



OW Web Release Notes

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Accounts

Accounts Activation Wizard

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7409 |
| Menu Option: | Accounts Launch accounts wizard |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts – Activation) |
| Detail: | The Accounts Activation wizard will activate the Orderwise Accounts module on a database, personalised to suit a company's accounting needs. It is important to ensure information is entered correctly as this process is irreversible. |

Sales

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3437: OWS-4141, OWS-5361 |
| Menu Option: | Accounts Purchasing Purchase ledger [Payments] [Make Payment] Accounts Sales Batch Customer Invoices [Add] Accounts Sales Sales Ledger [Add Batch Invoice] Accounts Sales Sales ledger [Payments] [Customer Receipt] User Group Settings Accounts Purchasing Payments [tab] <ul style="list-style-type: none">• Add ad hoc supplier surcharges User Group Settings Accounts Sales General [tab] <ul style="list-style-type: none">• Add ad hoc customer surcharges |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts – Activation) |
| Detail: | Batch customer invoices can be created from the Batch Customer Invoices or Sales Ledger tab. |

With the above User Group Settings enabled, Ad hoc surcharge invoices can be created when saving a receipt or payment to handle overpayments. The overpaid amount can be allocated to an invoice instead of remaining outstanding.

Sales – Advanced Credit Control

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5772: OWS-5803, OWS-5804 |
| Menu Option: | System Accounts Credit control Chase cycles System Accounts Credit control Chase queries |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts – Activation, Advanced Credit Control) |
| Detail: | Chase cycles bring together chase stages, which can be run to create chases as part of an automated credit control. |

Chase queries are used within chase stages to determine which transactions are overdue.

Bank - Bank Statement Form

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3215: OWS-4841 |
| Menu Option: | Bank Accounts Bank statement activity [Edit/View] User Group Settings Accounts Bank <ul style="list-style-type: none">• Edit bank statements• View bank statements |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts) |
| Detail: | With the above settings enabled, the Bank Statement form can be accessed from the Bank Statement Activity tab, allowing imported bank statements to be viewed and edited. |

Purchasing

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3448: OWS-3454, OWS-5546 |
| Menu Option: | Accounts Bank Bank accounts [Purchase Payments] Make Payment Supplier Payment <ul style="list-style-type: none">• Recurring Accounts Bank Bank accounts [Purchase Payments] Take Refund Supplier Refund <ul style="list-style-type: none">• Recurring Accounts Purchasing Batch supplier invoices [Add] Accounts Purchasing Purchase Ledger [Add Batch Invoice] Accounts Purchasing Purchase ledger [Payments] Make Payment Supplier Payment <ul style="list-style-type: none">• Recurring Accounts Purchasing Purchase ledger [Payments] Take Refund Supplier Refund <ul style="list-style-type: none">• Recurring User Group Settings Accounts Purchasing Payments [tab] <ul style="list-style-type: none">• Recurring supplier payments |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts – Activation) |
| Detail: | Batch supplier invoices can be created from the Batch Supplier Invoices or Purchase Ledger tab. |

With the above User Group Setting enabled, recurring supplier payments or refunds can be created using the 'Recurring' button on the Supplier Payment/Refund form to generate payments or refunds on a schedule.

Utilities – Recalculate Nominal Ledger

| | |
|-------------------|---|
| Orderwise Ref: | OWS-3483: OWS-3488 |
| Menu Option: | Accounts Utilities Recalculate nominal ledger |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Accounts – Activation) |
| Detail: | This utility can be run to force a recalculation of the nominal code balances and totals. |

API

eCommerce – API Export Definition Reference

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7850 |
| Menu Option: | API System <ul style="list-style-type: none">• POST/system/export-definition-byreference/{ref} eCommerce API Export Definitions [Add/Edit] Details Details [tab] <ul style="list-style-type: none">• Reference |
| Status: | Enhancement |
| Licensed Feature: | Yes (API) |
| Detail: | An API export definition endpoint can be run using the above optional 'Reference' field. |

Sales and Stock – Orderwise API

| | |
|-------------------|--|
| Orderwise Ref: | 68734 |
| Menu Option: | API Sales <ul style="list-style-type: none">• POST/sales/orders API Stock <ul style="list-style-type: none">• POST/stock/transfer• POST/stock/transfers System Security API User Group [Add/Edit] |
| Status: | Enhancement |
| Licensed Feature: | Yes (Orderwise API) |
| Detail: | The above Orderwise API endpoints can be run if the API User Group has access enabled. |

Reporting – Layout

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7687 |
| Menu Option: | API Reporting <ul style="list-style-type: none">• POST/v2/reporting/layout/{id} |
| Status: | Enhancement |
| Licensed Feature: | Yes (API) |
| Detail: | The above endpoint is used by Web for all layouts via API. |

Allocation – Delete

| | |
|-------------------|---|
| Orderwise Ref: | 68740 |
| Menu Option: | API Allocation <ul style="list-style-type: none">DELETE/allocation/transaction/{vts_id} System Security API User Group Settings [Add/Edit] General [tab] <ul style="list-style-type: none">Allocations - Delete |
| Status: | New Development |
| Licensed Feature: | Yes (API) |
| Detail: | A transaction allocation split can be deleted using the above endpoint. |

