



# OW Web Release Notes

2026.Q1

26.1.54.0  
March, 2026



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## API

### Orderwise Web API

Orderwise Ref:	ORW-9705, ORW-11297
Menu Option:	Web API   Layouts <ul style="list-style-type: none"><li>• GET/api/v2/layouts</li><li>• GET/api/v2/layouts/{layoutID}/alternates</li><li>• POST/api/v2/layouts/{layoutID}/alternates/{alternateLayoutID}/output</li><li>• POST/api/v2/layouts/{layoutID}/output</li></ul>
	Web API   Variant <ul style="list-style-type: none"><li>• DELETE/api/v2/variants/{variantID}/images/{imageID}</li><li>• GET/api/v2/variants/{variantID}/images</li><li>• GET/api/v2/variants/{variantID}/images/{imageID}</li><li>• GET/api/v2/variants/{variantID}/images/{imageID}/file</li><li>• PATCH/api/v2/variants/{variantID}/images/{imageID}</li><li>• POST/api/v2/variants/{variantID}/images</li><li>• PUT/api/v2/variants/{variantID}/images/{imageID}</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	Orderwise Web API can use the above endpoints.

## Accounts

### Journal History – Reverse and Output

Orderwise Ref:	ORW-8086
Menu Option:	Accounts   Journals   Journal history   [Reverse] Accounts   Journals   Journal history   [Output] User Group Settings   Accounts   Journals <ul style="list-style-type: none"><li>• Reverse journals</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	Journals can be output from the Journal History tab. With the above setting enabled, journals can be reversed.

### Sales Ledger – Customer Adjustments

Orderwise Ref:	ORW-4139
Menu Option:	Accounts   Sales   Sales ledger   [Add Adjustment]
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	The Customer Adjustments form allows sales credit transactions to be allocated to written-off transactions to clear their outstanding balance.

## Bank – Batch Customer Receipt/Refund

Orderwise Ref:	ORW-3437: ORW-6332
Menu Option:	Accounts   Bank   Bank accounts   [Reconcile]   [Add]   Batch Customer Receipt/Refund Accounts   Bank   Bank accounts   [Sales Payments]   Batch Customer Receipt/Refund Accounts   Bank   Bank reconciliation history   [Add/Edit]   [Add]   Batch Customer Receipt/Refund Accounts   Bank   Sales payments   Batch customer receipt/refund activity   [Edit] Accounts   Sales   Batch customer receipt/refund activity   [Edit] User Group Settings   Accounts   Sales   Batch Customer Invoices/Receipts <ul style="list-style-type: none"><li>• Add batch customer receipt</li><li>• Delete batch customer receipt</li><li>• Edit batch customer receipt</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts - Activation)
Detail:	With the above settings enabled, batch customer receipts and refunds can be added or edited from the above areas to create a single batch record to view, assign or pay for multiple receipts or refunds at once.

## Bank – Bank Transfer Activity Buttons

Orderwise Ref:	ORW-8989
Menu Option:	Accounts   Bank   Bank transfer activity   [Add] Accounts   Bank   Bank transfer activity   [Edit] Accounts   Bank   Bank transfer activity   [View]
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	Bank transfers can be created, and existing ones edited or viewed, from the Bank Transfer Activity tab.

## Bank – e-Banking export

Orderwise Ref:	ORW-11674
Menu Option:	Accounts   Bank   Bank accounts   [Add/Edit]   e-Banking   Export [tab] Accounts   Bank   Bank accounts   [Add/Edit]   e-Banking   Import [tab] <ul style="list-style-type: none"><li>• Statement import definition</li><li>• Statement import definition type</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	In the e-Banking section of a bank account, an export definition and direct debit details can be configured in the Export tab. The above settings have been moved to the Import tab.

## Bank – Bank Statement Import Definitions

Orderwise Ref:	ORW-5769
Menu Option:	Accounts   Bank   Bank statement import definitions
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation, Bank Statement Import Definitions)
Detail:	Bank statement import definitions allow statements to be imported against bank accounts within Orderwise from a CSV or Microsoft Excel file format.

## Batch Supplier Payment/Refunds

Orderwise Ref:	ORW-3448: ORW-4536
Menu Option:	Accounts   Bank   Bank accounts   [Purchase Payments]   Batch Supplier Payment/Refund Accounts   Purchasing   Purchase ledger   [Payments]   Add Batch Payment/Refund User Group Settings   Accounts   Bank <ul style="list-style-type: none"><li>• Batch supplier payment export</li></ul> User Group Settings   Accounts   Purchasing   Payments <ul style="list-style-type: none"><li>• Add batch supplier payments</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	With the 'Add batch supplier payments' setting enabled, the Batch Supplier Payment/Refund form can be used to process multiple supplier transactions at once.

## Batch Supplier Payment/Refund Activity – Export

Orderwise Ref:	ORW-8980
Menu Option:	Accounts   Purchasing   Batch supplier payment/refund activity   [Export] Accounts   Purchasing   Batch supplier payment/refund activity   [Not Exported] User Group Settings   Accounts   Bank <ul style="list-style-type: none"><li>• Batch supplier payment export</li></ul> User Group Settings   Accounts   Purchasing   Payments <ul style="list-style-type: none"><li>• Mark supplier payments as not exported</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	With the above settings enabled, batch supplier payments and refunds can be exported or mark individual payments or refunds as not exported.

