

ECI LBMH RELEASE NOTES: VERSION 33

Note: The Section in **Blue** is Spruce-specific.

What's New

Remote Client (Custom) Pairing Simplifies Connecting to Hosting

Custom Pairing is a streamlined self-service feature that makes it easy to connect your local workstations to the application in the hosted environment using the Remote Client Utility — without requiring technical expertise or manual configuration steps. See [Using Custom Pairing to Connect Workstations to Hosting](#).

Spruce Mobile Delivery in Production!

Customers have asked us to modernize the delivery process to allow Drivers to collect customer signatures and delivery photos, and to send delivery emails to customers when deliveries are complete. Spruce Mobile Delivery (Powered by JumpTrack) has all those features and more! To learn more, see [Spruce Mobile Delivery Delivers!](#)

Selecting a Document Style for Email Attachments

Based on your votes in the Idea Portal, we are adding a new feature that allows Point of Sale users to choose a document style format for email attachments. Whether you are sending an order invoice, a quote, a direct ship invoice, a payment receipt, or a purchase order, authorized users can choose the format for the attached document. As an administrator, you can also choose a default format for the branch. This attachment format determines whether pricing and quantity information are included in the document before it is emailed. See [Selecting Document Styles for Email Attachments](#).

New: VAT Tax Totals Percentages Display on Invoices

Some Caribbean businesses must show VAT percentages for items with different tax assessments on invoices. We added a new parameter that adds this calculation to your transaction documents; ECI Implementation and Support staff can enable it. To learn more about this feature, see [VAT Tax Totals Percentages Display on Invoices \(Region-Specific\)](#).

New Do It Best Distribution Centers for EDI Ordering

If you purchase products from Do It Best, you should know that they are adding two additional distribution centers that will open this December. We added these distribution centers, Hanover (Pennsylvania) and Millbank (South Dakota) to facilitate EDI processes that rely on distribution centers for orders and delivery. To learn more about this change, see [New Do It Best Distribution Centers for EDI Ordering](#).

CONTENTS

- What’s New..... 1**
- Global Updates..... 3**
 - Using Remote Client (Custom) Pairing to Connect Workstations to Hosting..... 3
 - Understanding the Remote Client (Custom) Pairing Process..... 4*
 - Requirements for Enabling Remote Client (Custom) Pairing 5*
 - Running Remote Client (Custom) Pairing Using the Left Menu 6*
 - Running Remote Client (Custom) Pairing from Device Maintenance 8*
 - Installing the Remote Client Service on the Station..... 11*
 - Re-Copying the Installer Link..... 14*
 - Spruce Mobile Delivery Delivers!..... 14
 - Selecting Document Styles for Email Attachments 15
 - Setting the User Permissions for Changing Default Doc Styles..... 15*
 - Setting the Default Printer for Email Style Transmissions for the Branch 17*
 - Selecting the Default Email Style Printer for a Branch..... 18*
 - Choosing the Document Style During the Transaction Process 19*
 - VAT Tax Totals Percentages Display on Invoices (Region-Specific) 22
 - New Do It Best Distribution Centers for EDI Ordering..... 22
- Defect Resolutions 23**
 - Release 33.1 23
 - Release 33.2 31
 - Release 33.3 32
 - Release 33.4 34

Global Updates

Using Remote Client (Custom) Pairing to Connect Workstations to Hosting

The Remote Client Utility, when paired with a workstation and the station's devices, uniquely identifies the station to the hosted application and ensures that the user has the appropriate access to their enabled features in Spruce. The Remote Client Utility must access the correct version of the application to provide the best user support. The Remote Client Utility updates automatically every evening, but you can prompt it for an update at any time:

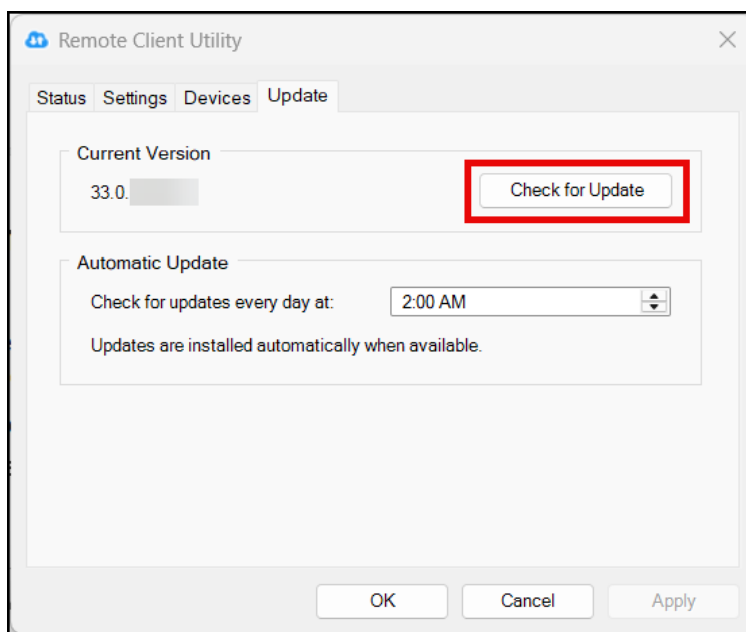


Figure 1. Remote Client Utility > Update Tab

You can click the Remote Client Utility  icon in the Left Menu or click **Pair Now** in the station's Device Maintenance form to receive a ready-to-use installer link. You can then double-click the installer, and the Remote Client (Custom) Pairing process handles everything else — enabling the station, generating a PIN, building a secure download link, and defaulting to a safe configuration that won't disrupt existing workflows.

New pairings created through a new Pairing default to a station type called *Pair Only (No Devices)*. This means:

- The Remote Client is connected and available for updates, portal access, and future capabilities.

- No devices (printers, bank card readers, cash drawers, scanners, signature pads, etc.) are routed through the Remote Client initially.
- Existing VPN or locally connected devices continue to work as before.

This safe default allows us to roll out Remote Client connections across the entire organization without disrupting the current device's workflows. You can upgrade stations later to full device routing when that feature is ready.

Note: The previous default station type has been renamed from *Standard Station* (Default) to **Paired** (with devices) for clarity.

Understanding the Remote Client (Custom) Pairing Process

The Remote Client Utility  icon is in the left menu from every application form — including active transactions. You don't need to leave your current workflow to start the pairing process.

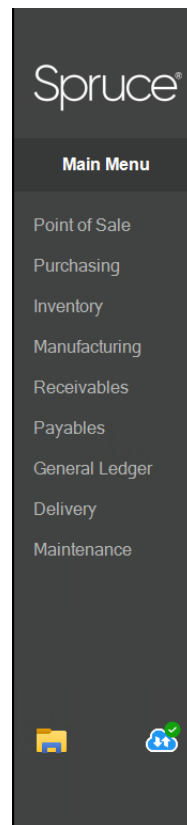


Figure 2. Remote Client Utility Icon in Left Column

A subtle **red badge** on the Remote Client Utility icon indicates when the station is not yet paired. Clicking this icon opens a clean, customer-friendly popup — not a technical troubleshooting console. You use this process to download the appropriate Remote Client msi file to the Downloads folder.

Then you can double-click it to start the installation process. The Remote Client Utility icon displays the current pairing status in the Left Menu.

Status	Description	Icon
Not Configured	The workstation has not begun the pairing process with the hosted system.	
Configured, Not Paired	The workstation's PIN displays, but it has not yet paired with the hosted system.	
Paired	The workstation is paired with the hosted system.	

Note: If you close the application before completing the pairing process, you can return later and pick up where you left off — the process preserves the PIN and you can recopy the installer link at any time.

Station One Note: You cannot use the Remote Client (Custom) Pairing process for Station One workstations because they have different configuration requirements.

Requirements for Enabling Remote Client (Custom) Pairing

Before you get started, this pairing requires these environmental settings:

1. You must be running the application using the (SoftLayer) Hosted Environment. This Pairing is not available for on-premise systems.
2. You must have Remote Client seats available.
If all seats are in use, the pairing option will be hidden or display a message indicating that no seats are available.
3. Your business must have the Remote Client Web Service URL configured in the Parameter Settings form. Check with your Support team if you are experiencing an issue. If this setting is missing, pairing will be blocked.
4. You must be using the application version 33.0.0 or a custom 32.0.2 version.
5. Support needs to enable the **Temp_LBMH03_9449_CustomPairing** feature flag (Maintenance > Database > Parameters > Options > Feature Flags) for your business. The feature flag can have one of the following statuses:
 - **Enabled:** The full Remote Client (Custom) Pairing experience is available from the Left Menu or using the **Pair Now** setting in the Device Maintenance form.

- **Disabled:** The new pairing interface is hidden. However, any stations already configured as *Pair Only (No Devices)* continue to function as they did before. The device routing remains suppressed for those stations, and they can still be viewed and managed in Device Maintenance.

Note: The feature flag is temporary and will be removed after rollout is complete. No additional configuration is needed.

Running Remote Client (Custom) Pairing Using the Left Menu

We recommend this process for pairing your workstations with the Remote Client Utility. Users with station login permissions can complete this work using their standard credentials.

To run the Remote Client (Custom) Pairing process using the icon in the Left Menu:

1. Log into the application using your user credentials.
2. From the Left Menu, double-click the **Remote Client Utility**  icon.

The red badge indicates the station needs pairing. The Remote Client Connection box displays. The system enables your station, generates a PIN, and copies a secure installer link to your clipboard. The PIN number displays on the screen.

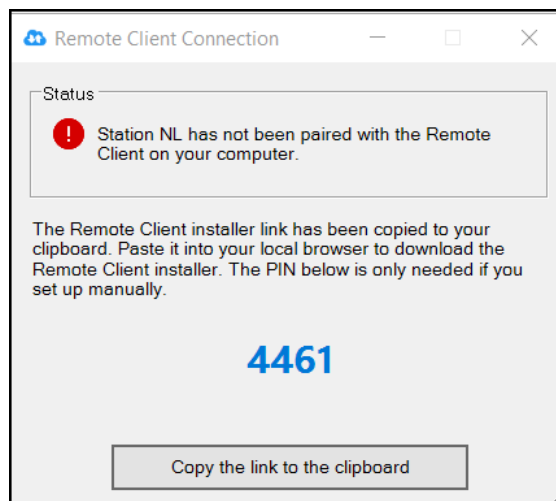


Figure 3. Remote Client Connection > Copy the link to the Clipboard

3. Click **Copy the link to the clipboard** and log out of the application.
4. Open a web browser, paste the link from your clipboard into the address bar, and press **Enter**. The Remote Client Download Portal displays. The portal checks the link to determine the version of software the application is running.