BI Alerts

Alert Queries and Rules

| | |
|-------------------|--|
| Orderwise Ref: | OWS-1726: OWS-1727, OWS-1731, OWS-1736, OWS-1745, OWS-1749, OWS-1750, OWS-1757 |
| Menu Option: | BI Alerts Alert Queries BI Alerts Alert Rules |
| Status: | New Development |
| Licensed Feature: | Yes (BI Alerts) |
| Detail: | Standard and custom BI Alert queries can be linked to alert rules, which will generate alert messages to be sent to a User's email address for review. |

Business Intelligence

Business Intelligence

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7192: OWS-7194, OWS-7196, OWS-7198 |
| Menu Option: | Business Intelligence Account manager Invoiced Products Business Intelligence Account manager Invoiced Variants Business Intelligence Account manager Invoiced Categories |
| Status: | New Development |
| 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

Sapient Royal Mail

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5775, OWS-9163 |
| Menu Option: | Despatch Courier manifests System Despatch Couriers |
| Status: | New Development |
| Licensed Feature: | Yes (Courier – Sapient) |
| Detail: | Courier integration for 'Sapient Royal Mail' has been added to Orderwise. Manifest documents must be generated from the above Courier Manifests tab. |

FedEx REST API

| | |
|-------------------|---|
| Orderwise Ref: | OWS-560 |
| Menu Option: | System Despatch Couriers |
| Status: | New Development |
| Licensed Feature: | Yes (Courier – FedEx) |
| Detail: | Courier integration for 'FedEx REST API' has been added and is only available in Web. |

Dashboards

Dashboard Editor

| | |
|-------------------|--|
| Orderwise Ref: | OWS-5776 |
| Menu Option: | User Group Settings Dashboards <ul style="list-style-type: none">• Allow add/edit layouts |
| Status: | New Development |
| Licensed Feature: | Yes (KPI Dashboards) With the above setting enabled, the Dashboard Editor will open when adding or editing a dashboard within Web, allowing dashboards to be created or edited. |

Despatch

Courier Manifests

| | |
|-------------------|---|
| Orderwise Ref: | OWS-9701 |
| Menu Option: | Despatch Courier Manifests |
| Status: | New Development |
| Licensed Feature: | Yes (Courier Integration, Courier – Sapient) |
| Detail: | Courier manifest documents can be generated and output from the above tab. This functionality is currently used by the Sapient Royal Mail courier definition. |

Ship – Number of Pallets

| | |
|-------------------|--|
| Orderwise Ref: | OWS-4259: OWS-6280 |
| Menu Option: | Despatch Orders requiring shipping [Ship] <ul style="list-style-type: none">No of pallets System Settings Despatch Packing <ul style="list-style-type: none">Use pallets in despatch |
| Status: | Enhancement |
| Licensed Feature: | No |
| Detail: | With the above setting enabled, the number of pallets used in the shipping process is displayed on the Ship form. |

eCommerce

eCommerce Session

| | |
|-------------------|--|
| Orderwise Ref: | OWS-196: OWS-332, OWS-334, OWS-336, OWS-338, OWS-345 |
| Menu Option: | eCommerce eCommerce session Amazon Advanced [tab] eCommerce eCommerce session Amazon General [tab] eCommerce eCommerce session eBay eCommerce eCommerce session Webshop eCommerce eCommerce session Session Fields |
| Status: | New Development |
| Licensed Feature: | Yes (eCommerce, eCommerce – eBay, eBay Listings, eCommerce – Amazon, Amazon Listings, Webshop) |
| Detail: | Amazon, eBay, Webshop and session field functionality can be accessed within an eCommerce session from the above areas. |

eCommerce Session – Restricted Scheduling

| | |
|-------------------|--|
| Orderwise Ref: | 69037 |
| Menu Option: | eCommerce eCommerce Session [Add/Edit] Schedule Restrictions [tab] eCommerce.exe |
| Status: | Enhancement |
| Licensed Feature: | No |
| Detail: | eCommerce sessions, queued through the eCommerce application, can be restricted to only run at specified times per day from the above tab. |

Copy eCommerce Session

| | |
|-------------------|--|
| Orderwise Ref: | OWS-3213 |
| Menu Option: | eCommerce eCommerce Session [Copy] |
| Status: | New Development |
| Licensed Feature: | Yes (eCommerce) |
| Detail: | eCommerce sessions can be copied, retaining all settings and session fields. |

Web Shops

| | |
|-------------------|--|
| Orderwise Ref: | OWS-8259; OWS-7425, OWS-8257, OWS-8258 |
| Menu Option: | eCommerce Web shops Contacts eCommerce Web Shop Customers eCommerce Web shops Variants |
| Status: | New Development |
| Licensed Feature: | Yes (eCommerce, Web Shop Integration) |
| Detail: | Web shop contacts, customers and variants can be viewed and edited from the above tabs. |

eCommerce Plugins

| | |
|-------------------|--|
| Orderwise Ref: | OWS-9221 |
| Menu Option: | eCommerce eCommerce session [Add/Edit] Export Main Details [tab] <ul style="list-style-type: none">• Export plugin eCommerce eCommerce session [Add/Edit] Import Additional Plugins [tab] [Add/Edit] eCommerce eCommerce session [Add/Edit] Import Main Details [tab] <ul style="list-style-type: none">• Import plugin System eCommerce eCommerce plugins System Sales app Order import setup Import Additional Plugins [tab] [Add/Edit] System Store EPOS Order import setup Import Additional Plugins [tab] [Add/Edit] |
| Status: | New Development |
| Licensed Feature: | Yes (eCommerce) |
| Detail: | Plugins can be added and stored in the eCommerce Plugins tab in the System module, which can then be selected within eCommerce sessions, sales app order import setup sessions, and store EPOS order import setup sessions. |