With the 'Batch supplier payment export' setting enabled, supplier payments can be exported using the export definition format defined within the relevant bank account.

## Launch Activation Wizard – Validate VAT Number

Orderwise Ref:	ORW-8508
Menu Option:	Accounts   Launch activation wizard   [Validate]
Status:	Enhancement
Licensed Feature:	Yes (Accounts, Accounts Activation Wizard)
Detail:	VAT numbers can be validated from the Launch Activation Wizard.

## Purchase Ledger – Supplier Adjustments

Orderwise Ref:	ORW-4612
Menu Option:	Accounts   Purchasing   Purchase ledger   [Add Adjustment]
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	The Supplier Adjustment form allows purchase invoices to be created and can write-off credit, payments and refunds.

## VAT Returns – View and Output Records

Orderwise Ref:	ORW-5107
Menu Option:	Accounts   VAT   VAT returns   [Add/Edit/View]
Status:	Enhancement
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	Within a VAT return, transaction records can be viewed and output.

## Utility – Create Scheduled Bank Payments

Orderwise Ref:	ORW-3483: ORW-3485
Menu Option:	Accounts   Utilities   Create scheduled bank payments User Group Settings   Utilities <ul style="list-style-type: none"><li>• Create recurring bank payments</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	With the above setting enabled, the Create Scheduled Bank Payments utility allows payments to be generated based on the schedule configured against recurring bank payments.

## Utility – Year End Adjustments

Orderwise Ref: ORW-3483: ORW-3489  
Menu Option: Accounts | Utilities | Year end adjustments  
User Group Settings | General | Utilities

- Year end adjustments

Status: New Development  
Licensed Feature: Yes (Accounts, Accounts – Activation)  
Detail: With the above setting enabled, the Year End Adjustments utility allows retrospective journal adjustments to be made into the previous closed financial year.

## Utility – Create Recurring Journals

Orderwise Ref: ORW-3483: ORW-3484  
Menu Option: Accounts | Utilities | Create recurring journals  
User Group Settings | Accounts | General | Utilities

- Create Recurring Journals

Status: New Development  
Licensed Feature: Yes (Accounts, Accounts - Activation)  
Detail: With the above setting enabled, the Create Recurring Journals utility will create and post all required recurring journals, up to the selected date.

## Utility – Create Scheduled Supplier Payments

Orderwise Ref: ORW-3483: ORW-3486  
Menu Option: Accounts | Utilities | Create scheduled supplier payments  
User Group Settings | Utilities

- Create recurring supplier payments

Status: New Development  
Licensed Feature: Yes (Accounts, Accounts – Activation)  
Detail: With the above setting enabled, the Create Scheduled Supplier Payments utility allows payments to be generated based on the schedule configured against recurring supplier payments.

## Agent

### Agent – Image Files

Orderwise Ref:	ORW-10356
Menu Option:	Orderwise Agent
Status:	Enhancement
Licensed Feature:	No
Detail:	The Orderwise Agent supports printing of the following image types: <ul style="list-style-type: none"><li>• BMP</li><li>• GIF</li><li>• ICO</li><li>• JPG</li><li>• PNG</li><li>• TIFF</li></ul>

## Allocation

### Reallocate to Stock Location

Orderwise Ref:	ORW-11651 / 68934
Menu Option:	Allocation   Allocate by order   [Reallocate To Location] User Group Settings   Allocation <ul style="list-style-type: none"><li>• Reallocate to location</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	With the above setting enabled, the 'Reallocate To Location' button allows for all lines or individual lines on an order to be reallocated to another stock location.

## API

### Allocations – Override Despatch Process

Orderwise Ref:	ORW-11221 / 69586
Menu Option:	API   Allocations <ul style="list-style-type: none"><li>• DELETE/allocations/transactions/{vts_id}</li></ul>
Status:	Enhancement
Licensed Feature:	Yes (API)
Detail:	An 'override_despatch_process' parameter has been added to the above endpoint. When enabled, transaction splits associated with open picks can be deleted.

## BI Alerts

### Alert Queries – Right-Click Menu

Orderwise Ref:	ORW-1726: ORW-1728
Menu Option:	BI Alerts   Alert queries   Right-Click Menu   Alert Query <ul style="list-style-type: none"><li>• Copy</li><li>• Export</li><li>• Import</li></ul>
Status:	New Development
Licensed Feature:	Yes (BI Alerts)
Detail:	Alert queries can be copied, exported or imported from the right-click menu.

### Alert Rules – Created and Resolved Alerts

Orderwise Ref:	ORW-1726: ORW-10272
Menu Option:	BI Alerts   Alert rules   [Run]   Run Once User Group Settings   BI Alerts <ul style="list-style-type: none"><li>• Show generated and resolved alerts on generation</li></ul>
Status:	New Development
Licensed Feature:	Yes (BI Alerts)
Detail:	With the above setting enabled, manually running an alert rule will open the Created and Resolved Alerts form, displaying a list of all generated and resolved alerts.

## Business Intelligence

### Company

Orderwise Ref:	ORW-7028: ORW-7102, ORW-7104
Menu Option:	Business Intelligence   Company   Sold   Category monthly turnover Business Intelligence   Company   Sold   Customer monthly turnover
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. Information regarding company performance within Orderwise can be viewed from the above areas.

