



OW Web Release Notes

2025.Q3

25.3.51.0
September, 2025



Table of Contents

| | |
|---|-----------|
| Accounts | 4 |
| Bank..... | 4 |
| Sales - Advanced Credit Control..... | 5 |
| Fixed Asset Register..... | 5 |
| Purchasing..... | 6 |
| Inter Ledger Contra Form..... | 6 |
| Budgets | 6 |
| Sales..... | 7 |
| Accounts Dashboards | 7 |
| Recalculate Balances Utility | 7 |
| Journals | 8 |
| VAT Returns – MTDfB | 8 |
| Business Intelligence | 9 |
| Business Intelligence..... | 9 |
| Courier Integration | 10 |
| Couriers Integrated into Web | 10 |
| Migrated Courier System Settings | 11 |
| Despatch | 11 |
| Orders Requiring Packing – Auto Ship..... | 11 |
| Orders Requiring Picking – Edit Sales Order | 11 |
| Orders Requiring Picking – Edit Delivery Method | 12 |
| Manufacturing | 12 |
| Pickers Works Order Pick Rules | 12 |
| Manufacturing Totes | 12 |
| Works Order Planner | 13 |
| BOM Tab Renamed to Components..... | 13 |
| Work In Progress – Additions | 13 |
| Purchasing | 14 |
| Batch Edit Purchase Order Lines | 14 |
| Purchase Order Entry – Amend Promised Date | 14 |

| | |
|--|-----------|
| Reports & Layouts | 14 |
| Layout – BOM Listing..... | 14 |
| Layout – Works Order Process..... | 14 |
| Layout – Kitting Detailed Picking Note..... | 15 |
| Layout – Works Order Listing | 15 |
| Layout – Works Order Goods Label..... | 15 |
| Layout – Works Order Component Label..... | 16 |
| Layout – Works Order Picking Note..... | 16 |
| Layout – Detailed Works Order Picking Note | 16 |
| Sales | 16 |
| Update Order Dates When Converting Quote to Order..... | 16 |
| Sales Activity – Customer Linked Returns | 17 |
| Stock | 17 |
| Mass Stock Movements..... | 17 |
| System | 17 |
| Accounts..... | 17 |
| System Settings – Accounts | 18 |
| Product – System Unit Quantity | 18 |
| Purchase Order – Discounts and Surcharges..... | 18 |
| Global – Delivery Method Analysis Fields..... | 18 |
| System Utilities – Merge Customer Accounts | 19 |
| Web Help Guide Pages | 19 |

Accounts

Bank

| | |
|-------------------|---|
| Orderwise Ref: | OWS-3215: OWS-3459, OWS-3462, OWS-3463, OWS-3464, OWS-3466, OWS-3469, OWS-4422 OWS-4966, OWS-4986, OWS-5015, OWS-5062, OWS-5088, OWS-5094, OWS-5158, OWS-6227 |
| Menu Option: | Accounts Bank Bank accounts Accounts Bank Bank account revaluation activity Accounts Bank Bank payment history Accounts Bank Bank transfer activity Accounts Bank Sales payments Batch customer receipt/refund activity Accounts Bank Sales payments Manually allocate sales payments Accounts Bank Sales payments Sales payment allocation history [Manually Allocate Sales Payments] Accounts Bank Scheduled bank payments Accounts Bank Purchase payments Manually allocate purchase payments Accounts Bank Purchase payments Purchase payment allocation history [Manually Allocate Purchase Payments] Accounts Purchasing Purchase ledger [Payments] Manually Allocate Payments Accounts Sales Sales ledger [Payments] Manually Allocate Payments |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts - Activation) |
| Detail: | Bank accounts can be added to ensure accurate maintenance of cash flow from the Bank Accounts tab, including bank transfers, reconciliations and statement imports. |

Foreign currency bank accounts can be revalued and any loss or gain posted to a foreign loss/gain nominal account. These can be reviewed in Bank Account Revaluation Activity tab.

