

ORDERWISE®

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



Release Notes

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Accounts

'Sales Out' Rebate Agreement Type

OrderWise Ref:	59196
Menu Option:	System Rebates Rebate Agreements [Add/Edit] Purchasing Supplier List Rebate History Purchasing Supplier List [Add/Edit] Rebates [tab] [View] Purchasing Rebates Rebate Activity
Status:	Enhancement
Licensed Feature:	Yes (Accounts)
Detail:	The 'Sales out' rebate agreement type calculates the rebate value based on the total value of sales invoices (minus credits) for the period specified in the relevant Supplier Rebate Agreement form, using either the invoiced value or the invoiced quantity.

Courier Integration

Advanced - DPD API International Direct Feed – Amendment

OrderWise Ref:	62416
Menu Option:	System Despatch Couriers [Add/Edit] Courier Integration [tab] [Courier Options] <ul style="list-style-type: none">• Importer Details [tab]<ul style="list-style-type: none">○ Use separate importer details• Importer Address [tab]
Status:	Enhancement
Licensed Feature:	Yes (Courier - DPD)
Detail:	With the above Courier Option enabled, the details in the Importer Details and Importer Address tabs will be exported to the 'invoiceDeliveryDetails' container in the json file exported to the courier. When disabled, delivery address details are exported instead.

Vigo API – Courier Integration

OrderWise Ref:	61733
Menu Option:	System Despatch Couriers [Add/Edit] Courier Integration [tab] [Courier Options] System Settings Despatch Courier Integration Vigo <ul style="list-style-type: none">• API key• Test mode• Live URL• Test URL• Label printer
Status:	New Development
Licensed Feature:	Yes (Courier – Vigo Soloways)
Detail:	Courier integration for Vigo API has been added to OrderWise.

Royal Mail API - Intersoft – Amendment

OrderWise Ref: 63258
Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration [tab] | [Courier Options]

- Terms

Status: Enhancement
Licensed Feature: Yes (Courier – Royal Mail API (Intersoft))
Detail: The 3 letter code specified in the ‘Terms’ Courier Option will be exported to the ‘terms’ field when shipping with Royal Mail API - Intersoft.

DPD Netherlands API – Amendment

OrderWise Ref: 63547
Menu Option: N/A
Status: Enhancement
Licensed Feature: Yes (Courier - DPD)
Detail: Delivery Address 2 is exported from the sales order to the ‘street2’ field on the export XML file.

FedEx Web Service – Amendment

OrderWise Ref: 63577
Menu Option: System | Sales Order | Delivery Methods | [Add/Edit] | Courier Information [tab]

- Insured service

Status: Enhancement
Licensed Feature: Yes (Courier - FedEx)
Detail: With the above setting enabled, the insurance price of each parcel will also be exported.

DX DM6 Lite - Direct Feed – Amendment

OrderWise Ref: 62249
Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration [tab] | [Courier Options]
Status: Enhancement
Licensed Feature: Yes (Courier - DX)
Detail: With the ‘Get labels from DX API’ Courier Option enabled, labels will be retrieved from the DX API. The remaining Courier Options allow the label output to be configured.

ShipStation API – Amendment

OrderWise Ref: 63583
Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration [tab] | [Courier Options]

- Ship from warehouse

Status: Enhancement
Licensed Feature: Yes (Courier - ShipStation)
Detail: When the above setting is populated with a warehouse name from the courier portal, that warehouse address will be used as the ship address.

eCommerce

Delivery Header ID Exported when Syncing Despatches

OrderWise Ref: 62462
Menu Option: eCommerce | eCommerce Session | [Add/Edit] | Web Shop [tab]

- Export type

Status: Enhancement
Licensed Feature: Yes (Web Shop Integration)
Detail: When the 'Export type' is set to 'Despatches', a 'delivery_id' field is included in the export XML file that contains the delivery header ID.

Variant Back Order Rule Exported during Product Sync

OrderWise Ref: 64116
Menu Option: N/A
Status: New Development
Licensed Feature: No
Detail: Variant back order rules are exported when running the 'Products V2' Web Shop eCommerce session export.

Mobile Devices

AHHT – Variant Default Bin Visible on Variant Inspection

OrderWise Ref: 62939
Menu Option: AHHT | Variant Inspection
User Group Settings | Mobile Device | General

- Limit to user stock locations

Status: Enhancement
Licensed Feature: Yes (Mobile Devices – Android / Mobile Devices – Android 3rd Party)
Detail: With the above setting disabled, variants can be filtered by stock location within the Variant Inspection module on the Android HHT.

