

ORDERWISE®

BUSINESS MANAGEMENT SOFTWARE
WEB | STOCK | ORDER | WAREHOUSE | ACCOUNTS



Release Notes

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V21.8





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Accounts

Detailed Stock Postings – Rounding Journal

OrderWise Ref: 55379
 Menu Option: System Settings | Accounts | Detailed Stock Posting

- Split Out Additional Costs
 - Shipping Costs Nominal Code

Accounts | Journals | Journal History
 Accounts | Nominals | Nominal Ledger Activity

Status: Enhancement
 Licensed Feature: Yes (Accounts – Detailed Stock Posting)
 Detail:

With the above System Setting enabled, after shipping costs are posted, the system will check for any ‘Fully Received’ Purchase Orders with a shipping cost or shipping container. Once found, it will compare the cost of the shipping from the Purchase Order or Shipping Container with the shipping costs posted by Detailed Stock Postings. If it finds any difference, it will post that as a new journal to make it balance.

Detailed Stock Postings – Transaction History

OrderWise Ref: 55020
 Menu Option: Accounts | Journals | Journal History
 Accounts | Nominals | Nominal Ledger | Nominal Ledger History

Status: Enhancement
 Licensed Feature: Yes (Accounts – Detailed Stock Posting)
 Detail:

Access to the ‘Transaction History’ grid is possible when viewing an “Opening stock cost re-assignment” or “Purchase cost re-assignment” journal, from within the Journal or Nominal Ledger History grids, via the ‘Transaction History’ button.

Bank Statement Import Definition Added

OrderWise Ref: 54291
 Menu Option: Accounts | Bank | Bank Accounts | [Add/Edit] | eBanking [tab] | Import [tab] | Statement Import Definition

- Amazon Monthly Statement Import Extended (CSV)

Status: New Development
 Licensed Feature: Yes (Accounts)
 Detail:

The bank statement import definition ‘Amazon Monthly Statement Import Extended (CSV)’ has been added.

Columns Added to Cost Centre Targets

OrderWise Ref: 53989
 Menu Option: System | Accounts | Cost Centres | Targets [button]

- Revenue
- Revenue %

Status: Enhancement
 Licensed Feature: No
 Detail:

‘Revenue’ and ‘Revenue %’ columns have been added to the ‘Cost Centre Targets’ grid.

API

OrderWise API Endpoint to Change Sales Order ‘Order Type’

OrderWise Ref: 55092
 Menu Option: N/A
 Status: New Development
 Licensed Feature: Yes (API)
 Detail: OrderWise API Endpoint ‘POST/sales/order/{id}/change-order-type/{sales_order_type_id}’ has been added and can be used to change a Sales Orders ‘Order type’ to one of the listed IDs on the API Documentation.

OrderWise API Endpoint to Auto Ship Sales Orders within ‘Orders Requiring Shipping’

OrderWise Ref: 55291
 Menu Option: N/A
 Status: New Development
 Licensed Feature: Yes (API)
 Detail: OrderWise API Endpoint ‘POST/despatch/auto-ship-from-ors/{oh_id}’ has been added and can be used to automatically ship orders which appear within ‘Orders Requiring Shipping’.

OrderWise API Endpoint to Receive Transfers

OrderWise Ref: 53563
 Menu Option: N/A
 Status: New Development
 Licensed Feature: Yes (API)
 Detail: OrderWise API Endpoint ‘POST/goods-in/transfer’ has been added and can be used to receive despatched transfers.

Courier Integration

‘UPS Worldship 2012-2015’ Courier Amendments

OrderWise Ref: 55451
 Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration [tab] | [Courier Options] | General [tab]

- Do not output Ship From address

 Despatch | Courier Integration
 Status: Enhancement
 Licensed Feature: Yes (Courier – UPS)
 Detail: The above Courier Option has been added for the ‘UPS Worldship 2012-2015 - International Direct Feed’ and ‘UPS Worldship 2012-2015 (Commercial invoices) - International Direct Feed’ Couriers and, when enabled, will no longer export the <ShipFrom> address element. Additionally, changes requested by UPS have been made to improve the link between both Couriers and OrderWise which have not changed any current functionality.



