

prof.ITplus Release Notes

Release Notes 1.0.5 update 52

Nov 2018



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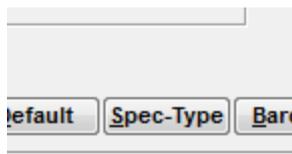
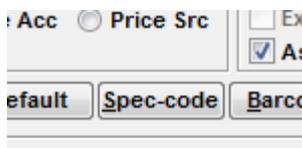
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STOCK CONTROL

- ❖ A change has been made to stock parameters to allow two sets of 'special' stock items (commonly referred to as 'ZZ' codes), each with their own set of default values. As well as a different prefix, each special stock code can be defined with its own number of digits and starting value

When the 'Spec-code' option is selected in the stock parameters screen, the display will initially show the first 'ZZ' code default values and the 'Spec-Code' button label will change to 'Spec-Type'.



Selecting this option will then toggle between the two available sets of default values, allowing the user to add or change settings as required.

Either special code prefix when entered during sales order creation will cause the stock maintenance screen to be displayed with the stock code defaulting to the next available number for the selected prefix.

No changes have been made to the general 'ZZ' code processes – these will apply for either prefix.

QUOTATIONS/SALES ENQUIRIES

- ❖ When using the 'Value' option in programs in the 'Quotations/Sales Enquiries' module, the setting of the new 'Include Carriage in Order Values/Margins?' parameter (see Sales Order Processing section) will determine whether any available carriage value is included on initial display. If a carriage value is available, a new 'With Carrg/Wout Carrg' option button in the 'Display Quotation Values' window can be used to toggle the display between including and excluding the carriage value.

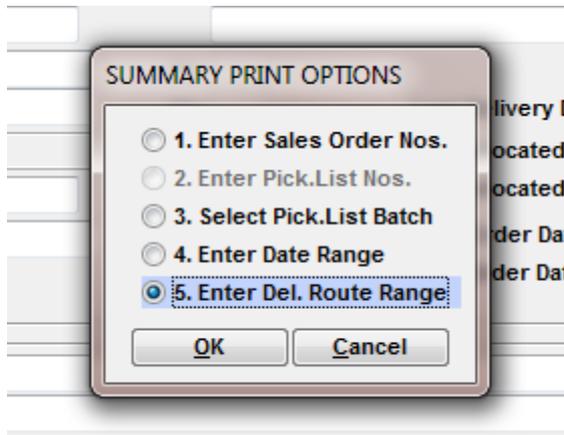
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SALES ORDER PROCESSING

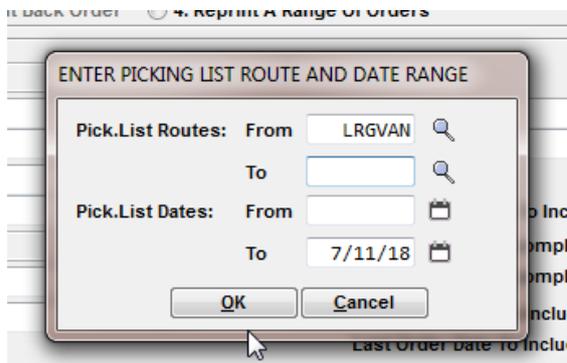
- ❖ A new 'Include Carriage in Order Values/Margins?' checkbox has been added to the Displays section of the General screen in the Sales Order Parameters' program. If ticked, the values and margins shown in the 'Display Order Values' window will include any available carriage value on initial display.
- ❖ When using the 'Value' option in programs in the 'Sales Order Processing' module, the setting of the new 'Include Carriage in Order Values/Margins?' parameter (see above) will determine whether any available carriage value is included on initial display. If a carriage value is available, a new 'With Carrg/Wout Carrg' option button in the 'Display Order Values' window can be used to toggle the display between including and excluding the carriage value.
- ❖ The Tele-order Template program has been changed so that, when displaying a template or raising a new order for a customer, if the customer has been marked as having 'cash with order' or proforma status, an information label at the top of the template screen will be displayed as either 'CO/Prf: CWO' or 'CO/Prf: PRF'.
- ❖ The 'Print Picking List' selection criteria screen has been amended so that the delivery route can now be selected as a range with 'from' and 'to' routes.

To produce picking notes for a single delivery route, the route code will need to be selected for both the 'from' and 'to' route. The standard lookup facilities are available using F2 or the 'magnifying glass' icon.

