

# prof.ITplus Release Notes

Release Notes 1.0.5 update 43

April 2017



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## INDEX OF CHANGES

Index of changes .....	2
Sales Ledger .....	3
✔ Calculated due date to be the last day of the month (e.g. 28/02/17)	
Purchase Ledger .....	3
✔ Facility to add attachments from within Post Invoices and Credit Notes program	
Stock Control .....	4
✔ Capability to enter a range of batch traceable references as part of the selection criteria used to report on stock movements	
Quotations/Sales Enquiries .....	4
✔ Added New 'Amendment Logs In Use' checkbox added	
Sales Order Processing .....	7
✔ Added 'Amendment Logs In Use' checkbox	
✔ Capability to enter a range of dates as part of the selection criteria for displaying sales orders	
✔ Added 'Prevent Update At Despatch' checkbox for carriage type and charge	
✔ Ability to manually override calculated carriage charge	
Purchase Order Processing .....	8
✔ Added an 'Amendment Logs in Use' checkbox	
✔ Capability to enter range of dates in 'Display Purchase Orders by Supplier'	
Company Details .....	10
✔ 'Clear After Adding PurOrd?' checkbox added	
Standard Information .....	11

## SALES LEDGER

- ❶ In the 'Set Up Customer Payment Terms' program, capability to specify the calculated due date should always be the last day of a month (e.g., 28/02/17). In the screen used to enter/update the details of customer payment terms, a new 'Adj. Last Day?' checkbox has been added. The new checkbox will be enabled if 'After EOM?' checkbox is ticked and the 'Due Days' textbox has a value.

Code	Description	Due Days	After EOM?	Adj. Last Day?	Sett. Days	After EOM?	Sett. Disc%
<div> <div>Due Days</div> <div>10</div> <div>After EOM?</div> <div><input checked="" type="checkbox"/></div> <div>Adj. Last Day?</div> <div><input checked="" type="checkbox"/></div> </div>							

➤ [Back to top](#)

## PURCHASE LEDGER

- ❶ Within the Post Invoices and Credit Notes program, the addition to add attachments is now available. Users can store attachments, ideally copies of supplier invoices or credit notes relative to the posting being made, although other documents may also be stored.

After the supplier reference has been entered, the attachment icon will display, allowing to display any current attachments.

Today's Date

Supp

3MUK

3M" (UK) LIMITED

3M House

After the invoice date and invoice no. have been entered the relevant document can be attached.

The attachment comment will default to a combination of the 1 or 2 transaction references entered within the posting screen and these may be manually added to or changed as required.

POST INVOICES & CREDIT NOTES User: jod-1 profitplus V1.0.5 DEVELOPMENT

Tue Mar 14 2017 Option: Invoices

Supp 3MUK 3M" (UK) LIMITED 3M House

Register Invoice Date 1/10/16 Curr Per 7 Invoice No. INV0808 Further Ref Ref A235

VAT Ind UK Exch Rate

Intrastat Details Return Terms Type Mode

VAT Analysis

1. October 0.00

2. September 0.00

SUPPLIER ATTACHMENTS

File Name	Comment	Web	Prn
INVOICE.pdf	INV0808:Ref A235	<input type="checkbox"/>	<input type="checkbox"/>
discount-a.xls		<input type="checkbox"/>	<input type="checkbox"/>

Attachments will display within the supplier details screen.

🔴 In the 'Set Up Supplier Payment Terms' program, have the capability to specify the calculated due date to be the last day of a month. In the screen used to enter/update the details of supplier payment terms, a new 'Adj. Last Day?' checkbox was added. The new checkbox is enabled if the 'After EOM?' checkbox is ticked and the 'Due Days' textbox has a value. An example, for payment terms of 60-days after end-of-month, the due date of a March invoice is calculated as 31/5/17 rather than 30/5/17 if the checkbox is not ticked.

➤ [Back to top](#)

## STOCK CONTROL

🔴 In the 'Report' option within the 'Display Stock Movements/Adjustments' program, if stock parameters are set indicate traceable stock is required, able to enter a range of batch traceable references as part of the selection criteria – output will only include movements that fall within the specified range. By entering a single traceable reference in the 'FROM' and 'TO' textboxes and leaving all other ranges blank, the report will contain any movements across all depots.

