

prof.ITplus Release Notes

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PURCHASE LEDGER

🔴 In the 'Purchase Ledger Parameters' program, a new 'Mand.Flds' screen has been added.

When adding, or maintaining supplier records in the 'Supplier Details' screen, it is now possible to specify that entry of data in some of the fields can be made mandatory: Main Telephone No., Supplier Type, Area Code, Payment Terms, Account Status, and User Fields 1-5 (if used)

Mandatory Entries

<input type="checkbox"/> Main Telephone No.	<input type="checkbox"/> User Field 1 - Industry
<input type="checkbox"/> Supplier Type	<input type="checkbox"/> User Field 2 - No. Emps
<input type="checkbox"/> Area Code	<input type="checkbox"/> User Field 3 - Not Used
<input type="checkbox"/> Payment Terms	<input type="checkbox"/> User Field 4 - Not Used
<input type="checkbox"/> Account Status	<input type="checkbox"/> User Field 5 - Not Used

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STOCK CONTROL

🔴 When searching for stock, the Find A Product From A List screen has been modified to include the Sup 1 Prc, if the user is allowed to see cost prices and the stock parameter 'Display Sup1 Price' is ticked.

Find A Product From A List

List Mode: **Descript** Search Key: **=RED** Depot: **DISTRIBUTION CENTRE**

Extracted Product List for Search String "**=RED**" (Full List, Incl.Obs, All Prices)

Stock Code	Description	Description 2	On Hand	Free	Sup 1 Prc
003	BLUSHER - RED				
02158	RED THAI SPRINKLE		10.000	10.000	
1003	PEN - BIRO - RED		15	15	
1007	A4 RING BINDER FOLDER - RED				
1300-127	SINTERED ELEMENT (SHORT)		39	39	
1565450	INSULATING TAPE PVC (RED)		66	64	3.00
1800-028	RED DISC		1448	1448	0.07
205013	Slazenger Red Colour Rackets	Short Tennis	6.00	6.00	
2200	RED VELVET CURTAIN MATERIAL				10.50
230	7oz Paper Cup	Red	23020	23020	16.00
3012520	POLYPIPE 25mm X 20mm POLYFIT	REDUCING ELBOW			
30625	POLYPIPE 25mm X 20mm PUSHFIT	REDUCER MDPE			
30632	POLYPIPE 32mm X 25mm PUSHFIT	REDUCER MDPE			
3063220	POLYPIPE 32mm X 20mm PUSHFIT	REDUCER MDPE			
3065032	POLYPIPE 50mm X 32mm PUSHFIT	REDUCING COUPLER			7.78
3085020	POLYPIPE 50mm X 20mm PUSHFIT	DOUBLE SPIGOT RED			
3085025	POLYPIPE 50mm X 25mm PUSHFIT	DOUBLE SPIGOT RED			

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QUOTATIONS/SALES ENQUIRIES

- ❖ In the 'Print Quotations' program, if the customer has their own document layout and the document range is set to print for this specific customer and for a single quote, the user will now be prompted to switch to the customer's own layout if another layout is to be used by default.
- ❖ When searching for stock, the Find A Product From A List screen has been modified to include the Sup 1 Prc.

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SALES ORDER PROCESSING

- ❖ Sales Order Despatch labels can now be enabled to print in Bin sequence order or Entry order.

This is available for single bin stock, if multi-bin stock is in use, this parameter will be disabled and will default to Entry.

Within Sales Order document parameters, a new parameter has been added. 'Desp Label Seq:'. with a drop down selection of Entry or Bin.

The screenshot shows the 'Delivery Notes' parameter screen. The 'Desp Label Seq:' dropdown is set to 'Bin'. Other visible parameters include 'Every Item?', 'Allocated Quantity?', 'Despatched Quantity?', 'Complete Items Only?', 'Print MadeUp Msg?', 'Product Memo To Print', 'Contact For Fax/Email', 'Always?', 'Complete Ord?', 'Max. Product Lines', 'More Than One Order?', 'Main Sequence:', 'Item Seq:', 'Desp Voucher?', 'Auto Labels?', 'Cre Lev', 'Prt Chg', 'Cust', 'Doc', 'Entry', 'Neither', 'Usr/Del?', and 'N/A'.

Enabling the Desp Label Seq to Bin will generate and print labels in bin sequence order rather than in line entry order.

- ❖ In the 'Set Up Sales Order Types' program, it is now possible to specify whether an order type is used when importing orders from a web site.

A 'Web Orders?' checkbox has been added, which will allow multiple web order types.

The screenshot shows the 'Set Up Sales Order Types' dialog box. The 'Order Type' is set to '01' and the 'Description' is 'high priority order'. The 'Allocate?' section has 'MinLev' selected. The 'Allocn Priority' is set to '1'. The 'Delivery Days' is set to '1'. The 'Check Products?' section has 'Include' selected. The 'Web Orders?' checkbox is checked. The 'OK' and 'Cancel' buttons are at the bottom.

Currently, only one order type can be designated to Sales Orders as being the order type used for web orders.

This change will have no immediate effect but has been made to allow for future developments. The default web order type (as setup in Sales Order Parameters) will continue to be used until further developed.

- Within Sales Order Alloc/Desp parameters, within the Despatch section, a new checkbox has been added '>10 Box Nos?'

☒ **Box Numbers?** ☒ **Separate Pack.Note?** ☐ **>10 BoxNos?**

This parameter will be enabled if Packing Notes are in use and will be unticked by default.

