

# ORDERWISE®

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



## Release Notes

## May 2023 Release

## V23.5





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## Accounts

### Fixed Asset Record Analysis Fields

OrderWise Ref:	61337
Menu Option:	Accounts   Fixed Asset Register   [Add/Edit]   Analysis [tab] System   Global   Analysis Fields <ul style="list-style-type: none"><li>• Analysis Type   Fixed Asset</li></ul>
Status:	Enhancement
Licensed Feature:	Yes (Accounts)
Detail:	Analysis fields can be added for Fixed Assets via the Analysis tab on the Fixed Asset record. The analysis fields can also be brought through to the Fixed Asset Register grid.

## Android

### Capture Customer Name in Android Signature App

OrderWise Ref:	61471
Menu Option:	System Settings   Sales   General <ul style="list-style-type: none"><li>• Signature pad title</li><li>• Signed by field offered</li><li>• Signed by field required</li></ul> User Group Settings   Despatch   General <ul style="list-style-type: none"><li>• Collect signature in despatch</li></ul>
Status:	Enhancement
Licensed Feature:	Yes (Signature Devices)
Detail:	The above System and User Group Settings have been added to include a name box to capture customer's name, not just the signature. With the 'Signed by field offered' System Setting enabled, the Print Name field and keyboard open automatically on the mobile device for the customer to type in a name and the signature box then opens afterwards.

## Courier Integration

### FedEx Cross Border – Amendment

OrderWise Ref:	61263
Menu Option:	System   Despatch   Couriers   [Add/Edit]   Courier Integration [tab]   [Courier Options] <ul style="list-style-type: none"><li>• Override API key</li></ul>
Status:	Enhancement
Licensed Feature:	Yes (Courier – P2P TrakPak API)
Detail:	With the above Courier Option populated, the API key specified in this field will be used when exporting shipments to the courier. If the Courier Option is not populated, the API key specified in the FedEx Cross Border System Settings will be used. Note: This System Settings field must be populated even when using 'Override API key'.



## Tuffnells Ezeelink Remote V3 - Local Direct Feed – Amendment

OrderWise Ref: 61912  
Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration [tab] | [Courier Options]

- Populate despatch date with delivery header date

Status: Enhancement  
Licensed Feature: Yes (Courier - Tuffnells)  
Detail: With the above Courier Option enabled, the OrderWise delivery date is exported to Field Number 19 (Date of despatch) on the file sent to the courier.

## Pall-Ex Nexus API - Domestic Direct Feed – Amendment

OrderWise Ref: 61910  
Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration [tab] | [Courier Options]

- Collection date is delivery header date

Status: Enhancement  
Licensed Feature: Yes (Courier – Pall-Ex)  
Detail: With the above Courier Option enabled, the delivery header date will be exported to the collectionInfo dueDate.

## CRM

### Questionnaire Enhancements

OrderWise Ref: 62090  
Menu Option: System | Questionnaires | [Add/Edit] | [Add/Edit]

- Question text
- Help text
- Mandatory

Status: Enhancement  
Licensed Feature: Yes (Questionnaires)  
Detail: Questions can be made 'mandatory' such that they must be answered to proceed to the next question on a Questionnaire. This will be ignored if a question is not set to be shown to the User. Yes/No questions will always be considered mandatory, but all other answer types are optional by default.  
  
If a User opts to skip a question they are presented with, the question with its blank answer is saved for reporting purposes.  
  
The maximum allowable characters in either a Question or Help text field has been increased to 750 characters. Likewise, the form size has been increased allowing longer Question and Help texts.



## Despatch

### Add Additional Packing Materials

OrderWise Ref: 57188  
Menu Option: System | Despatch | Packing Materials | [Add/Edit] | [Additional Packing Materials]  
Status: Enhancement  
Licensed Feature: No  
Detail: Additional packing materials can be added by using the button within the 'Packing Materials' form. When additional packing materials are used, the stock is deducted from the variant. The cost is taken from the variant estimated cost.

## eCommerce

### Upload Google Listings via SFTP

OrderWise Ref: 62328  
Menu Option: System | eCommerce | Google | Google Accounts | [Add/Edit]

- Use SFTP
- Port

Status: Enhancement  
Licensed Feature: Yes (Google Listings)  
Detail: When 'Use SFTP' is enabled and 'Port' is set to 19321, Google Listings will be uploaded via SFTP.

### Include Expiry Dates in Stock Export

OrderWise Ref: 61926  
Menu Option: System | eCommerce | Web Shop | Web Shops | [Add/Edit] | Stock [tab]

- Include expiry dates

Status: New Development  
Licensed Feature: Yes (Web Shop Integration)  
Detail: If the above setting is enabled, the oldest expiry date of a variant will be included in the export XML when running a stock sync eCommerce session.

