

ORDERWISE®

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



Release Notes

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V21.12





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Accounts

Due Dates for Credits

OrderWise Ref:	56185
Menu Option:	System Settings Accounts Purchasing <ul style="list-style-type: none">Apply due dates to supplier credits System Settings Accounts Sales General [tab] <ul style="list-style-type: none">Apply due dates to customer credits
Status:	New Development
Licensed Feature:	Yes (Accounts)
Detail:	With the above settings enabled, due dates are added for credits. This only occurs when posting to Accounts.

Detailed Stock Posting – Duty Amendment

OrderWise Ref:	56549
Menu Option:	Accounts Journals Journal History Accounts Nominals Nominal Ledger Activity
Status:	Enhancement
Licensed Feature:	Yes (Accounts, Accounts – Detailed Stock Posting)
Detail:	Duties are posted per duty, rather than per Variant.

Override the On Hold Customer Setting and Set an Expiry Date

OrderWise Ref:	53406
Menu Option:	Sales Customer List [Add/Edit] Credit Details [tab] <ul style="list-style-type: none">Prevent customer being placed on hold or over credit terms until Sales Customer List New Order [button] Statistics [tab] <ul style="list-style-type: none">Do not auto take off hold System Settings Customer General <ul style="list-style-type: none">Consider over credit terms when auto placing on/off holdConsider hold status when auto placing on/off hold User Group Settings Sales General General [tab] <ul style="list-style-type: none">Allow preventing orders to be automatically taken off hold
Status:	Enhancement
Licensed Feature:	No
Detail:	The above System Settings allow you to consider the Customer hold and credit terms statuses, when auto placing orders on and off hold. The 'Prevent customer being placed on hold or over credit terms until' Customer setting allows you to override the on hold Customer settings and specify a date in which you would like this to end. Controlled by the 'Allow preventing orders to be automatically taken off hold' User Group Setting, you can also choose to exclude orders from being taken off hold by enabling the order 'Do not auto take off hold' setting.

Ignore Disputed Invoices when Calculating Credit Terms

OrderWise Ref: 55768
Menu Option: Sales | Customer List | [Add/Edit] | Credit Details [tab] | More [tab]

- Exclude disputed invoices

Status: New Development
Licensed Feature: Yes (Accounts)
Detail: With the above Customer setting enabled, disputed invoices are ignored when calculating whether to automatically place over credit terms.

Ignore Weekends and Holidays for Settlement Discount Grace Days

OrderWise Ref: 53403
Menu Option: System Settings | Accounts | Sales | General [tab]

- Exclude weekends in settlement grace period
- Exclude holidays in settlement grace period

Status: New Development
Licensed Feature: Yes (Accounts)
Detail: With the above settings enabled, if the settlement discount date lands on a weekend or holiday respectively, the date is changed to the next working day.

Allocation

Control Access to Allocation Buttons

OrderWise Ref: 55179
Menu Option: User Group Settings | Allocation

- Manually allocate
- Auto allocate
- Auto deallocate

Allocation | Allocate by Variant
Allocation | Allocate By Order
Status: Enhancement
Licensed Feature: No
Detail: The above User Group Settings control access to the appropriate buttons within the 'Allocate By Variant' and 'Allocate By Order' Allocation module grids.

Android

Android POD – Job Role Field Data Dictionary

OrderWise Ref:	55595
Menu Option:	System Settings Despatch Transport Management <ul style="list-style-type: none">Show job role in POD contact list Android POD Customer Contact Info Android POD Customer Info Customer Contact List
Status:	Enhancement
Licensed Feature:	Yes (POD Devices & Transport Management)
Detail:	The above System Setting controls whether the Customer Contact Job Role field is appended to the Contacts' position in the Customer Contact List. When viewing the Customer Contact Info, the Contacts' Job Role field is listed using the corresponding Data Dictionary value for the field label.

