OGL Software

Release 87
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Contents

A lot of the changes in this release have been made because of the Windsor Framework arrangements that are due to be introduced on 30th September 2024. From that date, any consignments that are delivered to Northern Ireland will need to be designated as either 'at risk' or 'not at risk' of entering the EU. For a consignment to be identified as not at risk of entering the EU, either the exporter or the importer of the goods needs to have applied to HMRC for an authorisation under the United Kingdom Internal Market Scheme (UKIMS) – a UKIMS authorisation number, along with an EORI number, needs to be included in the information supplied by the exporter to the carrier. If a consignment is at risk of entering the EU, full EU import rules will apply and goods will require EU duties to be paid for by the importer, if applicable. If a consignment is not at risk of entering the EU, goods will not be subject to processing in Northern Ireland and will not have any duty applied.

A consignment will be covered by the Windsor Framework if it is delivered on or after 30th September 2024 to an address in Northern Ireland (i.e. the postcode of the delivery address begins with 'BT'). For such consignments, as part of sales order processing, the user will need to indicate whether the goods are at risk of entering the EU. The consignment can only be designated as not being at risk if the exporter, or the customer, as the importer, has a UKIMS authorisation number. There is a further consideration in that we have seen documentation that suggests that a consignment cannot be designated as not at risk if it contains a product that might be subject to duty in the EU that is higher than the equivalent duty in the UK. If this turns out to be the case, we have allowed for products to be identified as needing to be considered as always being at risk of entering the EU.

The main purpose of the changes to prof.ITplus for the new Windsor Framework rules is so that any carrier integration file produced on despatch can include all the necessary information for deliveries to Northern Ireland. The 'at risk' indicator, the appropriate UKIMS and EORI numbers, and an indication whether the importer is a 'business' or a 'customer' will be included in any carrier integration file for those carriers that have updated their file formats. So far, the only updated file format we have received is from DPD, so this is currently the only carrier within prof.ITplus that is fully compliant with the Windsor Framework. At the time of writing, we are still waiting for an updated format from UPS, and once changes are available in prof.ITplus, this will be communicated. Any sites that intend to use any other carrier for deliveries to Northern Ireland will need to discuss this with your Customer Success Manager.

Sales Ledger

A new textbox for a customer's UKIMS authorisation number has been added to the 'Customer Details' screen, appearing below the 'VAT Reg / EORI / UKIMS' label at the bottom left-hand corner of the screen. The textbox will be enabled if Windsor Framework facilities are in use (see the Company Details' section) and if the customer has a Northern Ireland address (i.e. the postcode begins with 'BT'.

Similarly, a new textbox has been added to the 'Imported Customer Details' screen, into which a customer's UKIMS authorisation number can be imported, or manually entered.

Purchase Ledger

No changes in this release.

Stock Control

A new 'UKIMS At Risk?' checkbox has been added to the 'Levels/Misc' section of the 'Stock Details' screen. We have seen documentation that suggests that, for some products, levels of duty in the EU will mean that any consignment containing any of those products cannot be identified as not being at risk of entering the EU. If this is indeed the case, ticking this checkbox for a product will mean that, for any order including the product will always be identified as at risk of entering the EU.

Similarly, a 'UKIMS At Risk?' checkbox has been added to the 'Imported Stock Details' screen, so that an 'at risk' setting can be imported or manually entered.

Nominal Ledger

No changes in this release.

Quotations / Sales Enquiries

The 'Quotation Entry' program has been modified so that, when raising a sales order from a quotation, if Windsor Framework rules are applicable to the order (see Introduction, above), a prompt will now appear asking whether or not the goods on the order are at risk of entering the EU. If the order contains a product that is marked as being at risk, no prompt will appear, and the order will automatically be marked as being at risk.

Sales Order Processing

The 'Sales Order Entry' program has been modified so that, when adding a sales order, if Windsor Framework rules are applicable to the order, a listbox will now appear in the 'Overall Discount And Carriage' window that is displayed at the end of entry of the order. The user will be asked to select an entry

in the listbox to confirm whether the goods on the order are at risk of entering the EU. If the order contains a product that is marked as being at risk, it will only be possible to select the 'at risk' entry in the listbox.

Also in the 'Sales Order Entry' program, when using the Value option to display the total value and cost of the order, if Windsor Framework rules are applicable to the order, a listbox will be displayed in the pop-up window confirming whether the goods on the order are at risk of entering the EU.

Purchase Order Processing

No changes in this release.