## Drill Downs

Orderwise Ref: ORW-6649: ORW-7924, ORW-7925, ORW-7926, ORW-7928  
ORW-6652: ORW-7920, ORW-7922, ORW-7927  
ORW-6913: ORW-7916, ORW-7917, ORW-7918, ORW-7921  
ORW-6914: ORW-7905, ORW-7911, ORW-7912, ORW-7913, ORW-7914  
ORW-6970: ORW-7857, ORW-7858, ORW-7859, ORW-7865, ORW-7868, ORW-7869  
ORW-7028: ORW-7875, ORW-7876, ORW-7881, ORW-7882, ORW-7884, OWS-7885,  
ORW-7886, ORW-7888  
ORW-7116: ORW-7907, ORW-7908, ORW-7909  
ORW-7130: ORW-7902, ORW-7903, ORW-7904, ORW-7929  
ORW-7144: ORW-7898, ORW-7899, ORW-7900  
ORW-7153: ORW-7892, ORW-7893, ORW-7894, OWS-7895  
ORW-7192: ORW-7848

Menu Option: Business Intelligence | Account manager | Invoiced | Categories  
Business Intelligence | Category | Invoiced | Account managers  
Business Intelligence | Category | Invoiced | Customers  
Business Intelligence | Category | Invoiced | Sales reps  
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 | Company | Invoiced | Account managers  
Business Intelligence | Company | Invoiced | Categories  
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 | Category monthly turnover  
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 | Sold | Buying/not buying  
Business Intelligence | Customer | Sold | Categories  
Business Intelligence | Customer | Sold | Products  
Business Intelligence | Customer | Sold | Variant quoted not sold  
Business Intelligence | Customer | 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 | 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 | 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

Status: New Development  
Licensed Feature: Yes (Business Intelligence, Creditsafe Integration)  
Detail: Drill down options in the above areas allow for more detailed information.

## Courier Integration

### Polar Speed - Batch Feed

Orderwise Ref: ORW-10688  
Menu Option: Despatch | Courier manifests  
System | Despatch | Couriers  
Status: New Development  
Licensed Feature: Yes (Courier - Polar Speed)  
Detail: Courier integration for 'Polar Speed - Batch Feed' has been added to Orderwise Web. Manifest documents can be generated from the above Courier Manifests tab.

### Amazon Merchant Fulfillment SP-API – Local Direct Feed

Orderwise Ref: ORW-10844  
Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration  
Status: New Development  
Licensed Feature: Yes (Courier - Amazon Merchant Fulfillment)  
Detail: Courier Integration for 'Amazon Merchant Fulfillment SP-API - Local Direct Feed' has been added to Orderwise Web.

## Royal Mail - Click & Drop - API

Orderwise Ref: ORW-5872  
Menu Option: System | Despatch | Couriers  
Status: New Development  
Licensed Feature: Yes (Courier – Royal Mail)  
Detail: Courier integration for 'Royal Mail - Click & Drop - API' has been added to Orderwise Web.

## Palletforce Alliance API

Orderwise Ref: ORW-4817: ORW-7701  
Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration  
Status: New Development  
Licensed Feature: Yes (Courier – Palletforce)  
Detail: Courier integration for 'Palletforce Alliance API' has been added to Orderwise Web.

## DPD Ireland API - International Direct Feed

Orderwise Ref: ORW-10888  
Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration  
Status: New Development  
Licensed Feature: Yes (Courier – DPD)  
Detail: Courier integration for 'DPD Ireland API - International Direct Feed' has been added to Orderwise Web.

## Pall-Ex Nexus API - Domestic Direct Feed

Orderwise Ref: ORW-11649 / 69298  
Menu Option: System | Despatch | Couriers | [Add/Edit] | Courier Integration  
Status: New Development  
Licensed Feature: Yes (Courier - Pall-Ex)  
Detail: Courier integration for 'Pall-Ex Nexus API – Domestic Direct Feed' has been added to Orderwise Web.

## Despatch

### Ship – Assign Courier Totes

Orderwise Ref:	ORW-11017
Menu Option:	Despatch   [Ship] System   Despatch   Packers   [Add/Edit] <ul style="list-style-type: none"><li>Show courier tote on ship</li></ul> System Settings   Despatch   Ship   Courier Totes <ul style="list-style-type: none"><li>Use courier totes</li></ul> User Group Settings   Despatch   Courier Totes <ul style="list-style-type: none"><li>Select courier tote on ship</li><li>Validate courier totes</li></ul>
Status:	New Development
Licensed Feature:	Yes (Courier Totes)
Detail:	With the above settings enabled, a tote can be assigned when shipping an order. With 'Validate courier totes' enabled, any tote already associated with a different courier cannot be assigned to the shipment.

### Courier Totes

Orderwise Ref:	ORW-7417
Menu Option:	Despatch   Courier totes System Settings   Despatch   Ship <ul style="list-style-type: none"><li>Use courier totes</li></ul> User Group Settings   Despatch   Courier Integration <ul style="list-style-type: none"><li>Courier integration</li></ul> User Group Settings   Despatch   Courier Totes <ul style="list-style-type: none"><li>Mark courier tote as collected</li></ul>
Status:	New Development
Licensed Feature:	Yes (Courier Integration, Courier Totes)
Detail:	Courier totes allow deliveries to be placed into totes for a specific courier, then marked as collected when the courier collects the deliveries. The Courier Totes tab displays deliveries in the warehouse awaiting collection and allows them to be marked as collected if the 'Mark courier tote as collected' setting is enabled.