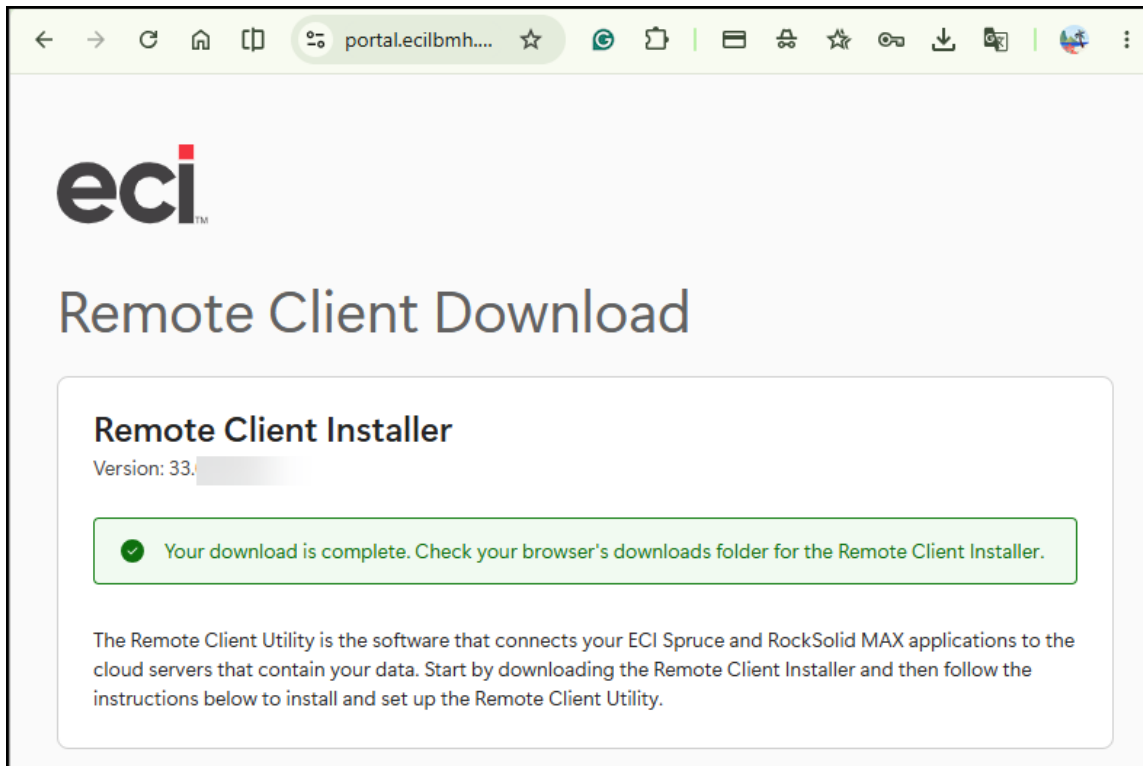


Figure 4. Remote Client Download Portal

The portal downloads a pre-configured installer to your Downloads folder.

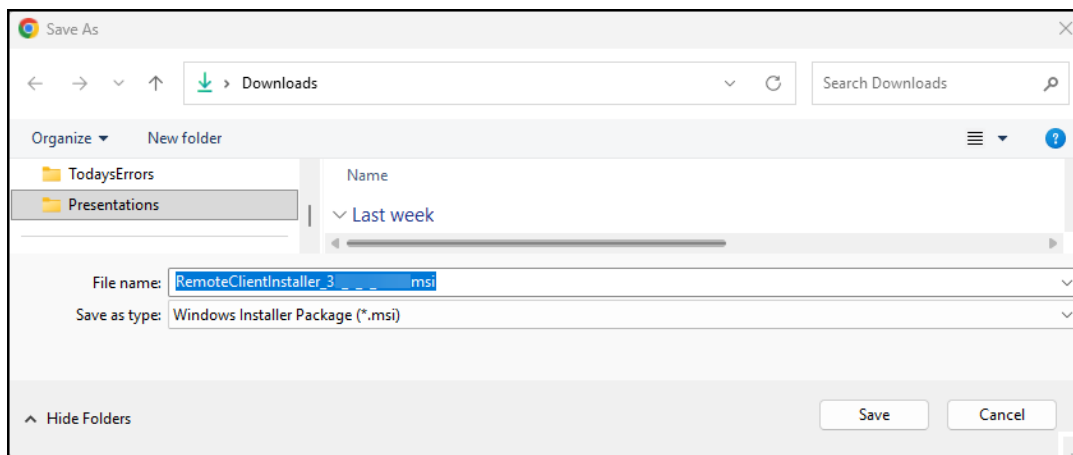


Figure 5. Save As > Remote Client Installer > Download File

5. Click **Save** to download the Remote Client Installer msi file.

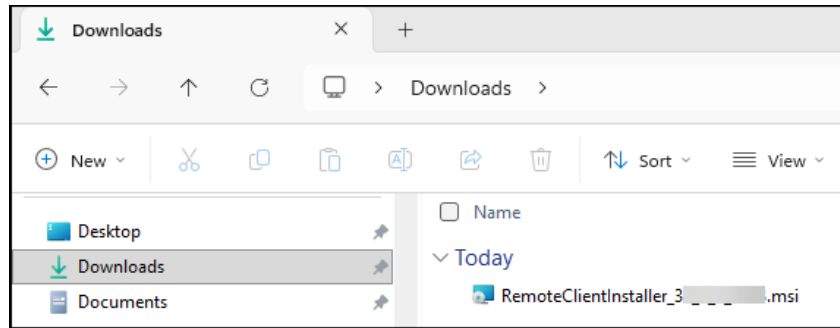


Figure 6. Downloads Folder > Remote Client Installer

6. Open the Windows File Explorer, go to the Downloads folder, and double-click the *Remote Client Installer MSI* file. The Remote Client Service Setup (Wizard) displays. See [Installing the Remote Client Service on the Station](#) for instructions.

During the Remote Client Installer process, the Remote Client pairs automatically using the PIN from step 1.

Running Remote Client (Custom) Pairing from Device Maintenance

Use these instructions to start the Remote Client (Custom) Pairing service from the Device Maintenance form. Users with station login permissions can complete this work using their standard credentials.

To run this Pairing process from the Device Maintenance form:

1. Log into the application using your user credentials.
2. From the Main Menu, choose **Maintenance > Database > Devices**. The Device Maintenance form displays.
3. From the *Device Name* list, choose the station's ID. The station settings update.

Device Maintenance • 1000 - ANY SUPPLY CO. • User: on Station:

File Favorites Memos Help

Station Printer

Device Name: NL Location: Desk Branch: 1000

☐ Temporarily Disabled IP Address: Max # Sessions: 1

Signature Pad Address: 010.009.000.100.8080

Form Scaling: 100

Attachments

- ☒ Barcode Scanner
- ☒ Card Pad
 - Type: Cayan Settings
- ☐ No Item Display
- ☐ Signature Pad (Secondary)
 - Type: None
- ☐ Cash Drawer
- ☐ MICR Reader Port: 0 Settings

Default Printers

- Invoice: BTHR
- Order: BTHR
- Quote: BTHR
- Backroom: BTHR
- Ticket: DUMY
- Direct: CPDF
- Label: DYMO
- Security: BTHR
- Dispatch: BTHR
- Yard: BTHR

Cash Drawer #: 1 POS Lock ☐

☐ POS Shared

☒ POS Promotional Pricing Enabled

☒ Custom Reports Access

☐ POS Advance to New Line

BlueTarp POS ID:

☐ Request Email At customer entry

Remote Client

This station has not yet been paired with Remote Client

Pair Now

Default Label Template: BILLTEST

F1 Next F2 Import F3 Style F4 F5 Template F6 F7 Test F8 F9 Cancel F10 Exit F11 F12 Process

Figure 7. Device Maintenance > Remote Client Section > Pair Now

- In the *Remote Client* box, click **Pair Now**. The Remote Client box updates to show the Copy Installer Link button and the pair ID.

Remote Client

Copy the installer link to download the Remote Client. The PIN below is only needed for manual setup.

Copy Installer Link **7470**

Figure 8. Device Maintenance > Remote Client Box > Copy Installer Link and ID

Note: Admins who click the **Gear**  icon, can review the Remote Client pairing type, **Pair Only (No Devices)**. In the future, there will also be a *Paired (with devices)* option.

- Click the **Copy Installer Link** button, paste it into your browser, and press **Enter**. The Remote Client Installer downloads the right installer file to your downloads folder and displays this message:

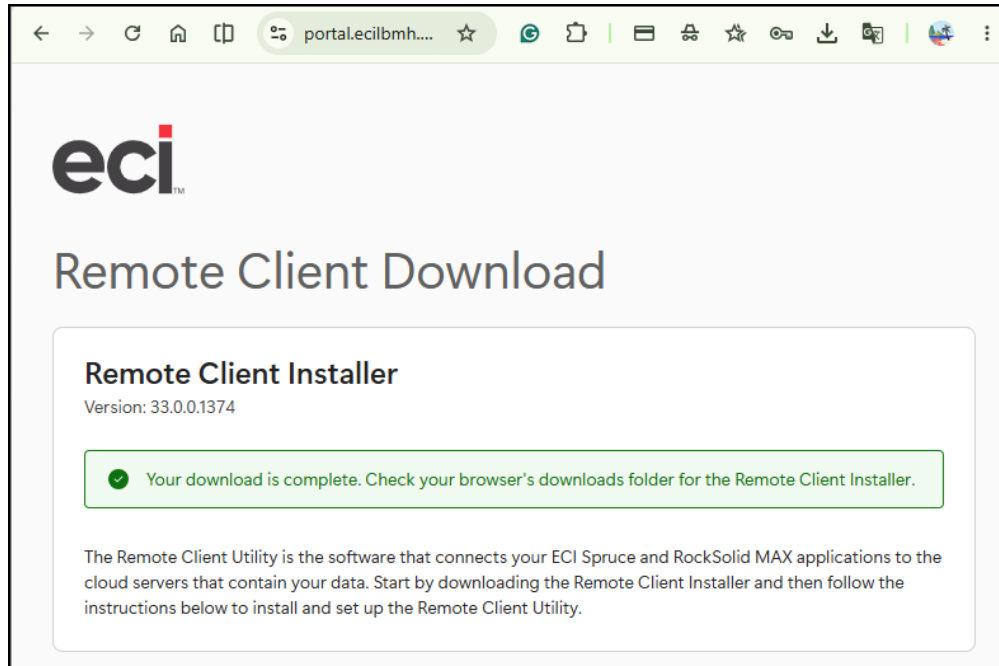


Figure 9. Remote Client Download > Remote Client Installer

Note: The version number matches the current version installed on the station.

