What's new - version 2023

We are pleased to present the new 2023 version of WinTree®. As every year, this means a large number of improvements within the software and we have also once again been able to incorporate many customer requests as new features.

To ensure the security, quality and stability of the WinTree® software, this new version can only be installed on Windows 10 (version 10.0.10240 or higher) or Windows 2016 server (or higher). If you are using a computer or server on which an outdated Windows version is running, the installation cannot be performed.

The most significant and eye-catching improvements included in version 2023 are explained below. Some of the points mentioned will need some assistance of TSD to activate. Some other points are new paid modules/functions.

If you come across something new in this document or version that is not clear as to how it works, feel free to let us know via MyTSD. Our support colleagues will be happy to help. Several titles contain a reference number (issue/ASW). When you mention this number in the request, it is immediately clear to our support colleagues where we can be of assistance.

Items with **WinTree® CONNECT - basic** in the title are available to all users.

General

Optimal security of WinTree® (ASW 833, WinTree® CONNECT - basic)
Having the best information security is obviously essential for everyone, but especially for an ICT company. Not only to ensure the best possible security but also to keep systems functioning properly. Although changes in terms of security are usually not visible to a user, every update contains new and up to date techniques, making WinTree® and the WinTree® App as secure as possible. In terms of security, an important responsibility also lies with the user of the software. For example, make sure you do not share your WinTree® login and password with others.

Saying farewell to Crystal Report (ASW 973)
To maintain stability when printing or emailing a document, TSD started some time ago to replace all standard documents built in Crystal Reports with FastReports. As of WinTree® version 2022, a notification was therefore displayed when using a document built in Crystal Reports. As of WinTree® version 2023, a Crystal Reports document can no longer be used by default. Are you still using an old Crystal Report please contact us via MyTSD and together we will find a suitable solution.

Copy settings (ASW 82, WinTree® CONNECT - basic)
Screen display, print options but also set colours can now be copied between employees. For security reasons, this action can only be carried out by an administrator within WinTree®. In order to do this, open the menu File – Basic information - Other - Employees.
Select the employee whose settings you wish to copy and click [Copy profile]. A pop-up screen is displayed where one or more employees can be selected. Click [Process] to add the new settings to the selected employee(s). The changes become active when the employee restarts WinTree®. The employee can always set their own preferences, within the assigned authorisations.
Exception: Settings for sending e-mails and rights are not copied.

Packaging overview without totals (ASW 186, WinTree® CONNECT - basic)
By popular demand, totals of all packing types are no longer shown at the bottom of the Packing statistics per relation (external) document.

Improved handling of complaints (ASW 480, WinTree® CONNECT - basic)
The menu Contacts - Maintain complaints will show by default the complaints that should be handled by the logged-in WinTree® user. If you want to see all complaints, change the selection via [Search] and remove the employee number at 'To be handled by'. If there are no complaints to be handled by a user, all complaints will be shown automatically.

FastReports, SQL queries which customers may edit (ASW 604, WinTree® CONNECT - basic)
If you use customized FastReport documents and you can make your own adjustments n the Report designer software, you are now able to test these adjustments in the report designer software. Before this was only available for TSD because of the use of database passwords. Via File – Settings – Tab Properties you can find a button [FastReport Password]. With this button you can request an password for the user FastReport. An ODBC source can be set up for FastReport to use this new function.

Contacts

Find employees faster (ASW 321, WinTree® CONNECT - basic)
Everywhere in WinTree® where you can select employees using a drop-down list, this display is now sorted in alphabetical order by the employee's surname.

Check VAT number according to VIES system (ASW 42, WinTree® CONNECT - basic)
In the EU, the VIES system exists which can be used to check the accuracy of VAT numbers. Within WinTree® it is now also possible to use this VIES system* when entering VAT numbers in Contacts – Maintain contacts – Customer- or Supplier information tab.
To use this option, parameter 2719 should be set to value 1. Once this parameter is activated, after entering a VAT number, the validity of the number is immediately checked via the VIES system. This may take a few seconds. If the entered VAT number is known in the VIES system, you will see the company data directly from the VIES system. Choose Yes or No to save or not save the entered VAT number.

