

What's New - Version 2024

We proudly present the new WinTree® version 2024. Like every year we developed a significant amount of improvements within the software and also incorporated many customer requests as new features.

This new version can only be installed on Windows 10 (version 10.0.10240 or higher) or Windows 2016 Server (or higher) in order to ensure the security, quality and stability of the WinTree® software. If you are using a computer or server with an outdated version of Windows, the installation cannot be executed.

We will highlight the most important and noticeable improvements included in the 2024 version below. Several features require assistance from TSD to activate. Additionally, there are items concerning new paid modules/features. If features mentioned in this document are unclear, please let us know via MyTSD. Our support team is happy to help. A reference number (issue/ASW) is mentioned in the heading, when you reference this number in your support request the support colleague will be able to assist you accordingly.

Items labelled with **Basic** in the heading are available to all users.

General

TreeCommerce Messenger: technical improvements within communication connection (ASW 1097, Basic)

TSD continuously works on improving and optimizing the software, this includes the connection between systems. A technical improvement in the communication between WinTree® and TreeCommerce® Messenger (TCM) has been achieved. When WinTree® is started by an administrator a notification appears indicating that the API key (communication key to TCM) needs to be replaced. Upon closing this notification, the TCM settings are opened. You can then click on the 'Replace TreeCommerce Messenger' button. The TCM web portal will now open. Log in with the correct login credentials for TCM. Copy the displayed API key by clicking on the icon next to the key. Go back to the WinTree® software and paste the key into the 'API key' field. Press the 'TAB' key and then click on 'Check connection with TreeCommerce Messenger'. If the connection is successful, a notification will be shown. If the updated API key is not retrieved immediately by first notification, the notification will be shown each time the administrator logs in. This notification will continue to appear until the API key is replaced.

Employees: Any employee can be selected in the App (ASW 1515, Basic)

Every employee available in WinTree® can be selected as an App user (cloud user). It is now also possible that a changed password of an employee will be forwarded to the historical databases (if the employee is available in said database). To achieve this, the already existing property in File -> Settings -> 'Properties' tab must be present.

Creating text blocks; procedure adjusted (ASW 1687, Basic)

The procedure regarding Text blocks and the format of which is improved.

It is now possible to alter the layout of the text blocks which are printed on the documents within WinTree®. The text can now be made bold, italicized, or underlined to make the text stand out more. NOTE: When copying and pasting from another programme, the formatting is completely removed leaving only the text. Afterwards, certain formatting can still be changed.

The font and font size can only be altered for text blocks which are created for e-mail texts.

You can now also choose to apply the altered text blocks to all the different menu's in which this Text block is available. You can choose to either not apply the altered text block in the menu's where this text block is in use and only use the altered text for newly created documents, to apply where the text block is already in use but not manually altered in the document, or to apply on all the documents.

NOTE: Formatted text blocks can only be printed or included in the PDF when the standard report is being used. Special user reports, even if they are made in FastReport, cannot use these formatted text blocks. To achieve this, TSD must make adjustments to the user report.

Stock items

Customer article information: increasing prices per article group percentage-wise (ASW 1079)

Items stored in Customer Article information can already be increased by percentage. Using parameter 2791, it is now possible to set the correct percentage per article group. Open the menu 'Contacts' – 'Article information contact'. By selecting the correct contact, the stored articles are displayed. Then click on 'Options >>' and choose 'Modify prices by percentage..'. In the pop-up, the source and target prices can be set. Now set the correct percentage for the factor per article group. Factor 100 means 'Target price equals Source price'. If the target price needs to be increased by, for example, 10% compared to the source price, enter factor 110. A factor of 95 will decrease the target price by 5% compared to the source price.

Catalogue: increasing prices per article group percentage-wise (ASW 1079, Basic)

It is already possible to increase prices of batches included in a catalogue or stock list by a certain percentage. However, using parameter 2793, the desired percentage can now be set per article group, adjusting the prices in the catalogue. This new feature can only be used in a catalogue and not in a stock list. In the selected catalogue click on 'Options >>' and choose 'Modify prices by percentage..'. In the pop-up, the source and target prices can be set. Now set the correct percentage for the factor per article group. Factor 100 means 'Target price equals Source price'. If the target price needs to be increased by, for example, 10% compared to the source price, enter factor 110. A factor of 95 will decrease the target price by 5% compared to the source price.

