

New Features / Improvements

Email

- Support for sending email messages using an SMTP server that requires a port other than 25 - #52937

Synchronization

- Include reason for changes when an "error while modifying invoice" is listed in the synchronization log file - #52840

Bug Fixes / Technical Corrections

Business Activity

- Business Activity Review sequence is reversed after refreshing the list - #40038

Customer

- Salesperson ID for new customers entered with the "Restrict Access by Salesperson" option should default to the user's salesperson ID - #52910
- Products tab lists oldest sales first, instead of newest sales first - #52914

Database Maintenance

- "String or binary data would be truncated" error message when configuring new EDI Trading Partners - #52948

Inventory

- "Incorrect syntax" error may occur on transactions for lot or serial numbers containing an apostrophe - #51850
- Assembly Component Requirement Report does not show variable yield/batch assemblies. - #52951
- 'Timeout Expired' message may be received when posting an Inventory Balance Adjustment for multiple Lot/Serialized Products. - #52963
- "Unclosed quotation mark" error may occur when entering inventory transactions for product IDs containing an apostrophe - #52965
- Warehouse Location may appear blank for a lot/serial number after entering an inventory balance adjustment - #52981
- Product information may not get filled in when entering balance adjustments for multiple lot or serial numbers for the same product - #52995

Product

- Product lookup does not include all Item Types on the Components tab for Assemblies - #52977

Reports

- Customer Lookup by Job Name does not return the Job Name for report filters - #52936

Sales Order

- Changes to unit length/weight for products using variable length/weight-based pricing don't update the total length/weight - #52934
- Clicking the "Print Sales Order" button may result in a new email message with the sales order attached as a PDF - #52967

Shopping Cart

- Ship-To Location may be blank for sales orders imported using the Web Orders Import - #42998
- Contact Name is not being imported for PDG Commerce web orders - #52925

Synchronization

- Cannot synchronize after QuickBooks Data File (QBW) was moved to a new directory - #52826
- "Cannot insert duplicate key" error may occur during customer sync if a customer was entered in both ACCTivate! and QuickBooks with the same name - #52907
- "Object variable or With block variable not set" error may occur during invoice sync due to corruption in QuickBooks - #52908
- "An attempt was made to modify a Invoice ... before the closing date" message may appear in the Sync Log after changing the A/R account or Ship date in QuickBooks - #52917
- "Cannot insert duplicate key" error may occur during Import QuickBooks Data wizard if customer jobs exist in QuickBooks - #52958
- "An attempt was made to modify a Invoice with a date that is on or before the closing date of the company" error may occur during for invoices with discounts - #52978

ACCTivate! 6.4.1 Release Notes (QuickBooks Edition)

New Features / Improvements

Product

- VendorID included in ProductSupplier data view for reports - #52662

Bug Fixes / Technical Corrections

Business Alerts

- Checking the box on a reminder note does not mark the note as completed - #51919
- Overdue Invoices tab may not sort properly if there are a very large number of overdue invoices - #52830

Customer

- A new customer contact with a duplicate Contact ID may overwrite another contact - #52579
- Cannot view customer websites beginning with https:// - #52633
- Products tab may not sort properly if there are a very large number of products - #52666
- Confusing message in Create Mailing List - Export list - #52766

Database Maintenance

- "Subscript out of range" error may occur towards end of ACCTivate! database upgrade - #52844

Import

- Lengthy product descriptions or Tech Spec may be truncated to 255 characters - #52852

Installation

- Some data grids may not contain any data on computers where the MSBIND.DLL component is not registered properly - #52713
- "CREATE UNIQUE INDEX" error may occur when upgrading to ACCTivate! 6.4.0 with duplicate Customer Job names - #52829
- "Dependency source C:\Program Files\ACCTivate\ClientFiles\MSXML4\msxml4r.dll does not exist." error after updating ACCTivate! - #52898

Inventory

- Cannot enter added cost (zero quantity receipts) for serial-numbered items - #46456
- Receive run time error and 'EOF or BOF...' error when tabbing through Product dropdown menu on Enter Count window. - #52736
- Unit cost for lot number is incorrect after entering an inventory balance adjust to adjust unit cost to \$0.00 - #52741
- Lot/Serial drop-down appears from prior line when entering a new component line on an Inventory Assembly (with the Variable Batch / Build module) - #52894

Lookup

- "A column has been specified more than once in the order by list" error when using the customer lookup by Address option - #52644

Product

- Avg Cost in Total row on Inventory tab (for all warehouses) is not rounded properly - #52806

Purchasing

- Cannot minimize the Purchase Order window - #50150
- "Item cannot be found in collection" error when looking up a PO by Vendor Product ID - #52756

Reports

- Include WIP quantity for unposted assemblies in Inventory Reorder reports - #52855

Sales Order

- "Row cannot be located for updating" error when attempting to save a sales order that has been modified by another user - #48818
- Double-clicking invoice on Invoices tab displays invoice when user doesn't have the "View Invoices" permission - #52204
- Incorrect Terms Code may print on Order report and pick tickets - #52539
- Orphaned sales order lines may remain in database when a sales order is not saved successfully - #52580
- Locations entered on 'show components' tab are not saved. - #52609
- "Override Credit Hold" permission does not prevent users from overriding a held sales order - #52824
- Object Variable error may be received when looking up new Sales Order by Customer Name. - #52846
- Can't delete a note/reminder from the Notes tab of the Invoice / Credit Memo window - #52868

