

axis® diplomat 2012

Accounting and Business Information Systems

New features overview

03.12.2012



Introduction

This document outlines the major new features and benefits that you can expect to see by upgrading to **axis diplomat 2012** from the previous edition of software, **axis diplomat 2010**.

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 axisfirst web site at <http://www.axisfirst.co.uk/diplomat2012> for the latest product information. Level updates within the **axis diplomat 2012** release will be free to all axis diplomat 2012 licensees with current support contracts.

Similarly, axis diplomat 2010 continued to be enhanced and improved during its life and so, if you are upgrading from an early level of axis diplomat 2010, there will be further modifications to be seen over and above those documented here.

In addition to the normal on-going level updates for **axis diplomat 2012**, those customers with Software Assurance will be offered further updates from time to time, which will be pre-releases of new features from the next release of software due in 2014.

Details of Software Assurance, and of any pre-release features from the next version that have been made available to Software Assurance customers, can be found on the axisfirst web site at <http://www.axisfirst.co.uk/software/assurance> and will also feature in newsletter emails from time to time.

Summary of New Features of axis diplomat 2012

The choice of new features for **axis diplomat 2012** is driven by a number of factors:

- “Wish List Calls” - from time to time, our Customer Services department will take a query from a customer asking if the software does something where the answer is no. In these cases that support call will be moved into a “Wish List” category. These wish list calls are reviewed on a regular basis (typically quarterly) and, in cases where a number of customers have asked for similar things or a single customer has made a request that seems like a really good idea, we consider adding that request to our development schedule.
- Part-funded customer projects.
- Strategic Development – because of the close interaction we have direct with our customer base, we have a fundamentally good understanding of what would make our customers’ lives easier.
- Current Market Needs – there are some things that we know the great majority of our customers will need or benefit from sooner or later. This includes keeping up with market changes and legislation changes – we anticipate, for example, future developments with VAT and schedule developments accordingly.
- Internal axisfirst requirements – as an intensive user of axis diplomat ourselves, we frequently identify developments that would save us time or money. Since we would only do this if they made economic sense given that we have to effectively fund these developments ourselves, these should offer even greater savings to other axis diplomat users.

The developments within **axis diplomat 2012** are inevitably influenced by the economic climate and how that affects the needs of our customers. As with axis diplomat 2010, this release:

- includes a number of features and benefits aimed at helping customers reduce costs and increase the efficiency of their staff.
- has retained support for all hardware and operating systems supported by the previous version: the new release still runs, for example, on Windows XP or Windows Server 2003 and can still run on a display with 1024x768 resolution.

Upgrading

Customers with Software Assurance are entitled to an upgrade to their software licence to **axis diplomat 2012** under the terms of their agreement. To request an update to **axis diplomat 2012**, Software Assurance customers should visit our web site at <http://www.axisfirst.co.uk/software/assurance/> and follow the link to request their upgrade. The online request form also allows training to be ordered at the same time.

The following list highlights our **Top Ten Favourite New Features** of **axis diplomat 2012**:

1. Real-Time Business Intelligence
2. Online Dashboards
3. Group-Wide and System-Wide Monitors
4. Nominal Ledger Business Intelligence
5. Nominal Ledger Profit & Loss and Balance Sheet Monitors
6. Pending Supervisor Mode
7. Direct Export to Excel
8. Larger Database Size (Up to 4 Billion Transaction Records)
9. Scrolling Data Lists Profiles
10. Emailing of Contact Details as Attachments (vCard .vcf Support)

Everyone's favourite new features will of course vary as every business is different so you are strongly urged to review all of the new features listed in this document as you are sure to find some further gems that are not in the list above.

Details of Enhancements

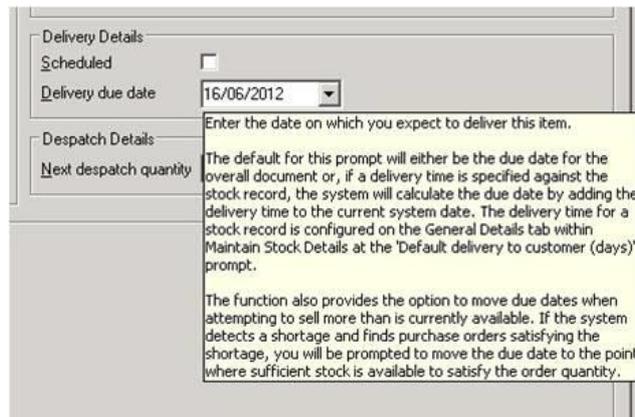
In the following sections, these colour codes have been used to aid clarity:

- Black** A standard facility within **axis diplomat 2012**; available to all
- Teal** A standard facility within **axis diplomat 2012** that has already been pre-released to those customers with Software Assurance
- Blue** A new facility within **axis diplomat** that requires one or more existing optional modules
- Red** An optional extra, available as an add-on to **axis diplomat 2012** but not available at previous versions