## Proof of Delivery

Orderwise Ref:	ORW-9470: ORW-9487 ORW-9471: ORW-9556
Menu Option:	Despatch   Delivery history   [Proof Of Delivery] Returns   Customer   Customer returns activity   [Proof Of Delivery] Sales   Customer list   [Order History]   [Proof Of Delivery]
Status:	New Development
Licensed Feature:	Yes (POD Devices, Returns)
Detail:	Delivery attempts, deliverer and delivery driver signatures and proof of delivery photos can be viewed from the above areas. With the Returns license, the same information can be viewed for collections associated with customer returns.

## Transport Management – Weekly Run Planning

Orderwise Ref:	ORW-9471: ORW-9559
Menu Option:	Despatch   Transport management   Weekly run planning
Status:	New Development
Licensed Feature:	Yes (Transport Management)
Detail:	Weekly transport templates can be linked to a calendar week, within a specified stock location, from the Weekly Run Planning tab.

## Orders Requiring Picking – Marshalling Areas

Orderwise Ref:	ORW-7420
Menu Option:	Despatch   Orders requiring picking   [Assign]   Marshalling Area System Settings   Despatch   General <ul style="list-style-type: none"><li>• Default order marshalling area filter</li><li>• Use marshalling areas for orders</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	With the above settings enabled, marshalling areas can be assigned to orders.

## eCommerce

### eCommerce Deals

Orderwise Ref:	ORW-196: ORW-202 ORW-393: ORW-839
Menu Option:	eCommerce   eCommerce deals eCommerce   eCommerce session   [Deals] User Group Settings   eCommerce <ul style="list-style-type: none"><li>eCommerce Deals</li></ul>
Status:	New Development
Licensed Feature:	Yes (eCommerce Deals)
Detail:	With the above setting enabled, variants in Orderwise can be sold using a code imported by an eCommerce session. This allows a listing on an online shop to automatically link to a series of variants set up in the eCommerce deal, rather than matching to a single variant. The series of variants will be given an order and a quantity to determine when the variant should be used and how many can be used before the deal will use the next variant in the order.

## General

### Expand Multi-line Fields

Orderwise Ref:	ORW-10377
Menu Option:	N/A
Status:	New Development
Licensed Feature:	No
Detail:	Multi-line fields throughout Web, including 'Delivery special instructions' and 'Special instructions' on the Sales Order Entry form, can be expanded for easier viewing.

### Blank and Non-Blank Grid Filters

Orderwise Ref:	ORW-5755
Menu Option:	Orderwise Web   Right Click   Hide/Show   Filters
Status:	New Development
Licensed Feature:	No
Detail:	The 'Blank' and 'Non-Blank' filters can be applied to grid columns to show blank or non-blank rows.

## Invoicing

### Xero Accounts

Orderwise Ref:	ORW-8424
Menu Option:	Invoicing   Post to accounts System Settings   Invoicing   General <ul style="list-style-type: none"><li>• Accounts package</li></ul>
Status:	New Development
Licensed Feature:	Yes (Xero Accounts)
Detail:	Selecting Xero as the accounts package provides a direct synchronisation of key financial data between Xero and Orderwise.

### Post to Accounts App – x64 Version and Sage V33

Orderwise Ref:	ORW-8044
Menu Option:	System Settings   Invoicing   General <ul style="list-style-type: none"><li>• Accounts package</li><li>• Version in use</li></ul>
Status:	Enhancement
Licensed Feature:	No
Detail:	The Post to Accounts application has an x64-bit version, in addition to the existing x32-bit version, which can be installed from the P2A x64 folder in the Orderwise installation files.

Version 33 of Sage can be used with Orderwise by selecting '2026' from the above 'Version in use' setting, when using Sage 50 as the accounts package. The x64 version of the Post to Accounts app is required for compatibility with Sage 50 V33.

## Manufacturing

### Open Works Order Picks

Orderwise Ref:	ORW-7301
Menu Option:	Manufacturing   Open works order picks User Group Settings   Manufacturing   Picking <ul style="list-style-type: none"><li>• Open works order picks</li></ul>
Status:	New Development
Licensed Feature:	Yes (Manufacturing)
Detail:	With the above setting enabled, outstanding works order picks can be viewed, confirmed, cancelled, assigned or unassigned from the Open Works Order Picks tab.

## Sales Order Work in Progress

Orderwise Ref:	ORW-5787
Menu Option:	Manufacturing   Sales order work in progress User Group Settings   Manufacturing   General <ul style="list-style-type: none"><li>Sales order work in progress</li></ul>
Status:	New Development
Licensed Feature:	Yes (Manufacturing)
Detail:	With the above setting enabled, sales orders and related works orders can be viewed and edited on the Sales Order Work In Progress tab. Works orders can be allocated, progressed, picked, built and have labour and equipment logged.

## Update Sub-Assembly Work in Progress Area Bins

Orderwise Ref:	ORW-11023 / 69494
Menu Option:	Manufacturing   Sales order work in progress   [Edit]   Details <ul style="list-style-type: none"><li>Work in progress area</li></ul> Manufacturing   Work in progress   [Edit]   Details <ul style="list-style-type: none"><li>Work in progress area</li></ul> Manufacturing   Works order activity   [Edit]   Details <ul style="list-style-type: none"><li>Work in progress area</li></ul> System Settings   Manufacturing   Picking <ul style="list-style-type: none"><li>Use work in progress areas</li></ul>
Status:	New Development
Licensed Feature:	Yes (Manufacturing)
Detail:	When updating the 'Work in progress area' field for a works order that has sub-assemblies, upon saving the form, the User is given the option to update this field for all related sub-assemblies below the works order.