Courier Integration

DPD API International – Enter PID Number on Sales Order Form

OrderWise Ref:	55796
Menu Option:	Sales Customer List New Order [button] Delivery Address [tab] <ul style="list-style-type: none">PID number
Status:	New Development
Licensed Feature:	No
Detail:	The above field initially gets populated by the selected delivery address' PID Number. This may however be overridden at Sales Order level by the User and will be used by DPD Couriers, in place of the previously used Customer delivery address PID number. The affected Couriers (which use the 'Courier - DPD' and 'Courier - DPD Local' Licences respectively), are: <ul style="list-style-type: none">Advanced - DPD API International Direct FeedAdvanced - DPD Local API International Direct Feed <u>Please note that Orders saved before this field was introduced will need to have the field manually populated.</u>

FedEx Web Service – Use Delivery Date as Parcel Collection Date

OrderWise Ref:	55560
Menu Option:	System Despatch Couriers [Add/Edit] Courier Integration [tab] Courier Options [button] <ul style="list-style-type: none">Use delivery date for shipment timestamp
Status:	New Development
Licensed Feature:	Yes (Courier - FedEx)
Detail:	Enabling the above setting ensures that the 'Ship' form delivery date is used as the shipment timestamp in the FedEx integration, rather than the current date when shipping occurred. This gives greater flexibility and ensures that shipment notifications are sent out by FedEx at the appropriate time.

Metapack V3 International Direct Feed – Always Export Parcel Dimensions

OrderWise Ref: 55581
 Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration [tab] | Courier Options [button]
 • Always export parcel dimensions
 Status: Enhancement
 Licensed Feature: Yes (Courier - Metapack)
 Detail: When using the 'Always export parcel dimensions' Courier Option, the Variant's depth, length and width sent to Metapack each have a minimum value of 0.1 centimetres.

UPS Worldship – Strip Out Special Characters

OrderWise Ref: 56058
 Menu Option: N/A
 Status: New Development
 Licensed Feature: Yes (Courier - UPS)
 Detail: Special characters are stripped from all fields exported to the Courier, except those in email fields.
 This applies to:
 • UPS Worldship 2012-2015 - International Direct Feed
 • UPS Worldship 2012-2015 (Commercial invoices) - International Direct Feed

Despatch

Pack Scan – Honour Customer Merge Packs Setting

OrderWise Ref: 55577
 Menu Option: System Settings | Despatch | Packing | Pack Scan [tab]
 • Honour customer merge packs setting
 Status: Enhancement
 Licensed Feature: No
 Detail: With the above System Setting enabled, the existing 'Merge orders on a pick by delivery address' System Setting is only applied when the Customer also has 'Allow multiple orders to be packed together' enabled.

Volume Percentage Bar in Assign Tasks to Transport

OrderWise Ref: 55744
 Menu Option: Despatch | Transport Management | Assign Tasks To Transport | Assign Run [button]
 Status: Enhancement
 Licensed Feature: Yes (Transport Management)
 Detail: When assigning a task to a Run, the volume percentage bar allows the User to clearly see how much space a vehicle has left for additional deliveries, based on the vehicle's 'maximum volume'.

Mobile Devices

AHHT Picking – Only Allow Scan for Variant

OrderWise Ref:	55508
Menu Option:	User Group Settings Mobile Device Picking More [tab] <ul style="list-style-type: none">• Only allow scan for variant
Status:	New Development
Licensed Feature:	Yes (Mobile Devices - Android/ Mobile Devices - Android 3rd Party)
Detail:	With the above User Group Setting enabled, Variants must be scanned in Picking; attempting to manually type in a Variant code/EAN shows a warning.

Purchasing

Quick Add Variants within Purchase Orders

OrderWise Ref:	55734
Menu Option:	User Group Setting Purchasing Purchase Orders General [tab] <ul style="list-style-type: none">• Quick add variant
Status:	New Development
Licensed Feature:	No
Detail:	With the above User Group Setting enabled, Users may access the Sales Order's 'Quick add variant' functionality from inside Purchase Orders. This permits new Variants to be created from within Purchase Orders.

Supplier Contracts

OrderWise Ref:	56183
Menu Option:	System Settings Supplier <ul style="list-style-type: none">• Use supplier contracts Purchasing Supplier Lists [Add/Edit] Purchasing Supplier Lists New Order [button] Purchasing Purchasing Reports To Purchase Report
Status:	New Development
Licensed Feature:	No
Detail:	Supplier Contracts can be created within a Supplier record when the 'Use supplier contracts' System Setting has been enabled. Variants can be configured against these Supplier Contracts, which can then be displayed within Purchase Orders. Double clicking a Contract within a Purchase Order will update the cost(s) and cost per(s) for the applicable Purchase Order Lines.

Reports & Layouts

CN22 Label Updates

OrderWise Ref: 55385
 Menu Option: System | Reports & Layouts | Layouts
 • CN22 Label
 Status: Enhancement
 Licensed Feature: No
 Detail: The standard OrderWise CN22 Label has been updated to match the latest format from Royal Mail.