When the catalogue is refreshed, either manually or automatically, the prices in the list will retrieve according to the settings in the list again. The previously adjusted prices per article group will also be reset.

Stock alteration: option to search by location number (ASW 1035, Basic)

When doing stock alterations, as well as removing allocations, you can now select based on location numbers. When WinTree® has a multitude of locations it can become very tricky to select the correct location. With the help of parameter 2785 (value = 2) it is now possible to select based on location number. Click on the dropdown list in which the locations are shown and type in the number of the correct location.

The option to select on location number is only available for stock alterations and managing stock. The alterations can only be done when the allocations are adjusted or removed.

Stock items: adjusting Base price from a sales line (ASW 932)

With the use of parameter 316 it was already possible that if the base price of an article is 0 that this will be changed to the first sales price of the article when first sold. This parameter has an extra value (= 2), which will always alter the base price to the sales price which is entered in the sales order. This does not include sales prices entered via the Order Entry screen in the sales order.

Stock list: additional translation options (ASW 990)

With the help of parameter 2824, to be set by TSD, the Stock list can be translated more efficiently. If parameter 2824 is set to 1 and the Stock list is created in English, Contacts can be linked to a listing through a selection. The language of the linked Contacts (always create a selection with Contacts with the same language codes) is now used in the listing. The button 'Texts' now displays the text blocks of type 'Stocklist' with the language code of the selected Contacts. A dropdown menu with languages is now available at the top of the screen, with English selected as a standard. Merge fields are also included in the email text for the listing to make the email text more personal. In the properties of the 'Print options' for the 'Listing (personalized)', codes @3 (Contact match code) and @5 (reference) are used for naming the attachment. Note: Select the correct language code when creating the stocklist. Contact TSD to start using this extra option.

Booking lines using a SKU code (ASW 1315, Basic)

A SKU code (Stock Keeping Unit) is an alphanumeric field for items that can be used when booking lines via the Order-Entry menu in WinTree®. Think of Stock, quotations, sales orders, fictive stock, and purchase orders. The use of the SKU code is an alternative to entering a matchcode or searching by Latin name. After entering the SKU code per article in 'Stock items' – 'Maintain stock items*'), this code can be used in the Order Entry menu. Contact TSD to activate this new feature.

*) If the module for importing stock items is available, the SKU code can also be imported per article from Excel.

Stock App: option to show 0 batches (ASW 1380)

Via the 'App settings' of the Stock App, a new setting is now available to show batches without stock (0 batches). Open the 'App settings' and set up 'Show empty batches' per user. When stock is managed via the App, the stock of a batch that is at 0 in WinTree® can now be altered via the App.

Contacts

Contact persons replace and then delete (ASW 1056, Basic)

Via Contacts - Maintain contacts it is now possible to delete Contact persons on the tab 'Contact persons'. When the selected contact person is not in use in WinTree® you can safely remove this data. When the contact person is in use within WinTree®, for example in a Quotation or sales order, a pop-up will appear giving you the possibility to select a different contact person of this Contact, in which all the data will be replaced with the newly selected contact person.

Title contact person visible in drop-down lists (ASW 1709, Basic)

When selecting a contact person in a quotation, sales order, delivery or purchase order, the title of the contact person is now visible. The title is shown between () behind the name of the available contact persons.

Search based on city adapted (ASW 1765, Basic)

Searching based on city within contacts has been amended. Where the search first included the alternative delivery addresses it now only focusses on the city in the standard postal-, delivery-, invoice- or visiting addresses of the contact.

Sales Orders

Proforma Invoice: Set up Header- and footer text and contact person (ASW 1054, Basic)

You can create a proforma invoice via the Free document with the use of parameters 1902, 1903 and 1904. With the addition of parameter 2630 it is now possible to set up the preferred header- and footer texts. Value = 0 will ensure that the header- and footer text of the source (sales order, delivery) is used. Value =2 will activate the option to choose which standard invoice Header- and footer texts will be used.

With the help of parameter 2786 you can now also set up which Contact person to send the proforma invoice to. Looking at the contact person which is set up in the contact info under the tab 'Communication'. Value 0 = Free document, Value 1 = Invoice.