## Purchasing

### Purchasing Reports – Splitters

Orderwise Ref:	ORW-10699
Menu Option:	Purchasing   Purchasing reports   To purchase report Purchasing   Purchasing reports   To purchase report   [Add] Purchasing   Purchasing reports   To transfer report   [Add]
Status:	Enhancement
Licensed Feature:	Yes (Transfers)
Detail:	A splitter bar has been added to the above grids, allowing the top and bottom grids to be resized.

## Purchase Activity – Cancel

Orderwise Ref:	ORW-10707
Menu Option:	Purchasing   Purchase activity   [Cancel] User Group Settings   Purchasing   General <ul style="list-style-type: none"><li>Cancel purchase orders from activity/history</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	With the above setting enabled, purchase orders can be cancelled within the Purchase Activity tab.

## Supplier Order History – Add and Cancel Invoices

Orderwise Ref:	ORW-4258; ORW-9718
Menu Option:	Purchasing   Purchase activity   [Supplier Order History]   [Add Invoice] Purchasing   Purchase activity   [Supplier Order History]   [Cancel] Purchasing   Supplier list   [Order History] [Add Invoice] Purchasing   Supplier list   [Order History] [Cancel] User Group Settings   Purchasing   General <ul style="list-style-type: none"><li>Cancel purchase orders from activity/history</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	Purchase invoices can be added and cancelled within the Supplier Order History form. Invoices can only be cancelled with the above setting enabled.

## Purchase Order Payments

Orderwise Ref:	ORW-10370
Menu Option:	Purchasing   Purchase activity   [Make payment] Purchasing   Supplier list   [New Order]   Order   Payments [tab]   [Make payment] Purchasing   Supplier list   [Order History]   [Make payment] Purchasing   Supplier payment activity   [Edit] User Group Settings   Accounts   Purchasing   Payments <ul style="list-style-type: none"><li>Add supplier payments</li><li>Delete unposted supplier payments</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation)
Detail:	With the above setting enabled, purchase order payments can be added to purchase orders in the above listed areas. Payments that have not been posted can be edited from the Supplier Payment Activity tab.

## Purchase Invoices – Shipping Container Invoice Activity

Orderwise Ref:	ORW-5795
Menu Option:	Purchasing   Purchasing invoices   Shipping container invoice activity System Settings   Invoicing   General <ul style="list-style-type: none"><li>• Use shipping container invoice disputes</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts - Activation)
Detail:	Shipping container invoices can be viewed from the above tab. With the above setting enabled, dispute reasons for invoices can be added or resolved.

## Purchase Order Entry – Import Lines from Excel

Orderwise Ref:	ORW-11647 / 69238
Menu Option:	Purchase Order Entry   [Add]   From Excel User Group Settings   Purchasing   Purchase Orders   Lines <ul style="list-style-type: none"><li>• Import lines from Excel</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	With the above setting enabled, purchase order lines can be imported from an Excel document.

## Supplier Payment Activity

Orderwise Ref:	ORW-5798
Menu Option:	Purchasing   Supplier payment activity
Status:	New Development
Licensed Feature:	Yes (Accounts)
Detail:	The payment history for all suppliers can be viewed from the above tab. Payments can be edited or marked as exported or not exported for eCommerce purposes.

## Returns

### Returns Order History

Orderwise Ref:	ORW-11057
Menu Option:	Returns   Customer   Return Customer List   [Returns History] Sales   Customer list   [Order History]   [Returns History] Sales   Sales activity   [Returns History] User Group Settings   Returns   Customer Returns <ul style="list-style-type: none"><li>• Add customer linked return</li><li>• View customer return history</li></ul> User Group Settings   Returns   General <ul style="list-style-type: none"><li>• Linked returns in sales</li></ul>
Status:	Enhancement
Licensed Feature:	Yes (Returns)
Detail:	With the above settings enabled, a customer's returns order history can be viewed. The button to access this form has been changed from 'Linked Returns' to 'Returns History'.

With the 'Add customer linked return' setting enabled, linked returns can be created when accessed from the Customer Order History form.

## Reports & Layouts

### Reports – SQL Settings

Orderwise Ref:	ORW-9906
Menu Option:	Reporting   [Add/Edit]   Content   SQL [tab]   [Show Generated SQL] Reporting   [Add/Edit]   Content   SQL [tab]   [Validate]
Status:	Enhancement
Licensed Feature:	No
Detail:	The above buttons have been moved from the Details section to the SQL tab in the Content section of the Report form.

### Layout – Batch Customer Invoice

Orderwise Ref:	ORW-2537: ORW-2591
Menu Option:	Accounts   Sales   Batch customer invoices   [Output] Accounts   Sales   Sales ledger   [Add Batch Invoice] System   Reports & Layouts   Layouts
Status:	New Development
Licensed Feature:	Yes (Accounts)
Detail:	The Batch Customer Invoice native layout can be output from the above areas.

## Layout – Pack Address Label

Orderwise Ref:	ORW-2537: ORW-2623
Menu Option:	Despatch   Open packs   [Edit]   [Output]   Pack Address Label Despatch   Open packs   [Output]   Pack Address Label Despatch   Open picks   [Auto Ship] Despatch   Order lines requiring picking   [Auto Ship] Despatch   Orders requiring picking   [Auto Ship]
Status:	New Development
Licensed Feature:	No
Detail:	The Pack Address Label native layout can be output from the above areas.