Historical records of all bank payments can be viewed from the Bank Payment History tab. Transactions can be reversed from this tab.

Transfer balances made from one bank account to another can be viewed from the Bank Transfer Activity tab.

Batch transactions made by customers, including receipts and refunds, can be viewed from the Batch Customer Receipt/Refund Activity tab.

Manually allocate sales and purchase payments and refunds, which can be allocated against the correct invoices or credits, if required.

Scheduled bank payments can be added, edited and viewed in the Scheduled Bank Payments tab.

Sales - Advanced Credit Control

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5772: OWS-5360, OWS-5805, OWS-5806, OWS-6047, OWS-6048, OWS-6049, OWS-6050, OWS-6051, OWS-6052, OWS-6053, OWS-6127, OWS-7054, OWS-7056 |
| Menu Option: | Accounts Sales Advanced credit control Chase activity Accounts Sales Advanced credit control Contact manager Accounts Sales Advanced credit control Credit control pipeline Accounts Sales Advanced credit control CRM record list Accounts Sales Advanced credit control Promised payment activity Accounts Sales Advanced credit control Transaction chase activity Accounts Sales Credit control <ul style="list-style-type: none">• [Add Manual Chase]• [Chase History]• [Edit Chase] System Accounts Credit control Chase reasons System Accounts Credit control Chase stages User Group Settings Accounts Sales Credit Control System Settings Accounts Sales Credit control <ul style="list-style-type: none">• Use promised outstanding amount in chases and promised payments• Automatically recalculate promised payments after allocating transactions• Include copy invoices when outputting credit control letters from chase• Include copy credits when outputting credit control letters from chase• Prevent generating chases for negative amounts• Require reason when completing chase• Automatically complete fully allocated chases• Hide contact manager from chase card |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts – Activation, Advanced Credit Control, CRM) |
| Detail: | Advanced Credit Control is a licenced feature that automates the process of chasing unpaid invoices by sending personalised, scheduled payment reminders. It integrates with the Accounts, CRM and Contact Manager modules to track outstanding invoices, monitor customer payment behaviour, and provide real-time insights into accounts receivable. Manual Chases can also be added and edited against a customer. |

Fixed Asset Register

| | |
|-------------------|---|
| Orderwise Ref: | OWS-3503: OWS-35043952 |
| Menu Option: | Accounts Fixed asset register |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts - Activation) |
| Detail: | Fixed assets can be managed, sold and disposed of from the above tab. On running the Period End wizard, depreciation journals will be posted where appropriate until the fixed asset fully depreciates. |

Purchasing

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3448: OWS-3452, OWS-3455, OWS-3457, OWS-3458, OWS-6492 |
| Menu Option: | Accounts Bank Purchase payments Batch supplier payment/refund activity Accounts Purchasing Batch supplier invoices Batch supplier invoice history Accounts Purchasing Batch supplier payment/refund activity Accounts Purchasing Purchase invoices due Accounts Purchasing Recurring supplier payment activity |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts - Activation) |
| Detail: | All multiple invoices entered from different suppliers can be viewed from the Batch Supplier Invoice History tab. |

Batch transactions made to suppliers, including payments and refunds, can be viewed from the Batch Supplier Payment/Refund Activity tab.

Supplier balances can be managed by displaying outstanding and overdue purchase transactions from the Purchase Invoices Due tab. New payment lists can be created from this tab.

Supplier payments set to occur on a regular basis can be viewed from the Recurring Supplier Payment Activity tab.