Removing multiple allocations faster (ASW 1046, Basic)

When deleting multiple selected lines, the 'Enter' key is now better focused on the buttons. This allows multiple allocations to be removed more quickly by just pressing 'Enter'.

Colour codes, also selectable per sales line (ASW 1089, Basic)

It was already possible to select a specific colour code per delivery line. It is now also possible to select one of the available colour codes from a dropdown list *) per sales line. The chosen colour code of the sales order line is then transferred to the delivery line when you book an delivery. The colour code can still be adjusted in the delivery line.

*) The dropdown list with the colour codes can be managed by the WinTree® user themselves in the menu 'File' - 'Basic information' - 'Stock' - 'Colour Codes'.

Booking Prepayments (ASW 341)

There is a new parameter available in WinTree® which activates the option to book pre-payments in sales orders or deliveries. Payment booked in a sales order is transferred into the delivery when the delivery is made. When the delivery is confirmed the payment is copied into the sales invoice, making it visible on the invoice how much the customer has already paid. Contact TSD if you want to activate this new function.

Importing webshop orders: Putting Retail Data in Sales Order (ASW 407)

When importing sales orders from a webshop, the stored retail data (Article information Contact) is now also stored in the sales lines. If the retail data is send in from the webshop, this data will be stored in the sales lines in WinTree®.

Quotation: Option to reduce quotation quantity when booking to orders (ASW 683)

With the use of the new parameter 2844 it is now possible to reduce the remaining quantity of the quotation based on the quantity in 'To order'. For example, if a quote line contains a quantity of 100, and 25 pieces are booked to a sales order, 75 plants remain in the quotation line after booking to a sales order.

Quotation: Booking to order with quotation text as Delivery note text (ASW 1144)

When booking a quotation to a sales order, it is now also possible to include the quotation texts as texts for the Delivery note. An extra option has been added for this in the 'Copy Header/Footer text quotation' option in 'Transfer quotation'. Via the dropdown list, you can now also choose 'Yes – also to delivery'. The header-, footer-, and email text of the quotation are transferred to both the sales order and the delivery note.

Sales Order Lines with allocations: Easier to delete (ASW 1535, Basic)

When deleting order line with allocations, it was previously necessary to remove the allocation of each line separately. If an order line was already included in a delivery (not yet confirmed), the order line could not be deleted via the sales order. Parameter 2842 can now be set to determine how the 'Delete' button is used with order lines.

The available options of this parameter are:

- 0 - Standard, delete allocations per line with all options
- 1 - Option between Standard (with pop-ups) or Quick, default Standard
- 2 - Option between Standard (with pop-ups) or Quick, default Quick
- 3 - Quick, no pop-ups

Standard = delete lines with pop-ups about allocations, lines in delivery cannot be deleted.

These lines must first be removed from the delivery.

Quick = delete sales order line, including those in delivery, no pop-ups (allocated batches remain present and become available as free stock). Sales order lines that have already been delivered (delivery is confirmed) can never be deleted from the sales order.).

Sales Order Lines: Automatic Allocation to Fictitious Stock on Delivery (ASW 1548)

If a batch is selected but not allocated when booking a sales order line, where automatic allocation is required, an allocation will now be made to the preferred batch if it is in Supplier offers when delivering a sales order. The allocation on the preferred batch will create a new purchase order line. With the use of the existing parameter 716 you can determine on which purchase order this line will be added.

Delivering via the [Direct] button - option to allocate (ASW 1684, Basic)

There is an option to directly allocate the sales order lines when you transfer an quotation to a sales order. With the 2024 version there is a new checkbox 'Allocate delivery' present when transferring a sales order via the 'Direct order' button. This function will ensure that the delivery lines are allocated. The allocation will use the standard procedures for determining on which batches to allocate.

When the checkbox is ticked it will always allocate, even when the properties of the delivery screen are set to "do not allocate".

Automatic Allocation to Batches with Date ready in the future (ASW 1704, Basic)

WinTree® has various options for automatically allocating sales order lines to existing stock. An extra option is added, which allows you to allocate to batches with a Date ready in the future based on the sales order delivery date. The batch stage of the stock batch is also a factor when allocating. Contact TSD for more information about this feature.

