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FOR SOFTWARE

AXIS Diplomat 2006

New Features Overview

Release Date: 1st November 2006

Introduction

This document outlines just some of the major benefits that you can expect to see by upgrading to AXIS Diplomat 2006 from the previous edition of software, AXIS Diplomat 2004.

This list is by no means exhaustive and further enhancements will continue to be added after the initial release in the form of on-going level updates; please check with the Axis First web site at http://www.axisfirst.co.uk/diplomat2006 for the latest product information. Level updates within the AXIS Diplomat 2006 release will be free to all of those users with current support contracts.

To keep up-to-date with the latest developments, we would encourage you to subscribe to our email newsletters by visiting http://www.axisfirst.co.uk/newsletters and clicking on “Subscribe”.

The key highlights are:

- Business Intelligence Module
- Document Designer
- Allocation Tracking
- Wide-ranging interface improvements, including
    - Saved User Responses and default tabs
    - CSV Export on all scrolling lists
    - Hard Copy (Print) on all scrolling lists
    - Search on any scrolling list
    - Column sorting on scrolling lists
    - Column re-ordering on scrolling lists
- Functional improvements, including new Cash Book and Nominal Ledger improvements, such as new Nominal Journal functions and Historical Reports
- Many modules that were previously optional are now standard, including Gap Analysis and Credit Note Tracking
- Improved SQL Server support

These, and other, enhancements are described in more depth in the rest of this document.

AXIS Diplomat 2006 is now available in three editions -

- AXIS Diplomat 2006 Express
- AXIS Diplomat 2006 Small Business Edition
- AXIS Diplomat 2006 Medium Business Edition

Section F at the rear of this document contains a detailed breakdown of the differences between the three editions.

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Management Overview - 5 Reasons to Upgrade

This document contains detailed information on the key advances to be found in AXIS Diplomat 2006, compared with AXIS Diplomat 2004. There are literally hundreds, if not thousands, of additional enhancements that are simply too numerous to mention. If you are still running AXIS Diplomat 2000SE then you will also gain all of the benefits of AXIS Diplomat 2004 when you upgrade. These are covered by an equivalent document, which can be found by visiting www.axisfirst.co.uk/diplomat2004 and selecting “Upgrades”.

Naturally, different features of any upgrade will be important to different users. There are, however, 5 key reasons to consider upgrading which will be equally applicable to every user:

1. Better Control of your business through greater Management Information

   Get a much better picture of how your business is doing; the growth areas and the areas that maybe need a little attention before its too late, by using the Business Intelligence module, in conjunction with KPIs and Targets. Export information more easily to Microsoft Excel™. Use Gap Analysis to identify those customers that buy one type of product but not another, or used to buy something that they now don’t.

2. Create a Better Impression with your Clients

   Using the Document Designer, make sure all of the documents that you produce create the right impression.

3. Greater Productivity through Improved Efficiency for your Accounts staff

   The Allocation Tracking facilities make it much quicker and easier for you to identify who paid what, when and for what. The new Cash Book functions are quicker and easier to use, as are the revised Nominal Journal functions.

4. Improved Efficiency for Everyone!

   The numerous productivity tools new at AXIS Diplomat 2006, including being able to sort, search and output any scrolling list of data, make everyone’s job easier.

5. Protect Your Investment

   With the advent of AXIS Diplomat 2006, you can now take advantage of Software Assurance, which means that for a fixed monthly sum, you will be automatically entitled to future version upgrades as and when they are released, with no further upgrade licence fees. From time to time, Software Assurance customers may also be offered the opportunity to receive specific new features ahead of general release.

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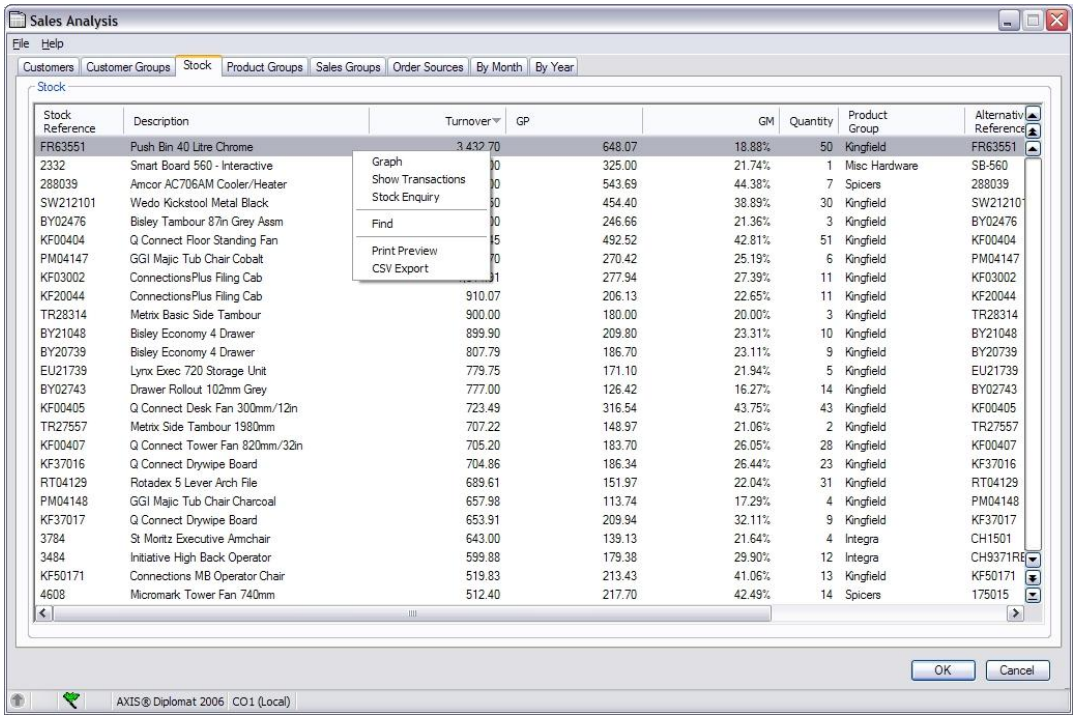
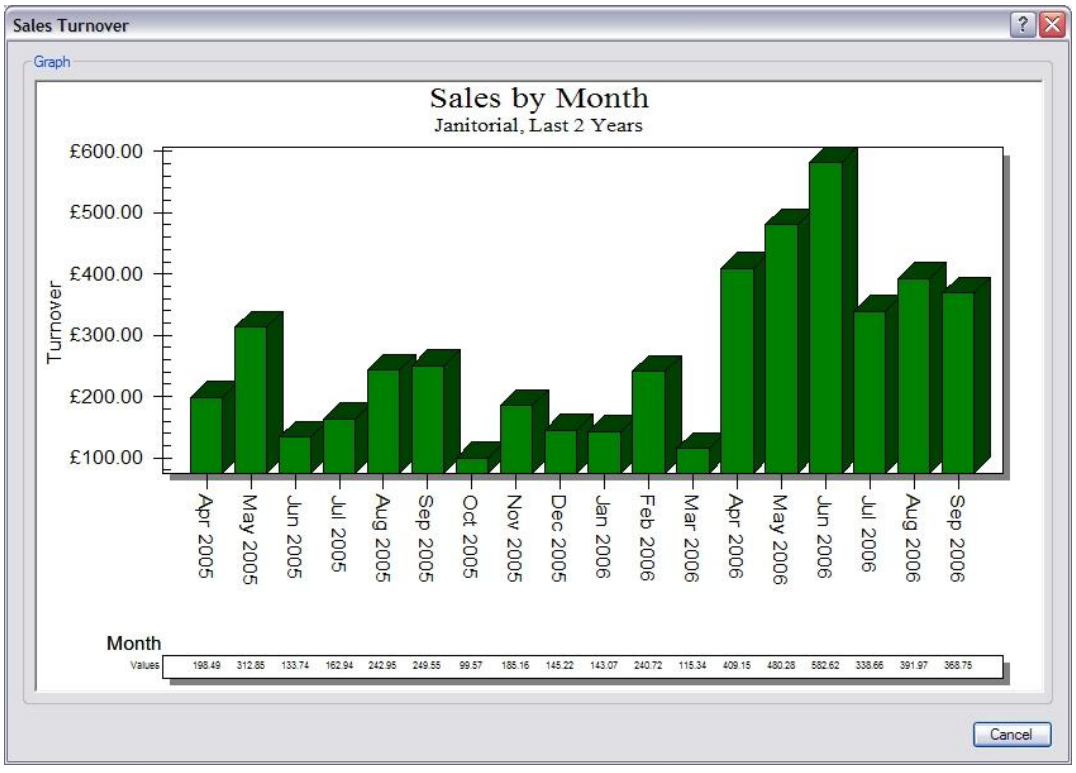
Section A : General Enhancements

A1. Business Intelligence Module

The Business Intelligence Module provides a number of functions that allow you to monitor the performance of your business in the way that suits you.