The Save As > Downloads form displays:

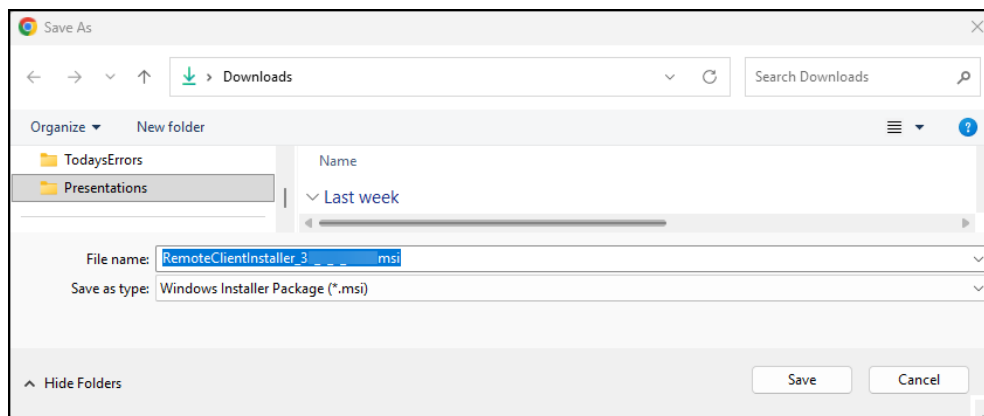


Figure 10. Save As > Downloads

6. Choose **Save** to save the new Remote Client Installer file to the Downloads folder. The installer downloads.

7. Click **Open**.

Now you are ready to begin the Remote Client Setup Wizard process as described in [Installing the Remote Client Service on the Station](#).

During the Remote Client Installer process, the Remote Client pairs automatically using the PIN from step 1.

Installing the Remote Client Service on the Station

After you download the Remote Client Utility installer, follow these instructions to install it using the downloaded MSI file so the system can pair it with the station.

1. In the Downloads folder, double-click the installer msi file.

The Welcome to Remote Client Service Setup Wizard displays.

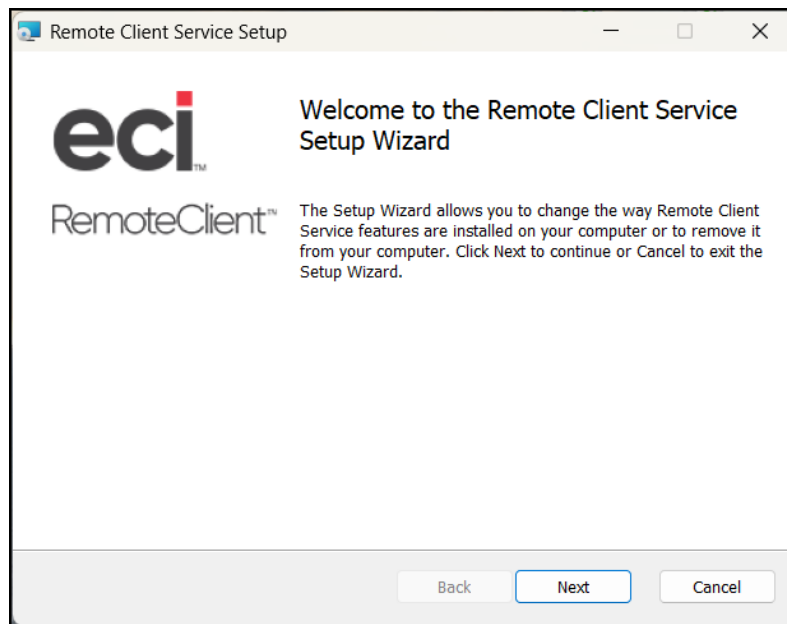


Figure 11. Remote Client Wizard

2. Click **Next**. The Agreement for Remote Client Installer displays.

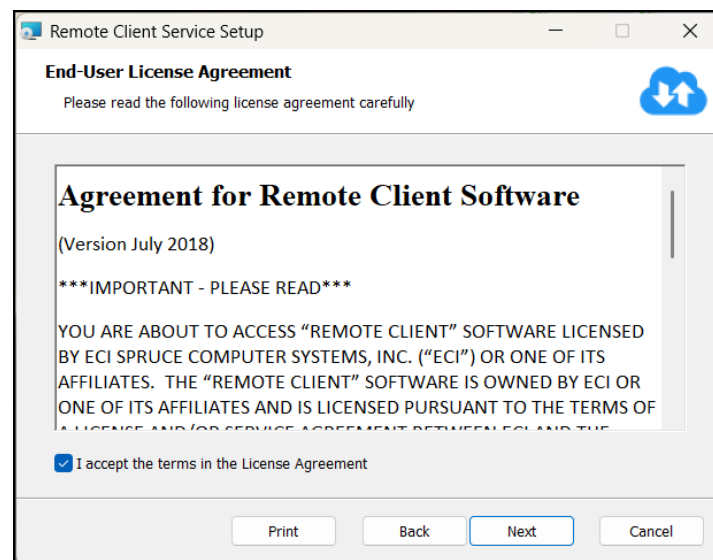


Figure 12. Remote Client Wizard > Agreement

3. Check *I accept the terms in the License Agreement* check box and click **Next**.
The Destination Folder displays so you can choose or confirm the installer folder. You can change the folder if you prefer by selecting the **Change** button.

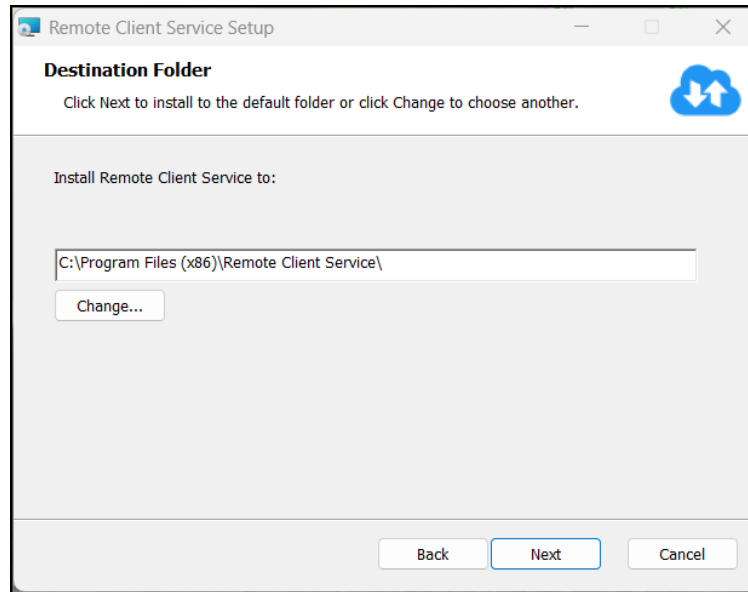


Figure 13. Remote Client Wizard Destination Folder

4. When the path for the installer is set click **Next**.
The Ready to Install Remote Client Service form displays.

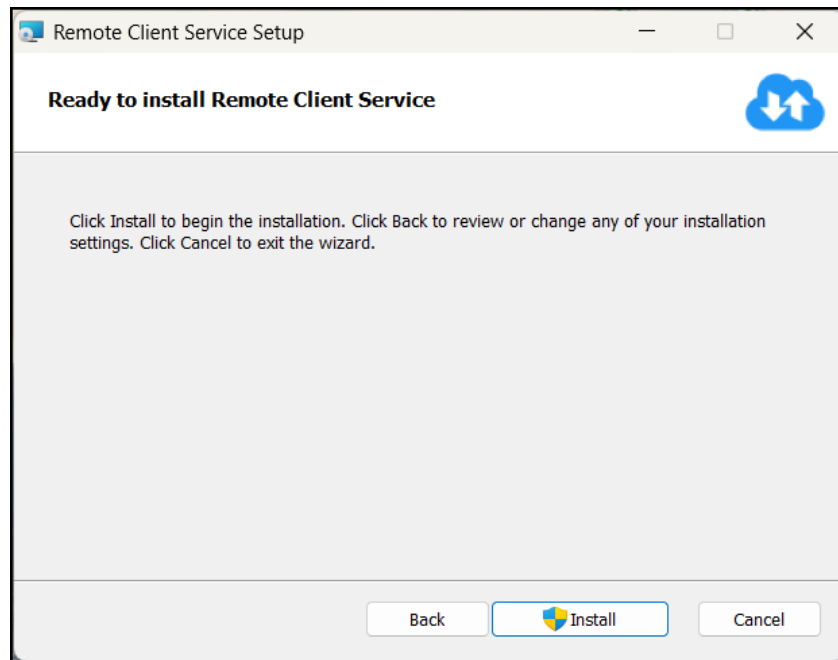


Figure 14. Remote Client Wizard > Ready to Install Remote Client Service

- Click **Install**. The system prompts you to accept that you are beginning the installation; click **Yes**. If you have run the application recently, the Files in Use box may display.