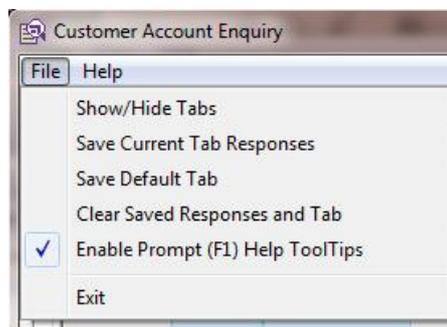
Section A - User Interface Improvements

A1 Tool Tips on Prompts

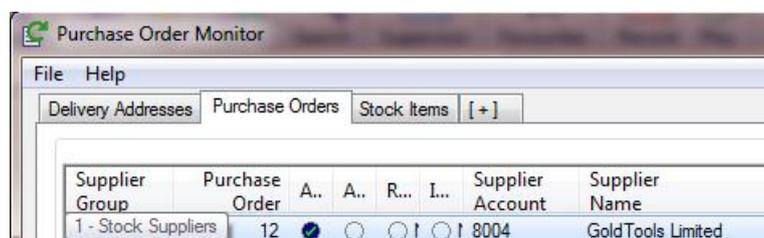
Hovering the mouse over a prompt now displays a tooltip containing the Help text for that prompt.



We have introduced this because many users were unaware of the Help available by pressing F1 and we wanted to make this useful information more accessible.



Whilst enabled by default, users can turn this facility on or off via the "File" menu.



Similarly, hovering over a cell in a Scrolling Data List now displays the content as a tool tip if the column width is not wide enough to display the whole text.

A2 Enhancements to Scrolling Data Lists

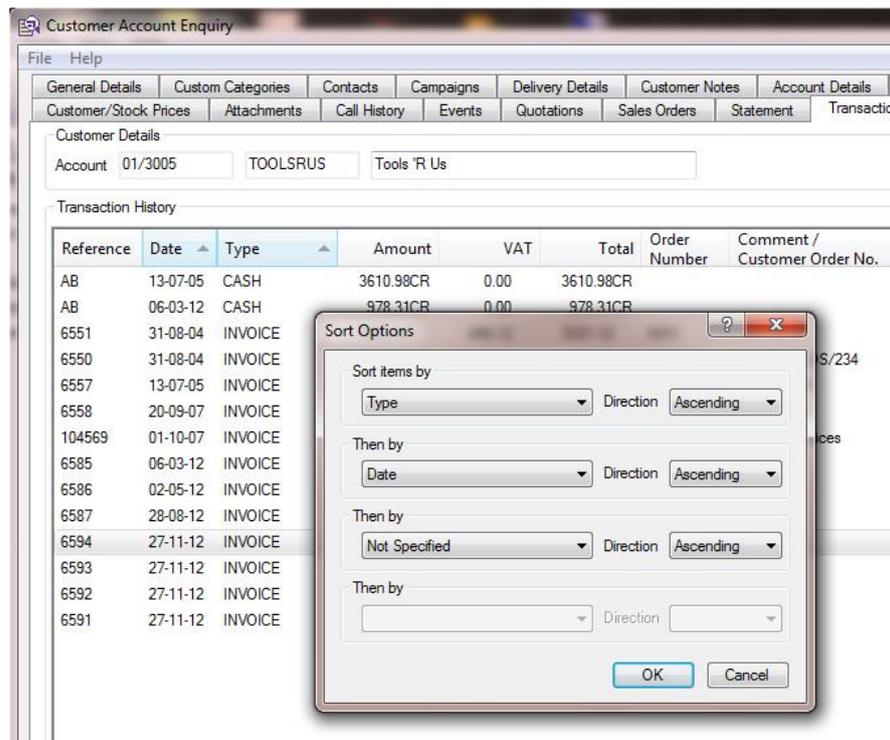
Scrolling Data Lists occupy an increasingly vital part of the axis diplomat user interface through their use, for example, in monitors which are, more and more, replacing static reports.

axis diplomat 2012 extends the capability of all of these Scrolling Data Lists to include the following:

Multiple Column Sorting

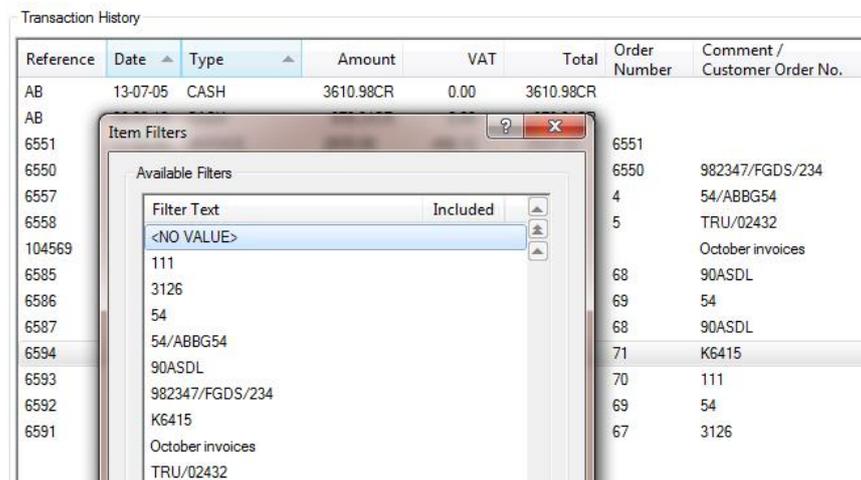
Whilst previous versions allowed you to sort by a single column simply by clicking on the column heading (which you can still do), you now have the option to sort by multiple columns, in a similar way to Microsoft Excel. This is accessed by right-clicking anywhere on the heading and selecting Sort Options.