Invoicing & Pricing

No changes in this release.
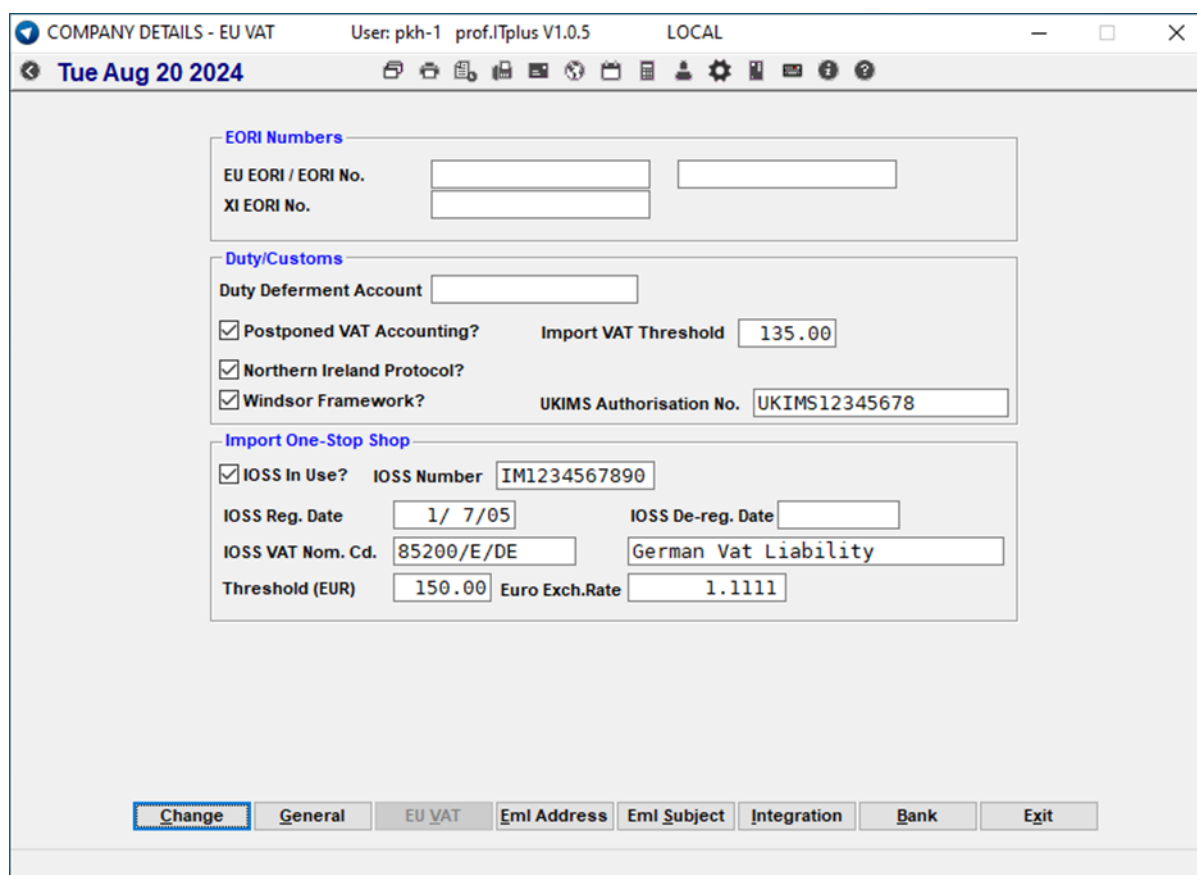
Sales Analysis

No changes in this release.

Purchase Analysis

No changes in this release.