Courier Options Added for Multiple Couriers

OrderWise Ref:	54907
Menu Option:	System Despatch Couriers [Add/Edit] Courier Integration [tab] Courier Options [button] <ul style="list-style-type: none">• Send Labels To Packing Machine Folder<ul style="list-style-type: none">○ Packing Machine Folder
Status:	Enhancement
Licensed Feature:	Yes (Courier – DPD / Courier – Parcelforce / Courier – Whistl)
Detail:	The above Courier Options have been added for the following Couriers: 'ParcelForce ExpressLink - Web Service', 'Whistl - International Direct Feed', 'Advanced – DPD API International Direct Feed', 'Advanced – DPD API Domestic Direct Feed'. When enabled, all files (except ZPL files) are converted to PDF by the Filewatcher utility and saved to a specified third-party folder.

'FedEx - Web Service' - Additional Courier Option

OrderWise Ref:	55128
Menu Option:	System Despatch Couriers [Add/Edit] Courier Integration [tab] Courier Options [button] <ul style="list-style-type: none">• Purpose of shipment
Status:	Enhancement
Licensed Feature:	Yes (Courier – FedEx)
Detail:	'FedEx – Web Service' Courier exports the 'Purpose of Shipment' Courier Option, selected from the drop-down options for international shipments.

'DPD API' and 'DPD Local API' - Export PID Number

OrderWise Ref:	54859
Menu Option:	Sales Customer List [Add/Edit] Delivery Addresses [tab] [Add/Edit] <ul style="list-style-type: none">• PID number
Status:	Enhancement
Licensed Feature:	Yes (Courier – DPD/Courier – DPD Local)
Detail:	With the above 'PID number' field populated, when using either the 'Advanced – DPD API International Direct Feed' or 'Advanced – DPD Local API International Direct Feed' Couriers, the PID number will be exported.

'USPS via Endicia' - Account ID Field Length Increased

OrderWise Ref:	54954
Menu Option:	System Settings Despatch Courier Integration Endicia <ul style="list-style-type: none">• Account ID
Status:	Enhancement
Licensed Feature:	Yes (Courier – Endicia)
Detail:	The 'USPS via Endicia' Courier Account ID has been updated to allow up to 10 characters in System Settings.

'Landmark Global API' - Export IOSS Number

OrderWise Ref: 55060
Menu Option: System | Despatch | Couriers | [Add/Edit] | Shipper Details [tab]
• IOSS no
Status: Enhancement
Licensed Feature: Yes (Courier – Landmark)
Detail: 'Landmark Global API' exports the IOSS Number or IOSS Override Number when the Delivery Method Service Trigger is set to "Vendor". If the IOSS Override Number is set (imported orders only), then this will output even if the Courier IOSS Number is set, if not then it will favour the Courier IOSS Number. If neither are set, then no IOSS Number will be added to the label request vendor information.

'Stop Start Transport API - Direct Feed' - Courier Integration

OrderWise Ref: 53393
Menu Option: System Settings | Despatch | Courier Integration | Stop Start Transport
Status: New Development
Licensed Feature: Yes (Courier – Stop Start)
Detail: OrderWise has been integrated with the Courier 'Stop Start Transport API - Direct Feed'.

'Quinn Transport API - Direct Feed' - Courier Integration

OrderWise Ref: 53840
Menu Option: System Settings | Despatch | Courier Integration | Quinn Transport
Status: New Development
Licensed Feature: Yes (Courier - Quinn Transport)
Detail: OrderWise has been integrated with the Courier 'Quinn Transport API - Direct Feed'.

CRM

Questionnaires within CRM Records

OrderWise Ref: 48786
Menu Option: CRM | Record List | Edit Record [button] | Questionnaires [tab]
Status: New Development
Licensed Feature: Yes (Customer Relationship Management, Questionnaires)
Detail: Questionnaires may be linked to CRM Records. These can be added, viewed or deleted from the 'Questionnaires' tab within the CRM Record.

Despatch

Courier Totes

OrderWise Ref: 54701
Menu Option: System Settings | Despatch | Ship

- Use courier totes
- Courier tote prefix

User Group Settings | Despatch | Courier Totes
User Group Settings | Mobile Device | Courier Totes
Despatch | Courier Totes
Android HHT | Courier Tote

Status: New Development
Licensed Feature: Yes (Courier Totes & Mobile Devices – Android/Mobile Devices – Android 3rd party)
Detail: Courier Totes enables deliveries to be placed into a tote for a specific Courier, then marked as collected when the Courier collects the deliveries. This allows the User to see what deliveries are still in the warehouse awaiting collection. Courier Totes can be added to and marked as collected using both the main system and Android HHTs. The above User Group Settings control what actions a User can perform with Courier Totes in the main system and Android HHT.

