

ORDERWISE®

BUSINESS MANAGEMENT SOFTWARE

WEB | STOCK | ORDER | WAREHOUSE | ACCOUNTS



Release Notes

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Courier Integration

GLS Poland ADE WebAPI 2 - Direct Feed – Amendment

OrderWise Ref:	62241
Menu Option:	Sales Customer List [New Order] Delivery Address [tab] <ul style="list-style-type: none"> • Delivery contact • Delivery telephone
Status:	Enhancement
Licensed Feature:	Yes (Courier - GLS Poland)
Detail:	Delivery telephone is exported to the 'rphone' field and Delivery contact is exported to the 'rcontact' field only if the delivery email field, which normally populates this, is empty.

Palletways Portal API - International Direct Feed – Amendment

OrderWise Ref:	60852
Menu Option:	System Despatch Couriers [Add/Edit] Courier Integration [tab] [Courier Options] <ul style="list-style-type: none"> • Reference to store • Recover tracking number for previously submitted consignments • Confirm the consignment number when it is created and recover tracking number • Maximum number of attempts to recover tracking ID
Status:	New Development
Licensed Feature:	Yes (Courier - Palletways)
Detail:	The above courier options have been introduced to this courier and together can be used to automatically confirm consignments and recover/import their tracking numbers from the courier's Web Portal.

DHL Express MyDHL API - International Direct Feed – Amendment

OrderWise Ref:	62039
Menu Option:	N/A
Status:	Enhancement
Licensed Feature:	Yes (Courier - DHL)
Detail:	Some extra mandatory information required by DHL has been included in the request file sent from OrderWise.

Update Auto Ship Delivery Date

OrderWise Ref:	62243
Menu Option:	System Settings Despatch Ship <ul style="list-style-type: none"> • Update delivery date to Monday when falling on a weekend for auto ship
Status:	Enhancement
Licensed Feature:	No
Detail:	With the above System Setting enabled, the delivery date for orders that are auto shipped on a Saturday or Sunday will be the following Monday.

Despatch

Skip Google Route Planning

OrderWise Ref:	62430
Menu Option:	Despatch Transport Management Planned Runs [Plan]
Status:	Enhancement
Licensed Feature:	Yes (Transport Management)
Detail:	When planning a run, if the Google Route Planner cannot find a location based on a postcode provided, a warning message is raised. This warning message allows Users to optionally continue and manually plan the run. When manually planning the run, the Google Route Planner is disabled and Users must manually determine the order and priority of despatches on the route.

eCommerce

Create Web Shop Records when Importing Sales Orders

OrderWise Ref:	62444
Menu Option:	eCommerce eCommerce Session [Add/Edit] Import Setup [tab] Advanced Settings [tab] General [tab] <ul style="list-style-type: none"> • Create for existing customers • Create for existing contacts
Status:	New Development
Licensed Feature:	Yes (Web Shop Integration)
Detail:	If the above settings are enabled, Web Shop records will be created for customers and contacts when orders are imported for them. This will only happen if a record does not already exist for that Web Shop and existing records will not be updated.

Subscript/Superscript Options Available for All HTML Editor Fields

OrderWise Ref:	62057
Menu Option:	Stock Variant List [Add/Edit] More... [tab] Listings [tab] Web Shop [tab] [Add/Edit] <ul style="list-style-type: none"> • Full description [tab] • Short description [tab] Stock Variant List [Add/Edit] Detail [tab] [HTML descriptions] System Reports & Layouts User Output Options [Edit] Email Body [tab] System Product Variant Categories [Web Info] [Add/Edit] Description [tab]
Status:	New Development
Licensed Feature:	Yes (Web Shop Integration)
Detail:	Wherever there is an HTML Editor field (i.e. in the areas listed above), options will appear to use subscript/superscript text.

General

Customer Activity Log

OrderWise Ref:	61800
Menu Option:	Sales Customer List [Customer Activity] CRM CRM Customer List [Customer Activity] User Group Settings Customer Activity
Status:	Enhancement
Licensed Feature:	No
Detail:	Multiple User Group Settings have been added to allow the audit trail to be viewed in a summarised and User-friendly manner, limited to a single customer. Each of the User Group settings will hide/show the relevant activity type in the Customer Activity grid. With the 'Show customer activity' User Group Setting enabled, a 'Customer Activity' button will appear on the Customer List and CRM Customer List tabs, which leads to a Customer Activity grid for the selected Customer. The data in the grid will come from the audit trail, only records that are captured by the audit trail will be visible and only columns that are set to be saved in the detailed log will be used.

Purchasing

Update Line Costs and Duties

OrderWise Ref:	62187
Menu Option:	Purchasing Supplier List [Add/Edit] [Update line costs and duties] User Group Settings Purchasing Purchase Orders Lines [tab] <ul style="list-style-type: none"> Update PO line costs
Status:	Enhancement
Licensed Feature:	No
Detail:	With the above User Group Setting enabled, an 'Update line costs and duties' button is added to the button toolbar in the Purchase Order Entry form. When clicked, this button will recalculate and update the item cost for lines on the purchase order not yet fully received. The item net used will be determined by the variant's purchase settings. Additionally, any variant purchase duties will also be recalculated.