Returns

Linked Returns Added for Multiple Return Orders

OrderWise Ref: 56180
 Menu Option: User Group Settings | Returns | Customer Returns
 • Add/edit multi-linked returns
 Returns | Customer | Returns Customer List | Order History [button] | New Multi-Linked Return [button]
 Status: New Development
 Licensed Feature: Yes (Returns)
 Detail: The above User Group Settings allows for the User to select multiple return orders, via the 'New Multi-Linked Return' button, and groups them together depending on the "Actual action" chosen by the User. This then follows the same path as regular Linked Returns apart from combining the "Actual action" reasons together when processing returns.

Copy Media Codes on Orders Raised via Linked Returns

OrderWise Ref: 56060
 Menu Option: System Settings | Returns | Customer Returns | Advanced [tab]
 • Copy original media code on orders generated from linked returns
 Status: New Development
 Licensed Feature: Yes (Returns, Media Codes)
 Detail: With the above System Setting enabled, Orders and Credits created from Linked Returns will have the media code copied from the original order. For Return lines using the "Replace" action, the media code on the order is copied from the Credit, rather than from the original order.

Copy Questionnaires on Orders Raised via Linked Returns

OrderWise Ref: 56060
 Menu Option: System Settings | Returns | Customer Returns | Advanced [tab]
 • Copy original line questionnaires on orders generated from linked returns
 Status: New Development
 Licensed Feature: Yes (Returns, Questionnaires)
 Detail: With the above System Setting enabled, Orders and Credits created from Linked Returns will have questionnaire data copied from the original order Line.



Questionnaires in Returns

OrderWise Ref:	56067
Menu Option:	Stock Variant List [Add/Edit] More... [tab] Questionnaires [tab] [Add/Edit] Returns [type] Returns Customer Returns Customer List New [Linked/Unlinked] Return [buttons]
Status:	New Development
Licensed Feature:	Yes (Questionnaires, Returns)
Detail:	The Customer Returns entry form will require the User to fill out questionnaires when adding a Variant which has a Returns questionnaire record. Questionnaires filled out against the Returns line can be viewed using the 'View questionnaires' button on the Return record. If a Returns line with questionnaire data is split, this will be copied to the new line. Questionnaires will load up just once per Returns order if the 'Only required once per order/return' setting is enabled on the Questionnaire record.

Sales

See Margin after Worst Case Rebates in Sales and Invoicing

OrderWise Ref:	56187
Menu Option:	System Settings Accounts Rebates <ul style="list-style-type: none">Calculate sales order cost and margin based on rebate amount User Group Settings Rebates <ul style="list-style-type: none">Show rebate adjusted cost and margin in sales order entry
Status:	Enhancement
Licensed Feature:	Yes (Rebate Management)
Detail:	With both the above System Setting and User Group Setting enabled, the User can pull through columns on the Sales Order and Invoice grids to show post rebate costs and margins. These are calculated by using the highest percentage rebate possible for the selected customer.

Integration with Fiserv Payment Gateway

OrderWise Ref:	56056 & 56057
Menu Option:	System Settings Sales Payment Gateway Fiserv Sales Customer List Take Payment [button] Sales Customer List New Order [button] Take Payment/Give Refund [buttons] Accounts Sales Sales Ledger Payments [button] System Sales Order Payment Methods [Add/Edit] Payment Processors [tab]
Status:	New Development
Licensed Feature:	Yes (CCP, CCP Fiserv)
Detail:	OrderWise can be integrated with the Fiserv Payment Gateway and can be used to process Sales Order Internet Payments and Refunds. Details can be overwritten within the Payment Method this Payment Gateway is configured against.

Allocate Whole Transaction

OrderWise Ref: 52993
Menu Option: System Settings | Global | Product Search | Search [tab]

- Select transactions when searching in SO

Status: Enhancement
Licensed Feature: No
Detail: With the above System Setting enabled, an “Allocate” column is made available on the Transactions form. This checkbox can be selected as an alternative to (or alongside) the existing “Typed in” column’s quantity field, when allocating transactions to a Sales Order or selecting them via the Product search’s transaction selection.

Stock

Variable Usage Forecasting Negative Growth Factor

OrderWise Ref: 55050
Menu Option: Stock | Variant List | [Add/Edit] | Stock Information [tab] | [Add/Edit]

- Use a growth factor of X % when calculating variable usage forecast

Status: Enhancement
Licensed Feature: No
Detail: When using the “Variable Usage” Forecasting method, the Growth Factor can be set to -100 or 99999.99.