Delivery

CMR: Extra option to select the transporter of the transport (ASW 1132)

Via the properties of the CMR screen an extra option is now available to select the transporter of the transport via the dropdown menu.

Adding packing to a confirmed delivery (ASW 1088, Basic)

With the help of parameter 2810 is now possible to add packing to a confirmed delivery, which is not yet invoiced. Set parameter 2810 to value 1 to activate this feature.

Loading time when opening Delivery has been reduced. (ASW 1360, Basic)

When you open a delivery WinTree® will load all the outstanding Sales order lines. With the use of parameter 2819 this can be filtered. Only the outstanding sales order lines which are partly booked into deliveries will be loaded when parameter 2819 value is set to 1.

If you create a delivery with this parameter activated you will only be shown a select amount of sales order lines. For example, when you have 3 sales orders, in which 2 sales orders have lines that are booked in delivery, you will only be shown the sales order lines of those 2 sales orders and not the third sales order.

Use the menu 'Deliver sales orders' if you want to create an delivery from a sales order where no lines have been booked in a delivery yet.

Planning overview: holidays from Office Manager visible (ASW 1208)

If WinTree® Office Manager is active, holidays are now visible in the planning overview. In addition to the date, the description of the holiday will be displayed in **bold red**. When selecting a date (for example, a delivery date) via the calendar, the holidays are displayed in bold.

Lifting list: option not to print collected lines (Picking list app) (ASW 1289)

When printing lifting lists, document 9, 92, and 231, a new print setting 'Also print collected lines in App' is available. By unchecking this checkbox and saving, lines collected via the 'Picking list-App' will not be printed when printing the lifting lists.

Creating deliveries based on date ready of the allocated batches (ASW 1424)

WinTree® now offers a new feature that will allow you to collectively create deliveries based on the Date ready of the batches, which are allocated on sales orders and deliveries.

After selecting the batches ('Stock items - 'Maintain stock') you go to 'Options >> - Deliver batches..' to create the deliveries for the allocated batches. Contact TSD if you want to use this new feature.

Link with IPAFFS system for import in United Kingdom (ASW 1837)

The IPAFFS system of the British government must be used to export plants to the United Kingdom since April 2024. As an addition to the existing e-Cert feature, an IPAFFS file can now also be created, which can be imported into this system. Contact TSD to use this new addition in the e-Cert feature.

e-Cert feature adjusted to comply with the new requirements (ASW 1898)

The export files created using the e-Cert feature are expanded with a number of additional fields to comply with the new requirements of e-Cert.

Invoices

Invoice menu: showing deviating VAT percentages and codes (ASW 472)

In WinTree®, deviating VAT codes can be used, for example for private sales to individuals outside your country. These deviating VAT codes are now also correctly displayed in the invoicing menu of WinTree®.

Purchase orders

Fill in representative of purchase order with logged-in user (ASW 697)

With the help of parameter 2820, it can be set whether the logged-in WinTree® user should be linked as a representative to a purchase order. Parameter 405 has been available for some time for filling in the representative's initials of the logged-in user on the quotation and sales order.

Purchases for delivery lines: an automated process - Purchasing robot (ASW 1085)

The WinTree® 'Purchasing robot' is a fully automated process that can be used to allocate (marked) delivery lines on existing purchase rules or fictitious stock (= supplier offer line). When allocated by this process on fictitious stock, a purchase line will automatically be created for this. Contact TSD to use this time-saving feature.

Purchase invoices: adjusting cost price based on current exchange rate in batches and statistics (ASW 1099)

By using parameter 2818, it is now possible to adjust the cost price of the existing batches and the cost price stored in the statistics when creating purchase invoices in a foreign currency based on the current exchange rate of the foreign currency.

Call Up and Direct Purchase now possible to split into 2 separate E-mails! (ASW 1513)

A long awaited complaint of many WinTree® users was that the Direct Purchase in the PDF was often times overlooked by their suppliers.

By setting parameter 1268 to value 2, it becomes possible to send a 'Call Up' and a 'Direct Purchase' as separate emails to the supplier ensuring that the Direct Purchase can no longer be overlooked. Values 0 and 1 were already available for this parameter. When doing a call up with the parameter set to value 0 or 1, the function within WinTree® stays the same as usual. TSD has an extensive manual available for this adjustment.