## Invoicing

### Obtain Aged Balances from Xero

OrderWise Ref:	62538
Menu Option:	System Settings   Invoicing   General   Xero <ul style="list-style-type: none"><li>• Age balances by</li><li>• Obtain aged balances from Xero</li></ul>
Status:	New Development
Licensed Feature:	Yes (Xero Accounts)
Detail:	If the 'Obtain aged balances from Xero' System Setting is enabled, customer and supplier credit details are updated with aged balances when posting to accounts with the Xero accounts package. The 'Age balances by' setting controls if balances are aged by invoice date or due date.

## Purchasing

### Single Transaction TPR – Exclude Transactions Below Set Threshold

OrderWise Ref:	62222
Menu Option:	Stock   Variant List   [Add/Edit]   Purchase [tab]   Purchase Reports [tab] <ul style="list-style-type: none"><li>• Exclude transactions from single transaction to purchase report</li><li>• Maximum transaction quantity to exclude</li></ul> System Settings   Purchasing   To Purchase Reports   Single Transaction Report <ul style="list-style-type: none"><li>• Stock up to the min/max stock to quantity</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	With the above System Setting enabled, the Single Transaction To Purchase Report will calculate the quantity required to fulfil the stock level up to the 'Stock To' level as the amount required to increase the current stock after all demands are met, minus any excluded transactions.

If the 'Exclude transactions from single transaction to purchase report' check box is enabled for a variant, then the 'Maximum transaction quantity to exclude' field becomes active. The value entered here will tell the report the size of transactions that should be excluded when it is determining demand fulfilment. Both the check boxes need to be enabled and a value provided for the setting to take effect on the report. Transactions will be excluded if the quantity is less than or equal to the quantity specified in the setting. The report shows a new line with a description "Transactions up to N excluded" (where N is the quantity configured in the variant setting). This is seen just below the opening balance, thus making it clear how the report has come to the total quantity required to be purchased.

Note: Variant settings to do with Purchase Reports have been moved from the 'General' tab to a new 'Purchase Reports' tab.

## Robotics

### DMX Channel Configuration for Robot Station Spotlights

OrderWise Ref: 62510  
Menu Option: Robotics Workhub  
Status: Enhancement  
Licensed Feature: Yes (Robotics, Robot Grids, Robotics Station, Pick Rules)  
Detail: The 'Spotlightsettings.XML' configuration file for the Robotics Workhub allows you to configure DMX channel mappings. This will allow for different models of spotlights to be used with the Robotics Workhub.

### Display of Pick Rule Description and Pick Rule Comments

OrderWise Ref: B83393  
Menu Option: System | Despatch | Pick Rules | [Add/Edit] | Detail [tab]

- Description
- Reset pick rule once order is assigned to a pick
- Pick comments

Status: Enhancement  
Licensed Feature: Yes (Robotics)  
Detail: The Robot Station will show pick comments when the 'Reset pick rule once order is assigned to a pick' setting is enabled, even when the pick rule is unassigned from the order. If the pick comments are blank the pick rule description will show instead, when the 'Reset pick rule once order is assigned to a pick' is disabled.

## Sales

### Quote Conversion Settings

OrderWise Ref: 62092  
Menu Option: Sales | Customer List | New Order  
System Settings | Sales | Sales Order Entry | Orders

- Update dates when converting quote to order
- Validate media code and recalculate when converting quote to order

Status: Enhancement  
Licensed Feature: No  
Detail: With the above System Settings enabled, it will implement new behaviour when changing a sales order quote to an order. The first setting will update order dates when converting from quote to order, it will set the order date to the current date and apply the system logic to update the order header and line promised and required dates. The second setting will control the triggering of price recalculation/validation.

## Customer Special Price & Price List RSP

OrderWise Ref: 62153  
 Menu Option: System Settings | Customer | General [tab]
 

- Special prices retain new RSP from earlier pricing methods

 Status: New Development  
 Licensed Feature: No  
 Detail: With the above System Setting enabled, previously calculated RSP such as those calculated by Price Lists, will be used when Special Price Discounts are applied.

## Stock

### Variant Stock Location Analysis Fields

OrderWise Ref: 62223  
 Menu Option: Stock | Variant List | [Add/Edit] | Stock Information [tab] | [Add/Edit] | Analysis [tab]  
 System | Global | Analysis Fields
 

- Analysis Type | Variant Stock Location

 Purchasing | Purchasing Reports | To Purchase Report  
 Purchasing | Purchasing Reports | Single Transaction to Purchase Report  
 Status: Enhancement  
 Licensed Feature: No  
 Detail: Analysis fields can be created and added to Variant Stock Locations. These analysis fields can be made visible in the To Purchase and Single Transaction to Purchase Reports.