Inter Ledger Contra Form

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3501: OWS-3210 |
| Menu Option: | Accounts Inter ledger contra history [Add] Accounts Purchasing Purchase ledger [Add Inter Ledger Contra] Accounts Sales Sales ledger [Add Inter Ledger Contra] |
| Status: | Enhancement |
| Licensed Feature: | Yes (Accounts, Accounts – Activation) |
| Detail: | Inter ledger contras, which offset supplier balances against customer balances where the customer is also the supplier, can be created from the above tabs. |

Budgets

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3490: OWS-3498 |
| Menu Option: | Accounts Budgets |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts - Activation) |
| Detail: | Annual and periodical budgets can be set against nominals codes per year within the Budgets form. The form displays the actual amounts for each period and year and shows the difference between the budget and actual values. |

Sales

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3437: OWS-3444, OWS-3445, OWS-3446, OWS-3983, OWS-5409 |
| Menu Option: | Accounts Sales Batch customer receipt/refund activity Accounts Sales Credit control <ul style="list-style-type: none">• [Add Dispute]• [Customer Receipt]• [Output]• [Resolve Dispute] Accounts Sales Customer receipt history Accounts Sales Generate direct debits |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts - Activation) |
| Detail: | Batch transactions made by customers, including receipts and refunds, can be viewed from the Batch Customer Receipt/Refund Activity tab. Customer payments can be added, disputes can be added or resolved, and customer statements can be output from the Credit Control tab. Payments received from customers, along with a list of transaction splits they have been allocated to, can be viewed from the Customer Receipt History tab. Outstanding transactions for customers set up as direct debit customers can be viewed from the Generate Direct Debits tab. Payments for direct debits can be made from this tab. |

Accounts Dashboards

| | |
|-------------------|---|
| Orderwise Ref: | OWS-3499 |
| Menu Option: | Accounts Accounts dashboard |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts - Activation) |
| Detail: | Accounts dashboards can be viewed and refreshed from the above tab. |

Recalculate Balances Utility

| | |
|-------------------|---|
| Orderwise Ref: | OWS-3483: OWS-3952 |
| Menu Option: | Accounts Utilities Recalculate balances |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts - Activation) |
| Detail: | Customer and/or supplier balances can be manually recalculated using the Recalculate Balances utility to ensure customer and supplier balances age correctly. |

Journals

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3474: OWS-3476, OWS-3477, OWS-3478, OWS-3479, OWS-3480, OWS-5026 |
| Menu Option: | Accounts Journals Accruals Accounts Journals Import payroll journal Accounts Journals Journal defaults Accounts Journals Journal history [Import Payroll Journal] Accounts Journals Prepayments Accounts Journals Stock journal |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts - Activation) |
| Detail: | Accruals can be added and edited from the Accruals tab to account for services or goods that have been received but not yet invoiced. |

Payroll journals can be imported from Sage into Orderwise from the Import Payroll Journal tab or Import Payroll Journal button on the Journal History tab.

Journal defaults can be added and edited from the Journal Defaults tab to speed up the process of creating journals.

Prepayments can be added and edited from the Prepayments tab to account for services or goods for which an invoice has been received and paid but the cost needs to be apportioned over more than one accounting period.

Stock journals can be created from the Stock Journal tab to account for the value of current inventory levels.

VAT Returns – MTDfB

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3226: OWS-4658 |
| Menu Option: | Accounts VAT VAT returns [Add/Edit] System Settings Accounts VAT Submission <ul style="list-style-type: none">• Use MTDfB• VAT registration number |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts – Activation) |
| Detail: | With the above settings populated, MTDfB VAT returns can be submitted to the HMRC Online Service directly. |