*) more information on the VIES system https://europa.eu/youreurope/business/taxation/vat/check-vat-number-vies/indexamp_nl.htm

Stock items

Adjustments to Production Planning (ASW 498)
Production Planning is now extended with the following two functions:

- Sizes can now be grouped according to a preset quality group (parameter 2774). The lines in the Production Planning screen are then entered according to the set quality group. The value of the selected quality is shown in the 'size description' column.
- You can choose whether you want to see lines without the quantity. This can be set via the properties of the Production Planning screen (parameter 2776).

Stock items search extended with EAN barcode (ASW 796, WinTree® CONNECT - basic)
In the extended search window (to be activated via the properties of the Maintain Stock items screen) it is now possible to search by EAN barcode number. When searching on the entered number (or range), the search first checks whether the EAN barcode number is known for an article. If this is not found, the search continues for a supplier barcode.

Calculate desired sales price via price formulas (ASW 934)
Using module 117, Price formulas, it is now also possible to calculate the Desired sales price and the Desired sales price private for batches.
Contact TSD to make use of this feature.

More administrator control on the order-entry screen
Editing the upper part of the order-entry screen can now be blocked for users. The order-entry screen is often used for viewing Stock items as well as for booking quotations, sales orders, purchase orders, purchase offers and stock. Via parameter 2717 (value: 1) it can be set that only the administrator of WinTree® can edit this part of the menu via the Setting modus.

Sales orders

Additional option for pricing (ASW 988, 667)
The order to determine the quotation- and sales prices can be set up. Through an expansion it is now possible to use the base price set up in Stock items. Please contact TSD to use this additional option.

Set composed item per sales line (ASW 353)
Using module 140, Consolidated article, a structure of, for example, a mix cart or tray can be entered in Maintain Stock items. It is now also possible to adjust the structure when entering a sales line. A new Structure tab is available in the order-entry menu for this purpose. A [Use an deviant composed article] button is available on this tab.

NOTE: this button can only be used if the sales line is not yet booked in a delivery.

After clicking this button, the structure from the article is displayed and can be adjusted. If no structure is available in the Stock items for the article, the structure can be created on the spot. The composed items can be placed in the external text of the sales line using the [To external text] button. This allows the customer to see how the sales line is composed.
Contact TSD to use of this additional option of the Consolidated article module.

New merge fields (ASW 46, issue 23626, WinTree® CONNECT - basic)
In the text blocks, type Quotations and Order Confirmation, two new merge fields are available: Delivery condition description and Currency.

Easily change VAT per line (ASW 102, WinTree® CONNECT - basic)
Based on a customer's VAT settings, both quotation and sales lines are given a VAT code. This VAT code can now be changed faster and easier. Per line or for several lines simultaneously. Contact TSD for a more detailed description of this feature.

Delivery of sales orders respects packing types (ASW 771, WinTree® CONNECT - basic)
Within WinTree®, a newly created delivery list can take over all packing from the sales order (Parameter 1233 value = 1). When this is active, it will now also be possible to use this via the Sales – Deliver sales orders function. The packing will then be transferred to the delivery. In the delivery, the packing and/or quantities can of course still be adjusted.

Split sales order lines via Excel (ASW 573)
To supply large sales orders in parts in a simple and fast way, an option is now available that allows splitting sales lines, based on an Excel file.
Contact TSD to make use of this additional option.

New feature: payment in advance (ASW 341)

A new feature is available in WinTree® that allows pre-payments to be booked into a sales order or delivery. A payment booked in a sales order will completely go through to a delivery. This amount can still be adjusted in the delivery. After the delivery has been completed, the paid amount is transferred to the sales invoice. TSD recommends not putting multiple deliveries on one invoice when using pre-payments.

In the sales invoice, the paid amount cannot be adjusted (*). The amount paid can be printed on the sales invoice using a print setting.
If orders are imported from a web shop, payments booked in the web shop can also be included in WinTree® using the import.
The paid amounts from the sales invoices can (depending on the software used) also be exported to the financial administration.

(*) If adjusting the paid amount in the sales invoice is necessary, the module Cash & Carry must be purchased for this.

Contact TSD to use this feature.
TSD can also activate a number of merge fields to show paid amounts also in the header or footer text of a sales order or shipping list.