Bug Fixes / Technical Corrections

Shipping

- Not Before and Not After are blank on Shipment Preparation window - #52718

New Features / Improvements

Customer

- Support for creating and modifying customer jobs in ACCTivate! - #51996
- Include full, concatenated Customer/Job name in Customer data view for reports - #52001
- Jobs tab on customer information window - #52002
- Support for Customer Jobs in Find Customer lookup window - #52004
- "View Invoice / Credit" function to quickly find, view details, modify and add notes to customer invoices and credits - #52078
- Option to include/exclude inactive Customer Jobs on the Jobs tab - #52796

Inventory

- Allow changes to component quantities on an Inventory Assembly (with the Variable Batch / Build module) - #51915
- Yield Quantity on Inventory Assemblies to record production quantity (with the Variable Batch / Build module) - #51916
- Default GL Account for Inventory Issue transactions (in Configuration Management) - #52026
- Ability to add / remove components from bill of materials on an Inventory Assembly (with the Variable Batch / Build module) - #52089
- Support for multiple locations per product in Inventory Product Location List report - #52601

Sales Order

- "In Dispute" status for each sales invoice to exclude it's balance from the customer's credit status - #52610
- Notes / Reminders for sales invoices and credit memos - #52620
- View payment / credit history on View Invoice window in ACCTivate! - #52621
- CustomerFullName view included in standard Sales Order documents (Crystal Reports) - #52809

Shopping Cart

- Attempt to match customer by searching the Alternate Customer ID, Account Number, CSS login and email address before using the default customer - #45967
- Import sales orders generated by PDG Commerce using the Web Orders Import wizard - #52029

Bug Fixes / Technical Corrections

Business Activity

- Binding Collection Error "Field not updatable" when attempting to modify contact information - #51091
- Changes to a Business Activity may not get saved if an Other Contact or Product is in the Related Items list - #52554

Business Alerts

- Inventory Management tab includes costs even for users without "View Invoice Cost" permission - #47317
- Recommended Reorder Quantity should be based on Max Stk Qty, not Min Stk Qty - #52137

Customer

- Customer Payment balances may be incorrect if payment was applied to an invoice that was voided - #43768

Database Maintenance

- When upgrading database, log file continues to show old database version until the next login - #52690

Import

- Product pictures are lost after updating products with the Import Data (Excel) utility - #52122
- "Query too complex" error when importing customer data - #52710

Inventory

- Inventory Reorder report is not sorted by Product ID and shows GUIDs in the list - #42695
- Unit cost may be incorrect for inventory transfers when using the FIFO cost method and lot numbers with multiple receipts - #52110
- Transferred serialized product cannot be removed from stock by a negative receipt. - #52575
- On hand and Available quantities for each warehouse location may be incorrect for lot-numbered products - #52606
- "Item cannot be found in the collection" error when entering an Inventory Receipt for a product that currently isn't being stocked in warehouse - #52688

Login

- "Login failed for user ..." error message may occur on workstations with a different "Language for non-Unicode programs" setting - #52080

ACCTivate! 6.4.0 Release Notes (QuickBooks Edition)

Bug Fixes / Technical Corrections

Product

- Performance problems related to displaying the Serial #s tab of the Product Information window - #52136
- The "Where Used" list for components of a Kit, Assembly or Assortment is not sorted by Product ID - #52174
- Cannot clear the primary location for a warehouse when using the Multiple Location Control module - #52634

Purchasing

- "View only" permission for Purchase Orders does not prevent users from modifying a purchase order - #51913

Reports

- Voided invoices appear in the Invoice Register report - #52132
- Subreports created in a different company (ie Demo) do not work in other companies - #52182

Sales Order

- Quantity is not selected when using the "down arrow" cursor key to move to the quantity field of the next line - #50288
- COGS should not use last or management cost if there is stock on hand with a \$0.00 unit cost - #50903
- "Object variable or With block variable not set" error on Drop Ship lines when changing the scheduled quantity - #52021
- "Invalid use of Null" when creating a sales order when customer's tax category has a null tax rate - #52055
- Credit memos with a transaction date before Closing Date can be voided in ACCTivate! - #52558
- Voiding a Credit Memo does affect the balance on the related invoice - #52631

Shipping

- Inner/Outer Pack on each carton should be set to quantities on Specs tab of Product Information for Standard Pack shipments - #52184
- Shipment date may be set to "12:00:00 AM" when using Shipping Manager integrated with FedEx Ship Manager - #52587

Shopping Cart

- Shopping cart import displays "Multi-Record" options for text file sources - #52115

Synchronization

- Invoices may appear with a credit balance if refunded by a Check or written off with a General Journal entry - #50439
- Voiding and re-creating an invoice with a payment may result in a payment synchronization error - #52669

[Click here to view release notes from prior version, ACCTivate! 6.3](#)