## Layout – Customer Receipt

Orderwise Ref:	ORW-2537: ORW-2609
Menu Option:	Accounts   Sales   Credit control   [Customer Receipt] <ul style="list-style-type: none"><li>• Output customer receipt</li></ul> Accounts   Sales   Customer receipt history   [Output]   Customer Receipt Accounts   Sales   Sales ledger   [Payments]   Customer Receipt <ul style="list-style-type: none"><li>• Output customer receipt</li></ul> Accounts   Sales   Sales ledger   [History]   [Output] Accounts   Sales   Sales ledger   [Transaction History]   [Output] Accounts   Sales   Sales ledger activity   [Output]
Status:	New Development
Licensed Feature:	Yes (Accounts)
Detail:	The Customer Receipt native layout can be output from the above areas.

The layout is output from the Customer Receipt form upon Save, with the above setting enabled. The layout can be output from the History and Transaction History form, and the Sales Ledger Activity tab, when a transaction type of 'Sales receipt' is selected.

## Layout – Customer Return Acknowledgement

Orderwise Ref:	ORW-2537: ORW-2610
Menu Option:	Returns   Customer   Customer returns activity   [Output] Returns   Customer   Customer returns activity   [Order History]   [Edit]   [Output] Returns   Customer   Customer returns activity   [Order History]   [Output] Returns   Customer   Returns customer list   [New Unlinked Return]   [Output]
Status:	New Development
Licensed Feature:	Yes (Returns)
Detail:	The Customer Return Acknowledgement native layout can be output from the above areas.

## Layout – Journal

Orderwise Ref:	ORW-2537: ORW-2618
Menu Option:	Accounts   Detailed stock posting   GRNI activity   [Output]   Journal Accounts   Detailed stock posting   PGI activity   [Output]   Journal Accounts   Journals   Journal history   [Add/Edit]   Record [tab] <ul style="list-style-type: none"><li>• Print journal</li></ul> Accounts   Journals   Journal history   [Output]   Journal Accounts   Journals   Stock journal   [Add/Edit]   Record [tab] <ul style="list-style-type: none"><li>• Print journal</li></ul> System   Accounts   Accounting periods   [Output]   Journal System   Accounts   Accounting periods   [Year End] <ul style="list-style-type: none"><li>• Output year end journal</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts, Detailed Stock Posting)
Detail:	The Journal native layout can be output from the above areas.

The layout is output from the Journal form upon Save when the 'Print journal' setting is enabled. The layout can be output from the Year End process when the 'Output year end journal' setting is enabled.

## Layout – Customer Return Collection Note

Orderwise Ref:	ORW-2537: ORW-2611
Menu Option:	Returns   Customer   Customer returns activity   [Output] Returns   Customer   Returns customer list   [New Unlinked Return]   [Output] Returns   Customer   Returns customer list   [Order History]   [Linked Return]   [Output] Returns   Customer   Returns customer list   [Order History]   [Output]
Status:	New Development
Licensed Feature:	Yes (Returns)
Detail:	The Customer Return Collection Note native layout can be output from the above areas.

## Layout – Customer Return Confirmation

Orderwise Ref:	ORW-2537: ORW-2612
Menu Option:	Customer Return Entry Returns   Customer   Customer returns activity   [Output] Returns   Customer   Returns customer list   [Returns History]   [Output]
Status:	New Development
Licensed Feature:	Yes (Returns)
Detail:	The Customer Return Confirmation native layout can be output from the above areas, including being output automatically when saving the Customer Return Entry form.

## Layout – Customer Return Repair Note

Orderwise Ref:	ORW-2537: ORW-2614
Menu Option:	Returns   Customer   Customer returns activity   [Output]   Customer Return Repair Note Returns   Customer   Returns customer list   [Returns History]   [Edit]   Return <ul style="list-style-type: none"><li>• Layout to output</li></ul> Returns   Customer   Returns customer list   [Returns History]   [Output]   Customer Return Repair Note
Status:	New Development
Licensed Feature:	Yes (Returns)
Detail:	The Customer Return Repair Note native layout can be output from the above areas. The layout is output from the Customer Return Entry form upon Save when the above setting is set to 'Repair Note'.

## Layout – Polar Speed

Orderwise Ref:	ORW-11359 / 69470
Menu Option:	Despatch   Courier Integration   [Output] System   Reports & Layouts   Layouts
Status:	New Development
Licensed Feature:	Yes (Courier - Polar Speed)
Detail:	The Polar Speed native layout can be output from the above areas.

## Layout – Customer Price List

Orderwise Ref:	ORW-2537: ORW-2557
Menu Option:	Sales   Customer list   [Price List]   [Output] <ul style="list-style-type: none"><li>• Customer price list</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	The Customer Price List native layout can be output from the above areas.

## Layout – Batch Supplier Invoice

Orderwise Ref:	ORW-2537: ORW-2592
Menu Option:	Accounts   Purchasing   Batch supplier invoices   [Output] System   Reports & Layouts   Layouts
Status:	New Development
Licensed Feature:	Yes (Accounts)
Detail:	The Batch Supplier Invoice native layout can be output from the above areas.