API Export Definitions

| | |
|-------------------|--|
| Orderwise Ref: | OWS-396 |
| Menu Option: | eCommerce API Export Definitions |
| Status: | New Development |
| Licensed Feature: | Yes (API, eCommerce) |
| Detail: | API Export definitions can be used to export information from Orderwise through the API. |

Goods In

Goods In Discrepancies

| | |
|-------------------|---|
| Orderwise Ref: | OWS-4420 |
| Menu Option: | Goods In Goods in discrepancies System Despatch Discrepancy reasons <ul style="list-style-type: none">• Applies to container goods in User Group Settings Despatch General <ul style="list-style-type: none">• Despatch discrepancies |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above User Group Setting enabled, together with discrepancy reasons set up with the 'Applies to container goods in' setting enabled, those reasons can be selected if there is a goods in discrepancy when skipping bins on a Mobile Device. The reasons can then be reviewed and marked as checked on the 'Goods in discrepancies' tab. |

Invoicing

Post To Accounts App – Multiple Companies

| | |
|-------------------|--|
| Orderwise Ref: | OWS-4765 |
| Menu Option: | Post To Accounts App Settings |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The Post To Accounts application can be linked to multiple Orderwise and Sage companies. |

Manufacturing

Batch Edit Works Orders

| | |
|-------------------|--|
| Orderwise Ref: | OWS-4380 |
| Menu Option: | Manufacturing Batch edit works orders User Group Settings Manufacturing Batch Edit <ul style="list-style-type: none">• Batch edit works orders |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | With the above setting enabled, works orders can be batch edited from the Batch edit works orders tab, which shows a list of all sales order specific works orders. Additionally, works orders can be split or merged into smaller or larger quantities. |

Purchasing

Shipping Containers – Invoicing

| | |
|-------------------|--|
| Orderwise Ref: | OWS-6369 |
| Menu Option: | Purchasing Shipping Containers [Add Invoice] System Settings Invoicing General <ul style="list-style-type: none">• Use shipping container invoice disputes System Settings Purchasing Shipping <ul style="list-style-type: none">• Auto generate accounts ref in shipping container invoice User Group Settings Accounts Purchasing Invoicing <ul style="list-style-type: none">• Override shipping container payment terms User Group Settings Purchasing General <ul style="list-style-type: none">• Add invoice• Change posting style• Require supplier invoice number |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above settings enabled, the Shipping Container Invoice form allows shipping container invoices and credits to be added against the Shipping Container records. |

Copy Purchase Orders

| | |
|-------------------|---|
| Orderwise Ref: | OWS-4479 |
| Menu Option: | Purchasing Purchase activity Copy [button] Purchasing Supplier list Order History [button] Copy [button] |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Purchase orders, headers and lines can be copied from the above areas. |

Purchase Orders Waiting Approval

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5792 |
| Menu Option: | Purchasing Purchase orders waiting approval System Settings Purchasing Order Approval <ul style="list-style-type: none">• Send approval emails User Group Settings Purchasing Purchase Order Approval <ul style="list-style-type: none">• Approve purchase orders• Purchase orders require approval |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above User Group Settings enabled, the Purchase Orders Waiting Approval tab displays all orders awaiting approval, which can be approved or declined. With the above System Setting enabled, emails can be sent to a selected User for approval. |

Purchase Order Entry – Amend Promised Date Line

| | |
|-------------------|---|
| Orderwise Ref: | OWS-4259: OWS-7739 |
| Menu Option: | Purchasing Purchase activity [Edit] [Edit Line] [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 line, 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. |

Purchase Order Statistics

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7744 |
| Menu Option: | Purchasing Supplier List [New Order] Statistics [tab] |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Information about the number of lines, line quantity, total weight and total volume of all variants on a Purchase Order can be seen on the Statistics tab. |

Purchasing Contact list

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7433 |
| Menu Option: | Purchasing Contact list |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The Supplier Contacts tab displays all supplier contact records. |

Reports & Layouts

Layout – BJS Courier Label

| | |
|-------------------|--|
| Orderwise Ref: | OWS-2682 |
| Menu Option: | Despatch Courier integration [Output] [Courier Label] Despatch Orders requiring shipping Ship [Ship] Despatch Order lines requiring picking [Auto Ship] Despatch Orders requiring packing [Auto Ship] |
| Status: | New Development |
| Licensed Feature: | Yes (Courier Integration, Courier – BJS) |
| Detail: | The Courier Label native layout for the BJS – Local Direct Feed courier can be output from the above areas. |

Layout – Courier Tote Label

Orderwise Ref: OWS-2537: OWS-2598
Menu Option: System | Reports & Layouts | Layouts
Status: New Development
Licensed Feature: Yes (Courier Totes)
Detail: The Courier Tote native layout can be output from the above area.

Layout – CRM Activity

Orderwise Ref: OWS-2537: OWS-2605
Menu Option: Accounts | Sales | Advanced credit control | CRM record list | [Output]
CRM | Activity list | [Output]
CRM | CRM customer list | [Record History] | [Output]
CRM | Record list | [Output]
Status: New Development
Licensed Feature: Yes (Customer Relationship Management)
Detail: The CRM Activity native layout can be output from the above areas.