Mobile Devices

Android HHT – Goods In Despatch

OrderWise Ref: 45425 & 55105
Menu Option: System Settings | Mobile Device | Goods In

- Search sales orders required X days ahead
- Process courier integration
- Print goods labels

User Group Settings | Mobile Device | Access

- Goods in - despatch

User Group Settings | Mobile Device | Goods In

- Allow update of Purchase Order quantity

User Group Settings | Mobile Device | Goods In - Despatch

- Import GS1 barcode quantities
- Allow override of delivery method

Status: New Development
Licensed Feature: Yes (Mobile GI Despatch & Mobile Devices – Android/Mobile Devices – Android 3rd Party)
Detail: The Mobile Goods In Despatch module has been added to Android HHT.

Android HHT – Auto Populate Batch Number from Expiry Date

OrderWise Ref: 55264
Menu Option: System Settings | Goods In | General [tab]

- Auto populate batch number from expiry date
- Batch number format

Status: Enhancement
Licensed Feature: Yes (Mobile Devices – Android/Mobile Devices – Android 3rd Party)
Detail: With the ‘Auto populate batch number from expiry date’ System Setting enabled, when booking in batch number and expiry date traced Variants through Goods In on an Android HHT, the batch number field is disabled and automatically calculated from the expiry date using the format specified by the ‘Batch number format’ System Setting options.

Android HHT – Update Default Bin Settings

OrderWise Ref: 53608
Menu Option: User Group Settings | Transactions

- Update variant stock location default bin

Status: Enhancement
Licensed Feature: Yes (Mobile Devices – Android/Mobile Devices – Android 3rd Party)
Detail: With the above User Group Setting enabled, when booking in stock through Goods In on an Android HHT, an additional ‘Update Default Bin’ option is available. With this additional option checked, the Variant’s default bin is updated to the bin scanned.

Android HHT – View All Available Bins in Picking

OrderWise Ref: 53598
Menu Option: User Group Settings | Mobile Device | Picking | More [tab]

- View and reallocate stock by pickline

Android HHT | Picking | [Select Pick] | Pick Options | View Stock

Status: Enhancement
Licensed Feature: Yes (Mobile Devices – Android/Mobile Devices – Android 3rd Party)
Detail: With the above User Group Setting enabled a ‘View Stock’ button becomes available in the Pick Options menu. Pressing this button opens the ‘Current Stock’ screen, where stock can be reallocated to the bin selected.

Android HHT – Bins with Current Stock

OrderWise Ref: 53013
Menu Option: Android HHT | Put Away | Place | Options | Current Stock
Status: New Development
Licensed Feature: Yes (Mobile Devices – Android/Mobile Devices – Android 3rd Party)
Detail: When placing stock in Put Away, bins that currently hold the Variant can be listed.

Reports & Layouts

Courier Tote Label Layout

OrderWise Ref: 55449
Menu Option: System | Reports & Layouts | Layouts
• Courier Tote Label
Status: New Development
Licensed Feature: Yes (Courier Totes)
Detail: A layout has been added for Courier Totes to be printed off and attached for quick identification, it contains the name of the Courier Tote and a large barcode for scanning.

Additional Standard BI Alerts

OrderWise Ref: 49918, 49923 & 49924
Menu Option: BI Alerts | Alert Queries
Status: New Development
Licensed Feature: Yes (BI Alerts)
Detail: Three standard BI Alert queries have been added.

The “Item in Put Away Bin More Than X Days” query creates an alert for every transaction that has been in a put away bin for longer than a specified number of days.

The “Sales order overdue” query creates an alert for sales orders with a ‘Date promised’ of today or earlier.

The “Variant is Overstocked” query creates an alert for every Variant that exceeds the maximum stock level for a stock location.

Returns

Process Second Hand Variants when Booking in Returns

OrderWise Ref: 50926
Menu Option: System Settings | Returns | Customer Returns | Second Hand [tab]
User Group Settings | Returns | Customer Returns
• Add second hand items
Returns | Customer | Customer Returns Activity | Edit Return [button] | Line Information [tab]
• Book in as second hand
Status: New Development
Licensed Feature: Yes (Returns)
Detail: When booking in returns, Variants can be processed as second hand items. This will create a new Variant and book the returned stock in against the newly created Variant.

