

## What is New?

Since the release of the WinTree® 2021 version development continued on. The long-awaited Cash and Carry App is now fully operational and the old PDA logistics scanning options are also available as an App. Various improvements for TreeCommerce® Messenger (TCM) are made. Many customer wishes are included as new functions within WinTree® as well to further improve efficient use of the software.

Below is an overview of the most important and notable issues included in this version. This list is certainly not complete. While working with WinTree®, other new fields or functions may catch your attention. If you want more information of how a new function works, you can search this site. We've added some new pages containing menu descriptions and features. Can't find the desired information? Simply create a support question via MyTSD. Our support colleagues are happy to assist.

In the overview below, an internal reference number (issue/ASW) is mentioned in various titles. Always quote this number when asking questions about these topics.

Items with (B) in the title are available to all users regardless of the module structure according to the WinTree® CONNECT packages. All other items are available with the more extensive packages.

### WinTree® Nursery Manager

#### **Stock items**

##### **Automatically refresh and send stock lists to TreeCommerce® Messenger (TCM)(B) (23625)**

For each stock list you can set up how often and at what time a list should be automatically refreshed. You can also set up whether the list should be sent out to a selection after updating via TCM. In the menu Stock items– Maintenance wish-/stock list the tab “Automatically refresh” is now available for this. Here you can set up on which days and times the selected list can be refreshed or updated and indicate whether the list should be sent afterwards in. You can also select which photo's to send with the updated list with the use of phototags..

##### **UK rules, adjustment phytosanitary period (B) (23374)**

A plant is only phytosanitary as an UK plant when a plant from the UK (Great Britain) has been present in the UK for 12 months. For this purpose, a fifth 'Type of crop' is added in the Genus groups (File – Basic information – Stock). This will ensure the plant will have GB at the D-field on the Plant Passport after 12 months from the date of receipt.

##### **Stock item EAN barcode available on stock labels (B) (23302)**

A field with the EAN barcode of the Stock item is added to the standard layout of the Stock labels and are available to add to your label.

To add this field on an existing label, an SQL upgrade of the label must be performed. To do this, open the layout wizard of the label.

Go to the “Extra” tab and click [SQL Upgrade]. Confirm the pop-up with 'Yes' and the field will be added to the existing list of fields.

This field can then be added to the layout on the “Layout” tab via [Add]. Make sure that the correct font (EAN or EAN half height) is selected.

##### **Import Photo function, improvements save photos in the cloud (23192)**

The existing function to collectively import photos from a hard drive into WinTree® is modified. The imported photos can now be stored directly in the cloud. Please contact TSD if you wish to use this feature.

#### **Sales orders**

### **Import a sales order from the web shop with trade units (23949)**

Both the XML message for sales orders and the message for the import of quotations can now be expanded with trade units. In the XML, this must be specified in the <Orderlines> segment as follows:  
 <Quantity>3,</Quantity> = number of units (or pieces if no Trade Unit is filled)  
 <TradeUnit>1</TradeUnit> = the sales unit, must exist in sales units (otherwise the import will be performed in Pieces)

<UnitSize>12</UnitSize> = quantity per unit

The example above leads to a sales line with:  $3 * 12 = 36$  pieces where the trade unit with sequence number 1 is used.

Please contact TSD if you wish to use this feature.

### ***Deliveries***

#### **Call-up confirmation (doc 140): use the e-mail address of the contact person from the delivery (B) (23856)**

A call-up confirmation can be emailed to the customer from a delivery. The e-mail address used for this is the e-mail address of the contact person selected in the delivery, tab "Delivery info", section General. If no contact person is selected here, the general e-mail address of the relevant customer is used.

#### **Create a delivery, date determination via [Direct] other than via Sales – Delivery (B) (23622)**

After a couple of adjustments it is now possible to transfer the delivery- and supply date from the sales order to the delivery when using [Direct] or the Deliver sales order menu with the use of parameters 814, 815, 816 and 1707. However, a side effect of using these parameters is that when creating a delivery via Sales -> Delivery, the delivery date of a new delivery cannot be adjusted in the pop-up for creating the new delivery. When a sales line is added to the delivery, the delivery date from this sales order is set as the delivery date. This date can then be adjusted manually on the "Delivery info" tab. To prevent this a number of new parameters (2693, 2694, 2695 and 2697) are created. These parameters are used when creating a delivery via the menu Sales -> Delivery. When creating a new delivery via this menu the values from parameters 814, 815, 816 and 1707 are copied to the new parameters after the installation of the new 2022 version.. From that moment on, these parameters are used to determine the data when creating a delivery via the menu Sales -> Delivery.

#### **Use of Picking List and Logistics App (23755)**

The Picking list function in the WinTree® App can now be activated together with the new Logistics-App. If both functions are activated, 6 new columns will become visible via the menu Confirm Deliveries and the tab "delivery alterations" in the menu Delivery.

- On Label: Shows the percentage or number of labels printed.
  - Collected: Shows the percentage or number marked in the Picking List function Collect.
  - Ready: Shows the percentage or number marked in the Picking List function Loading
  - Received: shows the percentage or number of plants received, scanned via the Logistics App
  - Packed: shows the percentage or number of packed plants, scanned via the Logistics App
  - Loaded: shows the percentage or number of loaded plants, scanned via the Logistics App
- It is important to note that the Loading-function in the Picking List function is separate from the Dispatch Control function in the Logistics App.

#### **Remove batch from a planned transport (23334)**

When using the Transport module, both Delivery (Deliver) and Call-up (Pick up) can be planned. It may happen that a delivery with lines allocated on called-up batches is included in a transport and that the call-up is also scheduled to be picked up in the transport.