Stock Reference	Description	Turnover	GP	GM	Quantity	Product Group	Alternative Reference
FR63551	Push Bin 40 Litre Chrome	3,432.70	648.07	18.88%	50	Kingfield	FR63551
2332	Smart Board 560 - Interactive		325.00	21.74%	1	Misc Hardware	SB-560
288039	Amcor AC706AM Cooler/Heater		543.69	44.38%	7	Spicers	288039
SW212101	Wedo Kickstool Metal Black		454.40	38.89%	30	Kingfield	SW21210
BY02476	Bisley Tambour 87in Grey Assm		246.66	21.36%	3	Kingfield	BY02476
KF00404	Q Connect Floor Standing Fan		492.52	42.81%	51	Kingfield	KF00404
PM04147	GGI Majic Tub Chair Cobalt		270.42	25.19%	6	Kingfield	PM04147
KF03002	ConnectionsPlus Filing Cab		277.94	27.39%	11	Kingfield	KF03002
KF20044	ConnectionsPlus Filing Cab	910.07	206.13	22.65%	11	Kingfield	KF20044
TR28314	Metrix Basic Side Tambour	900.00	180.00	20.00%	3	Kingfield	TR28314
BY21048	Bisley Economy 4 Drawer	899.90	209.80	23.31%	10	Kingfield	BY21048
BY20739	Bisley Economy 4 Drawer	807.79	186.70	23.11%	9	Kingfield	BY20739
EU21739	Lynx Exec 720 Storage Unit	779.75	171.10	21.94%	5	Kingfield	EU21739
BY02743	Drawer Rollout 102mm Grey	777.00	126.42	16.27%	14	Kingfield	BY02743
KF00405	Q Connect Desk Fan 300mm/12in	723.49	316.54	43.75%	43	Kingfield	KF00405
TR27557	Metrix Side Tambour 1980mm	707.22	148.97	21.06%	2	Kingfield	TR27557
KF00407	Q Connect Tower Fan 820mm/32in	705.20	183.70	26.05%	28	Kingfield	KF00407
KF37016	Q Connect Drywipe Board	704.86	186.34	26.44%	23	Kingfield	KF37016
RT04129	Rotadex 5 Lever Arch File	689.61	151.97	22.04%	31	Kingfield	RT04129
PM04148	GGI Majic Tub Chair Charcoal	657.98	113.74	17.29%	4	Kingfield	PM04148
KF37017	Q Connect Drywipe Board	653.91	209.94	32.11%	9	Kingfield	KF37017
3784	St Moritz Executive Armchair	643.00	139.13	21.64%	4	Integra	CH1501
3484	Initiative High Back Operator	599.88	179.38	29.90%	12	Integra	CH9371RB
KF50171	Connections MB Operator Chair	519.83	213.43	41.06%	13	Kingfield	KF50171
4608	Micromark Tower Fan 740mm	512.40	217.70	42.49%	14	Spicers	175015



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The Business Intelligence Module is covered in depth on the Axis First web site, which includes demonstrations of some of the facilities. For information, please visit www.axisfirst.co.uk/diplomat2006/upgrade/ and follow the link to Business Intelligence.

In essence, the Business Intelligence Module revolves around three key concepts:

Selectors

Selectors allow you to pre-define selection criteria that can be potentially complex, for use by the Business Intelligence routines.

For example, a company selling gardening supplies might define sales of garden tools to be sales of any products in product groups 10, 12, 14 though 18, 29 or 56, and where the Sales Group is either 15, 18, 50 or 60 though 70.

This is potentially too complex to report on in a conventional analysis report but can be easily defined as a single selector. Within the Business Intelligence Module, any reference to sales of Garden Tools will automatically select only those products that fall within the range(s) specified.

The system is supplied with a number of Selectors pre-defined that allow you to identify various time periods - Calendar Year To Date, Financial Year To Date, Last 12 Months, Last 2 Years and Last 5 Years.

For Office Products dealers, a number of industry-specific selectors are also pre-defined. Office Products dealers that are members of Integra also benefit from pre-defined selectors for the figures requested by the Benchmark questionnaire.

A Selector Wizard makes it easy to set up your own Selectors.

Key Performance Indicators - KPIs

Key Performance Indicators are ways of measuring the performance of the company. The system is supplied with a number of KPIs pre-defined, including

- Turnover
- Profit
- Profit Margin %
- Value of Debtors
- Debtor Days
- Call History - new calls or open calls
- Operating Costs

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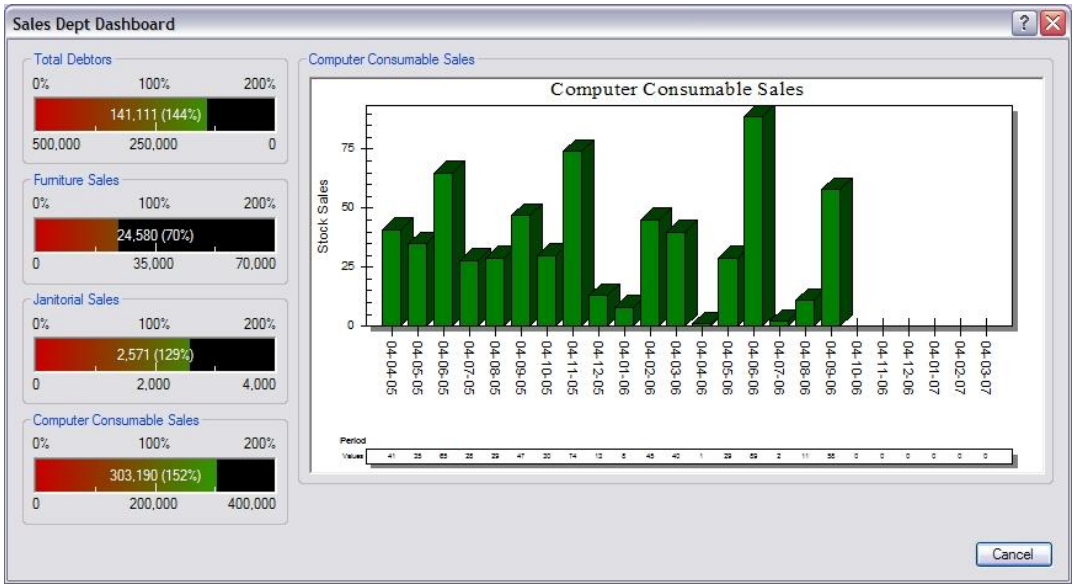
Targets



Business Intelligence allows you to associate target figures for various combinations of Selector and KPI, and to define which side of the target is good (in other words whether a value larger than the target is good, as with turnover, for example, or bad, as in Current Debtors).

Thus, for example, the Gardening Supplies company mentioned above might have a target of £2,500,000 per annum for turnover on Garden Tools, a target of £500,000 per annum for turnover on Gardening Books, a debtors target of £100,000 for trade customers and £5,000 for retail customers.

Information identified by Selectors is used in, for example the Sales Analysis tool, which can be seen in detail on our web site.

Targets can be added to a Dashboard and each operator can have their own Dashboard, showing graphically the current position against targets that are pertinent to them.

Please note: some functionality of the Business Intelligence module is only available in certain editions of AXIS Diplomat 2006. For more information, please see section F at the end of this document.

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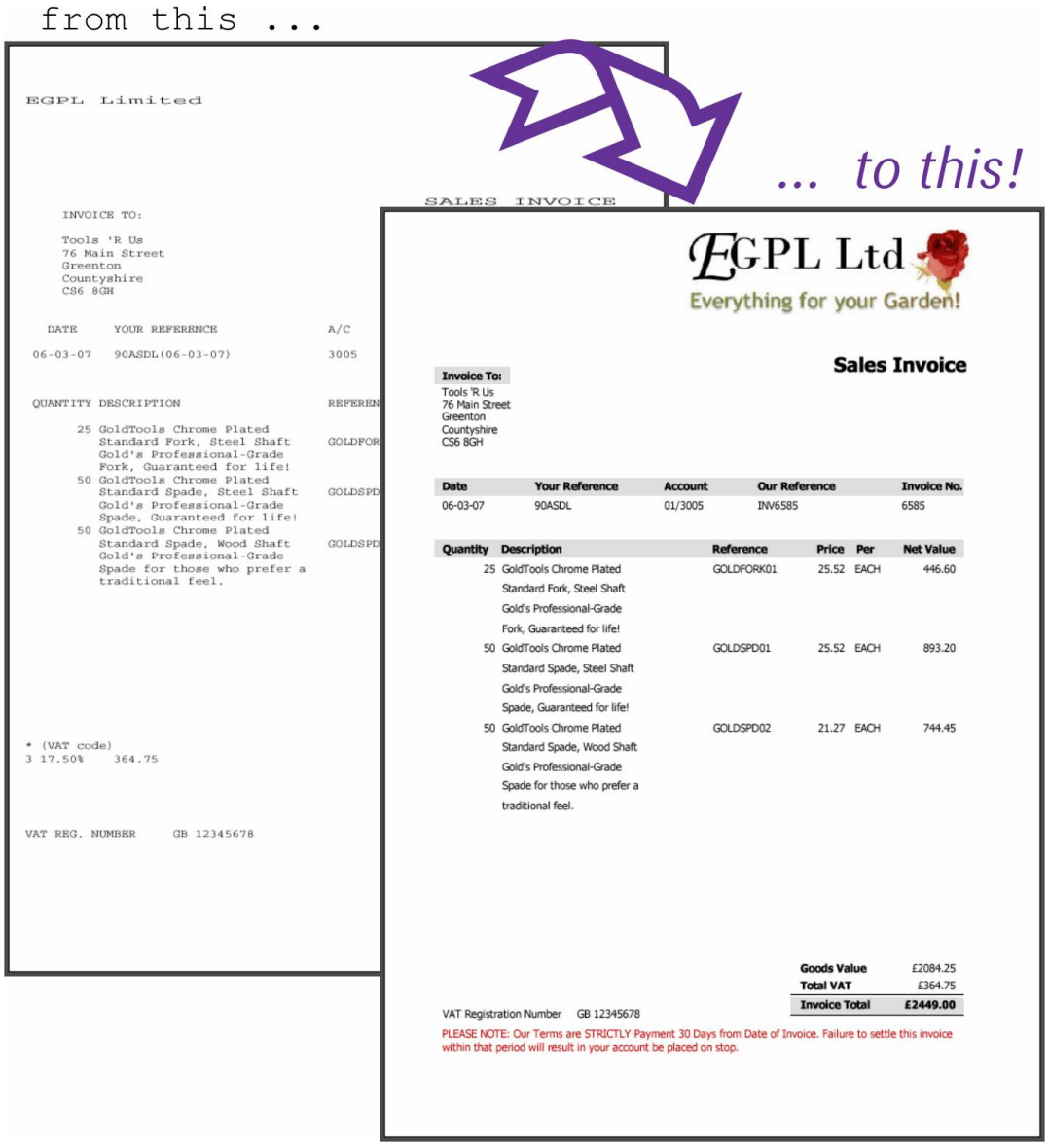
A2. Document Designer

Image is very important and for many companies their commercial documents (invoices, delivery notes, etc.) are the principal form of communication with their customers.