Sales

Edit Cost of Discounts and Surcharges

OrderWise Ref:	53979
Menu Option:	User Group Settings Sales Order Entry [Order Tab] <ul style="list-style-type: none">Edit discount/surcharge costs Sales Customer List New Order [button] Discount [button] [Add Discount/Surcharge] <ul style="list-style-type: none">Cost
Status:	Enhancement
Licensed Feature:	No
Detail:	Non-percentage Discounts and Surcharges can have their cost edited within a Sales Order, with the above User Group Setting enabled.

Default to Blank Delivery Addresses on Sales Orders

OrderWise Ref:	51100
Menu Option:	Sales Customer List [Add/Edit] Settings [tab] Sales [tab] <ul style="list-style-type: none">Force delivery address selection for new sales orders
Status:	Enhancement
Licensed Feature:	No
Detail:	Customers can individually be set to have the delivery address default to blank when creating a Sales Order.

Media Code Entry Prior to Sales Order Entry

OrderWise Ref:	54929
Menu Option:	User Group Settings Sales Order Entry Order [tab] <ul style="list-style-type: none">Show media code form on new orders Sales Customer List New Order [button]
Status:	Enhancement
Licensed Feature:	Yes (Media Codes)
Detail:	With the above User Group Setting enabled, a 'Select Media Code' form will open on creation of a sales order, allowing the User to select a media code before entering the order.

Robotics

Pick Rules – Set Robot Mission Priority

OrderWise Ref:	55369
Menu Option:	System Despatch Pick Rules [Add/Edit] Detail [tab] <ul style="list-style-type: none">Robot mission priority
Status:	Enhancement
Licensed Feature:	Yes (Robotics)
Detail:	Robot missions can have their priorities amended via the pick rule assigned to them.



System

Pallet Sizes

OrderWise Ref: 53842
Menu Option: System | Despatch | Pallet Sizes | [Add/Edit]
System | Despatch | Pallet Types | [Add/Edit]
• Size
Status: New Development
Licensed Feature: No
Detail: A grid has been added to create Pallet Size records. These can then be assigned to Pallet Type records.



Help Guide Pages

The following pages have been added for this release:

Section	Page
Dashboards	Dashboards Dashboards - V1
	Dashboards Dashboards - V2
Mobile Device	Mobile Device Android Modules Utilities Convert to Serial
	Mobile Device Android Modules Utilities Convert to Untraced
System	System Transport Management Vehicle Check List



The following pages have been updated for this release:

Section	Page
Accounts	Accounts Bank Bank Accounts Bank Statement Import Import Formats
Android	Android Proof of Delivery App
Courier Integration	Courier Integration BluJay Shop Direct Group Label Request
	Courier Integration BluJay Shop Direct Group Label Request - Mapping
	Courier Integration GFS Enterprise API - International Direct Feed
	Courier Integration GFS Enterprise API - International Direct Feed - Mapping
Despatch	Despatch Transport Management Planned Runs
eCommerce	eCommerce eCommerce Session Import Setup Tab
	eCommerce Web Shop Web Shop Setup
eCommerce Platform	eCommerce Platform Online Store Configuration
	eCommerce Platform Online Store Dashboard
	eCommerce Platform Online Store Design
	eCommerce Platform Online Store Modules
	eCommerce Platform Online Store Modules Blog
	eCommerce Platform Online Store Modules Variant Display Options
	eCommerce Platform Online Store Products
	eCommerce Platform Online Store Settings
Mobile Device	Mobile Device Android Modules Goods In
	Mobile Device Android Modules Manufacturing Works Orders
	Mobile Device Android Modules Picking
	Mobile Device Android Modules Replenishment
	Mobile Device Android Modules Variant Inspection
Purchasing	Purchasing Supplier List Add Supplier Credit Details Tab
	Purchasing Supplier List Add Supplier Settings Tab
	Purchasing Supplier List New Purchase Order
Returns	Returns Customer Returns Creating Customer Returns Linked Payment Refunds
Sales	Sales Take Payment
Stock	Stock Add/Edit Variants Add Stock Location
System	System Sales Order Delivery Methods
	System Transport Management Delivery Vehicles
System Settings	System Settings Manufacturing General
User Group Settings	User Group Settings Mobile Device Access
	User Group Settings Mobile Device General
	User Group Settings Mobile Device Goods In
	User Group Settings Mobile Device Picking