Pricing extension: Desired sales price based on formulas (ASW 989)

Using parameter 941 (value 1 or 2), it is already possible to use the Desired sales price of the selected batch when booking quotation- or sales lines (via the order entry screen). Now it is also possible to increase/decrease this desired sales price using a customer-specific price formula.
Possible via WinTree® module 117, Price formulas in combination with parameter 2792 (value = 1).
Please contact TSD to use this new possibility.

New feature: Swap! (ASW 839, WinTree® CONNECT - basic)

Allocations of sales or delivery lines can now be easily and quickly swapped with allocations of other lines. We call this swapping. It is also possible to copy allocations from other lines.
A comprehensive guide for this new feature is available by TSD. Please contact TSD to take advantage of this new feature.

Deliveries

Additional print option for lifting lists: print collected via App? (ASW 632, WinTree® CONNECT - basic)

In the print settings of the lifting lists, you can now set whether batches collected via the WinTree® App should still be printed.

Automatic refreshing of delivery when changing sorting (ASW 367, WinTree® CONNECT - basic)

When the sorting is changed from input order/manually converted to plant size sequence number in a delivery, this adjusted sorting is immediately visible on the "Delivery alterations" tab when changing tabs in the delivery. There is no need to reopen the delivery for this.

Transport planning extension: control by postcode (ASW 458)

Parameter 2742 can now be used to determine which address data of a planned transport, for checking the planned driving route, should be sent to Google Maps. The parameter has two values:
1. address, city, country (default value)
2. postal code, city, country

When using addresses outside the Netherlands in particular, value 2 is recommended.
Note that this parameter only works if parameter 2203 (use new version Google Maps) is set to value 1.

Transportation method sorting in transport planning (ASW 410)
The transport method required for transport planning is now sorted by description in all drop-down lists.

Transport planning can process customised delivery address (Issue 23431)
A delivery address can be entered in a delivery. The delivery can then be planned into a transport. Using parameter 2659 (value = 1), it can now be set that a modified delivery address is also directly implemented in the already planned transport.
After setting the parameter, restart WinTree® to activate.

Quick export of a transport to Excel (Issue 18656)
Data from a scheduled transport can be exported to Excel via a (customised) export command. This SQL command is then available in the Extra - Process SQL Statements menu. Using parameter 2328, it is possible to execute this export command directly from a scheduled transport via [Options] - Export. The folder where the Excel file is saved after the export is controlled via parameter 1085. Contact TSD to create an SQL command and activate parameter 2328.

Specifying Load space per transport (issue 18656)
Using parameter 2326, it is possible to specify load space per transport. After activating the parameter, a list of transport units to use can be set up via Basic information - Others - Freight units. When creating a transport, an input field Freight space is available in which a number of the freight units entered can be selected. This field is an indication of the size of the transport, it is not used for further calculations. The standard report for printing the Transport order does not include this field, TSD can create a custom report for this purpose.

New option timeframe per transport line (issue 18656)
In a composed transport, two additional fields 'Alt. Time start' and 'Alt. Time end' can be activated by parameter 2326. A starting and ending time at which the delivery is expected can be entered here. The standard report for printing the Transport order does not include these fields; TSD can create a custom report for this purpose. Via a customised export order, these time fields can also be exported to Excel.

Create EKT message from delivery (ASW 840) In
There are a number of larger garden centre chains in the Netherlands that expect to be supplied with an electronic dispatch list, constructed using the 'auction method', when receiving a delivery. In WinTree®, these so-called EKT (Electronic Clock Transaction) messages, based on a delivery note, can be generated and sent. This does not require the link (separate module) with Floriday. However, WinTree® does need to be set up to communicate with the auction.
Contact TSD to use this feature.

Printing status of some labels not filled (ASW 958, WinTree® CONNECT - basic)
When printing delivery labels, by default the status 'Printed' of the delivery line is filled with the date of printing. If the delivery labels are reprinted, these lines are not printed again. It can be useful that when printing certain labels, this printed status should not be filled. So that when labels are printed a second time, these delivery lines are simply printed again.
For this purpose, parameter 2753 is activated in which the label number can be entered as a value. When printing that label number, the printed status of the delivery lines is not filled with a date. Please contact TSD to make use of this parameter.