This, for example, allows you to sort the Transaction tab of a Customer Enquiry firstly by the transaction type and secondly by the transaction date, giving you all of the Cash transactions, in chronological order, followed by the Invoice transactions in chronological order.



Filter by No Value

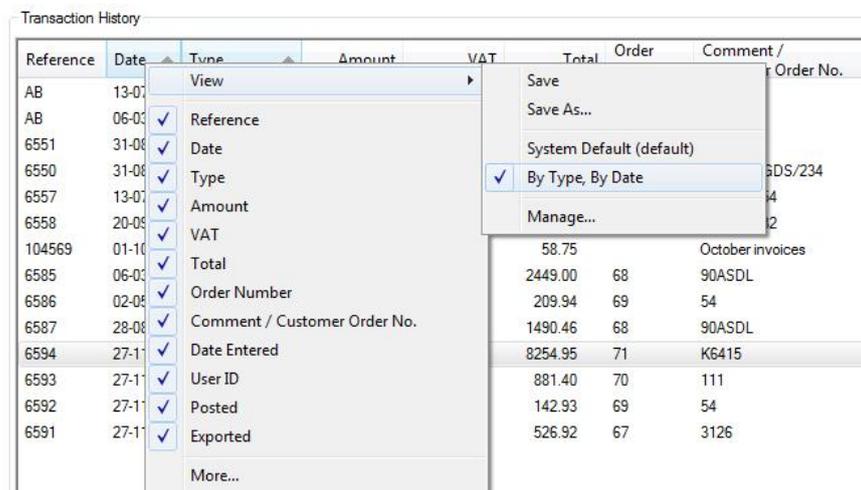
Some columns may contain entries in only certain rows. You can now filter a list to just those rows that contain no value; previously you were only able to filter the list to those rows that contained a specific value.



View Management (Profiles)

If you find yourself regularly changing a given Scrolling Data List between the same selection of views, you can now save each of those views as a profile, making it much easier to switch between them.

A profile remembers not only your column sort settings but also which columns are switched off and the order of the columns. Each profile is unique to that specific Scrolling Data List and to the user that created it.



Not only does this allow you to save a variety of different views of the same type of data (particularly useful in monitor functions) but can also be used to save one view for on-screen use and another view for printing a regular management report where, perhaps, you wish to have fewer columns shown.

Export to Microsoft Excel XLS format

The ability to save the contents of a Scrolling Data List as a CSV text file has proven extremely popular as a quick and simple way of exporting data.

Loading CSV files into Microsoft Excel, however, can be frustrating because of the way in which Microsoft Excel can make incorrect assumptions about the data. Telephone numbers and Stock References with leading zeroes, for example, can have those leading zeroes stripped whilst customer and supplier account numbers may be treated as dates.

In addition to being able to export from a Scrolling Data List as CSV you now have the additional option to export as a native Excel spreadsheet, XLS (provided that you have a suitable version of Microsoft Excel installed). This means that you can subsequently load the file in Microsoft Excel without it making any incorrect assumptions about your data.

Transaction History

Reference	Date	Type	Amount	VAT	Total	Order Number	Comment / Customer Order No.
AB	13-07-05	CASH	3610.98CR	0.00	3610.98CR		
AB	06-03-12	Open		0.00	978.31CR		
6551	31-08-04	Allocation Enquiry		496.12	3331.12	6551	
6550	31-08-04	Order Enquiry		0.00	279.86	6550	982347/FGDS/234
6557	13-07-05	Journal Enquiry		13.23	88.83	4	54/ABBG54
6558	20-09-07	Find		123.73	830.73	5	TRU/02432
104569	01-10-07	Print Preview		8.75	58.75		October invoices
6585	06-03-12	Export		364.75	2449.00	68	90ASDL
6586	02-05-12	CSV File					54
6587	28-08-12	Excel Spreadsheet					90ASDL
6594	27-11-12	INVOICE	7015.95				K6415
6593	27-11-12	INVOICE	734.50	146.90	881.40	70	111
6592	27-11-12	INVOICE	119.11	23.82	142.93	69	54
6591	27-11-12	INVOICE	439.10	87.82	526.92	67	3126