If summary picking lists are in use, an option has been added to the 'Summary Print Options' to allow the user to select by delivery route and date range.



When selected, the 'Enter Picking List Route and Date Range' window is displayed, as above standard lookup functions are provided.



Orders displayed in the selection window will then be limited according to the entered route and date range, allowing the user to select all orders or specific orders for printing.

INVOICING & PRICING

- ❖ A 'Query' option button has been added to the 'Display Customer Price List' program as well as to the 'Special Customer Prices', 'Display Special Prices By Customer', and 'Display Special Prices By Product' programs on the 'Special Customer Prices' sub-menu. A left-click with the mouse on the Query button will enable an enquiry to be performed on the CRM customer account (where applicable), the sales ledger customer account, or the product record for the price that is currently selected. A right-click with the mouse on the Query button will display a menu of various options relating to the selected price, any of which can then be selected. In the programs displaying the customer price list and the special prices by customer and by product, right-clicking a row in the main display table will select the corresponding price and will then display the same menu as appears when right-clicking the Query button. As part of the changes, free stock figures are now displayed in the 'Display Customer Price List' and 'Display Special Prices By Product' programs, requiring entry of a depot code for sites that use multiple depots.

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RETURN ORDER PROCESSING

- ❶ When using the 'Value' option in programs in the 'Return Order Processing' module, the setting of the new 'Include Carriage in Order Values/Margins?' parameter (see Sales Order Processing section) will determine whether any available carriage value (as well as any restock charge) is included on initial display. If a carriage value is available, a new 'With Carrg/Wout Carrg' option button in the 'Display Order Values' window can be used to toggle the display between including and excluding the carriage value (and restock charge).

MISCELLANEOUS

- ❶ When using standard search routines to find a code on a reference table (e.g. sales ledger area codes), if the Add option button in the 'Find A *reference code* From A List' window is clicked to call the program to set up the codes for the corresponding reference table, the Add option will now automatically be called on entry to the program – the textbox for the reference code will have focus ready for a new record to be created.

- ❶ **Making Tax Digital for VAT**

The HMRC driven project will make it easier for businesses to manage their tax and will save them, and their agents, time which can instead be devoted to maximising business opportunities, encouraging growth and fostering good financial planning. From 1 April 2019, under Making Tax Digital, around 1 million businesses registered for VAT with a taxable turnover above £85,000 will need to keep their VAT records digitally and file their returns using Making Tax Digital-compatible software.

The HMRC MTD pilot opened up to Public Beta on the 16/10/18 for around half a million businesses whose affairs are up to date and straightforward and will extend to most other business types over the coming months.

profitplus customers are advised not to sign up to MTD just yet as we are currently testing the functionality with HMRC and will be carrying out our own Beta pilot with some of our customers who meet the criteria. Those profitplus customers who are not excluded by the following criteria should email softwaresupport@ogl.co.uk to register their interest to take part in the pilot.

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HMRC Public Beta Pilot Joining Criteria:

You may qualify for the HMRC pilot if you use a standard accounting period, you're up to date with your VAT, and you:

- are a sole trader
- currently submit the VAT Return for a limited company

You will not be able to take part in the pilot at the moment if you:

- are a trust or charity
- are part of a VAT group or VAT Division
- trade with the EU
- are based overseas
- are a partnership
- submit annual returns
- make VAT payments on account
- use the VAT Flat Rate Scheme
- are a business that is newly registered for VAT and you have not previously used your VAT online account to submit your VAT Return
- have incurred a default surcharge in the last 24 months

If your business is eligible then please email softwaresupport@ogl.co.uk to register your interest and our development team will then contact with you to qualify suitability.

It is very important you **do not sign up** to the HMRC's public beta until you have been advised that prof.ITplus is ready.

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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.

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 and Servers are regularly reviewed to ensure optimum performance.

Microsoft Support

Use of Microsoft Office Products such as Excel, Word and Outlook are used regularly in conjunction with prof.ITplus.

With the cessation of support in April 2014 by Microsoft of the Office 2003 Suite, together with Office 2007 having now reached the end of its support lifecycle, OGL will no longer actively develop for, or amend, programs to work with these products. Where practical we will attempt, on a reasonable endeavours basis, to resolve any incompatibility problems reported, however it is OGL’s recommendation that unsupported Microsoft products should be upgraded to Office 365 or 2016 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/>

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