## Layout – Bank Reconciliation

Orderwise Ref:	ORW-2590
Menu Option:	Accounts   Bank   Bank reconciliation history   [Output]
Status:	New Development
Licensed Feature:	Yes (Accounts)
Detail:	The Bank Reconciliation native layout can be output from the above area.

## Layout – COA Listing

Orderwise Ref:	ORW-2596
Menu Option:	System   Accounts   Chart of accounts   [Output] <ul style="list-style-type: none"><li>• COA Listing</li></ul>
Status:	New Development
Licensed Feature:	Yes (Accounts)
Detail:	The COA Listing native layout can be output from the above area.

## Layout – CN22 Label

Orderwise Ref:	ORW-2595
Menu Option:	Despatch   Delivery history   [Output] System Settings   Despatch   General <ul style="list-style-type: none"><li>• Output CN22 label on ship</li></ul> System Settings   Despatch   Ship <ul style="list-style-type: none"><li>• CN22 label goods description</li><li>• CN22 label parcel maximum value</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	The CN22 Label native layout can be output from the above area using the value from the 'CN22 label goods description' and, with the 'Output CN22 label on ship' setting enabled, will also be output on ship. This is dependent on the parcel value being below the value set in the 'CN22 label parcel maximum value' setting, and the delivery method and country being set to output CN22.

## Layout Removed – Customer Goods Label

Orderwise Ref:	ORW-2537: ORW-2608
Menu Option:	Despatch   Orders Requiring Picking   [Output] Despatch   Order Lines Requiring Picking   [Output]
Status:	New Development
Licensed Feature:	No
Detail:	The Customer Goods Label layout has been removed from the above areas.

## Sales

### Stripe Card – Package Update

Orderwise Ref:	ORW-9328
Menu Option:	Sales   Customer list   [New Order]   [Take Payment]   [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]
Status:	Enhancement
Licensed Feature:	Yes (CCP, CCP – Stripe)
Detail:	The package for the 'Stripe Card' payment portal has been updated from 48.5.0 to 50.1.0.

### Customer Price List Report

Orderwise Ref:	ORW-9574; ORW-9230
Menu Option:	Sales   Customer list   [Price List] System Settings   Customer   Price List Report <ul style="list-style-type: none"><li>• Filter by</li><li>• Historic orders over X days</li><li>• Include</li><li>• X days</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	The customer price list report generates a list of variants and their prices chargeable to the customer. One set of report data is saved per customer; running the report again will replace the previous data with the new report data.  The filter defaults on the customer price list report are controlled by the above System Settings.

### Generate Price Lists

Orderwise Ref:	ORW-9229
Menu Option:	Sales   Generate price lists System settings   Customer   General   Price Settings <ul style="list-style-type: none"><li>• Use additional price lists</li></ul> User Group Settings   Customer   General <ul style="list-style-type: none"><li>• Generate price lists</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	With the above settings enabled, price list reports can be generated for multiple customers simultaneously from the Generate Price Lists tab.

## Sales Order Entry – Cancellation Reasons

Orderwise Ref:	ORW-8519
Menu Option:	Sales   Customer list   Sales Activity   [Edit] System   Sales order   Order cancellation reasons User Group Settings   Sales   Order Entry   Change Reasons <ul style="list-style-type: none"><li>• Order cancellation reason required</li><li>• Select order cancellation reason from list</li><li>• Show order cancellation reason popup</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	With the above 'Show order cancellation reason popup' setting enabled, a cancellation reason can be entered when cancelling a sales order. The remaining settings above control whether entering a cancellation reason is mandatory and if a reason can be entered or must be selected from a list created from the above Order Cancellation Reasons tree-view node.

## Stock

### Stock Transfers – Additional Buttons

Orderwise Ref:	ORW-10171
Menu Option:	Stock   Transfers   Stock transfers <ul style="list-style-type: none"><li>• Edit</li><li>• New Transfer</li><li>• View</li></ul>
Status:	New Development
Licensed Feature:	Yes (Transfers)
Detail:	Transfer incoming and outgoing stock location records can be edited and viewed. The existing 'New Order' button has been renamed 'New Transfer'.

### Transfers - Store Transfer Report

Orderwise Ref:	ORW-9565
Menu Option:	Stock   Transfers   Store transfer report
Status:	New Development
Licensed Feature:	Yes (Stores)
Detail:	The Store Transfer Report is used to transfer stock from a single stock location to multiple stores' stock locations and can be accessed from the above tab, which displays a history of all previously run reports.

## Product Search – Variant Usage Chart & Grid

Orderwise Ref:	ORW-10656
Menu Option:	Sales   Customer list   [New Order]   Order   [Add]   [Product Search] Stock   Variant list   [Add/Edit]   Stock Information   Add/Edit   Stock Information [tab] <ul style="list-style-type: none"><li>Usage period</li></ul> System Settings   Stock   Variants <ul style="list-style-type: none"><li>Default usage period</li></ul> User Group Settings   Stock   General <ul style="list-style-type: none"><li>Allow variant usage from product search</li></ul> Variant Information   Stock   [Product Search]
Status:	New Development
Licensed Feature:	No
Detail:	<p>The Variant Usage Chart and Grid tabs on the Product Search form display variant usage over periods of time, as determined by the 'Usage period' and 'Default usage period' settings.</p> <p>The 'Allow variant usage from product search' setting controls access to the Variant Usage button on the Product Search form, which can be used to display annual usage for a variant over several different periods.</p>