	A	B	C	D	E	F	G	H
1	Reference	Date	Type	Amount	VAT	Total	Order Number	Comment / Customer Order No.
2	AB	13-07-2005	CASH	-3610.98	0.00	-3610.98		
3	AB	06-03-2012	CASH	-978.31	0.00	-978.31		
4	6551	31-08-2004	INVOICE	2835.00	496.12	3331.12	6551	
5	6550	31-08-2004	INVOICE	279.86	0.00	279.86	6550	982347/FGDS/234
6	6557	13-07-2005	INVOICE	75.60	13.23	88.83	4	54/ABBG54
7	6558	20-09-2007	INVOICE	707.00	123.73	830.73	5	TRU/02432
8	104569	01-10-2007	INVOICE	50.00	8.75	58.75		October invoices
9	6585	06-03-2012	INVOICE	2084.25	364.75	2449.00	68	90ASDL
10	6586	02-05-2012	INVOICE	178.67	31.27	209.94	69	54
11	6587	28-08-2012	INVOICE	1268.47	221.99	1490.46	68	90ASDL
12	6594	27-11-2012	INVOICE	7015.95	1239.00	8254.95	71	K6415
13	6593	27-11-2012	INVOICE	734.50	146.90	881.40	70	111
14	6592	27-11-2012	INVOICE	119.11	23.82	142.93	69	54
15	6591	27-11-2012	INVOICE	439.10	87.82	526.92	67	3126

A3 Excel Integration

In addition to the ability to export Scrolling Data Lists as native XLS files outlined above, **axis diplomat 2012** features further developments aimed at simplifying integration with Microsoft Excel.

A new Kernel Supervisor Function entitled Excel Reports has been added which provides a repository for all of your Excel reports that are linked to real-time axis diplomat data via your SQL Server.

This gathers all of these spreadsheets together in one place, rather than having them stored in various undocumented folders on various servers (or worse, in specific user's My Documents). It also ensures that they are backed up as part of your axis diplomat backup regime. They are, for example, included in your .AXB backup files unless you specifically exclude supplementary data from a backup.

For advanced Microsoft Excel users that are familiar with creating macros, we have also provided two additional new facilities:

Firstly, when a spreadsheet is first loaded from the axis diplomat Excel Reports function, a macro can be automatically run. This allows you to build in any initialisation that you require, such as refreshing and/or reformatting the data in the spreadsheet or preparing selection criteria forms.

Secondly, we have provided the ability to call back into axis diplomat from Microsoft Excel. In other words, it is now possible to create a cell in a Microsoft Excel spreadsheet that, when double-clicked loads the appropriate axis diplomat enquiry.

An example of this functionality is included with **axis diplomat 2012** in the shape of a spreadsheet entitled SalesToday.xlsm, which provides a list of sales invoices and credit notes dated today. When any invoice or credit note number is double-clicked, it automatically loads the appropriate axis diplomat Invoice Enquiry or Credit Note Enquiry.

Section B - Accounts (General)

B1 Real-Time Business Intelligence

The data required for Business Intelligence is now available in real-time, meaning that both interactive Business Intelligence functions (such as Sales Business Intelligence) and Dashboards can now include today's data.

Previously, Business Intelligence relied on manipulated versions of the data generated overnight but extensive work on the storage and access to data via Microsoft SQLServer has meant that this data can now be accessed in real-time without a detrimental impact on performance.

B2 Online Dashboards

Now that Business Intelligence data is available in real-time, it has also been possible to develop online versions of dashboards to be accessed from a Business Intelligence App designed for SmartPhones and Tablets, running Apple's iOS 5 or Android 4.1 (or later).

A user simply identifies which of the tabs on their standard axis diplomat dashboard that they wish to appear online; the data is securely posted to a centralised data server on a regular basis (typically every 30 minutes) and is then available to be collected by the mobile Apps whenever and wherever they are connected to the Internet.

This means that you can now be kept up-to-date on all of your Key Performance Indicators, perhaps the value of sales orders received today or the current debtors, wherever you are in the world - you don't need remote access to your own network, or use thin client software to access full-screen applications from a small device; you just need an Internet connection from your device to receive the latest updates.





The Online Dashboard App will automatically redraw your axis diplomat Dashboards to fit the size and orientation of your device



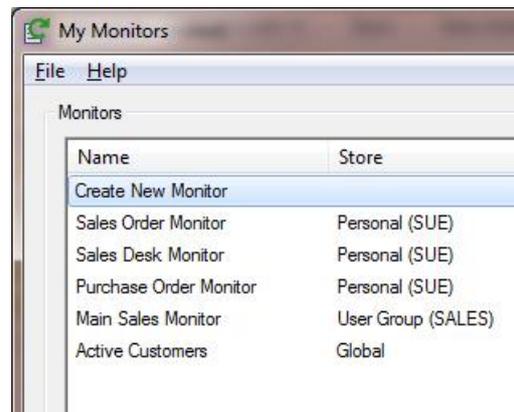
Just as you can with dashboards built in to axis diplomat, you can still drill-down into graphs to see the figures behind them

By publishing the Business Intelligence data to a separate server held in a data centre, your online dashboards are available even if your in-house server is not. It also means that you do not need to worry about the security concerns of providing remote access to your business data through your own network. A small monthly subscription covers the provision of this server resource within the data centre.

B3 Group-Wide and System-Wide Monitors

The "My Monitors" functionality introduced at axis diplomat 2010 has become very widely used, with users creating their own monitors, with each tab pre-filtered to their regular requirements. Each monitor can have any combination of tabs, including customers, suppliers, sales orders, purchase orders, and so on.