Returns

Use Transaction Cost when Raising Debits from Unlinked Supplier Returns

OrderWise Ref:	62431
Menu Option:	System Settings Returns Supplier Returns <ul style="list-style-type: none"> Use transaction cost on debits raised from unlinked supplier returns
Status:	New Development
Licensed Feature:	Yes (Returns)
Detail:	With the above System Setting enabled, debits raised from unlinked supplier returns will have line costs taken from the actual transaction returned to the supplier. This also depends on the line being fully returned on a single variant transaction before creating the debit. If this criteria is not met, the debit line costs will be determined using the variant's default purchase order cost setting.

Sales

Hard Allocate Works Orders to Sales Order

OrderWise Ref:	61914
Menu Option:	System Settings Manufacturing To Manufacture Report <ul style="list-style-type: none"> Hard allocate works order to sales order for build to order variants
Status:	Enhancement
Licensed Feature:	Yes (Manufacturing)
Detail:	With the above System Setting enabled and the variant to be manufactured is a build to order variant, a hard allocation between the works order and the sales order will be created where the link between the two will be maintained when picks are skipped or cancelled.

Mandatory 'Taken By' Field

OrderWise Ref:	62425
Menu Option:	Sales Customer List [New Order] Order Entry [tab] <ul style="list-style-type: none"> Taken by User Group Settings Sales Order Entry Order [tab] <ul style="list-style-type: none"> Do not select default taken by
Status:	Enhancement
Licensed Feature:	No
Detail:	With the above User Group Setting enabled, the 'Taken by' drop-down in the Sales Order Entry form will be forced to be blank and a mandatory field by default.

Copy Order Header Contact when Copying Order

OrderWise Ref:	60835
Menu Option:	Sales Sales Activity [Copy] Sales Customer List [Order History] [Copy] System Settings Sales Copy Order <ul style="list-style-type: none"> Copy order contact when copying orders
Status:	New Development
Licensed Feature:	No
Detail:	With the above System Setting enabled, copying an order will set the 'Ordered by' field to the same contact as the order being copied.

Customer Account Number Permissions

OrderWise Ref:	62513
Menu Option:	Sales Customer List [Edit] Detail [tab] <ul style="list-style-type: none"> Account number User Group Settings Customer <ul style="list-style-type: none"> Restrict edit of customer account number
Status:	New Development
Licensed Feature:	No
Detail:	With the above User Group Setting enabled, Users are prevented from editing the pre-populated customer account number for any new or existing Customer record.

Schedule Service

Notification Trigger Attachment Additions

OrderWise Ref:	62357
Menu Option:	System Scheduled Service Notification Triggers [Add/Edit] Email Attachments [tab] [Add/Edit] <ul style="list-style-type: none"> Type SQL System Scheduled Service Notification Triggers [Add/Edit] Email Attachment Settings [tab] System Scheduled Service Email Queue [Edit] Attachment Settings [tab]
Status:	Enhancement
Licensed Feature:	Yes (Notification Triggers (Customer Alerts))
Detail:	The 'SQL' option has been added to the Type drop-down in the Notification Trigger Attachment form. When selected, an 'SQL statement' and optional 'Where statement' can be entered to specify files to be attached to notification emails. The Validate SQL button confirms if the SQL statement contains any errors. When clicked, the Test SQL button will list any attachments that would be returned for the ID entered in the ID value field. The Email Attachment Settings tab has been added to the Notification triggers form, and the Attachment Settings tab has been added to the Email form. The settings in both tabs control if the attachments are zipped and the name of the zip file. If 'Skip attachments with errors' is enabled, emails will be sent without any attachment files that error. If this is disabled, the email will not be sent if an attachment errors. These settings apply to all attachment types.

Stock

Mandatory Fields in Quick Add Variant

OrderWise Ref:	62424
Menu Option:	System Product Quick Add Variant Field Selection
Status:	Enhancement
Licensed Feature:	No
Detail:	The Quick Add Variant Field Selection grid includes a 'Required' column in the grid, indicating that these fields must be populated when using quick add variant forms for Sales Orders, Purchase Orders or Customer Returns.

Assign Product when Adding Variants from Variant List

OrderWise Ref:	61858
Menu Option:	Stock Variant List [Add] Quick Search [form] System Settings Stock Variants General <ul style="list-style-type: none"> Display product quick search when adding a new variant
Status:	New Development
Licensed Feature:	No
Detail:	With the above System Setting enabled, products can be associated with newly created variants using a 'Quick Search' form.