➤ [Back to top](#)

## QUOTATIONS/SALES ENQUIRIES

🔴 Added a new 'Amendment Logs In Use?' checkbox to the 'Other General Parameters' section of the General screen in the 'Quotation Parameters' program. Selecting the checkbox, any amendments to a quotation header and/or its items will be recorded (e.g. changes to address, dates, prices, discounts, codes, etc.). The amendment logs will display within the Expand options in the main quotation programs (see below for details). By default, the new checkbox will be ticked but only for amendments made after the installation of this release will be logged.

**Other General Parameters**

☐ Invoice Prefixes In Use?

☒ Highlight Stock Shortages?

☒ Print Report Selection Details?

Amend Item Desc: No/Yes/Backtab

Quote No In SalesOrd Cust.Ordno?

Quotation Customer Account Ref.

Last Quotation Number Used

Days Before Quote Expires

☐ Expiry Days After End of Month?

☐ Ignore OrdnoMask/ContrOrdno Checks For Quotes?

☐ Recurring Transactions In Use?

☒ Amendment Logs In Use?

Added a new 'Amendment Log' radio button to the pop-up window when using the Expand option in the main quotation programs. When selecting the 'Amendment Log' option checkbox, it will display any recorded amendments for the current selected quotation item. An option selection bar within the window contains 'Next Item' and 'Prev Item' buttons to display any amendments for the next and previous item (if appropriate) and a 'Quote Log' button will display any amendments to the header record of the currently selected quotation.

**EXPAND A QUOTATION ITEM**

☐ Events

☐ Memos (Stock)

☐ Documents

☐ Line Values

☐ Component List

☐ Recurring Trans.

☐ Gen CRM Events

☒ Amendment Log

AMENDMENT LOGS

Item No.

Stock Code

Description

Unique No.

Current Quote Item Quantities

Quo.Qty	Last Ord.Qty	Tot.Ord.Qty	Tot.Ords

Quote Item Amendments Log

Date	Time	Field Name	Old Setting	New Setting

Field Label	User	Program

Quote Log

Item Log

Next Item

Prev Item

Quit

➤ [Back to top](#)

## SALES ORDER PROCESSING

➤ A new 'Amendment Logs In Use?' checkbox is added to the 'Other General Parameters' section of the General screen in the 'Sales Order Parameters' program. When the checkbox is ticked, any amendments to a quotation header and/or its items will be recorded (e.g. changes to address, dates, prices, discounts, codes, etc.). The log will display within the Expand options in the main sales order processing programs (see below for details). By default, the new checkbox will be ticked but only amendments made after the installation of this release will be logged.

Added a new 'Amendment Log' radio button to the pop-up window which appears when using the Expand option in the sales order processing programs. Selecting the 'Amendment Log' option will bring up a window displaying any recorded amendments for the current selected quotation item. An option selection bar within the window contains 'Next Item' and 'Prev Item' buttons to display any amendments for the next and previous item (if appropriate) and a 'Order Log' button will display any amendments to the header record of the currently selected sales order.

➤ In the 'Display/Manage Orders By Customer' program, ability to enter a range of dates as part of the selection criteria for displaying sales orders. A radio button can be used to specify whether the date range is for order dates or delivery dates.

- Added a new 'Prevent Update At Despatch?' checkbox to the 'Sales Order Parameters – Prompts' screen. The new checkbox appears adjacent to the 'Confirm Carriage Type?' checkbox and can be set separately for 'normal' and cash sale orders. If the new checkbox is ticked, the carriage type (N/A, Manual, or Autocalc) and any corresponding carriage charges will not be reset during confirmation of despatch. If the checkbox is not ticked, will automatically set the carriage type and carriage charge to match the new delivery method. The new checkbox will be unticked by default.
- In the 'Set Up Delivery Methods' program, will have the capability to manually override the calculated carriage charge during despatch process. In the screen used to enter/update the details of delivery method, a new 'Ovrd at Desp?' checkbox is added. The new checkbox will be enabled if the adjacent 'Crg:No/Man/Auto' listbox is set to 'AutoCalc and if the new 'Prevent Update At Despatch?' parameter is ticked for either 'normal' or cash sale orders.