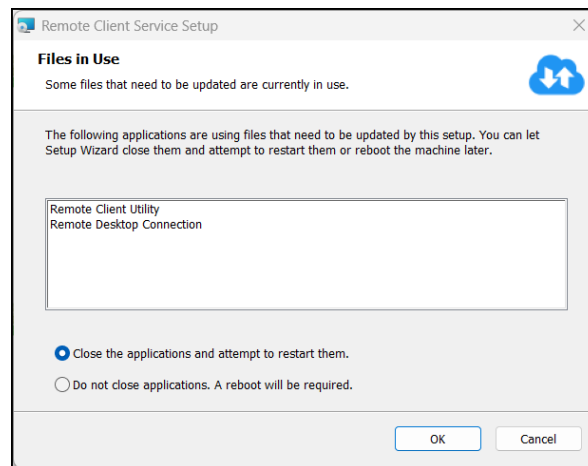


Figure 15. Remote Client Wizard > Files in Use

- Choose **Close the applications and attempt to restart them**, and click **OK**. The Wizard shows you the installation progress and when the installation is complete, displays this message:

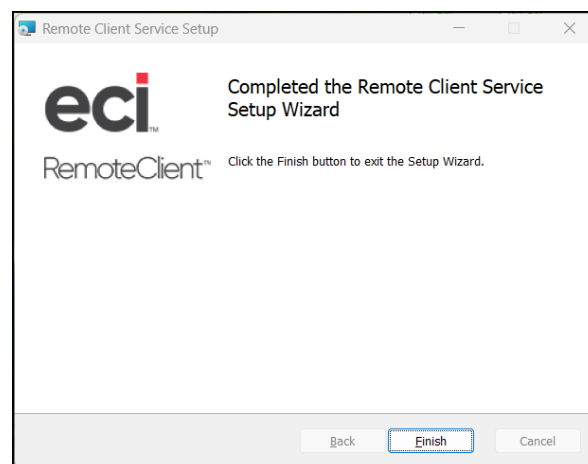


Figure 16. Remote Client Wizard > Finish

- Click **Finish** to complete the installation.

When Pairing is complete, the Remote Client Utility icon in the left menu displays with a check box in it.



Figure 17. Left Menu > Remote Client Icon Showing Pairing Complete

When you double-click this icon after the pairing process is complete, a status message displays the computer name of the station:

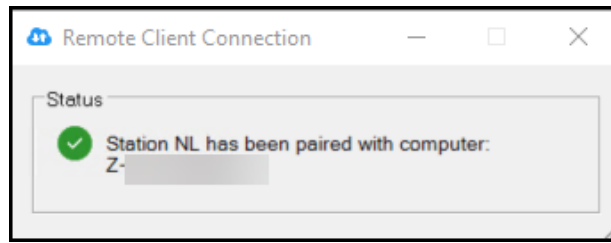


Figure 18. Remote Client Connection > Status Message

Re-Copying the Installer Link

If you need the installer link again (in cases where you cleared your clipboard or need to share it) you can follow these steps:

1. Click the **Remote Client Utility**  icon in the Left Menu. Your existing PIN will display.
2. Click **Copy the link to the clipboard** to get a fresh installer link.
3. Paste the link in your browser and proceed with the download using the instructions above.

Spruce Mobile Delivery Delivers!

To modernize the Mobile Delivery process, the Spruce Mobile Delivery solution integrates Spruce, JumpTrack, and the MyJumpTrack portal to deliver items to Customers. This process offers tools for Dispatchers, Drivers, Back Office team members, and Salespeople to manage deliveries and stay informed. Dispatchers use Spruce to collect delivery information, schedule work as they do now, and click a button to send it to JumpTrack. Drivers use JumpTrack on their phones to capture photos as physical proof of delivery, collect signatures, and transmit the data to the MyJumpTrack portal, even when there is no internet service. The MyJumpTrack portal provides a platform for near real-time delivery tracking that Dispatchers and Salespeople can use to keep Customers informed and Management in the loop. Customers also receive an email with the delivery details including the photos and signatures collected by the Driver. The portal transmits the delivery data back to Spruce, where we store it with the original transaction documents.

Important Note: You cannot use JumpTrack and AnyWare for delivery simultaneously, as each platform would send conflicting delivery information to the database. When you enable the

JumpTrack feature, the AnyWare Delivery workflow is hidden. You can still use AnyWare for other purposes, such as tracking inventory or reviewing Inventory and Point of Sale documents.

Learn more about the Spruce Mobile Delivery process by clicking the Help System links below:

[Spruce Mobile Delivery Overview](#)

[Setting up Spruce Mobile Delivery](#)

[Managing Deliveries with Spruce Mobile Delivery](#)

[Spruce Mobile Delivery FAQs](#)

Selecting Document Styles for Email Attachments

When you transmit transaction documents to your customers based on their orders, quotes, purchase orders, and payment transactions, it can be useful to allow authorized salespeople to choose the document format for the transmission during checkout. This ensures you can manage data sent over the internet, providing better control over the format of the transaction information you send.

This new feature lets you specify which document formats to use by default when sending email transaction documents to your customers. You choose the document style defaults based on the printer settings for each transaction type. You can also allow the salesperson to choose from a list of document formats during checkout. This section covers these processes.

Keep in mind that email transmissions are part of the nightly process, so the email is not automatically sent to the customer after a transaction is processed. Emails are sent all at once when the nightly process is complete.

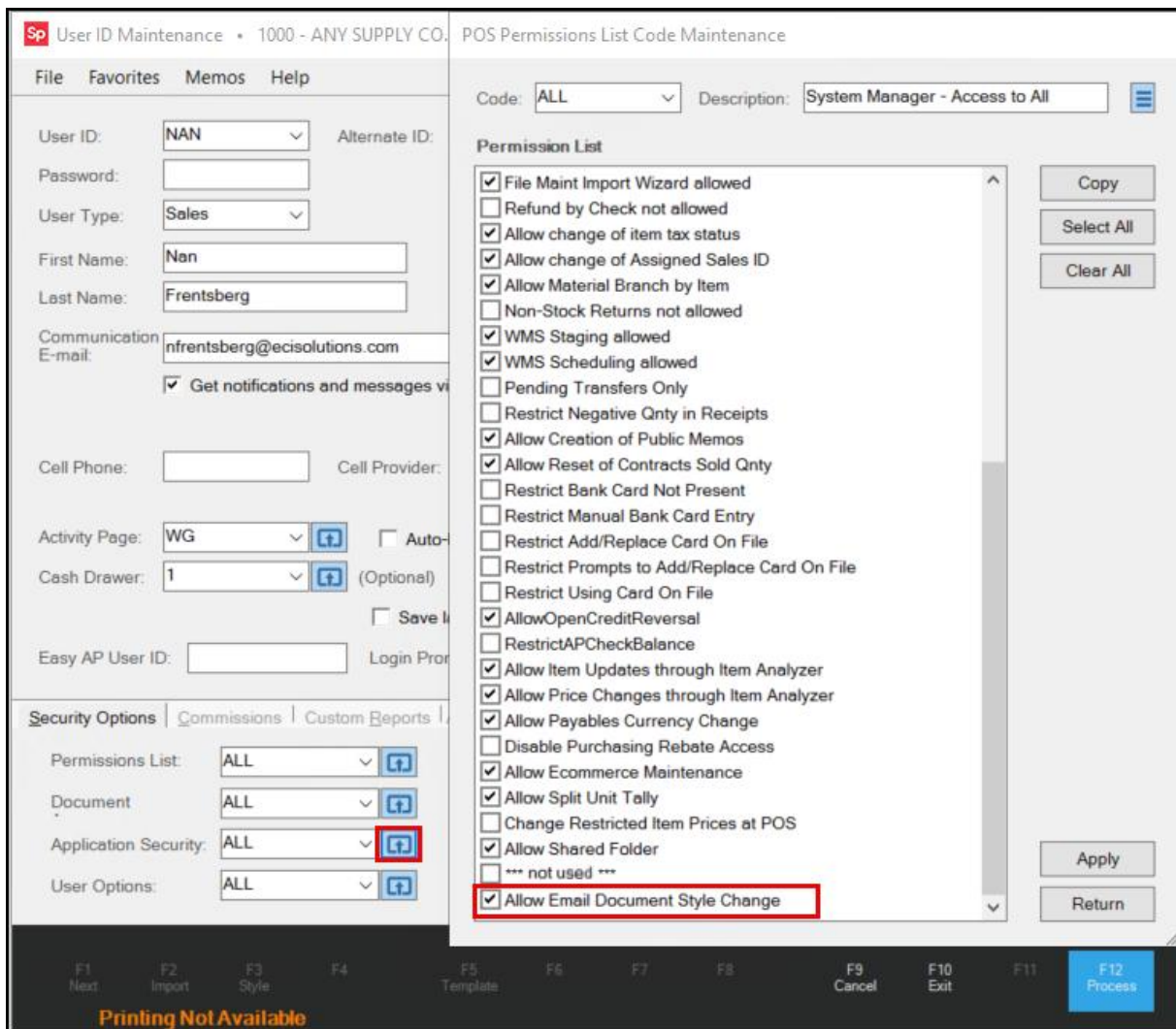
You can look up the Point of Sale document styles in the Help System to see what kind of information they include or exclude by entering the document style name, such as [PS Customer Orders](#).

Setting the User Permissions for Changing Default Doc Styles

Use the instructions in this section to allow specific Point of Sale users to change the default document style for transaction documents that the application emails to their customers. With this permission, a Point of Sale user can choose a different email document style before the message is queued and sent. When you do not enable this permission for a user, the application uses the document style specified in the branch default setting, and users cannot override it. This permission is disabled by default.

To add this user permission:

1. From the Main Menu, choose **Maintenance > Database > User IDs**.
The User ID Maintenance form displays.
2. From the *User ID* list, choose the user ID of the salesperson you want to add the permissions for and press **Enter**. The user's profile displays.
3. On the *Security Options* tab, click the *Application Security Settings*  icon to display the POS Permissions List Code Maintenance list.