Layout – CRM Milestone

Orderwise Ref: OWS-2537: OWS-2606
Menu Option: Accounts | Sales | Advanced credit control | CRM record list
CRM | CRM customer list | [Record History] | [Output]
CRM | Record list | [Output]
Status: New Development
Licensed Feature: Yes (Customer Relationship Management)
Detail: The CRM Milestone native layout can be output from the above areas.

Layout – CRM Record

Orderwise Ref: OWS-2537: OWS-2607
Menu Option: Accounts | Sales | Advanced credit control | CRM record list | [Output]
BI Alert | All alerts | [Edit] | Reference [tab] | [Reference Output]
CRM | Activity list | [Output]
CRM | CRM customer list | [Record History] | [Output]
CRM | Record list | [Output]
Status: New Development
Licensed Feature: Yes (Customer Relationship Management)
Detail: The CRM Record native layout can be output from the above areas. Only certain alert queries can output the label.

Layouts – Kit Components, Monetary Total Values and Delivery Note Sections

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7355 |
| Menu Option: | System Reports & Layouts [Edit] <ul style="list-style-type: none">• Enable components |
| Status: | Enhancement |
| Licensed Feature: | No |
| Detail: | <p>With the above setting enabled, kit components will be displayed for the native layouts listed below. All monetary total values on the layouts have now also been limited to 2 decimal places. New 'Kit Components' datasets within the Field List section have also been provided to the 'Items to Follow' and 'Previously Delivered' sections of the Delivery Note and Delivery Note Copy layouts. No standard presentation is currently included for these new datasets.</p> <ul style="list-style-type: none">• Acknowledgement• Build Up• Commercial Invoice• Commercial Invoice Copy• Credit Note (Sales Module)• Debit Note• Delivery Note• Delivery Note Copy• Invoice• Invoice Copy• POS A4 Receipt• POS A4 Receipt Copy• POS Refund A4 Receipt• POS Refund A4 Receipt Copy• POS Refund Till Receipt• POS Refund Till Receipt Copy• POS Till Receipt• POS Till Receipt Copy• Price Request• Pro Forma• Purchase Order• Quote |

Layout – Courier Error Label

| | |
|-------------------|---|
| Orderwise Ref: | OWS-2537; OWS-2597 |
| Menu Option: | Despatch Courier integration Export Despatch Order lines requiring picking [Auto Ship] Despatch Open picks [Auto Ship] Despatch Open packs [Auto Ship] Despatch Orders requiring picking [Auto Ship] Despatch Orders requiring shipping [Ship] [Ship] System Settings Despatch Courier Integration General <ul style="list-style-type: none">• Produce courier error label on ship• Produce per parcel |
| Status: | New Development |
| Licensed Feature: | Yes (Courier Integration) |
| Detail: | When shipping to a courier, if the shipment is unsuccessful and the 'Produce courier error label on ship' setting is enabled, the Courier Error Label native layout will be output. If the 'Produce per parcel' setting is enabled, an error label will be output for each parcel in the delivery. |

Layout – Allocation Note

| | |
|-------------------|--|
| Orderwise Ref: | OWS-2537: OWS-2584, OWS-2585 |
| Menu Option: | System Reports & Layouts Layouts User Group Settings Goods In Output Allocation Notes when booking in <ul style="list-style-type: none">• Output Allocation Notes when booking in |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above setting enabled, the Allocation Note and Allocation Note Copy native layouts will be output when booking in a transaction linked to a sales order. |

Layout – Supplier Contact Manager

| | |
|-------------------|---|
| Orderwise Ref: | OWS-2667 |
| Menu Option: | Contact Manager Outstanding Supplier Tasks [Output] Contact Manager Supplier [Output] Contact Manager Supplier Task Activity [Output] |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The Supplier Contact Manager native layout can be output from the above areas. |

Emailing Layouts

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7733 |
| Menu Option: | System Reports & Layouts User Output Options <ul style="list-style-type: none">• Acknowledgement• Build Up• Commercial Invoice (Copy & Requested)• Confirmed Packing List (Copy)• Credit (Copy & Requested)• Credit Note• Customer Info• Customer Notes• Debit Note• Delivery Note (Copy & Requested)• Direct Delivery Note• Invoice (Copy & Requested)• Order Address Label• Payment on Account Receipt (Copy & Requested)• Payment Receipt (Copy & Requested)• POS A4 Receipt (Copy & Requested)• POS Refund A4 Receipt (Copy & Requested)• POS Refund Till Receipt (Copy & Requested)• POS Till Receipt (Copy & Requested)• Price Request• Pro Forma• Purchase Order• Quote• Summary Picking Note |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The above native layouts have non-looped fields populated within their email body on output, if those fields are set in the User Output Options. |

Layout – Customer Contact Manager

| | |
|-------------------|---|
| Orderwise Ref: | OWS-2666 |
| Menu Option: | Contact Manager Customer [Output] Contact Manager Outstanding Customer Tasks [Output] Contact Manager Customer Task Activity [Output] |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The Customer Contact Manager native layout can be output from the above areas. |

Layout – Licence Plate

| | |
|-------------------|--|
| Orderwise Ref: | OWS-2620 |
| Menu Option: | Stock Licence plates |
| Status: | New Development |
| Licensed Feature: | Yes (Licence Plates) |
| Detail: | The Licence Plate native layout can be output from the above area. |