If the parameter is ticked, if box numbers are entered at sales order despatch and where separate packing notes are produced, this will enable more than 10 sets of box numbers and box quantities for each item. The number of rows in the entry table of box numbers and box quantities that appear during despatch will be increased from 10 to 100.

- In the various document printing programs (Acknowledgements, Delivery Notes, Certificates, Automatic Labels, Despatch Labels, Proforma Invoices and Price Support Claims) if the customer has their own document layout and the document range is set to print for this specific customer and for a single order, the user will now be prompted to switch to the customer's own layout if another layout is to be used by default.

- The Sales Order Profitability report has a new checkbox added to use 'Batch Costs?' when calculating profit margins.

Details
☒ Order lines? ☐ Convert currencies? ☐ Last price? ☐ Fwd Orders? ☒ Batch Costs? ☒ Print selection criteria?

If 'Batch Costs?' is selected and where traceable, multibin or FIFO stock items have been used, the cost price shown on the report and used for profitability calculation is a weighted average of the individual batch costs, in place of the order item cost price.

If no batch cost is available, the report will revert to using the standard order item cost price.

- When searching for stock, the Find A Product From A List screen has been modified to include the Sup 1 Prc.

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PURCHASE ORDER PROCESSING

- ❖ Purchase Order Parameter screens have been restructured, to accommodate several new parameters.
- ❖ A new screen has been added 'Rcpt/CstUp'. This contains the new addition of the 'Receipt Colour Highlights?' checkbox and the Cost Updates checkboxes (which have moved from the General section of the parameters)

The screenshot shows two sections of a software interface. The top section, titled 'Receipt Colour Highlights', contains a checkbox labeled 'Receipt Colour Highlights?' which is checked. To its right are three buttons: 'Part' (yellow), 'Full' (lime green), and 'Inv' (cyan). The bottom section, titled 'Cost Updates', contains a dropdown menu labeled 'Update: Valn, Supp, Both or None' with 'Both' selected. Below this are two columns of checkboxes. The left column includes: 'Prompt For Cost Updates?' (unchecked), 'Landed Costs In Use?' (checked), 'Apportion From Carriage?' (unchecked), 'Included In Valn Cost Prc?' (unchecked), and 'Included In Inv.Reserves?' (checked). The right column includes: 'Latest Cost From Invoice?' (unchecked), 'Matrices In Use?' (unchecked), 'Apportion By Weight?' (unchecked), 'Included In Latest Cost Prc?' (unchecked), and 'Included In Asgnd Sls Ords?' (unchecked).

The addition of the Receipt Colour Highlights checkbox will allow a visual indication of the receipt status of a purchase order and its items by using colour highlights, by highlighting the purchase order number textbox in screen headers and the receipt quantity, receipt status and invoice quantity cells in display tables

If the checkbox is ticked, three adjacent buttons are enabled to define the highlight colours. By default, the colours used to indicate part-receipt, full receipt, and invoice matched will be YELLOW, LIME, and AQUA, respectively, (corresponding with the 'Despatch Colour Highlights' section in the Sales Order Processing Parameters program).

The colours can be changed by clicking the corresponding button and selecting the required colour in the standard Windows colour dialogue.

- ❖ The separate 'OdueLett' screen is no longer being used and the 'Overdue Delivery Letters' section now appears within the General section.
- ❖ A new 'Mand/Deflt' screen has been added, containing 'Mandatory Entries' and Defaults sections.

Mandatory Entries


☐ Our Reference?
☐ Supplier Type Code?
☐ Area Code?
☐ Payment Terms Code?
☐ Order Type Code?

Defaults

Order Type	<input type="text"/>		
Manual Lines	Prod.Grp <input type="text"/>	Prod.Typ <input type="text"/>	Category <input type="text"/>



When adding or amending a purchase order, it is now possible to specify that entry of data in some of the fields can be made mandatory: Our Reference, Supplier Type Code, Area Code, Payment Terms Code, and Order Type Code

In the Defaults section, a default value can be set for Order Type in the purchase order header. MANUAL line items entered on purchase orders can have default settings for Prod.Grp, Prod.Typ, and Category.

-  In the various document printing programs (Purchase Orders, Automatic Labels, Receipt Labels, Purchase Enquiries, Return Notes and Debit Notes) if the supplier has their own document layout and the document range is set to print for this specific supplier and for a single order, the user will now be prompted to switch to the supplier's own layout if another layout is to be used by default.

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INVOICING & PRICING

-  In the various invoice and credit note programs (Entered, Calculated and Archived) if the customer has their own document layout and the document range is set to print for this specific customer and for a single invoice/credit note, the user will now be prompted to switch to the customer's own layout if another layout is to be used by default.
-  A textbox has been added to the selection criteria when printing manual invoices or credit notes, to allow a userid to be specified. If a user is selected this will limit the transactions being printed to those that were entered by the selected user. If left blank, all transactions (appropriate to the other selection criteria) will be printed.

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RETURN ORDER PROCESSING

- ❖ In the Return Order Acknowledgement and Collection Notes printing programs, if the customer has their own document layout and the document range is set to print for this specific customer and for a single order, the user will now be prompted to switch to the customer's own layout if another layout is to be used by default.

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COMPANY DETAILS

- ❖ If a user is setup with the ability to update the system exchange rate whilst posting transactions, any changes to the stored exchange rates will now be recorded in the system parameter log, under the file name 'compcurr'

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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 a best 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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