The screenshot shows the 'User ID Maintenance' form for '1000 - ANY SUPPLY CO.'. The 'Security Options' tab is active, and the 'Application Security Settings' icon is highlighted. The 'POS Permissions List Code Maintenance' list is displayed, showing a list of permissions with checkboxes. The 'Allow Email Document Style Change' checkbox is checked and highlighted with a red box.

Code	Description
ALL	System Manager - Access to All

Permission List

- ☒ File Maint Import Wizard allowed
- ☐ Refund by Check not allowed
- ☒ Allow change of item tax status
- ☒ Allow change of Assigned Sales ID
- ☒ Allow Material Branch by Item
- ☐ Non-Stock Returns not allowed
- ☒ WMS Staging allowed
- ☒ WMS Scheduling allowed
- ☐ Pending Transfers Only
- ☐ Restrict Negative Qty in Receipts
- ☒ Allow Creation of Public Memos
- ☒ Allow Reset of Contracts Sold Qty
- ☐ Restrict Bank Card Not Present
- ☐ Restrict Manual Bank Card Entry
- ☐ Restrict Add/Replace Card On File
- ☐ Restrict Prompts to Add/Replace Card On File
- ☐ Restrict Using Card On File
- ☒ AllowOpenCreditReversal
- ☐ RestrictAPCheckBalance
- ☒ Allow Item Updates through Item Analyzer
- ☒ Allow Price Changes through Item Analyzer
- ☒ Allow Payables Currency Change
- ☐ Disable Purchasing Rebate Access
- ☒ Allow Ecommerce Maintenance
- ☒ Allow Split Unit Tally
- ☐ Change Restricted Item Prices at POS
- ☒ Allow Shared Folder
- ☐ *** not used ***
- ☒ Allow Email Document Style Change

Figure 19. User ID Maintenance > POS Permissions List Code Maintenance

4. In the *Permissions List*, scroll down to the bottom and select the **Allow Email Document Style Change** check box.
5. Choose **Apply** and **Return**. The User ID Maintenance form redisplay.

- Choose **Process (F12)** to save this change to the database.

Setting the Default Printer for Email Style Transmissions for the Branch

When you set up a printer on your system, you set the default document style formats for each document type in the **Maintenance > Database > Devices > Printers** form:

File Favorites Memos Help

Station ☒ Printer

Device Name: Location: Branch:

☐ Temporarily Disabled Windows Printer: Type:

☐ Fineprint Enabled

Forms Mapping:			Selection 1			Selection 2			Selection 3		
Document	Tray #	Style #	# Copies	Tray #	Style #	# Copies	Tray #	Style #	# Copies		
PS Sale Invoices	1	1	1	0	0	0	0	0	0		
PS Open Tickets	1	1	0	0	0	0	0	0	0		
PS Direct Invoice	1	2	0	0	0	0	0	0	0		
PS Customer Orders	1	3	0	0	0	0	0	0	0		
PS Direct Order	1	4	0	0	0	0	0	0	0		
PS Customer Quotes	1	5	0	0	0	0	0	0	0		
PS Charge Returns	1	6	0	0	0	0	0	0	0		
PS Cash Payments	1	7	0	0	0	0	0	0	0		
PS Cash Payouts	1	8	0	0	0	0	0	0	0		
PS Cancelled Invoice	1	9	0	0	0	0	0	0	0		
PS Cash Payment Cancelled	1	10	0	0	0	0	0	0	0		
PS Cash Payout Cancelled	1	11	0	0	0	0	0	0	0		
PS Installed Sales	1	12	0	0	0	0	0	0	0		
PS Staging Ticket	1	13	0	0	0	0	0	0	0		
		14	0	0	0	0	0	0	0		
		15	0	0	0	0	0	0	0		
		16	0	0	0	0	0	0	0		
		17	0	0	0	0	0	0	0		
		18	0	0	0	0	0	0	0		
		19	0	0	0	0	0	0	0		
		20	0	0	0	0	0	0	0		
		22	0	0	0	0	0	0	0		
		23	0	0	0	0	0	0	0		
		24	0	0	0	0	0	0	0		

F1 Next F2 Import F3 Style F4 Te F8 F9 Cancel F10 Exit F11 F12 Process

Figure 20. Device Maintenance > Printers > Printer Settings

In the *Style* column, you choose the default document format for each document type that is tied to that printer. This entry will be treated as the default style for transmitting the transaction document initially. The *Tray #* and *# of Copies* entries are ignored.

For the instructions below, choose a printer (*Device Name*) that includes the default document style you want to use for emailing transaction documents to customers. If you do not choose a default printer, the application uses the default document styles for the transaction type instead.

Selecting the Default Email Style Printer for a Branch

Use this option to set the default email style printer (and the related document styles associated with it as chosen above) for each branch. To select the default email style printer (with the corresponding default document style selections) for the Branch:

1. From the Main Menu, choose **Maintenance > Database > Branches**.
The Branch Setup form displays.
2. From the *Branch ID* list, choose the branch you want to set the default email style for and press **Enter**. The branch details display.
3. Choose the **Printers** tab.

The screenshot shows the 'Branch Setup' form for 'Branch ID: 1000' (ANY SUPPLY). The 'Printers' tab is selected. In the 'Defaults' section, the 'Email Style' dropdown is highlighted with a red box and set to 'NISK'. Other settings include 'Purchase Orders: DUMY', 'Quotes: DUMY', 'Customer Orders: DUMY', and 'Session Reports: DUMY'. The 'Second Copy' section shows 'Yard Area: YPDF' and 'Dispatch Area: DPDF'. The 'Use Enhanced Cash Tickets' section is checked, with options for 'Show list price on discounted items', 'Show total customer savings', 'Show customer signature', 'Show authorized buyer', and 'Show document barcode'. The bottom of the form has a navigation bar with F1-F12 keys.

Figure 21. Branch Setup > Printers > Defaults > Email Style

4. From the *Email Style* list, choose the printer that uses the styles you want to use for email transmissions to customers.
5. When you complete this setting, choose **Process (F12)** to save this setting.

Choosing the Document Style During the Transaction Process

Now that your users have permission to change the default email document style during a transaction and you have selected the printer that contains the list of default email styles for each document type, users can change the document style format during the transaction document process.

To choose a new email document style during a transaction:

1. From the Main Menu, choose **Point of Sale > Orders**.
The Order Entry form displays.
2. Set up the order as you normally would (account name, order number, and item selections) and then choose **Process (F12)**. The Process Order Document form displays.

In general, the Point of Sale user handles the payment information and any additional settings required before moving on to the *Transmit* setting.

3. Choose the **Transmit** tab to display the email transmission options.

The screenshot shows the 'Process Order Document' window with the 'Transmit' tab selected. The 'Email' section is active, showing fields for 'Email Document' (checked), 'Contact' (Samantha Frentenberg), 'Email To' (Dfrentenberg@frentenberg.com), 'From Addr' (nl@anysupply.com), 'Subject' (mail of Customer Order: Duncan Robert Frentenberg), and 'Notes' (Total: \$398.58). The 'Email Style' dropdown menu is open, displaying a list of options including 'Order', 'OrderDispatch', 'OrderBackorder', 'OrderDispatchBackorder', 'OrderFile', 'OrderRemaining', 'OrderPickTicket', 'OrderStore', 'PackingSlip', 'OrderSavings', 'OrderNoPrice', 'OrderContract', 'OrderDispatchRemaining', 'OrderDispatchNS', 'OrderFootage', and 'OrderPickTicketOnHand'. The 'Local' radio button is selected under the 'Document' section. The 'Back' (F9) and 'Finish' (F12) buttons are visible at the bottom right of the form.

Figure 22. Process Order Document > Transmit > Email Tabs> Email Style Options

4. Select the **Email Document** check box (if not already selected) and review the list of options in the *Email Style* list.

Note: If you do not select this check box and you process the transaction, an error message displays to remind you to select it:

- *Email Document is not selected. The document will not be queued for email.*
5. From the *Email Style* list, choose the appropriate alternate document style.
Note: The Email Style list override appears only when the user is permitted to change the document style and when multiple styles exist for the document type.
 6. Choose **Finish (F12)** to process the transaction.

Typically, email transmissions occur as part of the nightly process, so the email may not be sent automatically. The application validates the email address format.

Note: If you do not select a default printer style for the branch and you do not select an email style in the *Point of Sale Transmit > Email* tab, the following warning message displays:

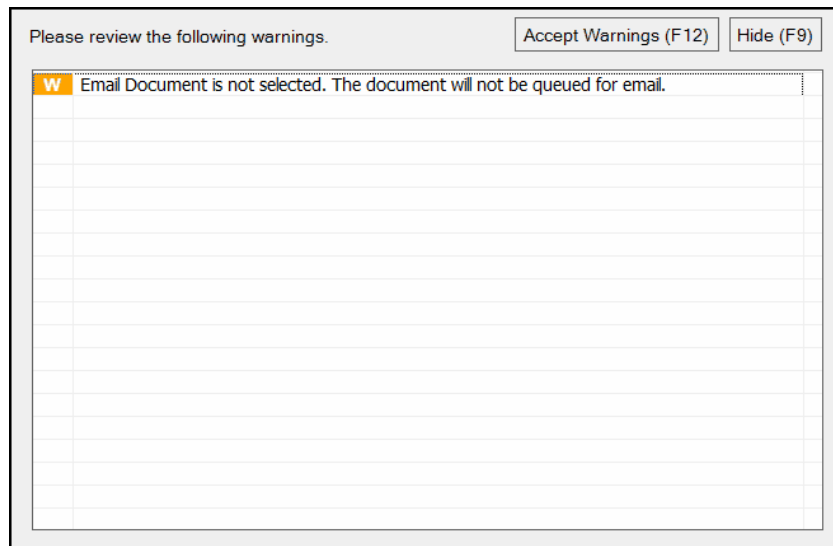


Figure 23. Email Style Warning Message

Choosing a Point of Sale Document Style Format

To choose a document style effectively, we recommend that you familiarize yourself with the available document style formats listed below. That way you can choose the formats that include the information you want in the emails you send.