Inward goods: improvement in speed when receiving goods (ASW 1701)

The processing speed of receiving goods via the 'Purchase' – 'Inward goods' menu has been greatly improved. Only the lines with a filled in quantity will be processed when clicking on 'Receive' or 'Return', making receiving goods much faster.

Inward goods: option to print Order lifting/call up labels(ASW 1734)

When receiving goods, it is now possible to print, in addition to the Delivery lifting/call up labels and stock labels, Order lifting/call up labels. These labels have been added to the print group 'Inward goods'

Transports

Load info visible on Confirm deliveries (ASW 95)

In the menu 'Sale - Confirm deliveries', a new column 'Load info' is now visible. This column displays the loading information from the Delivery. This information can also be adjusted in this menu. The adjusted text is saved then saved in the delivery.

Note! If the delivery is already scheduled in a transport, the load info shown with the delivery in the transport will not be amended.

Selecting contact person (ASW 1129)

Via parameter 2797 (value = 1), it can be set whether a contact person can be selected in the transport line. When a delivery is placed in a transport, in the scheduled line, one of the contact persons from the contacts info can be selected by double-clicking in the 'Contact person' column. When placing the delivery in the transport, no contact person from the delivery is selected. In the 'Transports' screen, a separate address based on a selected contact can also be added to the transport using the 'T' button. A contact person can be selected for this line, by double-clicking on the 'contact person' field.

To get the selected contact person (with name, mobile- and telephone number) also on the 'Transport' order (document number 374), TSD can adjust the existing report for this. Contact TSD for this adjustment.

Improvements when filtering in search windows (ASW 1365)

The options to save selections in the search windows of the 'Transports' menu have changed. TSD has an extensive manual available for this adjustment. Ask for this through the support department.

Memo field of delivery visible (ASW 1564)

In 'Maintain Transports', the column 'Info' is now made yellow (background) if the corresponding delivery contains a Memo text. Click on 'Info' to show the 'Info' screen. Previously, only an overview of the contents of the transports was displayed here. This data screen is now placed on a tab. If the

memo field is filled in, it will be focused on this when opening the 'Info' screen. The memo field cannot be changed here. In addition, the screen can be closed with the 'Esc' key.

WinTree® App

Stock function

Option to book stock (ASW 656)

In the WinTree® Stock App, existing stock can be adjusted directly. We also offer the option to quickly scan stock, with the scanned batches later processed in WinTree® Nursery Manager. TSD has an extensive manual available for this additional function. Contact TSD to use this function.

Picking list function

Collect per Delivery: filter option on Present and On the way (ASW 986)

In the Picking list app, 'Collect per Delivery', batches on location (status 'Present') as well as batches on the way (called up) are displayed. The batches 'On the way' can now be removed from the list by means of filtering. Per App user, this filter can be turned 'On' or 'Off' in the App settings. It is also possible to display batches in purchase order with a filter.

Logistics function

Option to print a CC-Container label from WinTree® (ASW 676)

When using the Logistics App, a Container label can now be printed from a Delivery in WinTree® Nursery Manager. For this purpose, an extra tab 'Container' is available in the Delivery menu. This tab

displays the contents per container and the label can be printed. The layout of this label is the same as that of the Container label that can be printed via the scanner.

Select default container with highest number when packing (ASW 715)

In the 'Pack by delivery' function, in the Logistics App, the highest container number is now selected by default. Of course, another container can still be selected to further fill it.

Batches harder to remove from Container (ASW 720)

By means of the new parameter 124, it is possible to receive a pop-up when removing a line from a cart, in which the removal must be confirmed. This pop-up is standard enabled if the parameter is set. However, the pop-up also contains a blue line on which it can be set that the pop-up will no longer be displayed with a subsequent removal. Note that from that moment on, the pop-up will no longer be displayed. The administrator of the App can always turn on the parameter again via the App settings to display the pop-up when confirming.

Cash & Carry-App

Search by Latin name when doing returns (ASW 1497)

In the C&C-App, when doing returns, it is now possible to search by Latin name. The first invoice line containing the entered Latin name will be opened. This line can then be processed further as a return