Stock Take by Variant

OrderWise Ref:	62527
Menu Option:	Stock Stock Take Stock Take Stock Stock Take Bin Report System Settings Stock Stock Take General [tab] <ul style="list-style-type: none"> Allow multiple variants to be selected during a stock take Allow variant filter to be used during a bin report stock take
Status:	Enhancement
Licensed Feature:	No
Detail:	When 'Allow multiple variants to be selected during a stock take' is enabled, multiple variants can be specified when creating a stock take. With 'Allow variant filter to be used during a bin report stock take' enabled, creating a stock take from the Bin Report grid enables the use of the variant filter functionality after one or more bins have been selected.

Restrict Stock Adjustments to User Stock Location

OrderWise Ref:	62312
Menu Option:	User Group Settings Transactions Transactions <ul style="list-style-type: none"> Restrict adjustments to user stock location
Status:	Enhancement
Licensed Feature:	No
Detail:	With the above User Group Setting enabled, Users are restricted from adding stock adjustments to any stock location other than their assigned location. This applies specifically to In and Out stock transactions in the Stock Information form. The 'Add in transaction' button pre-selects the User's stock location and makes it read-only, while the 'Add out transaction' button is disabled unless the selected stock location matches the User's assigned location. This restriction does not affect other areas of the system with similar transaction methods.

Store EPOS

Gift Card Expiry Dates - Updates

OrderWise Ref:	61746
Menu Option:	Store EPOS [Gift Card Enquiry] Store EPOS [Gift Card Payment] System Settings Store EPOS Gift Cards <ul style="list-style-type: none"> • Gift card expiry (months) • Calculate expiry from the first transaction
Status:	Enhancement
Licensed Feature:	Yes (Stores, Store Tills, Store Management)
Detail:	When the 'Gift card expiry (months)' value is not 0, the expiry date will show when scanning a gift card in Store EPOS. If 'Calculate expiry from the first transaction' is enabled, the expiry date will be calculated based on the date the gift card was first issued and the 'Gift card expiry (months)' value. If 'Calculate expiry from the first transaction' is disabled, the expiry date will be calculated based on the most recent transaction associated with the gift card and the 'Gift card expiry (months)' value.

Transfers

Shipping and Additional Line Costs Distributed in Stock Transfers

OrderWise Ref:	61668
Menu Option:	Stock Transfers Stock Transfers [New Transfer] <ul style="list-style-type: none"> • Shipping cost System Settings Stock Transfers General Transfer shipping cost distribution method <ul style="list-style-type: none"> • Do not distribute shipping costs • By quantity of line item on purchase order • By volume of line item on purchase order • By weight of line item on purchase order
Status:	New Development
Licensed Feature:	Yes (Transfers)
Detail:	When the 'Shipping costs' field is populated against a Transfer Sales Order, along with any of the System Settings enabled (apart from 'Do not distribute shipping costs') the costs will be distributed to the purchase order lines on the purchase order created from the transfer. If the original purchase orders net cost is updated, any transfer transaction that has used that stock will have the new cost cascaded down.



eCommerce
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Order
Management



Marketing
& CRM



Warehouse
Management



Stock Control



Mobile WMS
Devices



Manufacturing
& Kitting



Business
Intelligence



Accounts

Help Guide Pages

The following pages have been added for this release:

Section	Page
Online Store	Online Store Modules Quantity Calculator
Self Help Guides	Self Help Guides Online Store



The following pages have been updated for this release:

Section	Page
Accounts	Accounts Fixed Asset Register
Courier Integration	Courier Integration FedEx FedEx Cross Border
	Courier Integration Pall-Ex Nexus API - Domestic Direct Feed
	Courier Integration Pall-Ex Nexus API - Domestic Direct Feed - Mapping
	Courier Integration Tuffnells Tuffnells Ezeelink Remote V3 - Local Direct Feed
	Courier Integration Tuffnells Tuffnells Ezeelink Remote V3 - Local Direct Feed - Mapping
CRM 2	CRM 2 CRM 2 Customer List
	CRM 2 CRM 2 Record List
eCommerce	eCommerce Google Listings
	eCommerce Web Shop Web Shop Setup
Online Store	Online Store Design
	Online Store Settings
	Online Store Utilities
Sales	Sales Customer List
	Sales Customer List Add Customer More Tab
Self Help Guides	Self Help Guides OrderWise
Stock	Stock Add/Edit Products More Tab
	Stock Add/Edit Variants Add Stock Location
	Stock Add/Edit Variants More Tab
	Stock Add/Edit Variants Purchase Tab
	Stock Add/Edit Variants Stock Information Tab
Store EPOS	Store EPOS Initial Setup
	Store EPOS Interface
	Store EPOS Using Store EPOS
System	System Despatch Packing Materials
	System Global Analysis Fields
	System Properties Properties
	System Questionnaires
	System Sales Order Delivery Methods
	System Sales Order Discount Code Rules
System Settings	System Settings Customer General
	System Settings Invoicing General
	System Settings Purchasing To Purchase Reports
	System Settings Sales General
	System Settings Sales Sales Order Entry
User Group Settings	User Group Settings Despatch General