Point of Sale (PS)

- [PS Invoices \(Sales\)](#)
- [PS Customer Order](#)
- [PS Quotes](#)

- [PS Payments](#)
- [PS Installment Purchase](#) (Rent to Own / Hire Purchase)
- [PS Open Tickets](#)
- [PS Direct Ship](#)
- [PS Installed Sales](#)
- [PS Charge Returns](#)

Purchase Order (PO)

- [PO Receipts](#)
- [PO Purchase Orders](#)
- [PO Vendor Quotes](#)

Manufacturing (IN)

- [IN Work Orders](#)
- [IN Manufacturing Schedule](#)
- [IN Transfers](#)

Receivables (AR)

- [AR Debit Adjustments](#)
- [AR Payment Posting](#)

General Ledger (GL)

- [GL Journal \(Summary and Detail Styles\)](#)

Payables (AP)

- [AP Billing Invoice](#)

VAT Tax Totals Percentages Display on Invoices (Region-Specific)

There is a tax compliance requirement in some VAT tax regions that, when the tax rate varies based on the type of inventory item, the invoice must display the different tax percentages and amounts separately.

For example, when an item or group of items in a transaction has an assigned VAT tax percentage of 5%, and another item or group of items has a VAT tax percentage of 10%, the invoice must display:

- the tax percentage value,
- the total transaction amount for the item(s) that require that tax assessment,
- the resulting tax amount on the invoice.

Quantity	UM	Item	Description	D	Price	Per	Amount
			Quote: 2601-708337				
4	CASE	W2035	JOY LARGE WAFFLE CONE #7192CS	N	124.0000	CASE	496.00
2	CA	W3047B	TOPPING MINI M&M'S 1/5LB	N	72.5000	CA	145.00
			10% VAT ITEM				
			5% VAT on 496.00 = 24.80				
			10% VAT on 145.00 = 14.50				

Figure 24. Invoice with VAT Tax Percentage

To ensure the application complies with this tax requirement, we have added a new parameter setting that ECI Implementation or Support team members can enable for your business to display up to three tax percentage settings on your invoices. Contact your ECI Support or Implementation team and ask them to turn on the *Enable VAT tax totals on invoices* setting to get started.

New Do It Best Distribution Centers for EDI Ordering

We are adding the Hanover, Pennsylvania, and Millbank, South Dakota distribution centers for Do It Best dealers for our EDI processes. Starting in December, when these locations officially open, you will be able to view their quantity-on-hand data and place orders for point-of-sale items using the current EDI processes. If these distribution centers are closer to you and have the items you require, you will be able to use them to place orders from Spruce when they open in December.

After these distribution centers open in December, you will be able to:

- See the new distribution centers and select one as your primary distribution center.
- Place orders using the new distribution center and use the correct identifiers in the order file, so that Do It Best can process orders and ship the materials correctly.
- See the current quantity on hand for the new distribution centers so you can order materials.
- View real-time inventory of the new distribution centers using the API connection, improving order efficiency.
- Use the system to pull in the selected new center's catalog updates so that my electronic catalog is kept up to date.

The existing Do It Best EDI processes will work as they currently do and you will be able to select these distribution centers as needed when they are open. See the [Do It Best EDI Setup](#) page for distribution center details. This change will be available after you upgrade to version 33.3.

Defect Resolutions

Release 33.1

ECOMMR-8011 – Account Sync Corrected Between Spruce and Spruce eCommerce Portal.

Some customer accounts were not appearing in the Spruce eCommerce portal due to a synchronization failure between the application's back-end system and the customer-facing portal. This prevented customers from accessing their account information online. We corrected the synchronization logic to ensure that all active customer accounts properly sync from Spruce to the online storefront. The data flow has been restored and verified.

ECOMMR-8138 – Consolidated Contract Pricing Now Displays on SPEC Website.

We investigated an issue where contract pricing in the application was not displaying correctly on the Spruce eCommerce website. We found that our pricing calculation process didn't include consolidated contract pricing and was only looking for specific job numbers. Since consolidated contracts use a special identifier that wasn't being considered, we updated the pricing calculation to apply your consolidated contract prices correctly. In our testing, we found that this now works as expected.

ECOMMR-8698– Accounts Appearing Correctly on Storefront After Data Sync Process. (SPEC Only) Some customer accounts created in the application did not appear on the Storefront portal after the synchronization process was complete. We improved the database query process that retrieved new accounts and removed a problematic database hint that prevented their successful transfer. All accounts are now reliably retrieved during the data synchronization process.

LBMHR-32, LBMHR-2766 – Issue Resolved: *Material Vendor and Pre-Receipt Vendor are different.* (Spruce Only) When a Direct Ship purchase order includes an adjustment (adder) that is billed to a different vendor from the material vendor (for example, freight is charged to a separate freight vendor), processing the purchase order often resulted in the error:

- *Material Vendor and Pre-Receipt Vendor are different.*

This prevented the invoice from being paid. After some investigation, we found that the non-material vendor record was locked, which prevented the Purchase Order from validating. We corrected this issue to ensure that you can process this transaction successfully. As a temporary workaround, you can code these adder invoices to a holding liability account. As of this release, can process Direct Ship adder invoices normally through Payables Billing Entry with no additional steps.

LBMHR-303 – GL Inventory Reconciliation Report Alignment Issues Resolved.

In the past, some GL Inventory Reconciliation Reports displayed totals that did not align with GL Balance Sheet totals for the same period. The report incorrectly included non-inventory accounts (such as those reflecting labor costs) and showed doubled amounts when the branch mapping configurations were inconsistent with the Chart of Accounts structure. We resolved this to ensure accurate reporting when the System Journal mapping is configured properly.

Note: If the *Branch* check box is enabled for inventory accounts in System Journal setup (such as Receiving journal sequence #1), corresponding branch-level accounts must exist in the Chart of Accounts.

We recommend reviewing your System Journal setup under **General Ledger > Setup > System Journals**. For inventory accounts that either:

- Disable the *Branch* check box if branch accounts do not exist, or
- Create branch department accounts that match your inventory structure

This alignment ensures that the GL Inventory Reconciliation Report reflects your business's accurate totals.

LBMHR-354 – Complete Signature Captures Now Display for M400 Devices.

When you capture a signature on an M400 payment device, you expect the system to display the signature fully when the payment is processed. While the signatures printed correctly on documents, the on-screen display was incomplete. We have implemented smart signature scaling logic that automatically detects signature sizes and adjusts the display in Point of Sale accordingly to prevent this issue.

LBMHR-1518 – Installed Sales Currency Rounding Issue Corrected. (Spruce Only)

When completing Installed Sales contracts with third-party labor costs that included cents (such as \$50.25), we discovered a small rounding discrepancy that remained in the General Ledger's Deposits account. This prevented the General Ledger account from balancing properly and required manual adjustments. We corrected the rounding logic used when processing third-party labor adjustments to handle decimal values properly. This ensured that the GL account balances automatically without leaving these discrepancies.

LBMHR-1575 – Using Inventory Lookup in Point of Sale Works Better Now. In Point of Sale, when searching for an item in any Point of Sale area by right-clicking the *Item* field to use *Inventory Lookup*, if you typed search text in the *Filter Description* field without first selecting a Group/Section, the application often closed suddenly. When you selected a *Group/Section* first, the search worked, but the results reflected the entries in that group/section only. We updated the process to allow you to complete the search successfully regardless of whether a Group/Section has been chosen. This ensures that you can search for inventory items across all available groups and sections to find the entered data as expected.

LBMHR-1799 – Delivery Notes in POS Process Tab No Longer Causing Closure.

Some users experienced unexpected software closures when adding or editing delivery notes during the Order process. This occurred on some workstations without displaying an error message, preventing the update of delivery details. The issue occurred when the system attempted to update the text field and the scroll bar at the same time. We corrected this issue to ensure the successful addition of delivery notes during the Order process.

LBMHR-2120 – Air Miles Rewards Now Calculated Correctly for Tax-Included Payments. When processing payments on charge accounts with Air Miles rewards enabled, the system was calculating tax for these payments in some tax-included regions incorrectly. When the payment amount already included tax, the system treated the payment as if tax still needed to be added on top. This defect affected any business in a region/tax scenario with tax-inclusive payments. This resulted in:

- Inflated tax amounts displayed in the Air Miles dialog box

- Customers received fewer Air Miles rewards than they should have earned

We corrected this issue by updating the tax calculation process to ensure the correct tax basis is used to calculate Air Miles rewards from account payments.

LBMHR-2196 – Open Charge Credits Display Correctly in Spruce eCommerce

In the EvolutionX system, open charge credits were displayed incorrectly as Paid before they were applied to invoices. This caused confusion about outstanding balances and made it difficult to identify which credits were still available. To resolve this issue, we updated the system logic to reflect credit status accurately. Posted credits now show as **Paid**, while open or partially applied credits correctly display as **Unpaid** until they're fully applied to invoices.

LBMHR-2206 – Negative Final Billing Amount for Installed Contracts Resolved.

A customer reported a defect that allowed users to enter billing amounts, resulting in a negative final billing balance for installed sales contracts. The issue arose in two scenarios where customer orders included deposits linked to the installed contract. Because this deposit-linked workflow does not automatically create a "Billed" line item, users entered the recurring bill amounts manually. Without system-level guardrails, this resulted in:

- Recurring billing amounts that exceeded the total contract amount or the remaining billing balance.
- Reducing the contract amount to a value below the remaining-to-bill balance, creating a scenario where more was owed than the contract was worth.

Both conditions produced installed contracts with invalid negative final billing amounts. After the application created a negative balance, it required manual correction. We resolved this issue by adding validation rules on the Installed Sales > Billing Tab that the application checks automatically before an installed sale can be marked as complete. These rules include:

- *Validating the Billing Amount.*
The application checks whether a recurring billing amount exceeds the contract amount or the remaining-to-bill balance. If either condition is true, the system displays an error to prevent the user from saving the entry.
- *Validating the Contract Amount.*
The application checks whether a user is attempting to reduce the contract amount to a value below the current remaining-to-bill balance. If so, the system displays an error that prevents the change.
- *Ensuring the Final Billing Amount is not Negative.*
When a user tries to complete the installed sale process, they cannot proceed if the final billing amount is negative.