Layout – Works Order Allocation Note & Copy

| | |
|-------------------|--|
| Orderwise Ref: | OWS-2537; OWS-2652, OWS-2653 |
| Menu Option: | Goods In Order search [Book In] [Book In] Goods In Goods receipt history [Output] Goods In GRN [Add – GRN] [Book In] User Group Settings Goods In <ul style="list-style-type: none">• Output Works Order Allocation Notes when booking in |
| Status: | New Development |
| Licensed Feature: | Yes (Manufacturing) |
| Detail: | With the above setting enabled, when booking in components allocated to a works order, the Works Order Allocation Note native layout will be output from the above areas. A copy version of the layout can be output from the Goods Receipt History tab. |

Sales

Stripe Card Integration

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7731 |
| Menu Option: | CRM CRM customer list [Take Payment] [Internet Payment] Sales Customer list [New Order] Payments [tab] [Add] [Internet Payment] Sales Customer list [Order History] [Take Payment] [Internet Payment] Sales Customer list [Take Payment] [Internet Payment] Sales Sales activity [Take Payment] [Internet Payment] System Sales order Payment methods [Add/Edit] Payment Processors [tab] <ul style="list-style-type: none">• Payment processor System Settings Sales Payment Gateway Stripe Card <ul style="list-style-type: none">• Confirm billing address |
| Status: | New Development |
| Licensed Feature: | Yes (CCP, CCP Stripe) |
| Detail: | Payment portal 'Stripe Card' has been added to Web and can be used when taking payment from the above areas. With the above System Setting enabled, the billing address can be viewed and edited. |

Restrict Stock Availability

| | |
|-------------------|--|
| Orderwise Ref: | OWS-8242 |
| Menu Option: | Admin Settings Stock & Pricing Stock Display [tab] <ul style="list-style-type: none">Hide All Mention Of Stock Availability On Site Sales Customer List [Add/Edit] Contacts [Add/Edit] Settings Web Shop [tab] [Add/Edit] <ul style="list-style-type: none">View stock option Sales Customer List [Add/Edit] Sales Web Shop [tab] [Add/Edit] <ul style="list-style-type: none">View stock option |
| Status: | Enhancement |
| Platform: | Trade Portal & Layout Editor |
| Licensed Feature: | No |
| Detail: | The above Orderwise 'View stock option' settings work in conjunction with the Admin site setting to control web shop stock visibility on a customer and customer contact basis. |

Stock

Transaction Trace

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5802 |
| Menu Option: | Stock Transaction Trace |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The transaction trace allows the transaction history for variants, batch numbers, serial numbers or outbound ID's to be reviewed. |

Store EPOS

Store EPOS – Outstanding Invoices

| | |
|-------------------|---|
| Orderwise Ref: | 68228 |
| Menu Option: | Store EPOS [Select Customer] [Accept Customer] [View Outstanding Invoices] System Settings Store EPOS General <ul style="list-style-type: none">Show payment running total in outstanding invoices |
| Status: | Enhancement |
| Licensed Feature: | Yes (Accounts, Accounts – Activation, Stores, Store Management, Store Tills) |
| Detail: | With the above setting enabled, all payments made against a selected invoice within the Outstanding Invoices section of Store EPOS (since opening that section or printing the receipt) will be displayed. |

Additionally, the Outstanding Invoices section will display 'Invoice Information', 'Items' and 'Payments' in group boxes that can be expanded or collapsed.

Automatically Logout User on Force Synchronisation

| | |
|-------------------|---|
| Orderwise Ref: | 69132 |
| Menu Option: | System Store EPOS Store Tills [Force Sync] System Settings Store EPOS General <ul style="list-style-type: none">Force logout of user when sync requested |
| Status: | Enhancement |
| Licensed Feature: | Yes (Stores, Store Management, Store Tills) |
| Detail: | With the above setting enabled, when a till is marked as requiring synchronisation using the Force Sync button, Users will be logged out of that till after completing an order. |

System

User Group Settings

| | |
|----------------|--|
| Orderwise Ref: | OWS-7629: OWS-7630, OWS-8597, OWS-8598, OWS-8599, OWS-8600, OWS-8601, OWS-8602, OWS-8603, OWS-8604, OWS-8605, OWS-8606, OWS-8607, OWS-8608, OWS-8609, OWS-8610, OWS-8920, OWS-8921, OWS-8922, OWS-8988, OWS-9014, OWS-9015, OWS-9016, OWS-9020, OWS-9021, OWS-9022, OWS-9045, OWS-9046, OWS-9047, OWS-9048, OWS-9049, OWS-9050, OWS-9055, OWS-9100, OWS-9101, OWS-9102, OWS-9103, OWS-9104, OWS-9105, OWS-9106, OWS-9107, OWS-9109, OWS-9110, OWS-9111, OWS-9112, OWS-9113, OWS-9207, OWS-9208, OWS-9209, OWS-9210, OWS-9211, OWS-9212, OWS-9213, OWS-9214, OWS-9215, OWS-9216, OWS-9217, OWS-9218, OWS-9219, OWS-9367, OWS-9368, OWS-9369, OWS-9370, OWS-9371, OWS-9372, OWS-9374, OWS-9375, OWS-9376, OWS-9377, OWS-9388, OWS-9429, OWS-9430, OWS-9431, OWS-9432, OWS-9433, OWS-9434, OWS-9435, OWS-9436, OWS-9437, OWS-9438, OWS-9586, OWS-9587, OWS-9588, OWS-9612, OWS-9613, OWS-9614, OWS-9615, OWS-9616, OWS-9617, OWS-9618, OWS-9649, OWS-9651, OWS-9652, OWS-9653, OWS-9654, OWS-9655, OWS-9674, OWS-9679, OWS-9681, OWS-9685, OWS-9689, OWS-9693, OWS-9694, OWS-9698, OWS-9812, OWS-9946, OWS-10059, OWS-10101, OWS-10120, OWS-10122 |
| Menu Option: | System Security User groups User Group Settings Accounts Accounting Periods User Group Settings Accounts Accruals User Group Settings Accounts Bank User Group Settings Accounts Bank Payments User Group Settings Accounts Cash Flow Forecast User Group Settings Accounts Chart of Accounts User Group Settings Accounts Credit Control User Group Settings Accounts Fixed Asset User Group Settings Accounts General User Group Settings Accounts Journals User Group Settings Accounts Nominals |