With the help of parameter 2686 you can set up what to do with the batch when the allocation on the called up lines is removed in the delivery and the transport of this batch is also removed

This parameter has the following value:

1. Ask question with default value Yes - remove from the transport (default value of the parameter)
2. Ask question with default value No - don't remove from the transport
3. No question, but always remove from the transport
4. No question, but never remove from the transport

### **Commercial Invoice Adjustments (23220, 23209)**

Even though Brexit happened a while ago, new requirements are constantly being imposed on import documents. In this version a number of adjustments are made to ensure the export documents from WinTree® meet these requirements.

- Commercial Invoice: option to be sent by email
- Commercial Invoice: weight calculation amended
- Commercial Invoice: option to print the EORI number of the customer

### **Change codes of goods on the CMR to 10 characters (23216)**

Codes of goods are now printed on a CMR with the leading number 0. For example the article code 6029048 will now be printed as 06029048.

### **Import deliveries via XML (23181)**

Sales orders can be sent to WinTree® from a web shop. The XML message that is used for this can now be extended with a field so that a delivery is immediately created after the import of the message in WinTree®. It can also be included in the message that the delivery lines after the import are allocated to batches that have a certain batch phase. This phase is also included as a field in the XML message.

Please contact TSD if you wish to use this feature.

## ***Invoicing***

### **Easily transfer invoices via API (21564)**

The sales and purchase invoices can be processed from WinTree® to various accounting software. This processing is done via export files.

A more advanced option is made for a limited number of accounting software packages, whereby sales and/or purchase invoices are placed directly in the accounting software during processing.

Please contact TSD if you wish to use this feature.

## ***Purchase***

### **Matching plant sizes; the order of matching is adjusted (23925)**

When importing fictive stock the matching is now done by first looking at the already available matches, created by a WinTree® user. If no match is stored then the matching will be done based on Varb or VBN codes.

### **Printing retail labels during Inward goods (label orders) (22714)**

Using parameter 1251 with value 1 the use of label orders can be set. This function offers the possibility to indicate per delivery whether it is a label order. When the plants are received using the Logistics App, a pop-up is displayed on the scanner in which you can indicate whether the retail labels should be printed. This feature was created to provide this printing option when receiving the goods on the scanner.

It is now also possible to print labels using an optical scan-eye. Please contact TSD if you wish to use this feature.

## **General**

### **Drop-down list Contact persons sorted alphabetically (B) (23694)**

All drop-down lists showing multiple contact persons are now sorted alphabetically by surname and first name.

### **Easy to open MyTSD from WinTree® (B) (23691)**

As of January 1st 2022, TSD is using MyTSD to submit support requests. MyTSD is now easily accessible from within WinTree® via the menu Help – WinTree Info. In the opened pop-up, a button [MyTSD] is available that immediately opens the site MyTSD where (if you have been granted rights for this) the support request can be entered.

### **Employees - can copy settings from another employee (B) (23959)**

Many settings are stored per employee in WinTree®. If WinTree® is used with several users at the same time, different employees often use the same settings that need to be set up per employee.

To simplify the management of these settings, a new option is created that allows user settings from one employee to be copied to other employees.

The following settings can be copied:

- screen displays
- screen colours
- order entry columns
- user selections of documents
- user parameters
- roles and authorization

A function `fn_tsd_employees_prop_copy` is created to copy all the settings from one employee to the other. In WinTree® this function can be called up via the button "Copy profile", menu File -> Basic information -> Other -> Employees. This button is only visible to administrators of WinTree®.

In the list of employees, select the employees whose settings should be copied. Click on the button and a pop-up screen will open showing all other employees (sorted by Department, Login). Select one or more employees for whom the settings should be copied to and click on [Alter].

The existing settings of the selected employees are first deleted and then the copied settings will be implemented for the selected employees.

### **Performance improvements (B) (23407)**

In terms of software, a number of important adjustments are made, whereby the performance of WinTree® is greatly improved. This mainly concerns technical adjustments.

A number of changes that are visible to the users:

- When a WinTree® user opens a menu for which a lot of data needs to be loaded, a warning appears in which it can be indicated whether all lines must be loaded or whether loading 1500 lines is also sufficient. This message comes, among other things, when opening the Enquiry menu without a selection.
- Via the key combination <<CTRL>> + <<F5>> a screen can be temporarily set to 'Read only'. As a result, the screen is not automatically refreshed every time.

## **WinTree® App**

The WinTree® App includes many new features and enhancements. The Lifting list function is further expanded and three new, powerful functions have been added:



IT solutions in green

- WinTree® Cash & Carry App
- WinTree® Logistics App
- WinTree® Sort App

**Picking list- function:**

- By default all active deliveries will be shown
- Search on delivery number
- Assign collection area to deliveries

**Cash and Carry-App:**

The Cash and Carry app is the modern successor for the current Cash & Carry system. All functions from the current Cash & Carry menu are also available in the C&C App.

Some of the features are:

- Search by order/delivery/invoice
- New button [More] including the option to print Proforma delivery note and transfer a scanned order to another trade customer. An invoice that is already printed (not a receipt) can also be printed again.
- printing a receipt with or without quantity.
- Calculator to be used when scanning and/or manually adding a product.
- Enter 100% discount.
- Send delivery note by e-mail.
- Print different documents by type (delivery note/invoice)

This new Cash & Carry App can be used in addition to the current Cash & Carry menu. In time (1-2 years) this 'old' menu will phase out.

**Logistics-App (module 122):**

This new function replaces the current In- and Out-going goods scanning on a PDA scanner. The Logistics App currently has the following functions:

- Inward Goods
- Packing per delivery
- Outgoing
- Free package

This new Logistics App can be used in addition to the old PDA menu. In time (1-2 years) this old menu will phase out.