We implemented these validations as new task list error messages, which are now built into the Installed Sales Billing processes. These guardrails are automatic and require no setup. If you encounter a validation error, please review the recurring billing and contract amount fields to ensure they are consistent with any deposits already applied from linked customer orders. No workflow changes are needed beyond responding to these new on-screen error messages.

LBMHR-2574: Memory Leak in Manufacturing Area Resolved.

A customer using the Manufacturing feature reported issues when processing quotes and orders: the application did not release memory after completing these transactions. This caused the application to slow down during the day and even required a reboot at times. We resolved this issue to improve event handling, clean up enhanced memory issues, and added automated unit tests to catch similar issues that could occur in the future. No changes to your daily process are required.

LBMHR-2597 - Recurring Bills Use the Vendor's Default VAT Code Automatically.

Before the fix, when you used the *Copy Recurring Bills* utility to create accounts-payable invoices, the new invoices did not pick up the default VAT code set on the vendor record in Vendor Maintenance. Instead, they used the first VAT code in the list in alphabetical order. If the first code was *EXEMPT*, the application created the invoice without a VAT code, which meant the transaction could be left off your HMRC VAT return. We now ensure that this utility assigns the VAT code the same way as it does in manual Billing Entry, using the vendor's default VAT code. Invoices created from recurring bills will carry the correct VAT code and report accurately on the VAT return. If you previously created a duplicate VAT code to force correct ordering, that workaround is no longer needed.

LBMHR-2612 – Unexpected Database Error During Point of Sale Transaction Resolved.

Customers reported that during some Point of Sale transactions, the message appeared:

- *Unexpected Database Error (The transaction is either not associated with the current connection or has been completed.)*

Then, the application closed suddenly. Despite attempts to retry the transaction as prompted, the system indicated it had already completed, so the retry was unsuccessful. We updated the application to properly handle completed database transactions and prevent retry prompts from appearing when they cannot succeed. We also improved the error-recovery processes to eliminate the loop that caused repeated error messages.

LBMHR-2615 – Updates to the Total Report Correct Comparative/Trends Style Issues.

Previously, the Totals report displayed zero values when using the Comparative or Trends style with the default date selection. The report failed to parse the current year correctly, resulting in an invalid date (year 0026), and there was no corresponding sales data. Additionally, the date selection did not properly switch to *Selected month* when you chose the Comparative style. We corrected the date logic to display the year properly and fixed the date selection to default to the *Selected month* when you select the *Comparative* or *Trends* report styles. These changes ensure the report generates accurate MTD, PY MTD, and YTD comparative totals.

LBMHR-2617 – Daily Sales Report Tax Totals Issue Corrected. We corrected an issue we found that caused the Daily Sales Report to merge tax totals from all branches into a single, inflated figure -- even if you selected one branch. This occurred because a recent fix for clothing-tax duplication inadvertently omitted the branch-filtering logic in the report's underlying database query. We updated the process to explicitly include a Branch ID filter to ensure the SQL query confined the tax data to the selected branches only. This fix restores correct branch isolation while maintaining the previous fix for clothing-tax duplication. This change will correct the issue when you upgrade to the latest patch.

LBMHR-2661 – Local Launch Setting Now Visible for Remote Client-Supported Stations. When a Remote Client station connects to the server, the server runs a lookup to retrieve the station's branch settings. At the time this defect was reported, the Local Launch setting was not returned during this lookup process, meaning Remote Client had no way to know whether Local Launch was enabled for a given branch. We updated the database procedure to also retrieve the station's Local Launch branch settings with the existing settings, which resolves this problem. If a branch hasn't configured this setting, the station defaults to **off** (*false*), rather than causing an error.

LBMHR-2711 – Bank Card Process Permission Issues Resolved.

We discovered that when the *Restrict Manual Bank Card Entry* security setting was enabled in User permissions, the application incorrectly disabled both *Manual Card Entry* and the *Card Not Present* payment options at Point of Sale. We corrected the security logic so that restricting manual entry no longer affects these settings, which are particularly required to process phone orders from clients.

LBMHR-2719 – Performance Issues Associated with Price Updates Corrected.

During the automated price update process, the system was experiencing significant performance slowdowns and database blocking. We found that the database queries responsible for cleaning up processed price updates were using an inefficient search pattern, particularly when the system needed to delete records from the Price Updates table after

applying changes. We updated the system's price record search to use a faster, more direct method, improving performance.

LBMHR-2729 – Resolved: Document Issue that Prevented Lengths for Hardwood Tally Items.

A customer reported a defect that prevented the dimension information of Hardwood Tally items from appearing on Purchase Orders, Inventory Receipts, Sales Invoices, and Order documents. This prevented vendors and customers from receiving complete physical specifications for hardwood tally items on their paperwork. We corrected this issue to ensure that Hardwood Tally item entries display the full dimension string (depth × width × length) across all document types. The fix has been incorporated into the document-generation logic to prevent similar errors in the future.

LBMHR-2744 – Image List Images Displaying in Point of Sale Again.

When working in the Point of Sale area (and right-clicking the *Item* list to review and display Image List tiles), the header tile images were not displaying, although individual item images appeared correctly when you expanded the lists. When we investigated this issue, we found several problems that prevented the images from displaying correctly, and we created a more unified process for item display to address this problem. As a result, we corrected the image assignment process to use the scaled image variable to ensure proper flag updates, added new control logic to repaint the image when parent panels are resized or modified, and added comprehensive testing to prevent similar display issues from recurring.

LBMHR-2745 – Corrected: Notification Queue Printing Issues.

Some users encountered issues when attempting to print messages from the Notification Queue (Main Menu > Messages):

- Print jobs were reported as failing even when they succeeded using Remote Client
- Printer list displayed incorrect printers (showing server printers, not client printers)
- Print-to-PDF and other virtual printers produced corrupt or empty files

We corrected these printing issues for both local and Remote Client users. The system now correctly displays client printers in the printer selection dialog box and properly renders the requested output for both physical and virtual printers (including Print-to-PDF). Print jobs no longer show false failure messages.

LBMHR-2854 - Account and Item Maintenance Memory Leak Issues Resolved.

Some customers reported slowdowns and unexpected application closures after repeatedly opening and closing Account Maintenance (**POS > Database > Account**) and Item Maintenance forms throughout the day. We found that technical object handles were not being properly released when users closed these forms, causing the slowdown and closure issues.

As of the latest release, we have enabled three new memory-leak corrections that do not require manual database scripts. To benefit from this fix:

- Upgrade your application to the latest release, which contains the fix
 - Restart the application after the update is applied.
- The memory-leak mitigations take effect only after you restart the application.

Contact your System Administrator if your performance issues persist after the restart.

LBMHR-2936 – Complex Orders with Currency Rounding Issue Processing Normally Again.

When processing a special item order with a payment adjustment and delivery charges, and refunding a penny difference, a customer reported that the application closed with an error message. The root cause was a calculation issue related to currency rounding during the payment process, which we have resolved.

LBMHR-2949 – Overpaying an Order in Cash No Longer Causes Application Freeze.

An error occurred when a Cashier entered a cash overpayment on an order deposit in Point of Sale. After entering a cash amount greater than the balance due and completing the deposit, the system displayed the change-due screen with the message, *Press Space Bar to Return*. However, if the Cashier pressed the Space Bar, Spruce froze, leaving the Orders interface disabled and requiring the Cashier to force close and restart the application. We corrected the logic to ensure that the application re-enables the Orders form after the change-due message is dismissed. No workarounds are required after this update.

LBMHR-3072 – Selecting Multiple Branches for Installed Sales Report Working Correctly.

When running the Installed Sales report for an account with a designated report/POS branch, selecting multiple branches caused the Installed Sales report to return no data. We corrected the internal logic error that caused this report to fail, and it now handles selecting multiple branches as expected.

LBMHR-3087 – Email Warning Message No Longer Displaying for All Transactions.

Some customers reported that this warning message displayed even when the transaction did not require a document style selection and they were not using the new Email Document Style Selection feature:

- *Email Document is not selected. The document will not be queued for email.*

We corrected the issue that caused this message to display when it was not applicable. This message will still display if cashiers have not selected an email document style when a style selection is required.

Release 33.2

LBMHR-1952, LBMHR-2761 – Managing Register Errors Caused by Database Locks During Price Updates. When running a large vendor EDI Price Update during the business day, the system could lock up inventory records for a thousand or more items at a time. When this happened, Cashiers received *Database Locked* errors, preventing them from completing sales. The bigger the price update, the longer the lockout. We updated this process to break large price updates into smaller batches and release the item database lock between each batch, rather than holding them for the entire process. This dramatically shortens the window during which the register is affected. We recommend running this kind of large price update during off-peak hours to prevent database locks from impacting the checkout line.

LBMHR-808 – Large EDI Processes no longer Causing POS and Inventory Locks. When processing large Do It Best EDI processes or running a PO Build, some POS terminals and inventory forms froze across multiple branches and caused timeouts until the inventory receive or build finished. We corrected this issue by managing the update of the inventory pricing information in a way that does not affect these processes. We still recommend that you schedule large EDI processes outside of normal business hours (before or after the store closes) to minimize the effects of these important transmissions.

LBMHR-2408 – Vendor Adder Billing Link Issue Related to EasyAP Process Resolved. When using Easy AP (the third-party import invoice tool) to process invoices tied to purchase orders with vendor adders, the system failed to properly mark those adders as billed. As a result, Billing Entry (Payables) still showed adder charges as unbilled, even after they had been processed, so the received dollar amounts on imported bills didn't match what was received. We traced the issue to a sequence-numbering error. The process miscounted adder line numbers (starting at -1 instead of 0), which prevented the identification of matching rows; this left the billing linkage unset. We corrected this issue to ensure that we parse adder sequences accurately and record received amounts correctly. We confirmed that this resolution matches the behavior of the manual Billing Entry process. After the fix is deployed, you may want to perform a one-time clean-up of any previously imported bills with broken adder links. The Support team can assist you in identifying and correcting those records.