AHHT – Streamlined Return Goods In

OrderWise Ref: 62552
Menu Option: AHHT | Return Goods In
Returns | Customer | Customer Return Entry | Book In Details [tab]
User Groups Settings | Mobile Device | Modules

- Use streamlined booking in process for linked returns

Status: Enhancement
Licensed Feature: Yes (Returns, Mobile Devices – Android / Mobile Devices – Android 3rd Party)
Detail: With the above setting enabled, the returns process on the Returns Goods In module on the Android HHT will be streamlined for linked returns. Variant codes, batch and serial numbers will be auto-populated and only need to be confirmed. The Book In Details tab on the Customer Return Entry form displays any received transactions against the selected return line.

AHHT – Force Scan Additions

OrderWise Ref:	61945
Menu Option:	AHHT Goods In AHHT Move Stock AHHT Picking AHHT Put Away AHHT Replenishment Stock Scanning Issues User Group Settings Mobile Device Goods In Goods In [tab] <ul style="list-style-type: none"> • Only allow scan for bin number and variants User Group Settings Mobile Device Picking More [tab] <ul style="list-style-type: none"> • Only allow scan for bin numbers User Group Settings Mobile Device Put Away <ul style="list-style-type: none"> • Only allow scan for bin number and variants User Group Settings Mobile Device Replenishment <ul style="list-style-type: none"> • Only allow scan for bin number and variants User Group Settings Mobile Device Stock Movement <ul style="list-style-type: none"> • Only allow scan for bin number and variants
Status:	Enhancement
Licensed Feature:	Yes (Mobile Devices – Android / Mobile Devices – Android 3 rd Party)
Detail:	With the above User Group Settings enabled, Android Mobile Device Users will be forced to scan bin numbers and variants within the relevant module. If a User is unable to scan an option, the 'Report scanning issue' button can be found either on the scanning page or via the Module menu. Reported issues will be sent to the main system and can be viewed from the 'Scanning issues' tab.

Purchasing

Supplier Special Costs Tabs in the To Purchase Report and Purchase Order Entry

OrderWise Ref:	59200
Menu Option:	Purchasing Purchasing Reports To Purchase Report Special Costs [tab] Purchasing Supplier List [New Order] Special Costs [tab] System Global Date Ranges System Settings Purchasing Order Entry <ul style="list-style-type: none"> • Show supplier special costs in purchase orders System Settings Purchasing To Purchase Reports General General Settings <ul style="list-style-type: none"> • Show supplier special costs in the to purchase report
Status:	New Development
Licensed Feature:	No
Detail:	The above System Settings enable the visibility of a 'Special Costs' tab on the corresponding form which mirrors the 'Special Costs' tab against a Supplier record. However, the fields are not editable and there is no option to add rows. This must still be done through the Supplier record. Both grids have a date range selector, the default values can be set in the 'Date Ranges' tree-view node in the System module. The date range will be compared to the special cost start and end date. If either or both dates are null, they will not be filtered on that date.

Post Rebate Line Cost

OrderWise Ref: 59320
Menu Option: System Settings | Accounts | Rebates

- Calculate expected cost after rebates on purchase orders

Status: Enhancement
Licensed Feature: Yes (Rebate Management)
Detail: With the above setting enabled, the 'Post rebate line cost' field within the Purchase Order Entry form and the To Purchase Report will be populated with the expected cost of a purchase order line, subtracted by the value of any active rebates assigned to the variant/supplier. This value will not impact the purchase order total and is for reference only.

Batch Edit Purchase Order Lines Deallocation

OrderWise Ref: 62950
Menu Option: Purchasing | Batch Edit Purchase Order Lines | [Auto Deallocate]
Status: Enhancement
Licensed Feature: No
Detail: The 'Auto Deallocate' button removes any allocations that have been applied to the selected Purchase Order, Transfer or Works Order line(s). If the allocation belongs to a Works Order, only the Works Order component allocation will be removed.

Supplier Special Cost Discount Value

OrderWise Ref: 59199
Menu Option: Purchasing | Supplier List | [Add/Edit] | Special Costs [tab] | [Edit]
 Purchasing | Supplier List | [New Order]
 Purchasing | Purchasing Reports | To Purchase Report
Status: New Development
Licensed Feature: No
Detail: A 'Discount value' column can be added to the Supplier Special Costs grid and works in conjunction with the 'Standard cost (same supplier)' variant setting. When adding the variant to a Purchase Order, the value specified in this column will be discounted from the cost of the variant. The special cost reference can be displayed on the Purchase Order Entry form and To Purchase Report by adding the 'Supplier special cost' column to the respective grids. If the reference is blank, the special cost ID will be shown instead.