AXIS Diplomat 2006 features a Document Designer that allows you to design your own documents; you can also use the pre-built templates to replicate the existing layout but with fonts and shading to make the best use of the capabilities of modern inkjet and laser printer technologies.



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The Document Designer allows you to include company logos and other graphics anywhere on your documents and also to include standard fixed text (such as terms and conditions, special offers, web site promotions, etc.) anywhere on the document.

You have control over the data fields (such as quantity ordered, quantity shipped, gross price, net price, discount amount, etc.) that you decide to include, and where on the page they get printed.

You also have control over the fonts, colours, etc that are used on the documents.

The previous printing methods are still available, and are selectable by document type. This is important for businesses that use dot matrix printers[1] for printing documents. You can, for example, design your own quotation for printing on a laser printer but use a standard plain text format for delivery notes that are being printed on a dot matrix printer on multi-copy NCR paper.

The documents supported by the Document Designer include:

- Sales Invoice
- Sales Credit Note
- Quotation
- Sales Order Acknowledgement
- Advice/Packing Note
- Pro Forma Quotation
- Pro Forma Invoice
- Delivery Note for Ordered Goods
- Delivery Note for Invoiced Goods
- Delivery Note for Goods on Account

Note 1: there are now several options available for printing multiple document copies on laser printers so if you have only retained dot matrix printers because you need a 2 or 3 part document set, please discuss your requirements with your Account Manager.

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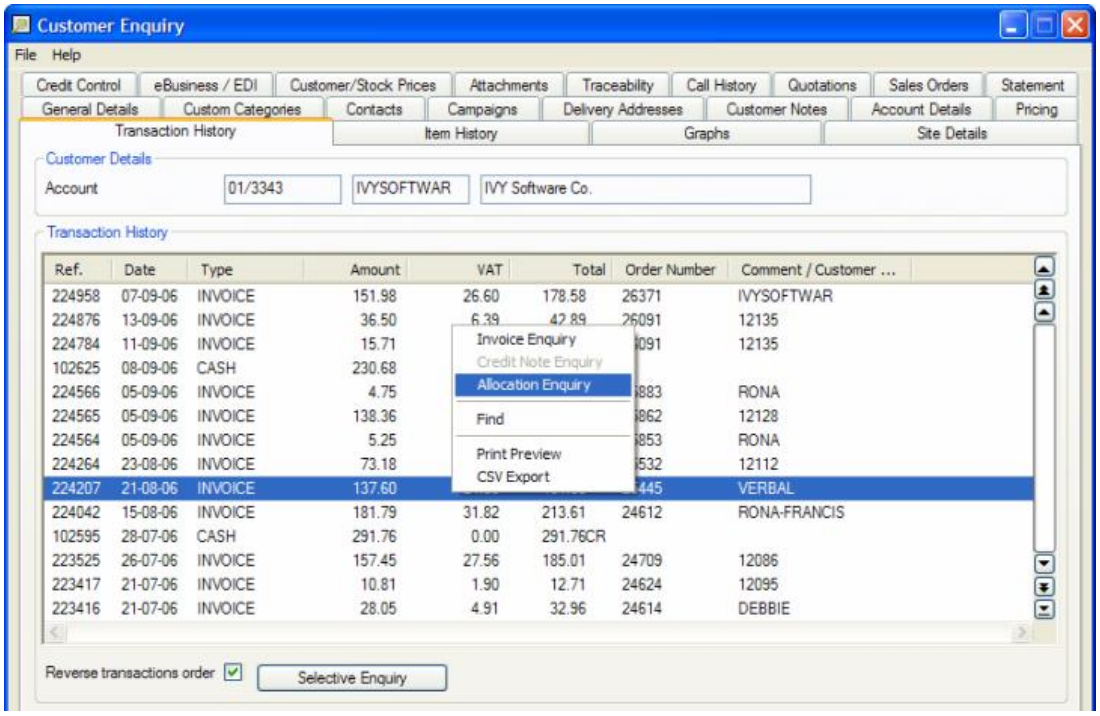
A3. Allocation Tracking

Allocation Tracking allows you to see, at the click of a button, what invoices were paid, or partially paid, by a payment or, conversely, what payments were allocated against a given invoice.

The information is held within the Archive section of the database and so is available indefinitely, making it possible to look but at payment queries months or years before.

The information is accessed simply by right-clicking on any transaction (debit or credit) within the Statement or Transaction History tabs of Customer Enquiry and selecting Allocation Enquiry:



Please Note: For existing AXIS Diplomat users upgrading to AXIS Diplomat 2006, this information will only be available for allocations made from the date of the upgrade onwards; prior to that, the information is not available.

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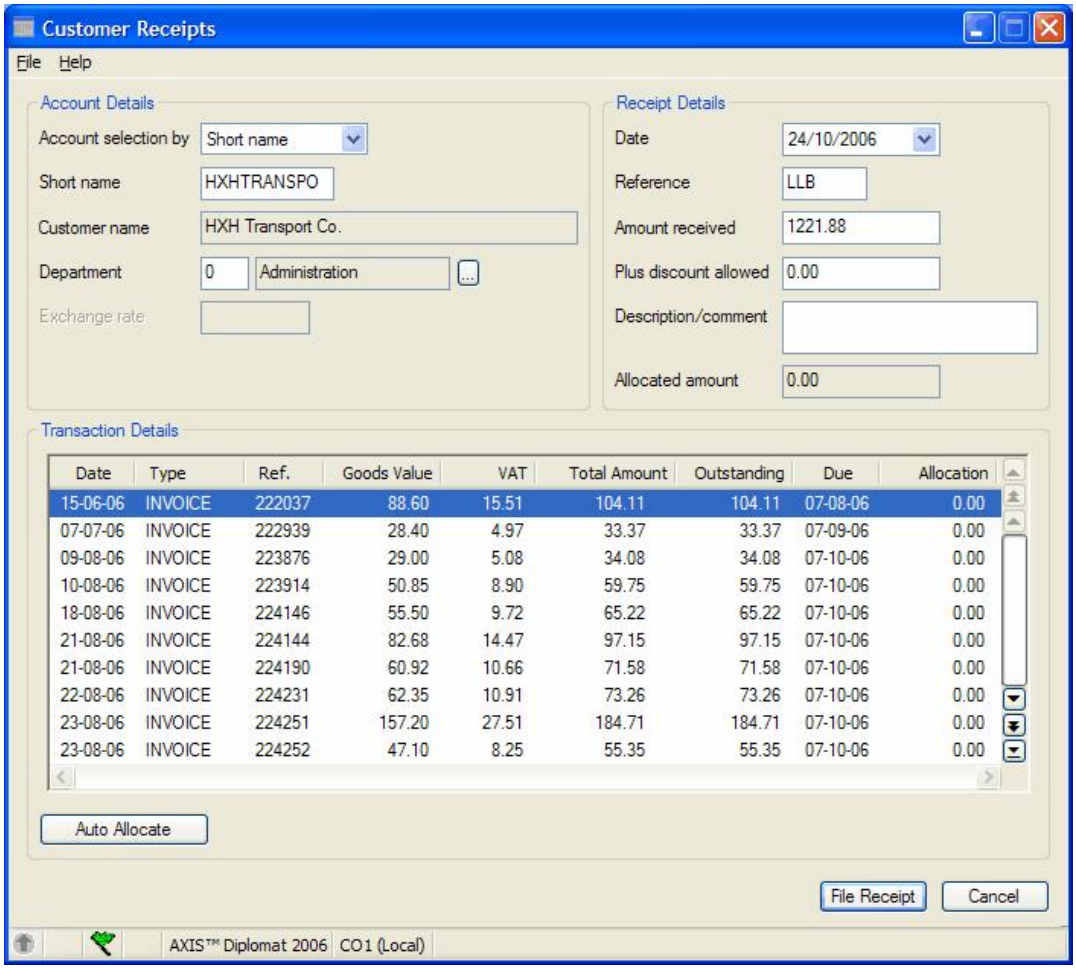
A4. Cash Book

The booking functions within the Cash Book module have been overhauled to make them quicker and more intuitive to use; the flow of the data entry procedure has also been changed. For example, when entering payments received from customers, you now follow this procedure:

1. Specify the Bank Account, and a Receipt Reference
2. Select the Customer and Amount Received; then simply allocate the amount against the outstanding transactions shown, or just hit the Auto Allocate button to allocate on an oldest-first basis. This is all done on the screen shown below:



A demonstration of this Cash Book function in use can be seen on the AXIS Diplomat 2006 web site, by visiting www.axisfirst.co.uk/diplomat2006/upgrade and clicking on “Cash Book”.

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A5. Other General Enhancements

There are a huge number of smaller enhancements to individual modules and functions at this version. More detailed information can be found on the web site but some of these enhancements include:

Favourites - add items to a “favourites” list for particular customers and have quick access to these items when entering a sales order. If the customer has access to a login on your AXIS VMerchant web site then this favourites list can be synchronised with the favourites list on the web site.