Company Details

A new 'Windsor Framework?' checkbox has been added to the 'Duty/Customs' section of the 'EU VAT' screen in the 'Company Details' program. The checkbox should be ticked if Windsor Framework facilities are in use because sales orders are to be processed for customers in Northern Ireland, so that, when entering or raising sales orders for these customers, the user can confirm whether the goods on the order are at risk of being moved into the EU area. Once the checkbox is ticked, an adjacent 'UKIMS Authorisation No.' textbox will be enabled. If the company has applied for and been allocated a UKIMS Authorisation Number, the number should be recorded in the textbox.
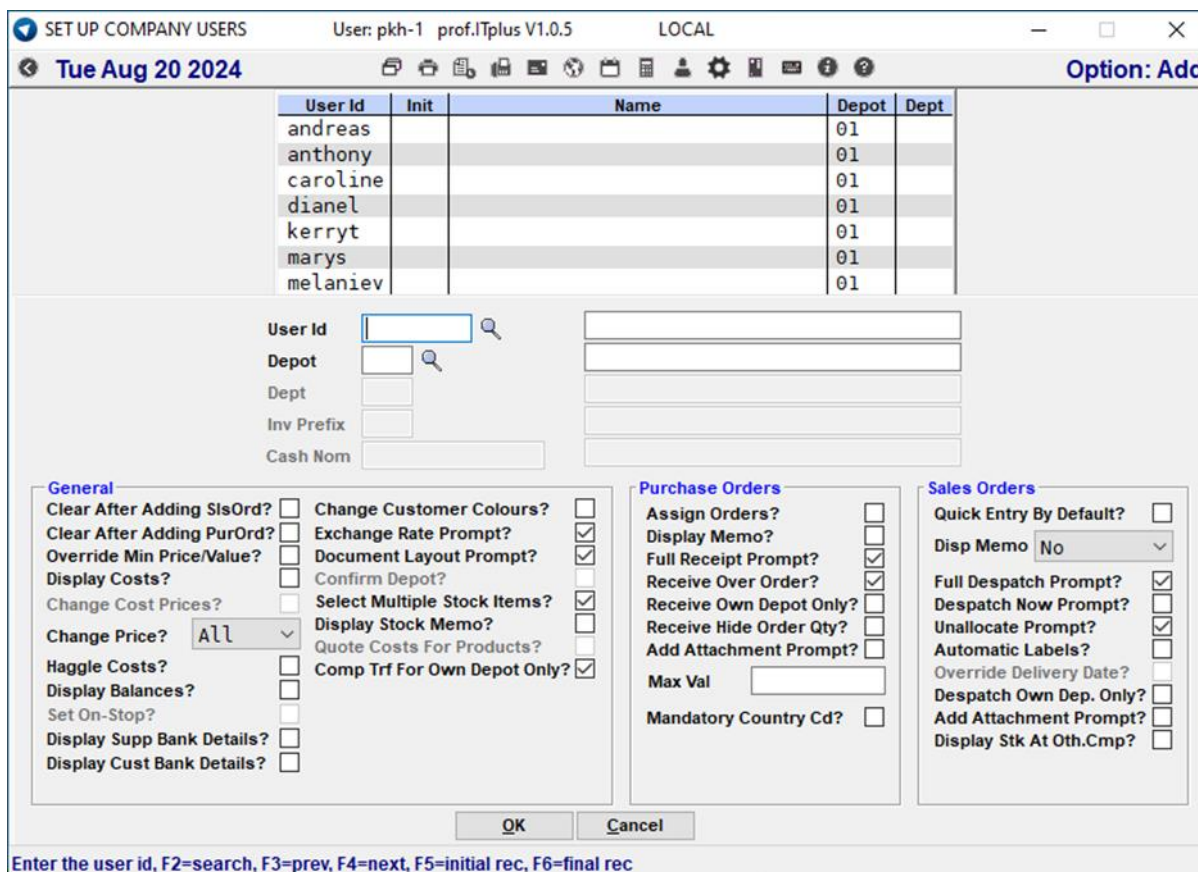
If you have a requirement to turn this feature on, then please arrange to speak to your Customer Success Manager.

Please note: If you are moving sanitary or phytosanitary goods, or goods subject to specific controls, or agrifood retail goods, then extra steps apply which are not covered by the feature.

The information contained in this document is for general guidance only. We recommend that you seek appropriate professional advice on your particular circumstances because the application of laws and regulations will vary depending on the particular circumstances and because laws and regulations undergo frequent change.

For those sites that have the 'Display Stock Levels At Other Companies?' checkbox ticked in Stock Parameters (to display the stock level of an item at other companies within an organisation during order entry), a flag has been added to the 'Set Up Company Users' program so that the display of stock at other companies can be restricted to specified users. When adding or changing a user, a 'Display Stk At Oth.Cmp?' checkbox has been added to the 'Sales Orders' section of the window that is used to enter user details. The checkbox will be blank by default, so it will need to be ticked for those users that should be able to see stock levels at other companies.

Return Order Processing

No changes in this release.

Works Order Processing

No changes in this release.

Customer Relationship Management

No changes in this release.

Miscellaneous

For web integration there is a limit to the timescale of archived transactions that are exported to websites. At the moment this is fixed at 180 days.

A change has been made to allow for a property to be set on the server to increase this.

Please note that an increased amount of transactions will lead to longer exports as the number of days requested will have a direct impact on data volume.

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 user's 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 PCs 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.

Please note OGL will no longer actively develop for, or amend, programs to work with end-of-life Microsoft products. Where practical we will attempt, on a reasonable endeavour's basis, to resolve any incompatibility problems reported, however it is OGL's recommendation that unsupported Microsoft products should be upgraded to latest versions 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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