Robotics

Empty Bin Check Message After Variant Confirmation

OrderWise Ref: 63082
Menu Option: System Settings | Robotics

- Bin check after variants confirmation

Status: Enhancement
Licensed Feature: Yes (Robotics, Robotics - Robots, Robotics - Stations)
Detail: With the above setting enabled, the empty bin check message will be shown after the User successfully scans/confirms the variant.



Sales

Variant Back Order Rules

OrderWise Ref:	62410
Menu Option:	Stock Variant List [Add/Edit] Settings [tab] Sales [tab] <ul style="list-style-type: none">Variant back order rule System Sales Order Variant Back Order Rules System Settings Sales Sales Order Entry Orders <ul style="list-style-type: none">Use variant back order rules User Group Settings System Sales Order <ul style="list-style-type: none">Variant back order rules
Status:	New Development
Licensed Feature:	No
Detail:	With the above System Setting and User Group Setting enabled, variant back order rules can be created and applied to a variant. When a variant with a back order rule is added to a sales order, the rule is checked and if the variant does not meet the criteria it will not be added to the sales order.

Multisaver Discount Method

OrderWise Ref:	62318
Menu Option:	System Customer Multisavers Multisaver Discounts [Add/Edit] Variant Group <ul style="list-style-type: none">Do not apply discount to this group
Status:	Enhancement
Licensed Feature:	No
Detail:	The above setting is available when using the multisaver discount method 'Get x for y (with groups)'. When enabled, the discount will not be applied to variants from this group when added to an order. They will still count towards applying a discount to variants from another group in the same multisaver discount.

Quick Add Customer

OrderWise Ref:	56463
Menu Option:	CRM Quick Add Customer Sales Quick Add Customer System Customer Quick Add Customer Setup System Settings Customer General <ul style="list-style-type: none">Use quick add customer User Group Settings Customer Quick Add
Status:	New Development
Licensed Feature:	No
Detail:	The above System Setting provides a more streamlined process for adding new customers. A list of customer fields can be selected from the 'Quick Add Customer Setup' tree-view node in the System module. Only those fields will be displayed when creating customers from the 'Quick Add Customer' tree-view node in the Sales and CRM modules.

Stock

Copy Category in Quick Add Variant Form

OrderWise Ref: 64274
 Menu Option: System Settings | Stock | Variants | Quick Add
 • Copy variant categories
 Status: Enhancement
 Licensed Feature: No
 Detail: With the above System Setting enabled, the variant category will be copied over to the new variant when using the Quick Add Variant form within Purchase Order or Sales Order Entry.

Store EPOS

Subtotal Groups

OrderWise Ref: 60415
 Menu Option: Store EPOS | [New Subtotal Group]
 System Settings | Store EPOS | General
 • Use subtotal groups
 Status: New Development
 Licensed Feature: Yes (Stores, Store Tills, Store Management)
 Detail: With the above System Setting enabled, the New Subtotal Group button in Store EPOS can be used to set groups against order lines to create subtotals for invoice, receipt or document calculations.

Restrict Manually Adding Variants within Store EPOS

OrderWise Ref: 59191
 Menu Option: Store EPOS | [Add Variant]
 User Group Settings | Store EPOS | Security [tab]
 • Allow manual add variant
 Status: New Development
 Licensed Feature: Yes (Stores, Store Tills, Store Management)
 Detail: With the above User Group Setting disabled, a Store User will require supervisor permission to add a variant manually within Store EPOS. Another Store User, with this setting enabled, can enter their credentials to allow the variant to be added. Store Users can still scan item barcodes to add variants to Store EPOS orders, regardless of this setting.

'Price Change Authorised by Store User' Column

OrderWise Ref: 59202
 Menu Option: Sales | Sales Activity
 Status: Enhancement
 Licensed Feature: Yes (Stores, Store Tills, Store Management)
 Detail: When a till User authorises an order line price amendment in Store EPOS, that User's name will populate the 'Price change authorised by store user' column in the Line Items grid within the Sales Activity tab once the order has been synced.