Email Notifications within Sales Order Processing - on systems using Manual Despatch Quantities, you can now choose to have the system automatically email your customers when certain events happen on their sales orders, such as goods being despatched. This applies equally to orders received via an AXIS VMerchant web site or orders entered via Sales Order Maintenance, provided a valid email address exists on the relevant contact.

Bill of Materials now allows both Kits and Assemblies on the same system; this means that on a single system you can now have some items that are simply a kit of parts to be supplied together whilst other items are manufactured from components. This will be of particular interest to users of the Material Requirements Planning (MRP) module.

Margin Protection features have now been incorporated at the Customer Account level as well as at the Product Group level. This allows you to define different minimum margins for different customers. If the overall margin on a Sales Order falls below the minimum specified for the customer then you will not be allowed to file the Sales Order.

Greater Flexibility in core functions, including Edit buttons within Supplier Enquiry and Stock Enquiry (subject to Security Permission control). At the previous version, an Edit button was introduced to the Customer Enquiry function and this has proven extremely popular - if looking at a Supplier or a Stock Item and something needs changing, it is now easy to change it there and then, without the need to run a different maintenance function.

Call Events within the CRM module creates a greater audit trail of who added what and when to a Call History item. Previously, each call contained a single continuous block of notes, to which anyone could add additional text. Now, with Call Events, each update, whether it is adding additional information, changing the priority or changing the responsibility, results in a new Event being added to the call.

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Section B : Options now Standard

The following sections cover functionality that has previously been available as optional (extra cost) options and which is now included as standard with every system.

B1. Gap Analysis

Gap Analysis is the art of using the sales history within your AXIS Diplomat system to identify gaps in your sales to your existing customers, and using that information to generate more accurately targeted marketing.

In its simplest form, the Gap Analysis module allows you to produce lists of customers that:

- bought a product, or a range of products, during a particular period of time
- didn't buy a product, or a range of products, during a particular period of time
- bought a product, or a range of products, during one particular period of time but didn't buy a different product, or a range of products, during a different period of time

If, for example, you sell both laser printers and laser printer consumables, you could identify all of those customers that have bought a laser printer in the last 18 months, but have not bought any consumables.

You can also narrow your selection down to a particular group of customers so that, depending on how your customer group codes are used, you could look, for example, specifically at your public sector customers.

This would allow you to carry out some very precise, targeted marketing to just those customers - perhaps with a special offer on laser printer consumables.

Furthermore, because the marketing is only going to those who do not currently buy printer consumables, you are protecting your margins with those customers that do buy them, by not reducing prices across the board with a more general special offer.

For users that have the Campaign Management module, Gap Analysis allows you to add all of the customers identified via a Gap Analysis query to a campaign. This means that, once you have identified a selection of customers, you can then use the system to send mailshots, emailshots or faxshots, and to manage a telesales campaign to those customers.

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B2. Credit Note Tracking

The Credit Note Tracking module helps you to keep control of the raising of credit notes against invoices. When creating a Credit Note, you can browse through previous invoices for the customer in question and simply add lines from those invoices to your credit note. From an Invoice Enquiry, you can also raise a credit note for the whole invoice.

Not only does this simplify the actual data entry associated with credit notes but, because the software also records the fact against the invoice line(s), it prevents you from raising two credits for the same item.

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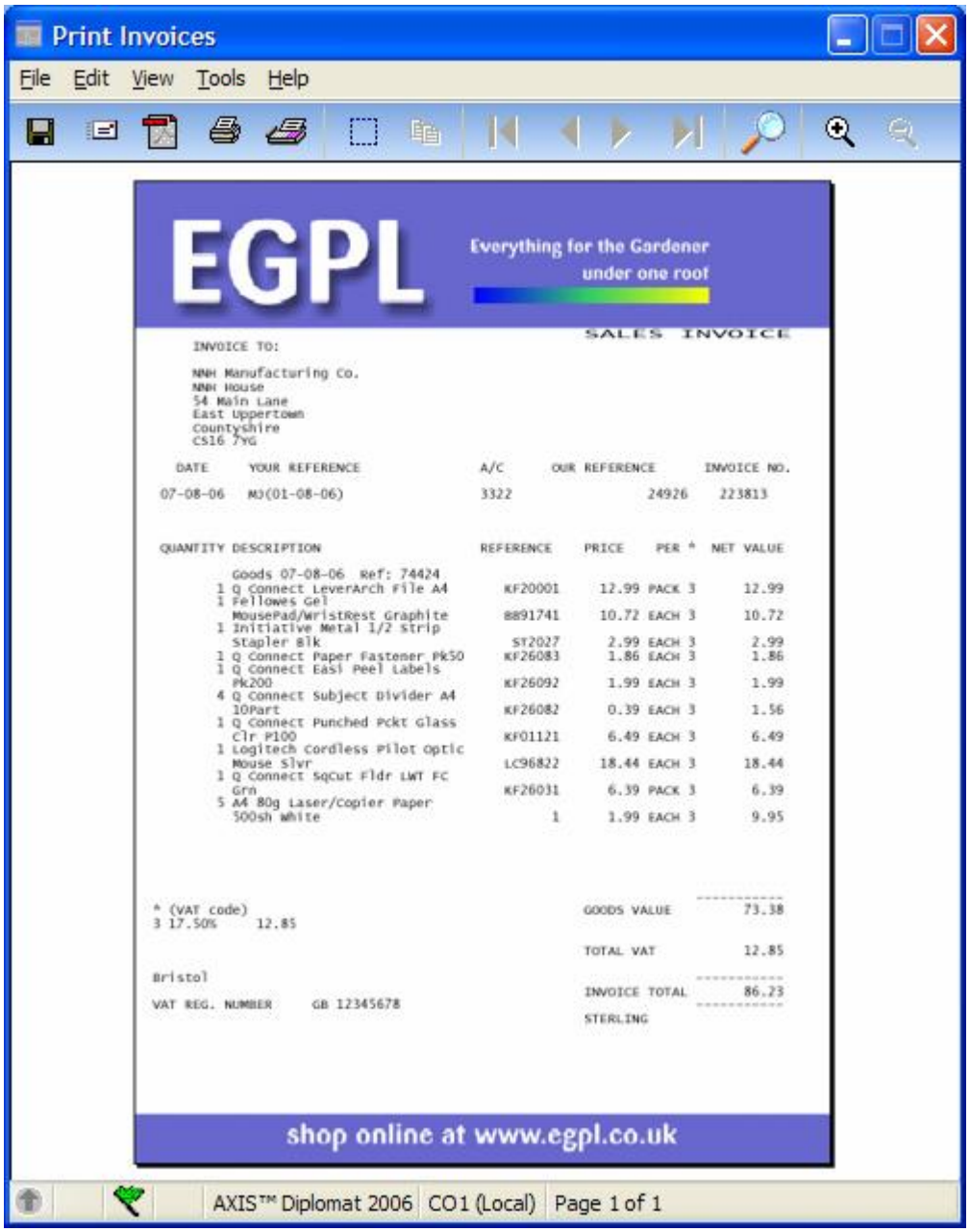
Section C : System Enhancements

C1. Document/Report Preview

The previous document and report preview function has been replaced. The new previewer gives a WYSIWYG view of the document, preserving font usage and incorporating graphical backdrops where defined. It is scaleable and can be dragged to the desired size.

Adobe PDF creation has been built in (no longer going via an external driver) which means that the speed of PDF creation has been improved by more than 1000% on most systems.



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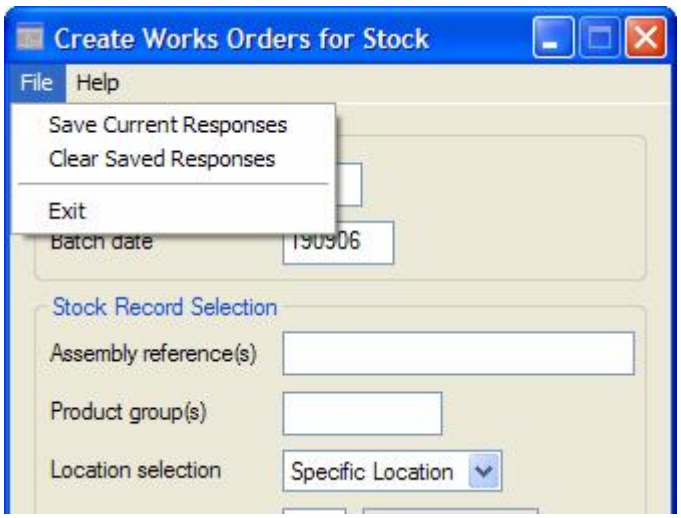
C2. Saved User Responses

Every function now offers additional options on the File menu to Save and Clear User Responses:



To use, the operator simply fills in the responses to any or all of the prompts on the screen, and then clicks File, Save Current Responses. From then on, whenever they go into the function, the prompts will default to the responses that they had saved.

The saved responses are unique to each function and to each operator.

In many cases, this will remove the need to create Batch Procedures in order to be able to, for example, run the same report on a regular basis making sure that the same selection is specified every time.