Customise collection area via "Confirm deliveries" screen (21892, WinTree® CONNECT - basic)
For each delivery, a collection area can be filled on the "Delivery Info" tab.
Parameter 2574 can be used to set that in the Sales – Confirm deliveries menu, an additional column Collection Area will become visible. The data in this column can be adjusted there directly and is saved within the relevant delivery.
NOTE: This option is only available if parameter 1723 has value 0 and/or module 141 (Multiple collection areas) is NOT activated.
Contact TSD to activate this parameter.

Invoices

Reference by default on manual invoice (ASW 257, WinTree® CONNECT - basic)
When creating a manual invoice (menu Sales – To invoice - Manual Invoice), a reference can be entered on the "Header" tab. If this field is filled, it will be printed in the header of the invoice.

Additional option for collecting invoices (23420, WinTree® CONNECT - basic)
In the Contacts - Maintain contacts menu, it was possible to set whether invoices should be collected per customer. The checkbox has been replaced by a drop-down list in which the choices "By customer / By order / Not" are available
Via the "Per order" selection, it can now be indicated that the invoices originating from the same order should be collected on one invoice.
Via parameter 2664, it can be set that the set selection from the customer data in the Sales - Invoice - Invoice - screen "Selection deliveries to be invoiced" can be changed. In this screen, a column 'Order numbers' has been added in the section where the confirmed deliveries to be invoiced are shown. The confirmed deliveries are sorted by order numbers when the "By Order" is selected for the relevant customer.

New: eInvoicing, sending UBL/XML file via sales invoices (ASW 1196, WinTree® CONNECT - basic)
When sending sales invoices by e-mail, a UBL file can now be included. This standardised file format is already required by a number of public authorities in the Netherlands.
It is also possible, via an additional module, to offer this UBL attachment directly to the customer via eVerbinding.
Contact TSD to take advantage of these options.

Purchases

Checking purchase invoices on the basis of plants sold (ASW 949)
In the Purchase - Purchase invoice*) menu, it is possible to check supplier invoices on the basis of lots called (and received).
It is now also possible to check purchase invoices against what has been invoiced to customers (via sales invoices) and allocated to the supplier. This enables settlement of consignment sales to suppliers in WinTree®.

Contact TSD to take advantage of this new option.

*) can only be used if the WinTree® module Checking purchase invoices (number 102) is activated.

Fictive stock: keep Desired sales price with batch when importing new list (ASW 48)

Using parameter 2283, it is already possible to display and enter a Desired sales price with a purchase offer line.

However, this price was removed on a new import. This can now be avoided by setting parameter 2681 to value 0. By default, this parameter is set to value 1, always override Desired sales price. This then sets the desired sales price to 0.

Fictive stock: import of desired sales price retail possible (ASW 49)

In the import profile for importing fictive stock but also purchase orders, it is now possible to define a column for the desired sales price retail. In addition to the "Desired sales price" field, an additional field "Desired sales price retail" has been added.

Distribute costs per purchase order across lines (ASW 959)

Using parameter 2795 (to be activated by TSD), it is possible to book costs into a purchase order where these costs can be distributed among the purchase lines which are already booked. The booked costs will calculate the PCP (purchase cost price) of the booked batches.

Contact TSD to use this new feature.

TreeCommerce® Messenger

View and correct a wrong match (ASW 649)

During the import of a call up, via TCM, the matches made on matchcode and size code can still be adjusted. These adjustment(s) are then saved in the list of matched plant names and sizes.
Click on the pencil icon (below the quantity field) to adjust the match.

WinTree® App

The version of the WinTree® App is developed separately from the standard WinTree® version. Unlike the WinTree® version that becomes available every summer, versions for the WinTee® App roll out more frequently.
The What's new document for the App version can be accessed via the [New] button, on the startup screen in the WinTree®-App.

In this document, we limit ourselves by explaining only a few changes that also directly relate to the WinTree® Nursery manager software.

Allocation view: New function available in the app (ASW 509, WinTree® CONNECT - basic)

The Allocation view will give you an overview of the allocated delivery lines for selected locations. When allocating delivery lines you will have overview on which locations an allocation is already set up, which will ensure the effective use of people and machinery. Batches collected via the picking list function will disappear from the overview with the help of an extra parameter. Contact TSD if you want to set up this new option.

Printing Delivery note with trolley contents via Logistics App (ASW 471)

A separate user-report can be activated by TSD with which a Delivery note with trolley contents can be printed. The Delivery note shows which batches are packed on which trolley.
Contact TSD to make use of this additional document.