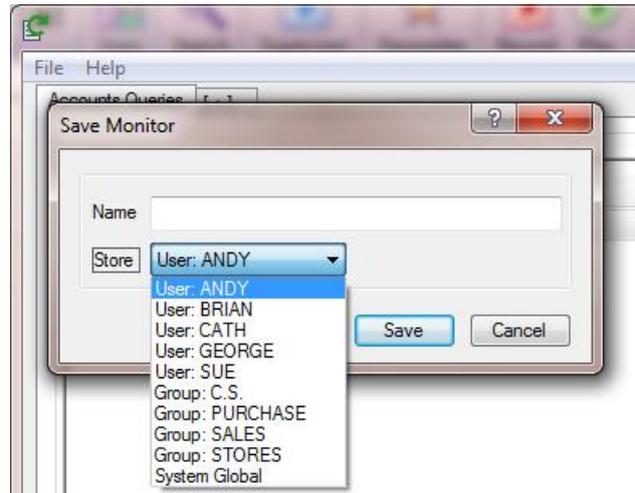
The latest development to the Monitor functionality now allows users to create their own customised monitors and to then publish them so that they become available to all users, or all users in a selected group. Now, when you click on the My Monitors toolbar icon, you not only see a list of the monitors that you have created yourself but also any applicable monitors published by others.



This user (Sue) can see her own personal monitors plus one that has been shared across her entire user group (SALES) and another monitor that is shared globally by all users

This would mean, for example, that you could create a monitor for a particular department, with tabs pre-filtered to that department's customers, suppliers, sales orders and so on and then make that monitor available to everyone in that department. You would then be assured that everyone using that monitor was seeing the same view as everyone else and that some people had not set their filters differently.

Security permissions exist to allow you to define who is allowed to create or modify system-wide and group-wide monitors.



This user is an Administrator with permission to create monitors, not only for themselves but for all users and all groups as well as global monitors

Taking this development a step further, it is also possible to publish specific tabs, again with pre-defined filters, column layouts, etc. which other users can then use to include in their own monitors. This allows users to mix and match the tabs within their own personal monitors whilst, at the same time, ensuring that everyone's view of a particular set of data remains constant. If someone (with the appropriate permissions) amends one of these published tabs then all of the monitors using that tab will be automatically updated, ensuring that they are kept in sync.

A Customer Services department, for example, may use a System Global monitor to provide all staff with the same view of outstanding calls, with different tabs for customers awaiting callback, calls awaiting feedback from customers, and so on.

One particular benefit of these developments is that it simplifies the task of setting up new users; you no longer need to set up their monitors for them, or train them how to set them up themselves. With system-wide or group-wide monitors, they can be already available to them.

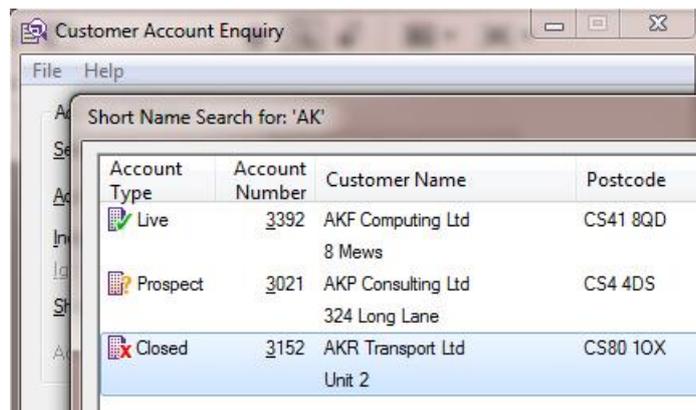
Section C - Sales Ledger & Sales Order Processing

C1 Closed Accounts

Working in a similar way to prospective accounts, you can now flag customer accounts as closed. You may choose to use Closed accounts to indicate customers that have ceased trading or simply accounts that you no longer trade with.

In order to flag a customer account as closed, it must have no outstanding sales orders, quotations or, in the case of systems with the Service Contract Management module, outstanding contracts. You may, however, flag an account as closed if it has an outstanding balance since a business may cease trading whilst still owing you money.

Closed accounts do not appear when entering sales orders, etc. but may be optionally included when searching via Customer Account Enquiry. Gap Analysis has also been extended to optionally exclude closed accounts.