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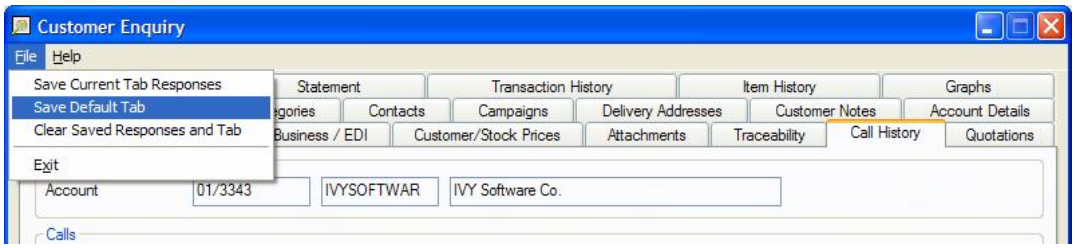
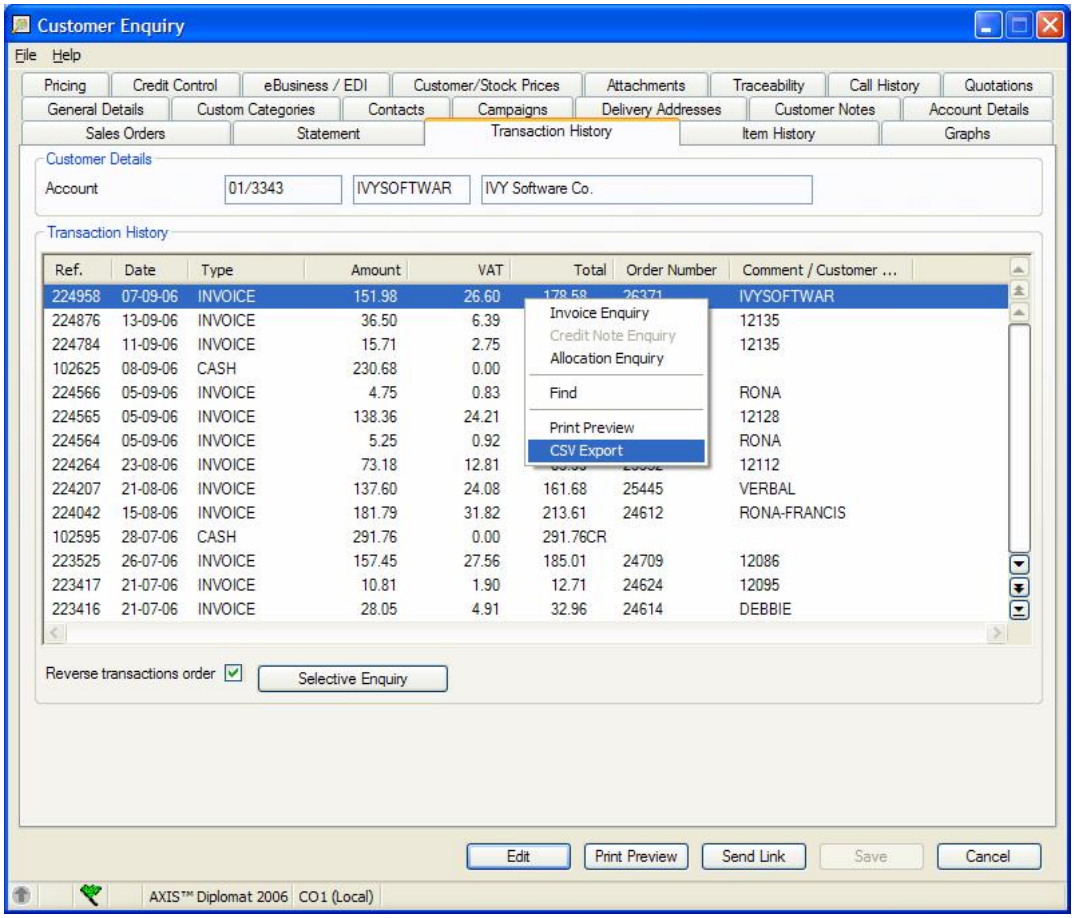
C3. Default Tabs

Any tabbed function, such as Customer Enquiry, now allows the user to save the default tab to be presented on going into the function. For example, a member of the Customer Services department who usually wants to see the Call History details within Customer Enquiry can click on the Call History tab and then select Save Default Tab from the File menu. From then on, every time they go into the function, the Call History tab will be the first one shown.



C4. CSV Export from Scrolling Lists

Any scrolling list of data within an AXIS Diplomat function can now be exported to CSV file by a simple right-click anywhere within the list and selecting CSV Export:



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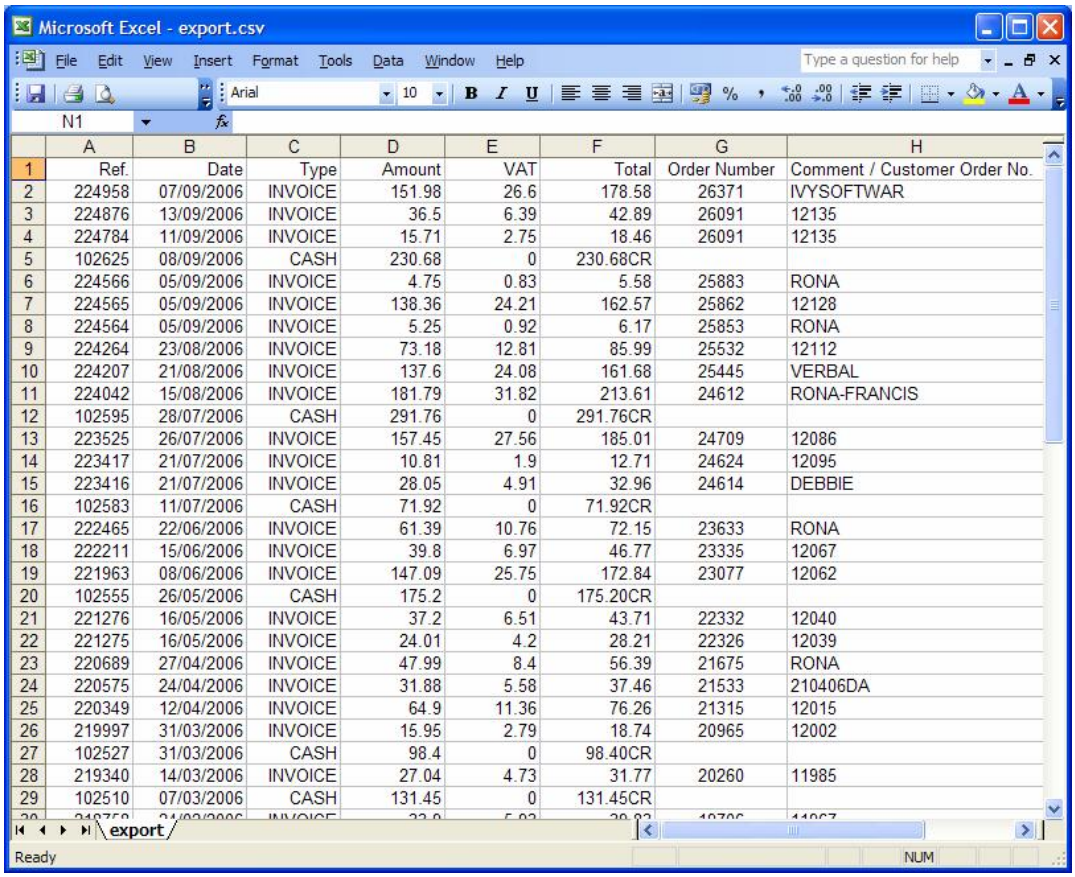
The resultant data file can then be used, for example, directly within Microsoft Excel™:



	A	B	C	D	E	F	G	H
1	Ref.	Date	Type	Amount	VAT	Total	Order Number	Comment / Customer Order No.
2	224958	07/09/2006	INVOICE	151.98	26.6	178.58	26371	IVYSOFTWAR
3	224876	13/09/2006	INVOICE	36.5	6.39	42.89	26091	12135
4	224784	11/09/2006	INVOICE	15.71	2.75	18.46	26091	12135
5	102625	08/09/2006	CASH	230.68	0	230.68CR		
6	224566	05/09/2006	INVOICE	4.75	0.83	5.58	25883	RONA
7	224565	05/09/2006	INVOICE	138.36	24.21	162.57	25862	12128
8	224564	05/09/2006	INVOICE	5.25	0.92	6.17	25853	RONA
9	224264	23/08/2006	INVOICE	73.18	12.81	85.99	25532	12112
10	224207	21/08/2006	INVOICE	137.6	24.08	161.68	25445	VERBAL
11	224042	15/08/2006	INVOICE	181.79	31.82	213.61	24612	RONA-FRANCIS
12	102595	28/07/2006	CASH	291.76	0	291.76CR		
13	223525	26/07/2006	INVOICE	157.45	27.56	185.01	24709	12086
14	223417	21/07/2006	INVOICE	10.81	1.9	12.71	24624	12095
15	223416	21/07/2006	INVOICE	28.05	4.91	32.96	24614	DEBBIE
16	102583	11/07/2006	CASH	71.92	0	71.92CR		
17	222465	22/06/2006	INVOICE	61.39	10.76	72.15	23633	RONA
18	222211	15/06/2006	INVOICE	39.8	6.97	46.77	23335	12067
19	221963	08/06/2006	INVOICE	147.09	25.75	172.84	23077	12062
20	102555	26/05/2006	CASH	175.2	0	175.20CR		
21	221276	16/05/2006	INVOICE	37.2	6.51	43.71	22332	12040
22	221275	16/05/2006	INVOICE	24.01	4.2	28.21	22326	12039
23	220689	27/04/2006	INVOICE	47.99	8.4	56.39	21675	RONA
24	220575	24/04/2006	INVOICE	31.88	5.58	37.46	21533	210406DA
25	220349	12/04/2006	INVOICE	64.9	11.36	76.26	21315	12015
26	219997	31/03/2006	INVOICE	15.95	2.79	18.74	20965	12002
27	102527	31/03/2006	CASH	98.4	0	98.40CR		
28	219340	14/03/2006	INVOICE	27.04	4.73	31.77	20260	11985
29	102510	07/03/2006	CASH	131.45	0	131.45CR		

Please note that all of the data in the list is exported, not just the rows that are shown on the screen.

This immediately increases many fold the range of options for exporting formatted data from within the system, without needing to use ODBC to import the data into a spreadsheet.