Business Intelligence

Business Intelligence

| | |
|----------------|---|
| Orderwise Ref: | OWS-6649: OWS-6465, OWS-6618, OWS-6639, OWS-6640, OWS-6641 OWS-6652: OWS-6653, OWS-6654, OWS-6655, OWS-6656 OWS-6913: OWS-6916, OWS-6917, OWS-6918 OWS-6914: OWS-6930, OWS-6931, OWS-6933, OWS-6934 OWS-6970: OWS-6960, OWS-6961, OWS-6962, OWS-6963, OWS-6991, OWS-6993, OWS-6995 OWS-7000 OWS-7001 OWS-7028: OWS-7029, OWS-7032, OWS-7034, OWS-7100, OWS-7106, OWS-7108, OWS-7110 OWS-7116: OWS-7119, OWS-7121, OWS-7123 OWS-7130: OWS-7133, OWS-7135, OWS-7137, OWS-7139 OWS-7144: OWS-7147, OWS-7149, OWS-7151 OWS-7153: OWS-7156, OWS-7158, OWS-7160, OWS-7162 |
| Menu Option: | Business Intelligence Category Sold Account managers Business Intelligence Category Sold Customers Business Intelligence Category Sold Sales reps Business Intelligence Category Sold Taken by Business Intelligence Category Invoiced Account managers Business Intelligence Category Invoiced Customers Business Intelligence Category Invoiced Sales reps Business Intelligence Company Invoiced Account managers Business Intelligence Company Invoiced Categories Business Intelligence Company Invoiced Customers Business Intelligence Company Invoiced Products Business Intelligence Company Invoiced Sales reps Business Intelligence Company Invoiced Territories Business Intelligence Company Invoiced Variants Business Intelligence Company Sold Account managers Business Intelligence Company Sold Categories Business Intelligence Company Sold Customers Business Intelligence Company Sold Products Business Intelligence Company Sold Sales reps Business Intelligence Company Sold Taken by Business Intelligence Company Sold Variants Business Intelligence Customer Invoiced Buying/not buying Business Intelligence Customer Invoiced Categories Business Intelligence Customer Invoiced Products Business Intelligence Customer Invoiced Variants Business Intelligence Customer Sold Buying/not buying |

Business Intelligence | Customer | Sold | Categories
Business Intelligence | Customer | Sold | Products
Business Intelligence | Customer | Sold | Variants
Business Intelligence | Customer | Sold | Variants quoted not sold
Business Intelligence | Product | Invoiced | Account managers
Business Intelligence | Product | Invoiced | Customers
Business Intelligence | Product | Invoiced | Sales reps
Business Intelligence | Product | Sold | Account managers
Business Intelligence | Product | Sold | Customers
Business Intelligence | Product | Sold | Sales reps
Business Intelligence | Product | Sold | Taken by
Business Intelligence | Supplier | Invoiced | Variants
Business Intelligence | Supplier | Sold | Variants
Business Intelligence | Variant | Invoiced | Account managers
Business Intelligence | Variant | Invoiced | Customers
Business Intelligence | Variant | Invoiced | Sales reps
Business Intelligence | Variant | Sold | Account managers
Business Intelligence | Variant | Sold | Customers
Business Intelligence | Variant | Sold | Sales reps
Business Intelligence | Variant | Sold | Taken by
New Development

Status:

Licensed Feature: Yes (Business Intelligence)

Detail: The Business Intelligence module provides the tools to analyse business performance, compared across two given time periods, and to filter down the results. The above areas of the system have been implemented in Web.

Courier Integration

Couriers Integrated into Web

Orderwise Ref: OWS-541: OWS-5861, OWS-6016, OWS-7003

Menu Option: System | Despatch | Couriers

Status: New Development

Licensed Feature: Yes (Courier – DHL, Courier – DX, Courier - DPD)

Detail: The following courier integrations have been implemented in Web:

- Advanced - DPD API Domestic Direct Feed
- Advanced - DPD API International Direct Feed
- DHL API - International Direct Feed
- DHL Express MyDHL API - International Direct Feed
- DX Despatch Manager API - International Direct Feed