The screenshot shows a window titled "Customer Account Enquiry" with a search bar containing "Short Name Search for: 'AK'". Below the search bar is a table with the following data:

Account Type	Account Number	Customer Name	Postcode
Live	3392	AKF Computing Ltd 8 Mews	CS41 8QD
Prospect	3021	AKP Consulting Ltd 324 Long Lane	CS4 4DS
Closed	3152	AKR Transport Ltd Unit 2	CS80 10X

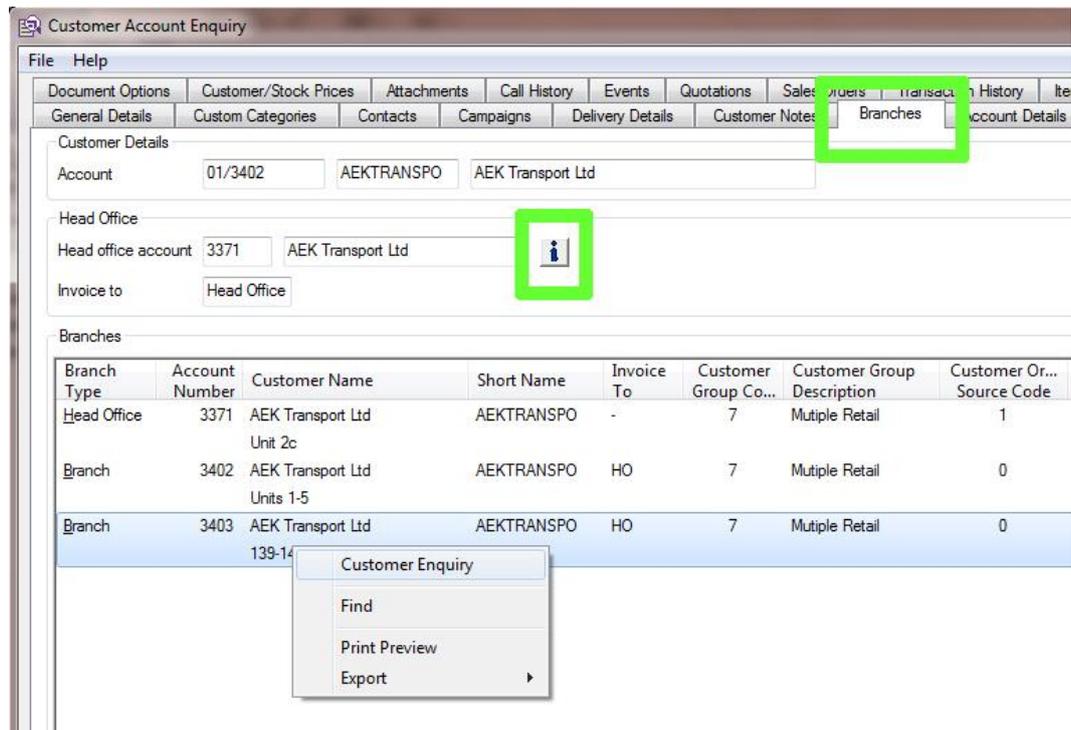
In the past, users have needed to rely on using a specific Customer Group or Order Source code to indicate accounts that are no longer trading. If this is the case for your system then you can take advantage of modifications to the Supervisor Function "Set Customer Flags" which can set all accounts within a selected range of Customer Groups and/or Order Source codes as Closed.

Note: historically, Account Type has been used to describe whether the account is a UK customer, an EC Export Customer or a non-EC Export Customer for VAT purposes. To avoid confusion, this has been renamed as the Classification.

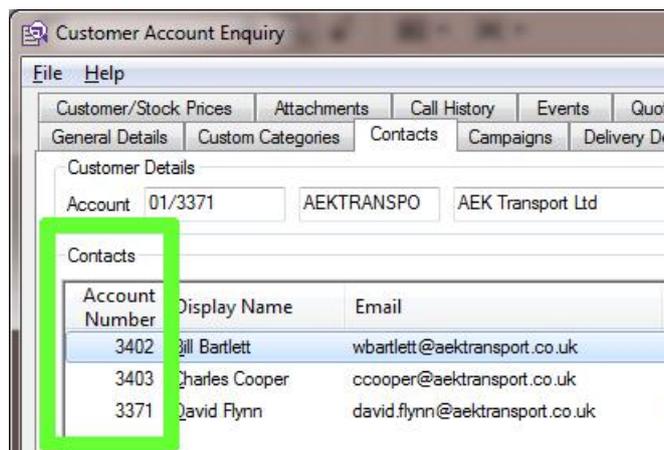
C2 Branch Account Enhancements

A large number of changes have been made to the system to improve and simplify dealing with customers with Branch Accounts:

A new tab has been added to Customer Enquiry when looking at a Head Office account to show all of its branches and when viewing a Branch Account, a 'Smartlink' has been added to jump to the Head Office account:



When viewing a Head Office account, you can now optionally see contacts from all of the branch accounts. You can also optionally see CRM calls and/or CRM Events from all branch accounts in the head-office list.



A new Head Office tab has also been added to Sales Business Intelligence.

Furthermore, for customers with the Service Contract Management module, CRM calls entered on a branch account can now be associated with a Service Contract on the Head Office account. This allows calls to be created separately against each branch even when a single Head Office service contract covers all branches.

C3 Sales Ledger Payments Enhancements

Sales Ledger Payments has been extended to allow a new payment type of "Electronic Fund Transfer". Previously these would have been classified as Cheque payments so this development aids clarity.

The screenshot shows the 'Payment Method Details' form. The 'Enabled' checkbox is checked. The 'Description' field contains 'Payment Direct to Bank'. The 'Type' dropdown menu is open, showing options: Unspecified, Unspecified, Cash, Credit / Debit Card, Cheque, Electronic Funds Transfer (highlighted), and Other. The 'Currency' field is empty, and the 'Till number' field is also empty.