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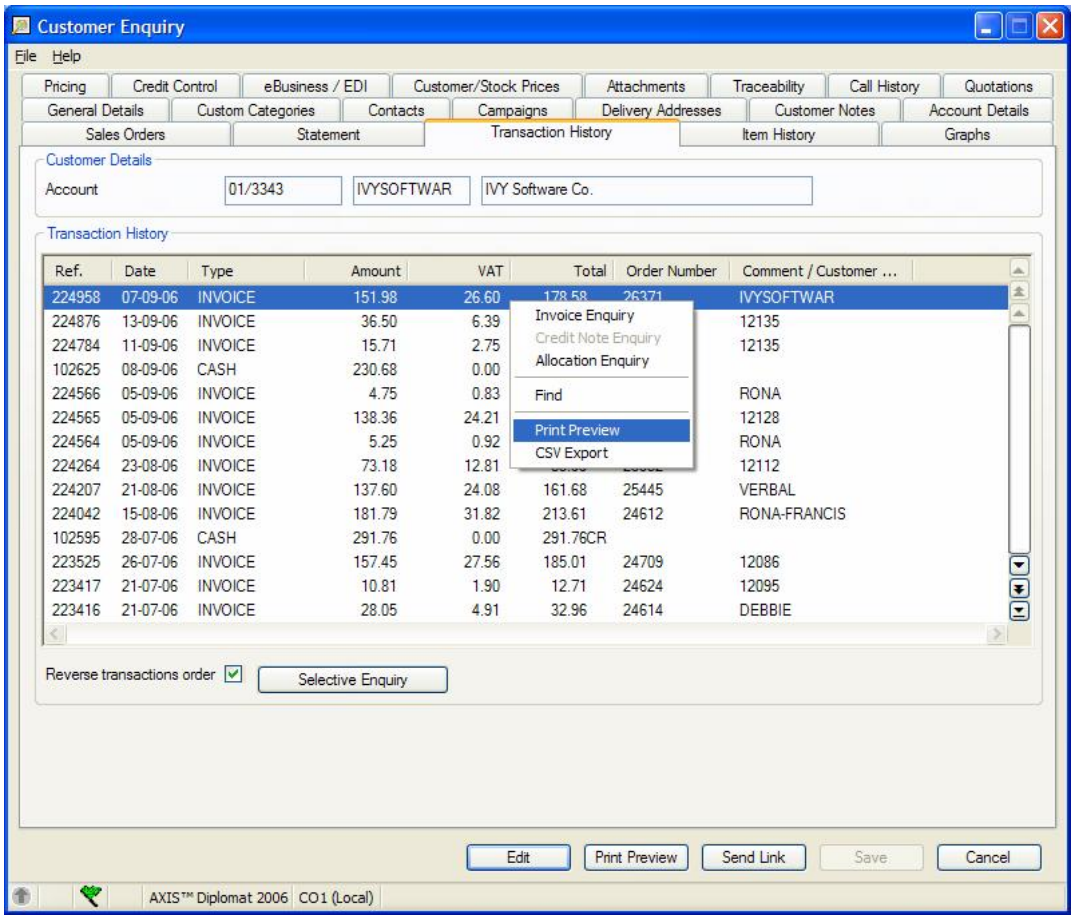
C5. Hard Copy from Scrolling Lists

Any scrolling list of data within an AXIS Diplomat function can now be printed, as an AXIS Diplomat report (and, therefore, it can be easily converted into a PDF and/or emailed, etc.) by a simple right-click anywhere within the list and selecting Print Preview:



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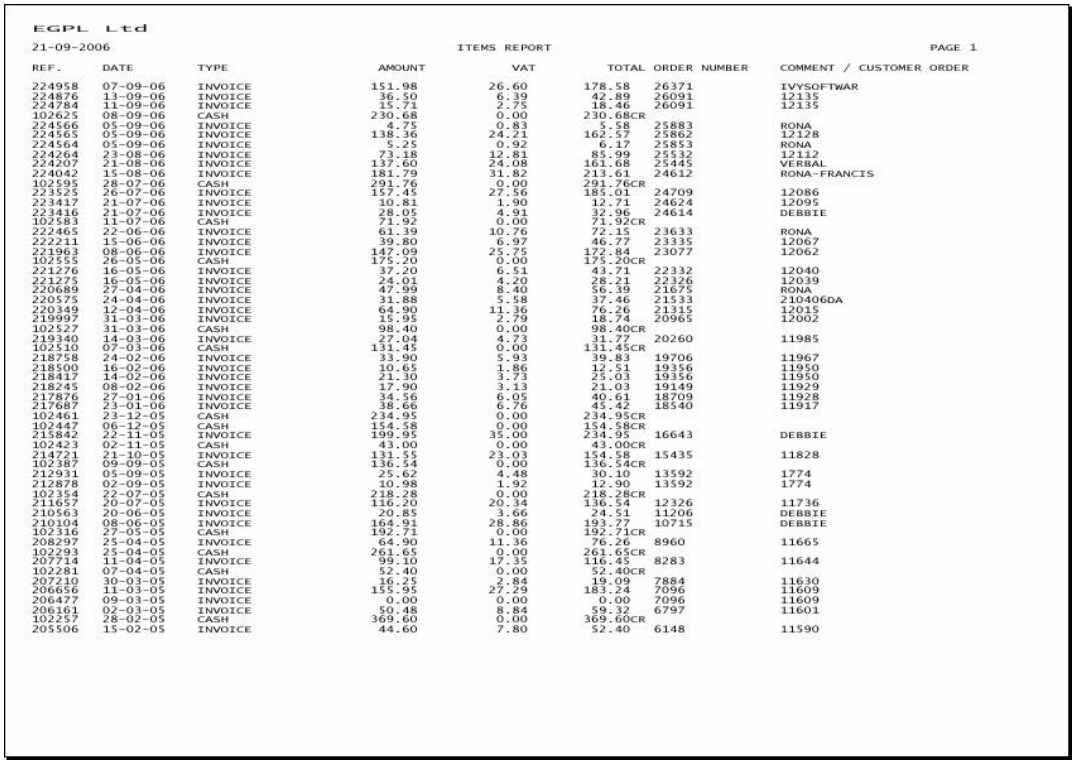
Please note that all of the data in the list is printed, not just the rows that are shown on the screen:



EGPL Ltd

21-09-2006 ITEMS REPORT PAGE 1

REF.	DATE	TYPE	AMOUNT	VAT	TOTAL	ORDER NUMBER	COMMENT / CUSTOMER ORDER
224958	07-09-06	INVOICE	151.98	26.60	178.58	26371	IVYSOFTWAR
224876	13-09-06	INVOICE	36.50	6.39	42.89	26091	12135
224784	11-09-06	INVOICE	15.71	2.75	18.46	26091	12135
102625	08-09-06	CASH	230.68	0.00	230.68CR		
224566	05-09-06	INVOICE	4.75	0.83	5.58	25883	RONA
224565	05-09-06	INVOICE	138.36	24.21	162.57	25862	12128
224564	05-09-06	INVOICE	5.25	0.92	6.17	25853	RONA
224264	23-08-06	INVOICE	73.18	12.81	85.99	25532	12112
224207	21-08-06	INVOICE	137.60	24.08	161.68	25445	VERBAL
224042	15-08-06	INVOICE	181.79	31.82	213.61	24612	RONA-FRANCIS
102595	28-07-06	CASH	291.76	0.00	291.76CR		
223525	26-07-06	INVOICE	157.45	27.56	185.01	24709	12086
223417	21-07-06	INVOICE	10.81	1.90	12.71	24624	12095
223416	21-07-06	INVOICE	28.05	4.91	32.96	24614	DEBBIE
102583	11-07-06	CASH	71.92	0.00	71.92CR		
222465	22-06-06	INVOICE	61.39	10.76	72.15	23633	RONA
222211	15-06-06	INVOICE	39.80	6.97	46.77	23335	12067
221963	08-06-06	INVOICE	147.09	25.75	172.84	23077	12062
102555	26-05-06	CASH	175.20	0.00	175.20CR		
221276	16-05-06	INVOICE	37.20	6.51	43.71	22332	12040
221275	16-05-06	INVOICE	24.01	4.20	28.21	22326	12039
220689	27-04-06	INVOICE	47.99	8.40	56.39	21675	RONA
220575	24-04-06	INVOICE	31.88	5.58	37.46	21533	210406DA
220349	12-04-06	INVOICE	64.90	11.36	76.26	21315	12015
219997	31-03-06	INVOICE	15.95	2.79	18.74	20965	12002
102527	31-03-06	CASH	98.40	0.00	98.40CR		
219340	14-03-06	INVOICE	27.04	4.73	31.77	20260	11985
102510	07-03-06	CASH	131.45	0.00	131.45CR		
218758	24-02-06	INVOICE	33.90	5.93	39.83	19706	11967
218500	16-02-06	INVOICE	10.65	1.86	12.51	19356	11950
218417	14-02-06	INVOICE	21.30	3.73	25.03	19356	11950
218245	08-02-06	INVOICE	17.90	3.13	21.03	19149	11929
217876	27-01-06	INVOICE	34.56	6.05	40.61	18709	11928
217687	23-01-06	INVOICE	38.66	6.76	45.42	18540	11917
102461	23-12-05	CASH	234.95	0.00	234.95CR		
102447	06-12-05	CASH	154.58	0.00	154.58CR		
215842	22-11-05	INVOICE	199.95	35.00	234.95	16643	DEBBIE
102423	02-11-05	CASH	43.00	0.00	43.00CR		
214721	21-10-05	INVOICE	131.55	23.03	154.58	15435	11828
102387	09-09-05	CASH	136.54	0.00	136.54CR		
212931	05-09-05	INVOICE	25.62	4.48	30.10	13592	1774
212878	02-09-05	INVOICE	10.98	1.92	12.90	13592	1774
102354	22-07-05	CASH	218.28	0.00	218.28CR		
211657	20-07-05	INVOICE	116.20	20.34	136.54	12326	11736
210563	20-06-05	INVOICE	20.85	3.66	24.51	11206	DEBBIE
210104	08-06-05	INVOICE	164.91	28.86	193.77	10715	DEBBIE
102316	27-05-05	CASH	192.71	0.00	192.71CR		
208297	25-04-05	INVOICE	64.90	11.36	76.26	8960	11665
102293	25-04-05	CASH	261.65	0.00	261.65CR		
207714	11-04-05	INVOICE	99.10	17.35	116.45	8283	11644
102281	07-04-05	CASH	52.40	0.00	52.40CR		
207210	30-03-05	INVOICE	16.25	2.84	19.09	7884	11630
206656	11-03-05	INVOICE	155.95	27.29	183.24	7096	11609
206477	09-03-05	INVOICE	0.00	0.00	0.00	7096	11609
206161	02-03-05	INVOICE	50.48	8.84	59.32	6797	11601
102257	28-02-05	CASH	369.60	0.00	369.60CR		
205506	15-02-05	INVOICE	44.60	7.80	52.40	6148	11590