Migrated Courier System Settings

| | |
|-------------------|---|
| Orderwise Ref: | OWS-6015 |
| Menu Option: | System Despatch Couriers [Add/Edit] Courier Integration [tab] Courier Options [tab] System Despatch Couriers [Import] [System Settings] |
| Status: | New Development |
| Licensed Feature: | Yes (Courier - APC, BJS, Royal Mail API (Intersoft)) |
| Detail: | System Settings for the following couriers have been moved to their respective Courier Options tab: <ul style="list-style-type: none">• Advanced - APC Hypaship - Direct Feed• APC Hypaship - Direct Feed• BJS - Local Direct Feed• Royal Mail API – Intersoft |

Existing System Settings values can be imported from Orderwise Desktop to the Courier Options tab for the selected courier(s) by using the 'Import' button on the Couriers tab. Usernames and passwords are not imported for security reasons and must be manually entered.

Despatch

Orders Requiring Packing – Auto Ship

| | |
|-------------------|--|
| Orderwise Ref: | OWS-4259: OWS-6161 |
| Menu Option: | Despatch Orders requiring packing [Auto Ship] User Group Settings Despatch Ship <ul style="list-style-type: none">• Auto ship from orders requiring packing |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above setting enabled, orders that are fully allocated can be auto shipped from the 'Orders requiring packing' tab. |

Orders Requiring Picking – Edit Sales Order

| | |
|-------------------|---|
| Orderwise Ref: | OWS-2332: OWS-5779 |
| Menu Option: | Despatch Orders requiring picking [Edit] User Group Settings Despatch Picking <ul style="list-style-type: none">• Edit sales order from orders requiring picking |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above setting enabled, sales orders can be edited from the Orders Requiring Picking tab. |

Orders Requiring Picking – Edit Delivery Method

| | |
|-------------------|---|
| Orderwise Ref: | OWS-1209: OWS-6374 |
| Menu Option: | Despatch Orders requiring picking [Edit] Delivery Method User Group Settings Despatch Picking <ul style="list-style-type: none">Edit delivery method in orders requiring picking |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above setting enabled, sales order delivery methods can be edited from Orders Requiring Picking tab. |

Manufacturing

Pickers Works Order Pick Rules

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5786 |
| Menu Option: | Manufacturing Picker works order pick rules User Group Settings Despatch Picking <ul style="list-style-type: none">Picker works order pick rulesView picker works order pick rules |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing, Pick Rules) |
| Detail: | With either of the above settings enabled, works order pick rules can be assigned to active pickers from the Pickers Works Order Pick Rules tab. |

Manufacturing Totes

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5785 |
| Menu Option: | Manufacturing Manufacturing totes System settings Mobile Device Android Manufacturing <ul style="list-style-type: none">Use totes in works order picking User group settings Manufacturing Picking <ul style="list-style-type: none">View manufacturing totes |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | With the above settings enabled, a list of totes connected to works order picks can be viewed from the Manufacturing Totes tab. |

Works Order Planner

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5790 |
| Menu Option: | Manufacturing Works order planner System Settings Manufacturing General Planner <ul style="list-style-type: none">• Use works order groups |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing, Works Order Planner) |
| Detail: | With the above setting disabled, works orders can be progressed and built from the Works order planner tab. |

BOM Tab Renamed to Components

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5860 |
| Menu Option: | Manufacturing Manufactured variant list Components [tab] |
| Status: | Enhancement |
| Licensed Feature: | Yes (Manufacturing or Kit) |
| Detail: | The 'BOM' tab has been renamed to 'Components' in the above tab. |

Work In Progress – Additions

| | |
|-------------------|--|
| Orderwise Ref: | OWS-4545: OWS-5358, OWS-5683 |
| Menu Option: | Manufacturing Work in progress [Build] [Save] Works Order Serial Numbers Manufacturing Work in progress [Build] [Save] Works Order Split Batches Manufacturing Work in progress [Pick Works Order(s)] [Create] Confirm Works Order Pick System Settings Manufacturing General Traceability <ul style="list-style-type: none">• Split batch works orders |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | Building multiple items that requires non-system default serial numbers will display the 'Works Order Serial Numbers' form, allowing serial numbers to be entered. |

Building items that require non-system default batch numbers will display the 'Works Order Split Batches' form, allowing batch numbers to be entered.