User Group Settings | Accounts | Prepayments
User Group Settings | Accounts | Purchasing
User Group Settings | Accounts | Sales | Batch Customer Invoices/Receipts
User Group Settings | Accounts | Sales | General
User Group Settings | Accounts | VAT
User Group Settings | Allocations
User Group Settings | Android | General
User Group Settings | Android | Mandatory Fields
User Group Settings | BI Alerts
User Group Settings | Business Intelligence | General
User Group Settings | Business Intelligence | Treeview
User Group Settings | Contact Manager
User Group Settings | CRM
User Group Settings | Customer | Activity
User Group Settings | Customer | General
User Group Settings | Customer | Quick Add
User Group Settings | Dashboards
User Group Settings | Despatch | Courier Integration
User Group Settings | Despatch | Courier Totes
User Group Settings | Despatch | Customer Part Shipment
User Group Settings | Despatch | Delivery History
User Group Settings | Despatch | Delivery Method Settings
User Group Settings | Despatch | Fulfilment
User Group Settings | Despatch | General
User Group Settings | Despatch | Pack Scan
User Group Settings | Despatch | Picking
User Group Settings | Despatch | Ship
User Group Settings | eCommerce | Amazon Listings
User Group Settings | eCommerce | eBay Listings
User Group Settings | eCommerce | General
User Group Settings | Global | General
User Group Settings | Global | Grids
User Group Settings | Global | Modules
User Group Settings | Global | Validation
User Group Settings | Global | Zones
User Group Settings | Goods In | General
User Group Settings | Integration | Postcoder
User Group Settings | Invoicing
User Group Settings | Jobs
User Group Settings | Manufacturing | Batch Edit
User Group Settings | Manufacturing | General
User Group Settings | Manufacturing | Picking

User Group Settings | Manufacturing | Subcontracting
User Group Settings | Manufacturing | To Manufacture Report
User Group Settings | Marketing Campaigns
User Group Settings | Mobile Device | Access
User Group Settings | Mobile Device | Courier Totes
User Group Settings | Mobile Device | General
User Group Settings | Mobile Device | Goods In
User Group Settings | Mobile Device | Goods In – Despatch
User Group Settings | Mobile Device | Manufacturing
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 | Mobile Device | Stock Take
User Group Settings | Part Finder
User Group Settings | Payment Portal
User Group Settings | Purchasing | General
User Group Settings | Purchasing | Purchase Invoices
User Group Settings | Purchasing | Purchase Order Approval
User Group Settings | Purchasing | Purchase Orders | Access
User Group Settings | Purchasing | Purchase Orders | Default Layouts
User Group Settings | Purchasing | Purchase Orders | Lines
User Group Settings | Purchasing | Purchase Orders | Orders
User Group Settings | Purchasing | To Purchase Report
User Group Settings | Purchasing | To Transform Report
User Group Settings | Rebates
User Group Settings | Reporting
User Group Settings | Returns | Customer Returns
User Group Settings | Returns | General
User Group Settings | Returns | Supplier Returns
User Group Settings | Sales | Bulk Orders
User Group Settings | Sales | Clear Down Sales Orders
User Group Settings | Sales | General
User Group Settings | Sales | Layouts
User Group Settings | Sales | Merge Orders
User Group Settings | Sales | Order Entry | Change Reasons
User Group Settings | Sales | Order Entry | Copy
User Group Settings | Sales | Order Entry | Direct / Back To Back
User Group Settings | Sales | Order Entry | Lines
User Group Settings | Sales | Order Entry | Order
User Group Settings | Sales | Order Entry | Price Request

User Group Settings | Sales | Order Entry | Retrospective Discounts
User Group Settings | Sales | Payments
User Group Settings | Sales | Pre-auth Payments
User Group Settings | Sales | POS
User Group Settings | Sales | Refunds
User Group Settings | Scheduled Service
User Group Settings | Security
User Group Settings | Stock | General
User Group Settings | Stock | Licence Plates
User Group Settings | Stock | Product Search
User Group Settings | Stock | Quick Adjustment
User Group Settings | Stock | Stock Take
User Group Settings | Stock | Variant EAN
User Group Settings | Stock | Variant Store Labels
User Group Settings | Stock Replenishment
User Group Settings | Stock Transfers
User Group Settings | Store EPOS
User Group Settings | Store Management
User Group Settings | Supplier
User Group Settings | System
User Group Settings | Third Party Logistics
User Group Settings | Transactions
User Group Settings | Transport Management - General
User Group Settings | Transport Management - Proof of Delivery
User Group Settings | Web | Security