Gift Card Expiry on Store EPOS Receipts

OrderWise Ref: 64360
 Menu Option: Store EPOS | [Menu] | Advanced | Layouts
 Status: Enhancement
 Licensed Feature: Yes (Stores, Store Tills, Store Management)
 Detail: Gift Card 'ExpiryDate' can be added through the Store EPOS Layout Editor onto the Gift Card Balance and Sales Receipt Layouts. The Expiry Date will appear on the first output of the receipts when added to the layouts.

Manufactured Option Additional Price

OrderWise Ref: 63800
 Menu Option: System Settings | Store EPOS | General

- Apply manufacturing option additional price

 Status: Enhancement
 Licensed Feature: Yes (Stores, Store Tills, Store Management)
 Detail: With the above System Setting enabled, adding a manufactured item to a Store EPOS order and selecting an option that has an additional price will add the additional price to the order line item.

Supervisor Override for Customer Credit Warnings

OrderWise Ref: 59194
 Menu Option: Store EPOS | [On Account]
 User Group Settings | Store EPOS | General [tab]

- Allow on account when over credit terms
- Allow on account when on hold
- Override available to spend

 Status: New Development
 Licensed Feature: Yes (Stores, Store Tills, Store Management)
 Detail: When taking an 'On Account' payment for a sales order within Store EPOS, a warning is raised when the customer is over their credit terms, on hold, or does not have any credit available to spend. If the Store User does not have the relevant User Group Settings enabled, listed above, a supervisor code will be required. Another Store User, with the relevant settings enabled, can enter their credentials to allow the 'On Account' payment to be made.

Single Use Discount Codes

OrderWise Ref: 59192
 Menu Option: System | Sales Order | Discount Codes | [Add/Edit]

- Single use

 Status: Enhancement
 Licensed Feature: No
 Detail: With the above setting enabled, a discount code can only be applied once per customer across their sales orders, whether in OrderWise or Store EPOS.



Help Guide Pages

The following pages have been added for this release:

Section	Page
Courier Integration	Courier Integration Vigo Vigo Courier API
	Courier Integration Vigo Vigo Courier API - Mapping
Robotics	Robotics
	Robotics Setup
	Robotics System Module
	Robotics Using
Sales	Sales Customer List Customer Activity
	Sales Quick Add Customer
Stock	Stock Scanning Issues
System	System Customer Quick Add Customer Setup
	System Sales Order Variant Back Order Rules
User Group Settings	User Group Settings Customer Activity
	User Group Settings Customer Quick Add
User Guides	User Guides Online Store
	User Guides OrderWise
	User Guides Video Guides





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
Accounts	Accounts Sales Sales Ledger Customer Receipts and Refunds
Android	Android Proof of Delivery App
	Android Setup App Data Service Setup
BI Alerts	BI Alerts
Business Intelligence	Business Intelligence
Courier Integration	Courier Integration Advanced DPD Advanced - DPD API International Direct Feed
	Courier Integration Advanced DPD Advanced - DPD API International Direct Feed - Mapping
	Courier Integration DHL DHL Express MyDHL API - International Direct Feed - Mapping
	Courier Integration DPD DPD Netherlands API
	Courier Integration DPD DPD Netherlands API - Mapping
	Courier Integration DPD DPD Poland - International Direct Feed - Mapping
	Courier Integration DX DX DM6 Lite - Direct Feed
	Courier Integration DX DX DM6 Lite - Direct Feed - Mapping
	Courier Integration FedEx Fed Ex - Web Service
	Courier Integration FedEx Fed Ex - Web Service - Mapping
	Courier Integration GLS Poland ADE WebAPI 2 - Direct Feed
	Courier Integration GLS Poland ADE WebAPI 2 - Direct Feed - Mapping
	Courier Integration Palletways Palletways Portal API - International Direct Feed
	Courier Integration Royal Mail Royal Mail API - Intersoft
	Courier Integration Royal Mail Royal Mail API - Intersoft - Mapping
	Courier Integration ShipStation API
Courier Integration ShipStation API - Mapping	
CRM 2	CRM 2 CRM 2 Customer List
Dashboards	Dashboards Dashboards - V2
	Dashboards My Dashboard
Despatch	Despatch Despatch Discrepancies
	Despatch Stock Replenishment
	Despatch Stock Replenishment How to Create and Complete Stock Replenishments
	Despatch Stock Replenishment How to Set Up Stock Replenishment
	Despatch Stock Replenishment Replenishing via Transformations
	Despatch Transport Management
	Despatch Transport Management Assign Tasks to Transport
Despatch Transport Management Planned Runs	
eCommerce	eCommerce Amazon Integration Suite
	eCommerce eCommerce Session Import Setup Tab
	eCommerce Web Shop Web Shop Setup
Invoicing	Invoicing Launch and Post to Accounts Package
	Invoicing View Records to Post
Manufacturing	Manufacturing Manufactured Variant List Variant Revision Toolbar Add Revision Components Tab