Store EPOS

Use Customer Pricing

OrderWise Ref: 55692
Menu Option: System | Store EPOS | Stores | [Add/Edit] | Settings [tab]

- Always use default customer pricing

Status: Enhancement
Licensed Feature: Yes (Stores, Store Tills, Store Management)
Detail: Enabled by the above setting against a Store, the default Customer record can be used for pricing purposes. Considering things like the Customer’s price list, discount structure, multisaver discount group and tax rate.

Show Delivery Stock Level on Order Line

OrderWise Ref: 55588
Menu Option: System Settings | Store EPOS | General [tab]

- Show delivery stock level on order line

Status: New Development
Licensed Feature: Yes (Store, Store Tills and Store Management)
Detail: With the above System Setting enabled, the User can check the available stock ready for delivery via the Store EPOS ‘Toggle Delivery’ button which tells the User if they have enough stock or not through using either red or green highlights.

System

Quick Add Variant in Sales Orders

OrderWise Ref: 56184
Menu Option: User Group Settings | Stock | General [tab]

- Quick add variant

Sales | Customer List | New Order [button]
Status: Enhancement
Licensed Feature: No
Detail: The 'Quick add variant' User Group Setting controls access to the 'Quick add' button within a Sales Order, even when the 'Add Variant' User Group Setting is disabled.

Description Added to Media Codes

OrderWise Ref: 55761
Menu Option: System | Media Codes | Media Codes | [Add/Edit]
Sales | Customer List | New Order [button] | Order Details [tab]

- Media Code

Status: Enhancement
Licensed Feature: Yes (Media Codes)
Detail: The 'Description' field has been added to Media Codes. This can be brought through into the Sales Order Entry Media Code grid when searching.



Help Guide Pages

The following pages have been added for this release:

Section	Page
Courier Integration	Courier Integration Advanced - APC Hypaship - Direct Feed
	Courier Integration Advanced - APC Hypaship - Direct Feed - Mapping
	Courier Integration Asendia wnGlobal API Subretailer - Direct Feed
	Courier Integration Asendia wnGlobal API Subretailer - Direct Feed - Mapping
	Courier Integration DHL DHL Americas API - International Direct Feed
	Courier Integration DHL DHL Americas API - International Direct Feed - Mapping
	Courier Integration DHL DHL Americas API - Domestic Direct Feed
	Courier Integration DHL DHL Americas API - Domestic Direct Feed - Mapping
Dashboards	Dashboards My Dashboard
Sales	Sales Generate Price Lists
System	System Product Barcode Schemas
	System Questionnaires
System Settings	System Settings Despatch Courier Integration Asendia





eCommerce & Websites



Order Management



Marketing & CRM



Warehouse Management



Stock Control



Mobile WMS Devices



Manufacturing & Kitting



Business Intelligence



Accounts

The following pages have been updated for this release:

Section	Page
Courier Integration	Courier Integration Amazon Amazon Merchant Fulfillment - Local Direct Feed
	Courier Integration Amazon Amazon Merchant Fulfillment - Local Direct Feed - Mapping
	Courier Integration Maxoptra API - International Direct Feed
	Courier Integration Maxoptra API - International Direct Feed - Mapping
	Courier Integration Royal Mail Royal Mail API - Intersoft
eCommerce	eCommerce Web Shop Web Shop Setup
eCommerce Platform	eCommerce Platform Online Store Configuration
	eCommerce Platform Online Store Modules Promotions
	eCommerce Platform Online Store Modules Quotes
	eCommerce Platform Online Store Orders
	eCommerce Platform Online Store Settings
	eCommerce Platform Online Store Utilities
Mobile Device	Mobile Device Android Notification Drawer
Pre-Requisites	Pre-Requisites GUI: Graphical User Interface
Sales	Sales Customer List Add Customer Credit Details Tab
Stock	Stock Add/Edit Products Settings Tab
	Stock Add/Edit Variants More Tab
	Stock Licence Plates
System	System Despatch Pick Rules
	System Purchase Order Purchase Order Shipping Methods
	System Scheduled Service Tasks
System Settings	System Settings Accounts Sales
	System Settings Customer Price List Report
	System Settings Manufacturing General
	System Settings Sales Advanced
	System Settings Stock Variants General
User Group Settings	User Group Settings Business Intelligence General
	User Group Settings Dashboards
Variant Information	Variant Information Transaction Tab