## Store EPOS

### Scan Discount Codes in Store EPOS

OrderWise Ref: 61334  
 Menu Option: Store EPOS | [Scan Discount]  
 System | Sales Order | Discount Code Rules | [Add/Edit]
 

- Store EPOS rule

 System | Customer | Multisavers | Multisaver Discounts | [Add/Edit] | Discount Codes [tab]
 

- Require discount code

 User Group Settings | Store EPOS | Security [tab]
 

- Add global discounts

 Status: New Development  
 Licensed Feature: Yes (Stores, Store Tills, Store Management)  
 Detail: With the above User Group Setting enabled, a 'Scan Discounts' button will show on Store EPOS. Selecting this button will allow a discount code to be scanned and the connected 'Discount Code Rule' or 'Multisaver Discount' to be applied. A Discount Code Rule record must have the 'Store EPOS Rule' setting enabled when using this method. Additionally, any 'Multisaver Discount' must have the 'Require discount code' setting enabled, and one or more discount codes connected to the multisaver.



# System

## Add Pre-Defined Lists of Values Against Properties

OrderWise Ref: 61441

Menu Option: Stock | Product List | [Add/Edit] | More... [tab] | Properties [tab] | [Add/Edit]

- Value

Stock | Variant List | [Add/Edit] | More... [tab] | Properties [tab] | [Add/Edit]

- Value

System | Import Data

- Property combo list (add only)

System | Properties | Properties | [Edit List]

System | Properties | Properties | [Add/Edit] | [Edit List]

Status: Enhancement

Licensed Feature: No

Detail: The 'Edit List' button allows a pre-defined list of values to be added against properties that, when added to a product or variant, are available to select from a drop-down menu in the 'Value' field. Property lists can also be imported via the Import Data utility.

## Help Guide Pages

The following pages have been added for this release:

Section	Page
Sales	Sales   Pending Refunds
Self Help Guides	Self Help Guides
User Group Settings	User Group Settings   Sales   Refunds



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
Android	Android   Setup   App Data Service Setup
Courier Integration	Courier Integration   Advanced - APC Hypaship - Direct Feed
	Courier Integration   DPD   DPD Ireland API - International Direct Feed
	Courier Integration   DPD   DPD Netherlands API - Mapping
	Courier Integration   Panther Logistics API V2 - Direct Feed - Mapping
	Courier Integration   Scurri - Direct Feed - Mapping
Goods In	Goods In   Order Search
	Goods In   Single Scan Booking In
Installation and User Interface	Installation and User Interface   First Time Installation
	Installation and User Interface   Upgrading OrderWise
Mobile Device	Mobile Device   Android HHT   Modules   Bin Inspection
	Mobile Device   Android HHT   Modules   Empty Bins
	Mobile Device   Android HHT   Modules   Move Bin / Licence Plate
	Mobile Device   Android HHT   Modules   Move Stock
	Mobile Device   Android HHT   Modules   Picking
	Mobile Device   Android HHT   Modules   Put Away
	Mobile Device   Android HHT   Modules   Stock Take
	Mobile Device   Android HHT   Modules   Utilities   Tote Transfer
	Mobile Device   Android HHT   Modules   Variant Inspection
	Mobile Device   Android HHT   Navigation Drawer
Online Store	Online Store   Configuration
	Online Store   Marketing
	Online Store   Settings
Pre-Requisites	Pre-Requisites   Grids: Features & Functionality
	Pre-Requisites   GUI: Graphical User Interface
Reporting	Reporting   Using the Reporting Module
Sales	Sales   Clear Down Sales Orders
	Sales   Customer List   New Order
Stock	Stock   Add/Edit Products   Settings Tab
Store EPOS	Store EPOS   Initial Setup   Card Machine Configuration
System	System   Import Data
	System   Product   Barcode Schemas
	System   Security   Mobile Device Users
	System   Security   Users



System Settings	System Settings   Despatch   Transport Management
	System Settings   Global   General
	System Settings   Invoicing   General
	System Settings   Mobile Device   Android
	System Settings   Sales   General
	System Settings   Stock   Variants
User Group Settings	User Group Settings   Global   General
	User Group Settings   Goods In   General
	User Group Settings   Mobile Device   Stock Movement
	User Group Settings   Sales   Order Entry
Video Guides	Video Guides