New status codes have also been added for both Cheque and EFT payment types to show whether a payment has been received, has been received but not cleared, etc.

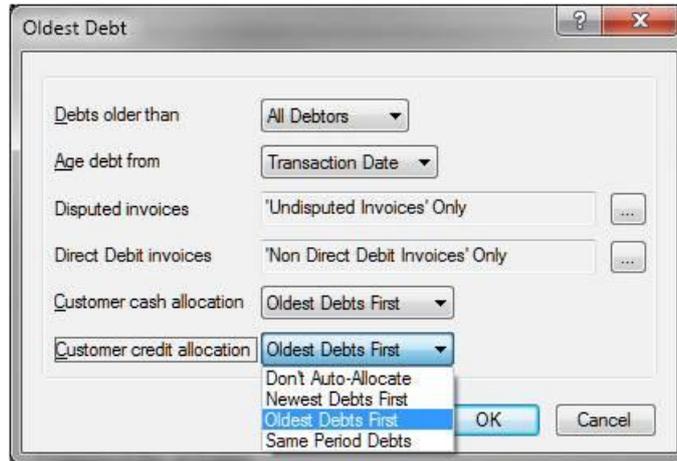
The screenshot shows two forms side-by-side. The 'Payment Details' form has 'Payment type' set to 'Cheque', 'Outstanding amount' of 251.70 GBP, and 'Payment amount' of 251.70 GBP. The 'Cheque Details' form has a 'Status' dropdown menu open, showing options: Pending (highlighted), Cancelled, Received, Rejected, and Cleared. The 'Number' field is empty.

C4 Document Delivery of Credit Notes

Document Delivery has been extended to include support for delivery of credit notes – any customer configured to receive invoices by email (or fax) will now receive credit notes in the same way (automatically to the same contact that is used for invoices - no further configuration is necessary).

C5 Credit Control Monitor Enhancements

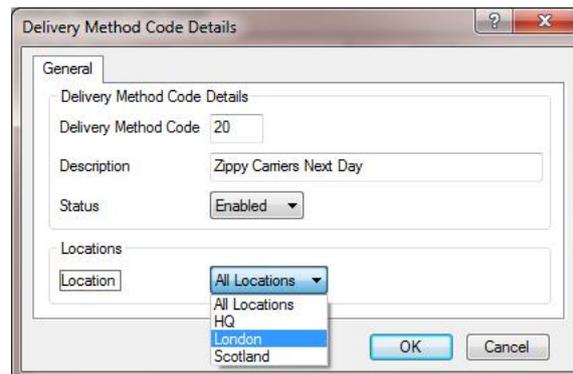
The Credit Control Monitor has been modified to optionally perform the same auto-allocation process that the Debtors Schedule can do – offering options to assume that any cash and credit balances will be allocated to the oldest debts, the newest debts or the debts that originate in the same period as the cash/credit.



C6 Location-Specific Delivery Methods

Delivery methods can now be defined as only available to a specific location.

For example: you have two locations from which goods are shipped; one uses carrier company 'a' and the other uses carrier company 'b'. Defining the respective axis diplomat delivery methods as specific to their respective locations prevents users from setting a sales order to a delivery method which is not valid for the order's location. This is especially useful where axis diplomat is interfacing directly with a carrier's consignment software.



The selected delivery method can be set as available for use at all locations or an individual stock location.



Only the delivery methods applicable to the sales order's stock location are shown for selection.

C7 Gap Analysis Enhancements

In addition to allowing exclusion of Closed Accounts (see above), Gap Analysis has been extended to allow selection by individual country and/or postcode area, allowing campaigns to be created which are targeted to a specific geography.

For users with the optional Campaign Management module, you can also now easily measure the effectiveness of a particular campaign by performing Gap Analysis against the members of that campaign.

You can also run Gap Analysis on a range of customer account opened dates to create campaigns based, for example, on only accounts opened within the last year.

The screenshot displays the 'Gap Analysis' application window. It features a menu bar with 'File' and 'Help'. Below the menu bar are two tabs: 'General Selection' and 'Category Selection'. The 'General Selection' tab is active and contains several sections of input fields and checkboxes:

- Customers:** Includes text boxes for 'Customer number(s)', 'Customer group(s)', 'Order source(s)', and 'Account opened date(s)'. A green box highlights the 'Postcode' and 'Country' fields, where 'Country' is a dropdown menu currently set to 'Any Country'.
- Archive Selection - Products Bought:** Includes a checked checkbox for 'Filter by products bought', a 'Date(s)' text box, 'Product group(s)', 'Sales group(s)', and 'Stock reference(s)' text boxes, and a checked checkbox for 'Include zero value transactions'.
- Archive Selection - Products Not Bought:** Includes a checked checkbox for 'Filter by products not bought', a 'Date(s)' text box, 'Product group(s)', 'Sales group(s)', and 'Stock reference(s)' text boxes. It also has unchecked checkboxes for 'Include zero value transactions', 'Include prospects', 'Exclude closed accounts', and 'Exclude customers with open orders'.
- Campaign Selection:** A green box highlights this section, which includes an unchecked checkbox for 'Filter customers by campaign membership' and a 'Campaign' dropdown menu.