## Store EPOS

### Payments Running Total – Amendment

Orderwise Ref:	69549
Menu Option:	Store EPOS   [Select Customer]   [Accept Customer]   [View Outstanding Invoices] Store EPOS   [Select Customer]   [Accept Customer]   [View Outstanding Invoices]   [Clear]
Status:	Enhancement
Licensed Feature:	Yes (Stores, Store Management, Store Tills)
Detail:	<p>The 'Payments Running Total' within the Outstanding Invoices section of Store EPOS has been moved to the right-hand side of the screen, providing an invoice is not selected. With an invoice selected, the 'Clear' button can be used to return to the 'Payments Running Total'.</p>

## System

### Transport Management

Orderwise Ref:	ORW-9469: OWS-9473, ORW-9474, OWS-9475, ORW-9476, ORW-9477, OWS-9480, OWS-9481, ORW-9553
Menu Option:	System   Transport management   Delivery drivers System   Transport management   Delivery failure reasons System   Transport management   Delivery routes System   Transport management   Delivery vehicles System   Transport management   Time slots System   Transport management   Transport stop reasons System   Transport management   POD theme settings System   Transport management   Vehicle check list
Status:	New Development
Licensed Feature:	Yes (Transport Management, POD Devices)
Detail:	Transport management can be set up from the above areas to provide the means to create routes for transporting orders and collecting returns after the despatch process.

### Scheduled Service – Generate Invoices Task

Orderwise Ref:	ORW-10969 / 69463
Menu Option:	System   Scheduled service   Tasks   [Add/Edit]   [Edit Options] <ul style="list-style-type: none"><li>• Invoice type</li><li>• Send as user</li></ul>
Status:	Enhancement
Licensed Feature:	No
Detail:	The Generate Invoices tab allows the type of invoices generated; invoices, credits or both, and whether a User's details are used when emailing the generated invoices to be selected.

### User Group Settings – Purchasing - Valid User Variants

Orderwise Ref:	ORW-9381
Menu Option:	User Group Settings   Purchasing   General <ul style="list-style-type: none"><li>• Activate</li></ul> User Group Settings   Purchasing   General   [Limit Purchase Variants]
Status:	New Development
Licensed Feature:	No
Detail:	The Limit Purchase Variants button becomes accessible with the above setting enabled. This opens the Valid User Variants form, which determines the variants and/or variant categories that can be manually added to a purchase order.

## System Settings – Purchasing – Order Approval

Orderwise Ref:	ORW-10080
Menu Option:	System Settings   Purchasing   Order Approval
Status:	New Development
Licensed Feature:	No
Detail:	The above tab controls the configuration of purchase order approval emails.

## Sales Order – Delivery Price Change Reasons

Orderwise Ref:	ORW-10375
Menu Option:	System   Sales order   Delivery price change reasons
Status:	New Development
Licensed Feature:	No
Detail:	Delivery price change reasons are used to amend the delivery price and reason for the change on the Amend Delivery Price form within the Sales Order Entry form.

## System Utilities – Update Variant Units of Measure

Orderwise Ref:	ORW-7449
Menu Option:	System   System utilities   Update variant units of measure
Status:	Enhancement
Licensed Feature:	No
Detail:	The above utility allows all variant units of measure to be updated. This will only update the units, not the numerical value to the equivalent of the new units.

## Nominal Codes – Budget Wizard

Orderwise Ref:	ORW-3897
Menu Option:	System   Accounts   Nominal codes   [Add/Edit]   Budget [tab]   [Edit]   [Budget Wizard]
Status:	New Development
Licensed Feature:	Yes (Accounts)
Detail:	The Budget Wizard automatically calculates and populates the period budgets based on the criteria within the setup.

## Credit Control – Chase Cycle Run

Orderwise Ref:	ORW-8908
Menu Option:	System   Accounts   Credit control   Chase cycles   [Run]
Status:	New Development
Licensed Feature:	Yes (Accounts, Accounts – Activation, Advanced Credit Control)
Detail:	The Run button manually generates chases linked to the selected chase cycle.

## Store EPOS – Theme Templates

Orderwise Ref:	ORW-9143
Menu Option:	System   Store EPOS   Theme templates
Status:	New Development
Licensed Feature:	Yes (Stores, Store Management, Store Tills)
Detail:	Theme templates adjust the theme inside Store EPOS. The colours, icons and login images can be customised for each store.

## Import Data – Add and Remove Variant Documents

Orderwise Ref:	69491
Menu Option:	System   Import data   [Options] <ul style="list-style-type: none"><li>• Delete existing variant documents</li></ul>
Status:	New Development
Licensed Feature:	No
Detail:	When importing variant documents, the above setting will delete all existing documents against a variant when adding a new document. Only the first entry for the variant on the import file will be used.

## Orderwise Service Manager (OSM)

Orderwise Ref:	OWS-5930, OWS-9442
Menu Option:	System   Logs   Service manager log System   Service manager
Status:	New Development
Licensed Feature:	No
Detail:	The OSM is a console application designed to centrally manage and monitor external business processes for each database instance, such as eCommerce, Task Service, and Schedule Service. OSM replaces the need for Windows Task Scheduler.

Processes for eCommerce, Task Service and Schedule Service can be added, started or stopped remotely from the Service manager tab. This requires a Service Manager executable file to be running. For information on how to set this up, please contact Orderwise support.

Activity in the Service Manager tab is logged and can be viewed from the Service Manager Log tab.

## Web Help Guide Pages

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