Status: New Development

Licensed Feature: Yes (Accounts, Accounts – Detailed Stock Posting, Android devices, BI Alerts, Bulk Orders, Business Intelligence, CCP Opayo Repeats, CCP Preauth, Courier Integration, Courier Totes, Creditsafe Integration, CRM, Delivery Rules, eCommerce, eCommerce Import Mapping, EPOS, GoCardless, HHT Goods In Despatch, Kits, KPI Dashboards, Licence Plates, Manufacturing, Marketing Campaigns, Media Codes, Mobile Devices – Android, Mobile Devices – Android 3rd Party, Mobile Multi-Floor Picking, Notification Provider - ClickSend, Notification Triggers (Customer Alerts), Part Finder, Payment Portal, Pick Rules, POD Devices, POS, Rebate Management, Returns, Stock Consolidation, Stock Replenishment, Store Management, Store Tills, Third Party Logistics Billing, Transfers, Transport Management, Variant Store Labels, Works Order Planner)

Detail: The User Groups functionality has been added and revised, with the above tree-view nodes available on the User Group Settings form. Settings can be searched by display and field names.

Scheduled Service – Tasks

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5812: OWS-6776, OWS-6777, OWS-6778, OWS-6779, OWS-6781, OWS-6782, OWS-6783, OWS-6784, OWS-6785, OWS-6786, OWS-6787, OWS-6788, OWS-6789, OWS-6790, OWS-6791, OWS-6792, OWS-6793, OWS-6794, OWS-6795, OWS-6796, OWS-6797 |
| Menu Option: | System Scheduled service Tasks [Add/Edit] <ul style="list-style-type: none">Type |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts, Advanced Credit Control, Creditsafe Integration, CRM Exchange Calendar Integration, GoCardless, Marketing Campaigns, Marketing Campaigns – MailChimp, Marketing Campaigns – CommuniGator, Notification Provider – ClickSend, Notification Triggers, Notification Triggers (Customer Alerts), Pick Rules, Payment Portal, RFM Profiling) |
| Detail: | The following task types have been added: <ul style="list-style-type: none">Assign works order pick rulesBatch customer receiptsCalculate RFM scoresCRM calendar sync via Microsoft Graph APIDatabase maintenanceDownload payment portal paymentsExpire promised paymentsGenerate credit control lettersGenerate customer statementsGenerate Royal Mail API manifestOutput invoice/credit to PDFPost to accountsProcess email queueProcess GoCardless PaymentsProcess notification triggersProcess SMS queueRefresh credit reportsRefresh marketing campaign contactsRefresh marketing campaign statisticsRun chase cycleStore free stock history |

Scheduled Service Task – Auto Generate Purchase Orders

| | |
|-------------------|--|
| Orderwise Ref: | 69104 |
| Menu Option: | System Scheduled Service Tasks [Add/Edit] [Edit options] <ul style="list-style-type: none">• Report to run |
| Status: | Enhancement |
| Licensed Feature: | No |
| Detail: | The 'Product to Order Report' option can be selected from above setting to run the Product to Purchase Report via the Scheduled Service. |

Scheduled Service – Email Queue

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7406 |
| Menu Option: | System Scheduled Service Email Queue User Group Settings Scheduled Service <ul style="list-style-type: none">• Edit email |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | A notification email is created when a task is assigned to a User, which will be added to the email queue. With the above User Group Setting enabled, these emails can be edited from the Email Queue tab. |

Security – API User Groups

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7484 |
| Menu Option: | System Security API User Groups |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | API user groups can be created and managed from the above tab to control which functions a user group can access within the API. |

Security – User Teams

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5814 |
| Menu Option: | System Security User teams |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | User teams can be created and managed from the above form, which Users can then be assigned to. |

Import Data

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7404 |
| Menu Option: | System Import data |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The Import Data wizard allows data to be imported into Orderwise through the Scheduled Service. Queued imports can be cancelled prior to or during processing. The Scheduled Service can perform up to 5 tasks simultaneously, if each task type is different. |

Accounts – Year End Wizard

| | |
|-------------------|---|
| Orderwise Ref: | OWS-3411; OWS-3521 |
| Menu Option: | System Accounts Accounting periods [Year End] |
| Status: | New Development |
| Licensed Feature: | Yes (Accounts) |
| Detail: | When the Year End wizard is run, the financial year is closed and a year end journal and new financial year is created. |

Manufacturing – Works Order Pick Rules

| | |
|-------------------|---|
| Orderwise Ref: | OWS-5789 |
| Menu Option: | System Manufacturing Works order pick rules |
| Status: | Enhancement |
| Licensed Feature: | Yes (Pick Rules) |
| Detail: | Works order pick rules allow rules to be set that determine which picker is assigned to pick a works order. |

Product – Part Finder

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7762; OWS-7779, OWS-7780, OWS-7781 |
| Menu Option: | System Product Part finder Part brands System Product Part finder Part models System Product Part finder Part numbers |
| Status: | New Development |
| Licensed Feature: | Yes (Part Finder) |
| Detail: | Part finder allows brands and models to be set up, which can be assigned to variants using part numbers. |

Product – Barcode Schemas

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7423 |
| Menu Option: | System Product Barcode schemas |
| Status: | New Development |
| Licensed Feature: | Yes (Custom Barcode Schemas) |
| Detail: | Barcode schemas allow custom barcode schemas to be created and added to products, for use when dispatching using Pack Scan and the Orderwise Android HHT. |