This effectively increases many times the number of reports available on the system, and provides quick access to printed information without needing to find a report that shows similar information. Much of the need for printed information can now be handled totally within enquiry functions, such as Customer Enquiry.

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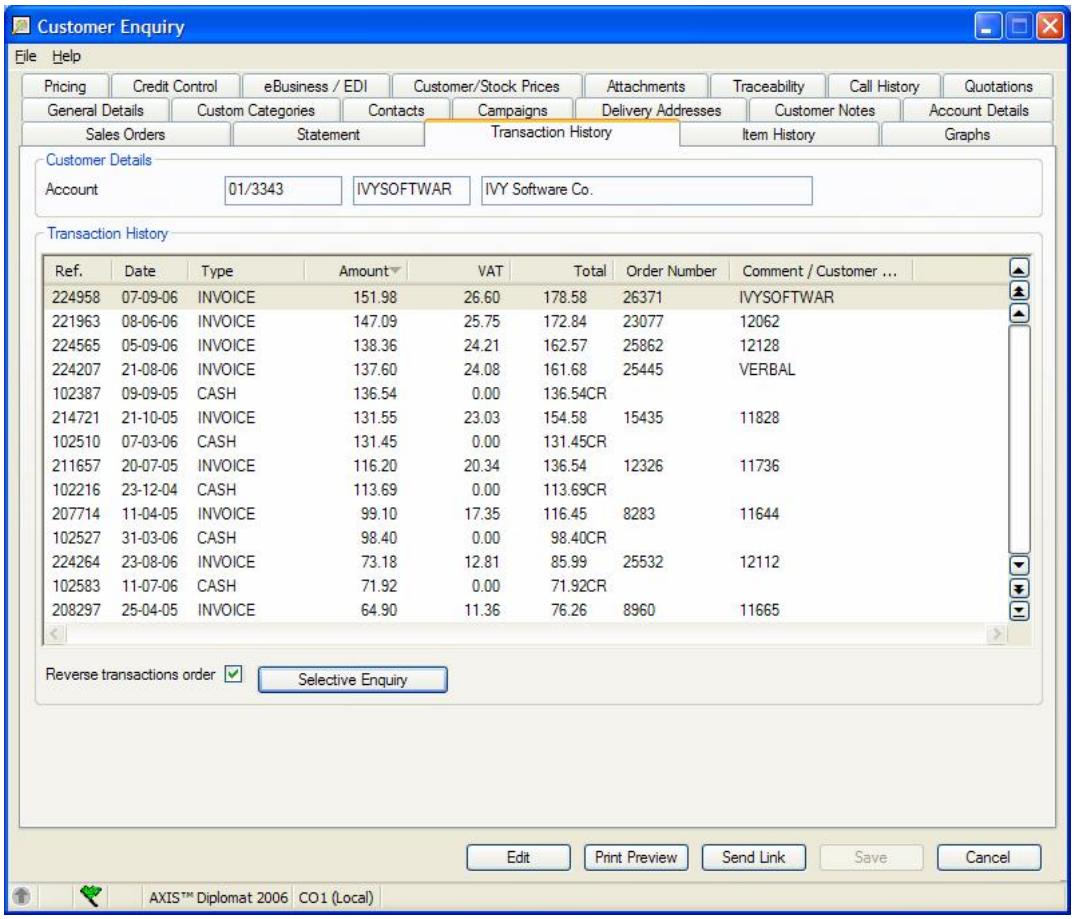
C6. Column Sorting in Scrolling Lists

Any scrolling list of data within an AXIS Diplomat function can now be re-sorted, simply by clicking on the column heading. The Transaction History tab, for example, in the Customer Enquiry shown below has been re-sorted into descending order by amount:



This is also useful for grouping similar or related information together, for example, the Call History tab can be resorted by Responsibility, so that all of the calls for a given customer that are one person's responsibility are listed together.

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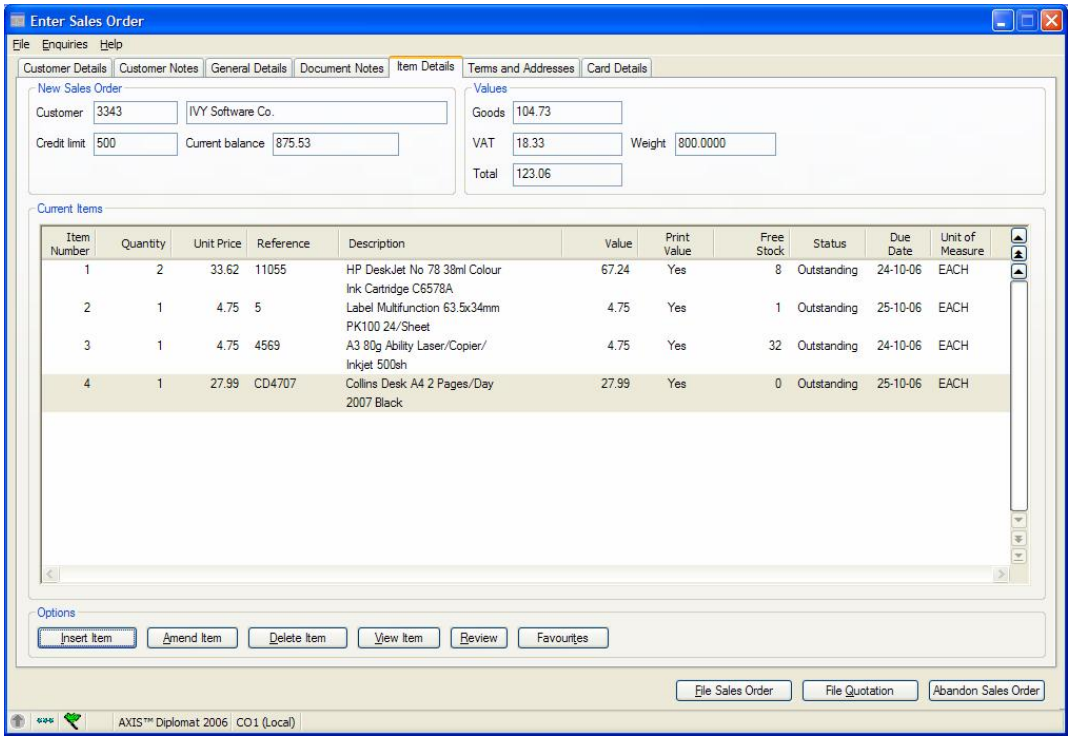
C7. Column Re-Ordering in Scrolling Lists

Scrolling lists of data within an AXIS Diplomat function can now be re-ordered, to make them more relevant to the job in hand. Some of the columns in a particular function may, for example, be irrelevant to one user, whilst columns that are important to them are on the far right-hand side, only visible by adjusting the horizontal scroll bar. Those columns can now be dragged with the mouse to a more logical position for the particular application. The system remembers the latest setting, for each operator, for each function.



In the example above, the Quantity and Unit Price columns have been moved to the left of the list.

In conjunction with print preview and column sorting, column re-ordering now makes it possible to produce customised printed reports very easily.

