payment declined email.</p> <p>"Store Settings > A/R Settings > Declined Payment Receipt Subject" and "Store Settings > A/R Settings > Send Payment Receipts For" settings have been added to SPOT. These allow the subject line of a declined CCOF payment receipt e-mail to be configurable, and for e-mail receipts to be sent for only approved or only declined CCOF payments.</p>	<p>Store Settings > A/R Settings > Declined Payment Receipt Subject</p> <p>(Default: "Payment Declined")</p> <p>Store Settings > A/R Settings > Send Payment Receipts For</p> <p>(Choices: "Approved and Declined", "Approved Only", "Declined Only")</p> <p>(Default: "Approved and Declined")</p>
SPOT	Email	Addition to Existing Feature	<p>As a SPOT user, I would like the scheduler emails to allow me to choose Counter, Route, and/or Locker customers</p> <p>"Order Ready Email" scheduled tasks can now be configured as "Route Only" or "Locker Only", in addition to the current default of "Counter Only".</p> <p>NOTE: If "Locker Only" is used, all locker orders in the customer's visit must be racked to a rack location of one letter</p>	

			followed by 5 numbers (e.g., "M12345") so that the order ready e-mails will be sent.	
SPOT	General	Fix	Email notification removal requests created in older versions of CustomerConnect were not displaying in the changes screen if the customer had no existing notification rules defined.	
SPOT	General	Fix	Fixed an issue that would cause Account Settings > Mark-in Settings to appear to be missing.	
SPOT	General	Fix	Batch Markin now refers to the number of items processed instead of the number of orders generated (which could erroneous due to ticket splitting.)	
SPOT	HSL	Change	<p>As a SPOT user, I would like to flag HSL with a popup comment any time it is detailed.</p> <p>Added a section to the HSL View/Edit screen to show the HSL Note (if present), with a new button to allow a manual entry or preset selection of these notes. This note will be presented to the user during Detail, Batch Markin, and HSL Association.</p> <p>Added an entry for an HSL to the Issue Manager, along with access to the HSL Definition view.</p>	There is a preset collection available at "Company > HSL Settings > HSL Notes". Each note is in two parts - Name and Description/Text.
SPOT	Markin	Fix	Auto adjustments were applying to subsequent invoices for route customers on Store->Markin->Finish Operation->Select Next Customer even when they had Customer View->Details->Disable Auto Adjustments set.	
SPOT	Markin	Fix	Redetailing an invoice in keyboard markin and then scanning a HSL into the existing order was causing a crash in certain cases.	
SPOT	Markin	Fix	The Ampersand character will now be displayed in various SPOT views instead of the underscore character.	
SPOT	Order View	Fix	An invoice that currently has items "On Conveyor" will no longer allow a store transfer.	
SPOT	Quick	Change	In Quick, if you select a department and then immediately select a different invoice mode, SPOT will now immediately recalculate the promised date based on the mode.	
SPOT	Reports	Addition to Existing Feature	Reports Gallery > Customer > Emails Removed by Date - New report to display bad emails removed automatically.	
SPOT	Routes	Fix	Menu->Delivery->GPX Export was crashing in certain cases when an address could not be mapped. It now displays this and allows the export to continue (minus that particular stop).	
SPOT	Routes	New Feature	<p>As a SPOT user, I would like to export my route/delivery manifests to a CSV file</p> <p>Route Manifests - Added option to Export (to CSV or XLS)</p>	

			Manifest data to disk. The File Manager must be enabled for this to work, as it uses the Client-side volume filters to provide destination folders to the user. This feature may be accessed via control next to the "Reprint Manifest" option of the manifest generation view.	
SPOT	Search	Change	<i>As a SPOT user, I would like the price change alert to not display splits</i> Price Change alerts and searches will not exclude split orders.	
SPOT	Utilities	Change	<i>As a SPOT user, I would like the SPOT Invoice Purge to be revamped with modern scripts</i> Menu > Tools > Data Purge - This now uses an improved method of purging that is more efficient, complete, and it will no longer prevent other workstations from accessing data while it is running.	
Dashboard	General	Addition to Existing Feature	<i>As a Dashboard user, I would like SPOT Messaging to support archiving.</i> Messaging now supports archiving.	
OTS	General	Addition to Existing Feature	New Correspondence can now be searched by email address.	
OTS	General	Change	Template Editor height has been increased.	
OTS	General	Addition to Existing Feature	CRM tab can now be filtered by email address.	
OTS	General	Change	<i>As an OTS user, I want the CCOF date type to only consider 1 month in the future instead of 2.</i> Expired CC date range type will now only include customers that have a credit card on file expiring the current month or the next month. Reduced from previously including the current and next 2 months.	
OTS	General	Addition to Existing Feature	<i>As an OTS user, I would like the ability to filter the campaign view with a date range or predefined date range.</i> Email Tracking widget now allows store and date range selections. These settings will be saved for the user.	
OTS	General	Fix	CCOF expiration will now correctly show in the Expired CCOF campaign.	
OTS	General	Change	Customer search functions now allow the search value to be anywhere in the word or number.	
OTS	General	Change	<i>As an OTS user, I would like the overdue orders to consider visits and only send based on the date of the last order racked in the visit.</i> Overdue Inventory campaigns will now send based on the date of the last order racked in the visit.	