RFM

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7766: OWS-7783, OWS-7784, OWS-7785 OWS-7786, OWS-7788 |
| Menu Option: | System RFM Activity score lookup rules System RFM Frequency rules System RFM Monetary rules System RFM Recency rules System RFM Score Lookup rules |
| Status: | New Development |
| Licensed Feature: | Yes (RFM Profiling) |
| Detail: | RFM provides the ability to create rules and scoring for recency, frequency and monetary profiling, allowing valuable customers to be automatically identified. |

Global – User Analysis Fields

| | |
|-------------------|--|
| Orderwise Ref: | 68842 |
| Menu Option: | System Global Analysis fields System Security Users [Add/Edit] Analysis [tab] |
| Status: | Enhancement |
| Licensed Feature: | No |
| Detail: | Analysis fields can be created for Users, which can be viewed within the 'Analysis' tab on the Users form. |

Global - Stores

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7451 |
| Menu Option: | System Global Stores |
| Status: | Enhancement |
| Licensed Feature: | Yes (Store Management) |
| Detail: | The Stores tab, already accessible from the Store EPOS section of the System module, can also be accessed from the above tab. |

Global – Store Categories

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7435 |
| Menu Option: | System Global Store categories |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Store categories allow stores to be assigned a category for reference purposes. |

Global – Zones

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7440 |
| Menu Option: | System Global Stock Locations [Add] Detail [tab] <ul style="list-style-type: none">• Level• Walk Route• Zone System Global Zones Zone details User Group Settings Global Zones <ul style="list-style-type: none">• Add zone details• Delete zone details• Edit zone details |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Zones allow bins to be grouped within a stock location to increase the efficiency of warehouse staff. |

Branch Restrictions – Packers

| | |
|-------------------|---|
| Orderwise Ref: | 68605 |
| Menu Option: | System Sales order Branch restrictions [Add/Edit] <ul style="list-style-type: none">• Type System Despatch Packers [Add/Edit] Branch Restrictions [tab] Despatch Packer timesheet Despatch Pack scan |
| Status: | Enhancement |
| Licensed Feature: | No |
| Detail: | Branch restrictions can be limited to Users or packers, with the latter enabling limitations with delivery methods for use within Pack Scan. Signing in a packer within the Packer Timesheet tab will force selection of a branch restriction if the packer has branch restrictions configured. |

Sales Order – Postcode Delivery Methods

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7443 |
| Menu Option: | System Sales order Postcode delivery method Postcode delivery methods System Settings Sales General <ul style="list-style-type: none">• Auto Calculate Delivery Charge Based On |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | With the above setting set to 'Postcode', Orderwise can automatically calculate sales order delivery charges based on the postcode. |

Sales Order – Order Cancellation Reasons

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7774 |
| Menu Option: | System Sales Order Order Cancellation Reasons |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Sales order cancellation reasons can be configured for selection when cancelling a sales order, allowing for a review of why an order was cancelled. |

Sales Order – Discount Codes

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7441 |
| Menu Option: | System Sales order Discount codes |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Discount codes allow a discount to be applied to sales orders, if the conditions of the associated discount code rules are met. |

Sales Order – Discount Code Rules

| | |
|-------------------|---|
| Orderwise Ref: | OWS-8095 |
| Menu Option: | System Sales order Discount code rules |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | Discount code rules are a set of conditions that must be applied to a discount code, allowing a discount to be applied to sales orders if the conditions are met. |

Sales App – Order Import Setup

| | |
|-------------------|--|
| Orderwise Ref: | OWS-8047 |
| Menu Option: | System Sales App Order Import Setup |
| Status: | New Development |
| Licensed Feature: | Yes (Android Devices) |
| Detail: | The above form allows sales orders to be imported from the Orderwise Android app into Orderwise. |

Sales App – Order Import Log

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7422 |
| Menu Option: | System Sales App Order Import Log |
| Status: | New Development |
| Licensed Feature: | Yes (Android Devices) |
| Detail: | The above tab tracks order import errors and activities made by the Android app. |

Store EPOS – Order Import Setup

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7388 |
| Menu Option: | System Store EPOS Order import setup |
| Status: | New Development |
| Licensed Feature: | Yes (Store Management, Stores, Store Tills) |
| Detail: | The above form allows sales orders to be imported from Store EPOS into Orderwise. |

System Settings – Customer Discount Calculation Order

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7408 |
| Menu Option: | System System settings Customer discount calculation order |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The above tab controls the priority order of methods used for discounting sales order lines. |

System Settings – Variant Usage

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7428 |
| Menu Option: | System System settings Variant usage |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The above tab controls which 'OUT' transactions will impact Variant Usage records. |

System Settings – Product Search Order

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7429 |
| Menu Option: | System System settings Product search order |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The above tab controls the priority of search categories on the Product Search form. |

System Settings – Stock Take Heat Bin Transactions

| | |
|-------------------|---|
| Orderwise Ref: | OWS-7430 |
| Menu Option: | System System settings Stock take heat bin transactions |
| Status: | New Development |
| Licensed Feature: | No |
| Detail: | The above tab controls how bins are ranked and which transactions are included in a stock take. |

System Settings – Sales – Manufacturing

| | |
|-------------------|--|
| Orderwise Ref: | OWS-7529 |
| Menu Option: | System Settings Sales Sales Order Entry Manufacturing |
| Status: | New Development |
| Licensed Feature: | Yes (Kits or Manufacturing) |
| Detail: | The above tab controls the functionality of manufactured variants in the Sales Order Entry form. |

Web Help Guide Pages

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