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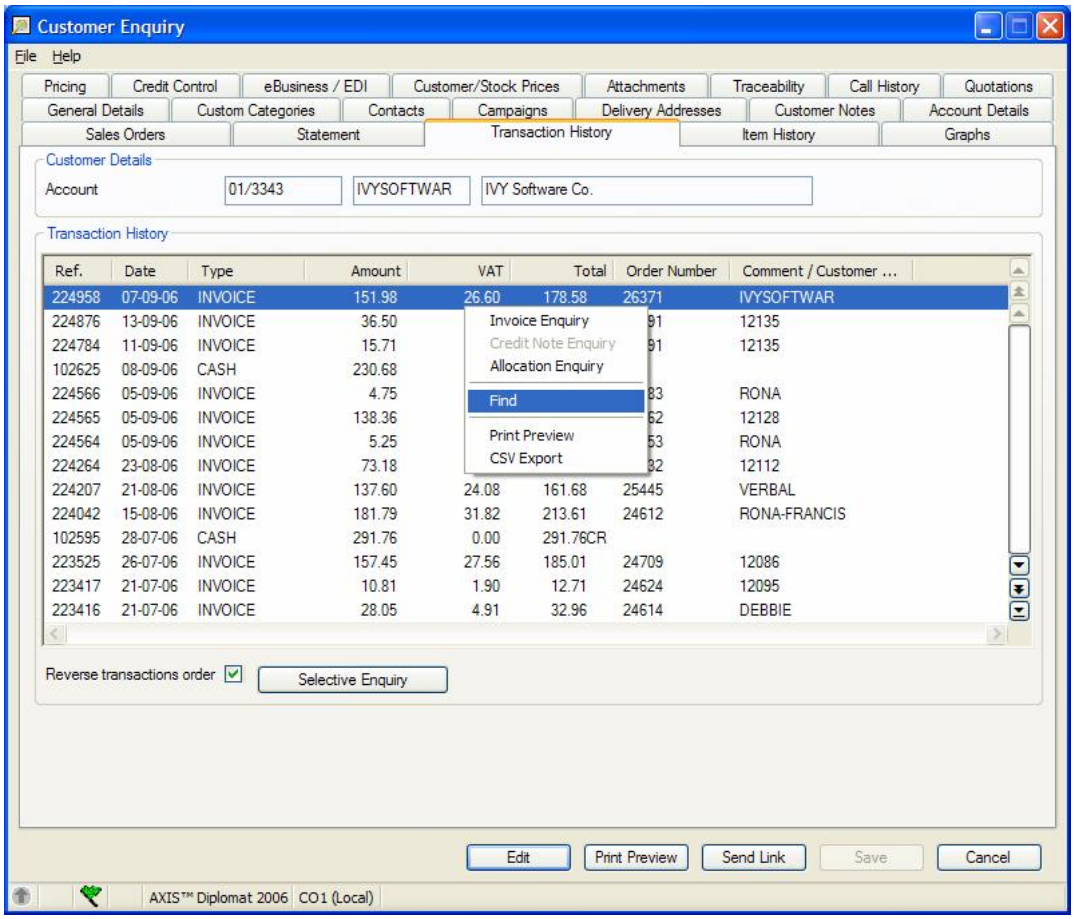
C8. Searching on Scrolling Lists

Scrolling lists of data within an AXIS Diplomat function can have hundreds, or even thousands, of entries. Finding the correct entry is now much easier by virtue of the new Search facility, available by right-clicking within the list and choosing Find, or by typing Ctrl-F:



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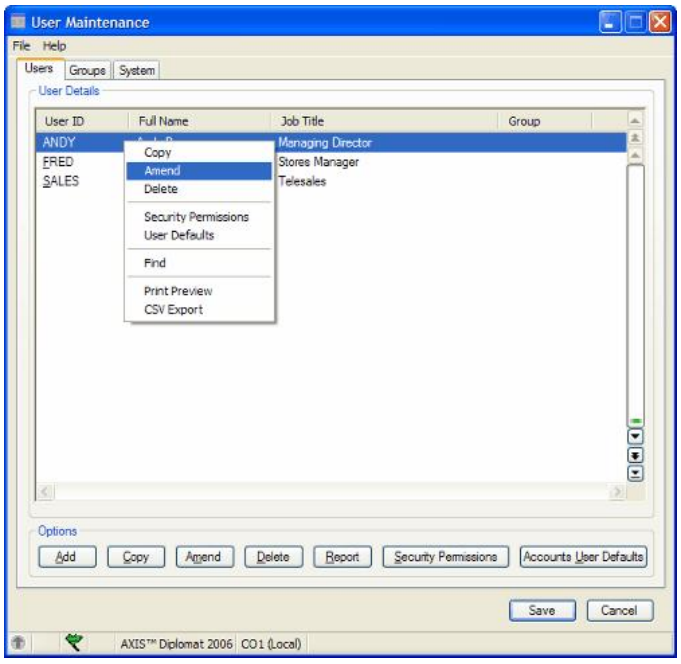
C9. New Operator and Security Maintenance

All of the functions previously used to maintain Operators, Groups, Menu Privacy (for operators, groups and the system) and Security Permissions have now been consolidated into a single, easy-to-use, function.

Security concerns are increasingly at the forefront of peoples' minds and controlling access to your line-of-business application is critical. The new maintenance function will make that job much simpler for administrators.

The new function also incorporates the maintenance of operator defaults.



C10. Improved Security

AXIS Diplomat 2006 extends and builds on the Security Permissions technology introduced at AXIS Diplomat 2004, giving finer control over the aspects of the system that an operator is allowed access to.

Network security is now improved since AXIS Diplomat 2006 can run from a UNC path (for example \\myserver\axis2006$), removing the need for a network drive mapping.

C11. Microsoft Windows Vista Support

AXIS Diplomat 2006 is the first version of AXIS Diplomat to be supported under the newest operating system from Microsoft, Windows Vista. Previous versions of AXIS Diplomat will not run with Vista.

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Section D : Other Enhancements

D1. Documentation

All of the documentation for AXIS Diplomat 2006 is now online, via our web site.

This includes all of the function-level help and User Guides, in addition to a much larger range of “how to” support notes and hints and tips.

By making this information available online, the wealth of information available is now searchable and cross-indexed.

Much of this information is only available to those that log in to “My Account” on the Axis First web site, at www.axisfirst.co.uk; all AXIS Diplomat users are entitled to log in so, if you do not already have an account on our web site, please contact your Account Manager.

In addition to the range of documentation available at previous versions, documentation has been added on a number of the Modules and Options (historically known as ‘features’) available for the AXIS Diplomat system.

Documentation is constantly being updated so by making it available online you know that you are looking at the most up-to-date information available.

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Section E : New Services

E1. Time Unit Based Implementation Services

Axis First can now provide the following services to AXIS Diplomat 2006 customers as part of a Time Unit Based Implementation Services package:

- Document Designer Template Creation
- Business Intelligence Module Configuration
- ODBC/SQL Services
- Importing/Exporting Data via Excel
- Small Software Modifications

With the exception of Small Software Modifications, the customer will have the tools to carry out these operations themselves but may lack the time or skills to make best use of the facilities available.

For example, some customers may be cautious of updating their Sales Ledger account details from a spreadsheet (perhaps having bought a mailing list of prospects) and would prefer the Axis First Customer Services team to run the update for them because it is an operation that they carry out very infrequently.

Axis First makes its expertise available in these areas on a time basis; by pre-purchasing a block of 40x15 minute units, you are able to utilise any of these services; the time taken on a particular task (rounded up to the next 15 minutes) is deducted from the pool and regular statements provided. A Time Unit Based package lasts for up to 12 months and, if you purchase another package within that period, any remaining units are rolled forward into the new pool.

Time Unit Based services do not cover on-site work, since, in many cases, the travelling time would consume the time units.

By making this service available in this way, it allows a range of small tasks to be carried out without the associated paperwork - there is no need to raise a purchase order each time, book invoices, or make small payments, etc. for each job. When you have a requirement for one of these services, we will provide an estimate of the number of units we expect the task to take and will proceed with just email authorisation.

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Section F : Upgrade Options and Pricing

F1. AXIS Diplomat 2006 Editions

There are three editions of AXIS Diplomat 2006. The table below shows the differences between them:

	AXIS Diplomat 2006 Express	AXIS Diplomat 2006 Small Business Edition	AXIS Diplomat 2006 Medium Business Edition
System Size & Environment			
Users	1-5	1-75	1-250
Windows 2000 Server	✓	✓	✓
Windows 2000 SBS	✓	✓	✓
Windows 2003 Server	✓	✓	✓
Windows 2003 SBS	✓	✓	✓
Windows 2000 Pro	✓	✓	✓
Windows XP Pro	✓	✓	✓
Data Analysis			
ODBC Sales Analysis	✓	✓	✓
ODBC read access to Raw data	×	✓	✓
ODBC read access to Raw data in real time	×	×	✓
Standard Facilities			
Document Designer	✓	✓	✓
Allocation Tracking	✓	✓	✓
List View Export/Print	✓	✓	✓
List View Sorting	✓	✓	✓
User Preferences	✓	✓	✓
Business Intelligence			
Core Module	✓	✓	✓
Standard Selectors	✓	✓	✓
User-Defined Selectors	✓	✓	✓
Standard KPIs	✓	✓	✓
Standard Targets	✓	✓	✓
User-Defined Targets	×	✓	✓
Dashboards	✓	✓	✓
User-Defined Dashboards	×	✓	✓
Real-Time Business Intelligence	×	×	✓
Module Availability			
Hire	✓	✓	✓
Job Costing	×	✓	✓
Office Products	×	✓	✓
Stock Traceability	×	✓	✓
MRP	×	✓	✓
All Other Standard Modules	✓	✓	✓

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F2. Pricing

1. Upgrade Client and New Client Pricing

	Upgrade from		New Client
Product	**AXIS Diplomat 2000SE**	**AXIS Diplomat 2004**	
AXIS Diplomat 2006 Express Client	£495	£295	£495
AXIS Diplomat 2006 Small Business Edition Client	£995	£495	£995
AXIS Diplomat 2006 Medium Business Edition Client	£1,195	£695	£1,195

2. Client Transition Pricing

	Transition From	
Transition To	**AXIS Diplomat 2006 Express**	**AXIS Diplomat 2006 SBE**
AXIS Diplomat 2006 Small Business Edition Client	£295	
AXIS Diplomat 2006 Medium Business Edition Client	£495	£295

3. Software Assurance

Product	**Per Client, Per Month**
AXIS Diplomat 2006 Express	£12.50
AXIS Diplomat 2006 Small Business Edition	£20.00
AXIS Diplomat 2006 Medium Business Edition	£25.00

Note: Software Assurance must be taken out at the time of upgrading to AXIS Diplomat 2006 or at the time a new AXIS Diplomat 2006 system is supplied.

4. Additional Services

Product	
Time Unit Based Implementation Services (40x15 minutes)	£695

This document is not intended as a substitute for direct evaluation of the system.

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Document Reference: Diplomat/2006/Upgrade/1.5

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