eCommerce & Websites



Order Management



Marketing & CRM



Warehouse Management



Stock Control



Mobile WMS Devices



Manufacturing & Kitting



Business Intelligence



Accounts

Mobile Device	Mobile Device Android HHT Modules Courier Totes
	Mobile Device Android HHT Modules Goods In
	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 Replenishment
	Mobile Device Android HHT Modules Return Goods In
	Mobile Device Android HHT Modules Variant Inspection
	Mobile Device Windows HHT Data Service Installation Windows 10
Online Store	Online Store Modules Valero SAP Integration
	Online Store Products
	Online Store Settings
	Online Store Utilities
Pre-Requisites	Pre-Requisites Grids: Features & Functionality
	Pre-Requisites GUI: Graphical User Interface
	Pre-Requisites The Home Tab
Purchasing	Purchasing Batch Edit Purchase Order Lines
	Purchasing Purchasing Reports To Purchase Report
	Purchasing Supplier List Add Supplier Special Costs Tab
	Purchasing Supplier List New Purchase Order
Returns	Returns Customer Returns Creating Customer Returns
	Returns Supplier Returns Creating Supplier Returns
Sales	Sales Customer List
	Sales Customer List Add Customer Credit Details Tab
	Sales Customer List New Order
	Sales Take Payment
Stock	Stock Add/Edit Products Amazon Listings Tab
	Stock Add/Edit Products More Tab
	Stock Add/Edit Products The Matrix Wizard
	Stock Add/Edit Products Using the Matrix
	Stock Add/Edit Variants Add Stock Location
	Stock Add/Edit Variants Detail Tab
	Stock Add/Edit Variants Forecasting Tab
	Stock Add/Edit Variants Purchase Tab
	Stock Add/Edit Variants Settings Tab
	Stock Add/Edit Variants Stock Information Tab
	Stock Stock Take Stock Take
	Stock Stock Transfers
	Stock Stock Transfers Stock Transfer Activity
	Stock Stock Transfers To Transfer Report
Stock Stock Valuation	





Store EPOS	Store EPOS
	Store EPOS Initial Setup
	Store EPOS Initial Setup System Module
	Store EPOS Interface Data Capture
	Store EPOS Interface Main Menu
	Store EPOS Interface Select Customer
	Store EPOS Using Store EPOS
System	System Customer Delivery Routes
	System Customer Multisavers
	System Global Stock Locations
	System Product Quick Add Variant Field Selection
	System Rebates Rebate Agreements
	System Reports & Layouts User Output Options
	System RFM
	System Sales Order Delivery Rules
	System Sales Order Discount Code
	System Scheduled Service Email Queue
	System Scheduled Service Notification Triggers
	System Security Users
	System System Utilities Import Purchase Orders
	System Transport Management Delivery Drivers
	System Transport Management Delivery Vehicles
	System Transport Management Time Slots
	System Transport Management Transport Stop Reasons
System Transport Management Weekly Transport Templates	
System Settings	System Settings Accounts Rebates
	System Settings Allocation
	System Settings Customer General
	System Settings Customer RFM
	System Settings Despatch Courier Integration Vigo
	System Settings Despatch Ship
	System Settings Despatch Transport Management
	System Settings Manufacturing To Manufacture Report
	System Settings Purchasing Order Entry
	System Settings Purchasing To Purchase Reports
	System Settings Returns Supplier Returns
	System Settings Sales Copy Order
	System Settings Sales Payment Gateway Opayo
	System Settings Sales Sales Order Entry
	System Settings Stock Stock Take
System Settings Stock Variants	
System Settings Stock Transfers General	





User Group Settings	User Group Settings Customer General
	User Group Settings Mobile Device General
	User Group Settings Mobile Device Goods In
	User Group Settings Mobile Device Modules
	User Group Settings Mobile Device Picking
	User Group Settings Mobile Device Put Away
	User Group Settings Mobile Device Replenishment
	User Group Settings Mobile Device Stock Movement
	User Group Settings Purchasing Purchase Orders
	User Group Settings Sales Order Entry
	User Group Settings Transactions
	User Group Settings Transport Management General