Works order picks created using the 'Pick Works Order(s)' button can be completed from the Confirm Works Order Pick form.

Purchasing

Batch Edit Purchase Order Lines

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5793 |
| Menu Option: | Purchasing Batch edit purchase order lines |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Multiple purchase orders can be edited together from the Batch Edit Purchase Order Lines form. |

Purchase Order Entry – Amend Promised Date

| | |
|-------------------|--|
| Orderwise Ref: | OWS-4259: OWS-4352 |
| Menu Option: | Purchasing Purchase activity [Edit] [Edit promise date] System settings Purchasing Order Entry <ul style="list-style-type: none">• Use promised date history |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above setting enabled, when editing a purchase order, the 'Date promised' field becomes read-only. An 'Edit promise date' button becomes available next to the field, allowing the promised date to be edited, along with a reason for the amendment. |

Reports & Layouts

Layout – BOM Listing

| | |
|-------------------|--|
| Orderwise Ref: | OWS-2593 |
| Menu Option: | Manufacturing Manufactured variant list [Output] <ul style="list-style-type: none">• BOM Listing |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing or Kits) |
| Detail: | The BOM Listing native layout can be output from the above area. |

Layout – Works Order Process

| | |
|-------------------|---|
| Orderwise Ref: | OWS-2659 |
| Menu Option: | Manufacturing Work in progress [Output] Manufacturing Work in progress [Progress] Details [Output] Manufacturing Works order planner [Output] |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | The Works Order Process native layout can be output from the above areas. |

Layout – Kitting Detailed Picking Note

| | |
|-------------------|--|
| Orderwise Ref: | OWS-4851 |
| Menu Option: | Despatch Open picks [Confirm] [Output] Despatch Open picks [Output] Despatch Open picks [Start] Despatch Order lines requiring picking [Assign] Despatch Orders requiring picking [Assign] System Settings Despatch Picking <ul style="list-style-type: none">• Automatically print detailed picking note on a pick assign• Automatically print detailed picking note on a pick start• Use the kitting detailed picking note layout |
| Status: | New Development |
| Licensed Feature: | Yes (Kits) |
| Detail: | The Kitting Detailed Picking Note native layout can be output from the above areas within the Despatch module. With the 'Use the kitting detailed picking note' setting enabled, the layout can be output from the Open Picks or Confirm Pick form. With the remaining settings listed above enabled, the layout can be output automatically when assigning or starting a pick. |

Layout – Works Order Listing

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5836: OWS-2657 |
| Menu Option: | Manufacturing To manufacture report Report [Output WO Listing] Manufacturing Work in progress [Output] Manufacturing Works order activity [Output] Manufacturing Works order planner [Output] BI Alert All alerts [Edit] Reference [tab] [Reference Output] |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | The Works Order Listing native layout can be output from the above areas. Only certain alert queries can output the label. |

Layout – Works Order Goods Label

| | |
|-------------------|--|
| Orderwise Ref: | OWS-2655 |
| Menu Option: | Manufacturing Work in progress [Output] Manufacturing Works order activity [Output] Manufacturing Works order planner [Output] |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | The Works Order Goods Label native layout can be output from the above areas. |

Layout – Works Order Component Label

| | |
|-------------------|--|
| Orderwise Ref: | OWS-2654 |
| Menu Option: | Manufacturing Work in progress [Output] |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | The Works Order Component Label native layout can be output from the above area. |

Layout – Works Order Picking Note

| | |
|-------------------|---|
| Orderwise Ref: | OWS-2658 |
| Menu Option: | Manufacturing Work in progress [Output] Manufacturing Works order planner [Output] Manufacturing Works order group planner [Output] |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | The Works Order Picking Note native layout can be output from the above areas. |