LBMHR-2761 – Update Prevents EDI-Based Price Update Lock Issue. Customers reported that when processing large EDI-based price updates, some Point of Sale stations reported timeout errors that prevented sales from completing. This affected credit card processing and other payment methods most. After investigating, we found that the system was locking the inventory database to prevent overwriting item prices during

transactions. We have improved this process to shorten the lock window to prevent transaction processing issues. However, we recommend scheduling large EDI price update processes outside of business hours to avoid such interruptions.

LBMHR-3092 – Email Transmission Issue Corrected.

Some beta customers reported that their emails were not transmitting successfully after upgrading to version 33 for testing. We have corrected this issue.

LBMHR-3110 – Corrected: Identifier Labels Not Printing from Purchasing Receipts.

Some stores using a Dymo label printer found that the Document Identifier label (the barcode/receipt ID sticker) stopped printing automatically when they finished processing a receipt (*Purchasing > Receipts > Process (F12) > Finish (F12)*). The form displayed the message: *Processing Complete*, but no label printed. We corrected this process to ensure the purchasing receipt identifier label prints as expected.

Release 33.3

LBMHR-1911: Installed Sales Billing Issues Resolved.

In the past, when an associate used the **Percent** option for Installed Sales billing on the Billing tab, Spruce could calculate bill amounts to fractions of a cent, like \$2,216.778, even though the form may only show normal dollars and cents. When those bills were posted, Accounts Receivable could end up with small fractional open credit that associates could not apply or clear; this required a manual data fix. We have corrected this issue by rounding Installed Sales bill schedules correctly to whole cents when you save a percentage billing.

Additionally, when a store associate tried to mark an Installed Sale as **Complete** on a contract using the Scheduled Invoice billing method, the system threw a *Task List Error* and would not allow them to close out the job — no matter what they tried. We corrected this issue so you can complete the scheduled invoice billing without any errors.

LBMHR-2750 – Bulk Inventory Import in UK Systems Working Correctly Again.

In the UK, VAT-enabled systems using the Bulk Inventory Import wizard (*Inventory > Database > Item > F2 Import > Wizard > Update Inventory*) to update prices for fixed-price items (PrcType "P") failed silently, retaining the old prices rather than applying the imported values. Other pricing types (such as Markup, Margin, etc.) updated correctly. This was apparently due to a tax-context calculation that overwrote the imported fixed prices with the old database price during the wizard's validation step. Interimly, customers used the Level Maintenance feature to update prices of this type, rather than the Bulk Import Wizard for fixed-price items. We

updated this logic to ensure that the system correctly keeps the imported fixed prices during the Bulk Update process and no longer overwrites them with the old values.

LBMHR-2840 – Update to Installed Sales Ensure Accurate Margin / Profit Totals.

On the Installed Sales form > Analysis tab, when a Labor SKU was set as *non-stocked*, the application counted the price twice — once under Materials and again under Labor. This overstated both Estimated and Actual totals, making margin/profit percentages inaccurate. We corrected the calculation logic to ensure that non-stocked labor items are now recognized consistently and are excluded from Materials totals. This applies to both Estimated and Actual totals in the Analysis tab. We added tests to confirm the numbers stay accurate going forward.

LBMHR-3065 – Reversing/Closing Vendor Bills No Longer Uses the Branch Logic Incorrectly.

When reversing and closing an AP credit invoice (vendor bill), the system incorrectly blocked the action, showing the following error message:

- *Original vendor invoice was processed in a different branch.*

Upon investigation, we found that this error message was inaccurate, as the user was attempting to reverse the invoice from the original branch. We corrected the branch-validation logic to ensure it properly recognizes when the branch's vendor bill matches your current session, so the reverse and close process works as expected. The new logic only applies to the cross-branch check process when the branches genuinely differ. We added tests to prevent this error from recurring.

LBMHR-3126 – Items Display in Folders (F4) tab for Inventory Adjustments Again.

After a recent update, when you selected the **Folders (F4)** key during an Inventory Adjustment, item details no longer displayed, and some of the other tabs appeared blank too. We restored the missing logic that displays these details, so the Folder tab details display correctly for this process.

LBMHR-3139 – Lost Sales shows Description and Valuation Item Details in POS.

In the past, when you reviewed the Lost Sales information for an inventory item in the Point of Sale data grid, the *Description* field and the fields in the *Valuation* box did not display these item details. Viewing this data required a workaround that was a frustrating extra step. We corrected this issue to ensure that all item details display properly when you look up the Lost Sales information for a selected item.

Lost Sales • 1000 - ANY SUPPLY CO. • User: on Station:

File Favorites Memos Help Debug

Detail ID: 12

Item: Select by: ☒ Item ID ☐ Catalog SKU
100107

Description: WIRE AND KEYLESS ENTRY

Account: CASH

Job ID: 0
CASH

Contact: Name:
Email:
Phone:
Cell:

Entry Date: 4/2/2024 01:08P
Entry User: QA05
Branch ID: 1000
Last Sale:
Last Purchase:
Reason Code: OUT OF STO

Valuation:

Qty Lost: 1 UM: EA
Price: 0.00 UM: EA
Avg Cost: 24.28

Additional Details:

#	Field Name	Value
0	PRICE OUT OF THIS WORLD	FALSE
1	NUMBER OF ITEMS ASKED	TRUE
2	NEED A BIGGER SIZE	FALSE

☐ Closed

F1 Next F2 Import F3 Style F4 F5 F6 F7 F8 F9 Cancel F10 Exit F11 F12 Process

Figure 25. Lost Sales Form > Description and Valuation Fields Highlighted

LBMHR-3141 – Workstations Log Out Automatically Based on Inactivity Setting Again.

Some customers reported that workstations were not logging out automatically after a normal period of inactivity, even when that logout time was pre-configured. We corrected this issue. You can set this timeout period in the *Inactivity Timeout* field in the Security Options tab of the User ID Maintenance form.

Release 33.4

LBMHR-551 – Item Records Updating Correctly when you Change Vendors.

When a store switched to a new EDI vendor (for example, moving from ACE to Do It Best), and downloaded a purchase order or invoice from that new vendor, the application was supposed to recognize that the item already existed in inventory by matching its UPC barcode that was stored in the item record. Using the UPC barcode, it could update the item record to use the new vendor's item number instead. The error occurred when the system began creating a duplicate SKU without a UPC barcode for the new vendor's item, while leaving the UPC attached to the old item. This caused inventory clutter, mismatched barcodes, and confusion when receiving products from multiple vendors that carry the same items. The application now

looks up the existing item by UPC during an EDI PO Update and adds the new vendor's item number to that item instead of creating a duplicate.

LBMHR-2115 – Billing Error No Longer Impacting Direct Ship PO Transactions.

Some customers reported that when they tried to process a Direct Ship Purchase Order in the Billing Entry form, the system closed suddenly when they attempted to generate the invoice. We corrected this issue. You should be able to process Direct Ship POs successfully and without errors through Billing Entry.

LBMHR-2635 – Update Resolves EOD Processing Issue with Finance Charges.

When someone posted an AR payment that applied to multiple Finance Charges at once (and the account had two or more outstanding Finance Charges), the system saved an inaccurate Finance Charge total, behind the scenes. This caused an End-of-Day (EOD) process failure, which prevented the books from balancing. We updated the Finance Charge calculation logic to ensure we apply the appropriate Finance Charge amount to each outstanding account balance and store it accurately for the EOD process calculation.

LBMHR-2820 – Opening SPEC Account Payment Documents Works Correctly Again.

When a customer made an account (ROA) payment on the SPEC portal and a user opened the payment document in the Document Viewer in Spruce, the application sometimes closed suddenly. This happened because the system mistakenly pulled in dozens of unrelated receipts and attempted to load them all simultaneously. We corrected this issue to ensure that you can open these documents safely.

LBMHR-2864 – Emailed PDFs are Readable Again.

Some customers reported that their customers were unable to open the invoice or statement PDFs sent through the application. It displayed correctly when you opened the PDF locally in the application, but not after it was emailed. The workaround was to save the document locally and send it manually, but it was a lot of work. After some investigation, we found that the process was adding an extra blank byte to the document, which caused this issue. We corrected this issue.

LBMHR-3049 – Promotional Item Updates Running More Efficiently Now.

When running a Promotional Item Update in the Vendor EDI area, some TrueValue customers reported that the application suddenly closed, displaying an *Application Abort* error. This was caused by the system taking too long to update the expected ship dates across all open purchase orders after loading the item promotion information, resulting in a timeout. We updated the logic to limit the expected ship date update to only the purchase orders and

promo items that are affected by the uploaded promotion, rather than scanning all open POs across the system, which resolved the issue.

LBMHR-3143 – Adding New Items to Inventory Works Better for ACE Rewards Stores.

For multi-branch businesses that use ACE Rewards, we used to run a promotional setup process when you added a new ACE item. This caused the application to run several processes simultaneously, which resulted in a database deadlock. This sometimes prevented transactions at the workstation from completing or forced the application to close. We now run the promotion setup process after the item has been saved to prevent the deadlock. If a similar situation occurs in the future, we display a *Try Again* message to prevent the application from closing unexpectedly.

LBMHR-3200 – Billing Error Due to Advanced Payments on Installed Sales Contracts Resolved.

When a customer with an Installed Sales contract made an advance payment (paid more than was due), the system incorrectly blocked the next scheduled bill. We corrected this process to ensure the application properly applies advance payments before calculating the next bill amount.

LBMHR-3206 – Preventing Large Do It Best POs From Locking Up POS Stations.

Some stores reported that when they processed large Do It Best purchase orders, the application sometimes locked up the Point of Sale workstations across all branches. We restructured this process to prevent the validation step from causing this lockup. We still recommend processing DIB POs during off-peak hours to prevent this type of issue.

LBMHR-3213 – EasyAP Adder Charges Handled Correctly Now.

When you imported an EasyAP bill from a receipt that included Adder charges (such as freight or handling fees), the application did not include those Adder charges when you included them in the Process AP Batch process. Because these adders were never marked as billed, the same charges remained available for billing again, which risked duplicate charges on future invoices. After some research, we found that EasyAP labeled the adders differently than the billing batch screens expected, which prevented the application from matching them. We updated the import process to ensure that the EasyAP import and Process AP Batch process language is aligned. This resolved the issue.