➤ [Back to top](#)

## PURCHASE ORDER PROCESSING

- Added a new 'Amendment Logs In Use?' checkbox to the 'Other General Parameters' section of the General screen in the 'Purchase Order Parameters' program. Selecting the checkbox, any amendments to a purchase order header and/or its items will be recorded (e.g. changes to addresses, dates, prices, discounts, codes, etc.). The amendment log will be available within the Expand options in the main purchase order processing programs. By default, the new checkbox will be ticked but only amendments made after the installation of this release.

A new 'Amendment Log' radio button is added to the pop-up window when using the Expand option from the main purchase order processing programs. Selecting the 'Amendment Log' option will display any recorded amendments for the current selected order item. An option selection bar within the window contains 'Next Item' and 'Prev Item' buttons to display any amendments for the next and



previous item (if appropriate) and an 'Order Log' button will display any amendments to the header record of the currently selected purchase order.

❖ In the 'Display Purchase Orders By Supplier' program, capability to enter a range of dates as part of the selection criteria for displaying purchase orders. A radio button can be used to specify whether the date range is for order or delivery dates. The 'from' and 'to' dates can be entered into textboxes adjacent to the radio buttons.

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➤ [Back to top](#)

## COMPANY DETAILS

❶ A new 'Clear After Adding PurOrd?' Checkbox is added when updating information in the 'Set Up Company Users' program. The setting of the field linked to the checkbox will control what happens after a user adds a purchase order in the 'Purchase Order Entry' program. When selecting the checkbox, the screen will clear and focus will return to the supplier reference or search name textbox, ready to enter the next order. If the checkbox is not ticked, the purchase order just entered will remain displayed and the option selection bar will reappear and regain focus at the foot of the screen. The setting of the new checkbox will also control what happens after the user adds a debit note order and a purchase order enquiry. For existing users, the default setting of the new checkbox will be the same as the equivalent 'Clear After Adding SlsOrd?' checkbox. For new users, the default setting of the new checkbox will not be ticked.

General	
Clear After Adding SlsOrd?	<input type="checkbox"/>
Clear After Adding PurOrd?	<input checked="" type="checkbox"/>
Override Min Price/Value?	<input type="checkbox"/>
Display Costs?	<input type="checkbox"/>
Change Cost Prices?	<input type="checkbox"/>
Change Price?	Stndrd ▼
Haggle Costs?	<input type="checkbox"/>
Display Balances?	<input type="checkbox"/>
Change Customer Colours?	<input type="checkbox"/>
Exchange Rate Prompt?	<input checked="" type="checkbox"/>
Confirm Depot?	<input type="checkbox"/>
Select Multiple Stock Items?	<input checked="" type="checkbox"/>
Display Stock Memo?	<input type="checkbox"/>
ROAD - Enable VMI?	<input checked="" type="checkbox"/>

➤ [Back to top](#)

## STANDARD INFORMATION

### Permissions

To provide access to any new programs, an administration user needs to use the “Set Up Permissions” option (accessed via the “Admin Menu” icon on the Utility Bar at the top of the screen) to grant permission to use the new menu / sub-menu to all users who are authorised to use the facilities.

Note: When released, adoption of new features may require stationery amendments or would benefit from onsite or internet based (LogMeIn) training sessions and will be charged at the prevailing rate. Please contact OGL Software Support or your Account Manager for advice.

### Future Development

As part of long-term developments, some programs have already been modified to allow for future functionality, and various new fields or buttons will be visible to users. None of these new fields will be useable at present and the system will continue to operate entirely as normal.

With the cessation of support in April 2014 by Microsoft of the Office 2003 Suite and Windows XP, OGL will no longer actively develop for, or amend, programs to work with these products. Where practical we will attempt, on reasonable endeavours only basis, to resolve any incompatibility problems reported, however it is OGL’s recommendation that unsupported Microsoft products should be upgraded with immediate effect to ensure compatibility is maintained. More information about Microsoft’s end of life policy can be found at <http://support.microsoft.com/lifecycle/>

**Note:** The performance of prof.ITplus can be significantly affected by the specification of the users’ PC and in particular the amount of memory available. Every effort is made to ensure that prof.ITplus operates as efficiently as possible, but to keep pace with new OGL and Windows developments and ensure user productivity is maintained, it is recommended that all PC’s are regularly reviewed to ensure optimum performance.

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➤ [Back to top](#)