Layout – Detailed Works Order Picking Note

| | |
|-------------------|--|
| Orderwise Ref: | OWS-2616 |
| Menu Option: | Manufacturing Work in progress [Pick Works Order(s)] Create Works Order Pick [Create] Confirm Works Order Pick [Output] System Settings Manufacturing Picking <ul style="list-style-type: none">• Output detailed works order picking note on pick create |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | The Detailed Works Order Picking Note native layout can be output from the Confirm Works Order Pick form. With the above setting enabled, the layout will be output when creating works order picks. |

Sales

Update Order Dates When Converting Quote to Order

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5760 |
| Menu Option: | System Settings Sales Sales Order Entry Orders <ul style="list-style-type: none">• Update dates when converting quote to order |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above setting enabled, converting a quote to an order will update the order date to the current date. The order header, line promised and required dates will also be updated to reflect the new order date. |

Sales Activity – Customer Linked Returns

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5465 |
| Menu Option: | Sales Sales activity [Linked Return] User Group Settings Returns General <ul style="list-style-type: none">• Linked return from sales |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above setting enabled, linked returns can be created for sales orders from the Sales Activity tab. |

Stock

Mass Stock Movements

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5801 |
| Menu Option: | Stock Mass stock movements User Group Settings Stock General <ul style="list-style-type: none">• Mass stock movements |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Mass stock movements allows for large-scale, instantaneous movement of multiple variants between stock locations and bin numbers. |

System

Accounts

| | |
|-------------------|---|
| Orderwise Ref: | OWS-3411: OWS-3428, OWS-3892, OWS-6544 |
| Menu Option: | System Accounts Nominal codes System Accounts Accounting Periods [Edit] [Period End] System Accounts Chart of accounts |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts – Activation) |
| Detail: | Nominal codes can be added, edited and viewed from the Nominal Codes tab. This includes adding or removing nominals from the chart of accounts and setting budgets against a nominal by period or financial year. |

The Period End Wizard can be run from the Accounting Periods tab to close off a period, preventing any further transactions being posted to that period.

A warning will show when attempting to delete chart of account type groups and nominal codes.

System Settings – Accounts

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5759 |
| Menu Option: | System Settings Accounts Allocations System Settings Accounts Nominal Codes System Settings Accounts Purchasing System Settings Accounts Sales Credit Control System Settings Accounts Sales General System Settings Accounts Sales Receipts/Refunds System Settings Accounts Tax Codes System Settings Accounts VAT Submission |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts) |
| Detail: | The above areas have been revised and added to the System Settings form. |

Product – System Unit Quantity

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7310 |
| Menu Option: | System Product System unit quantity |
| Status: | Enhancement |
| Licensed Feature: | No |
| Detail: | Pack sizes can be created from the above tab, which can then be assigned to variants. |

Purchase Order – Discounts and Surcharges

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5797 |
| Menu Option: | System Purchase order Discounts and surcharges |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Purchase order discounts and surcharges can be added from the above tab, which can then be applied to a purchase order instead of discounting or surcharging a specific variant. |

Global – Delivery Method Analysis Fields

| | |
|-------------------|---|
| Orderwise Ref: | 68624 |
| Menu Option: | System Global Analysis fields [Add/Edit] System Sales Order Delivery methods [Add/Edit] Analysis [tab] |
| Status: | Enhancement |
| Licensed Feature: | No |
| Detail: | Analysis fields can be configured and applied to delivery methods from the above Analysis tab. |

System Utilities – Merge Customer Accounts

| | |
|-------------------|--|
| Orderwise Ref: | 68702 |
| Menu Option: | System System utilities Merge customer accounts |
| Status: | Enhancement |
| Licensed Feature: | No |
| Detail: | The above utility allows customers to be merged from within Orderwise or using an Excel sheet. |

Web Help Guide Pages

The Web Help Guide contains pages for all the above menu options.