The Windows taskbar at the bottom shows the application name 'axis diplomat 2012' and the file name 'DFA (Local)'.

C8 2 Million Customer Accounts

axis diplomat previously had a maximum of 1 million customer accounts per sales ledger. Whilst this has been sufficient in the past, we are now seeing successful retail businesses grow to require more than this.

The maximum number of customer accounts has now been doubled to 2 million (per sales ledger).

C9 Maximum Credit Period

Many businesses like the idea of having the system automatically place new sales orders on hold when an account is overdue but will allow some leeway to their customers. For example, a particular customer account may have standard credit terms of 30 days but they would not want to place new sales orders on hold unless that customer has an outstanding balance over 60 days.

axis diplomat 2012 introduces a new field of Maximum Credit Period to sit alongside the existing payment terms. This is a field that can be used to control when sales orders are put on hold. In the example above, the payment terms would be set to 30 days but the Maximum Credit Period would be set to 60 days.

By further automating this aspect of credit control, **axis diplomat 2012** not only helps eliminate another manual aspect of the credit control process but helps eliminate the possibility of accidentally shipping goods to customers that are already in arrears.

The Supervisor Function "Amend Customer Terms" has also been modified to allow the setting of this value across whole ranges of customer accounts, simplifying the task of implementing this new method of operation.

C10 Postcode Address Verification

Address lookup buttons now appear regardless of whether a system has the optional "postcode address retrieval" feature. We have done this to promote the availability of the feature because of the increasing importance of address accuracy in order processing and despatch management.

To use postcode lookup, the feature will need to be purchased and an account opened with our chosen address search provider, PostcodeAnywhere (pay-per-lookup charges apply from the search provider).

C11 Sales Business Intelligence Enhancements

As described in Section B, Sales Business Intelligence now operates in real-time whilst further enhancements have also been made:

An additional tab has been added to Sales Business Intelligence providing analysis of Sales by Department. In addition, as covered in section C2, a further tab has been added for Sales by Head Office.

The Sales (and Purchase) Business Intelligence enquiries now include totals on columns of financial information.

When adding graphs to Dashboards, you can now specify a custom period for each bar of a bar graph so, for example, rather than having a bar graph showing month-by-month figures, you can now create one showing figures for financial or calendar quarters.

C12 Supply or Cancel

This new facility provides an additional way of dealing with part-shipped orders and provides additional configuration at a customer account level and on a sales order-by-sales order basis.

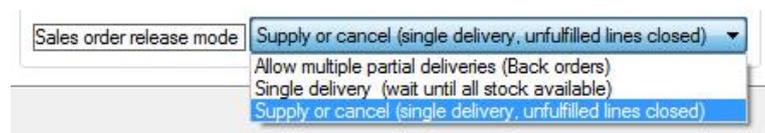
Sales Orders can now be configured with a choice of three release modes:

Allow Multiple Partial Releases (back orders) means that the order can be part-shipped and any lines left undelivered, or partially undelivered, will be left outstanding, on back order.

Single Delivery means that the order can only be released once all of the stock on all of the lines can be delivered.

Supply or Cancel allows a part-shipment but any remaining undelivered lines are automatically closed (i.e. not placed on back order).

The default setting can be configured against individual customer accounts and over-ridden on particular sales orders.



C13 Sales Order Processing Enhancements

A number of new enhancements have been added to the Sales Order Processing module, to increase its speed, convenience and usability:

- A new parameter has been introduced to allow suppression of the opening 'batch details' dialogue.
- The Sales History option in Sales Order Maintenance now shows the historical Actual Cost and the Product Group.
- Convert Quote to Order can now issue warnings if the quote contains stock items with Urgent Stock Notes.
- A new parameter has been introduced to allow Urgent Customer Notes to be displayed as part of the Sales Order Release process.
- Systems with SOP Kits can now specify on a kit-by-kit basis whether the kit itself should be added to a sales order or just its components; previously this was a system-wide parameter.
- Individual Sales Order Status Codes can now be flagged to prevent Advice/Packing Notes being printed for sales orders with those status codes. This means that if you have, for example, a Sales Order Status Code indicating that a sales order needs a directors approval, then it won't generate an Advice/Packing Note until its status is updated.
- The Total Order List report has been modified to optionally only include sales orders that have resulted from quotations being converted to sales orders. This can be useful in performing analysis of conversion rates on quotations by comparing the report with quotations remaining on the system (in other words, those that have not been converted).
- It is now possible to automatically email specific users whenever a sales order is taken on or off of credit hold; this may be particularly useful for customers with sales staff who are mostly out of the office and may not have access to the Sales Order Monitor.

C14 Other Sales Ledger Enhancements

- A SmartLink has been added to the General Details tab of the Customer Enquiry function to allow quick access to the contact details for the main contact on the account.
- The Sales Desk Monitor can now show an additional tab for Sales Transactions. This is ideal if, for example, your sales staff want to see details of sales recently made to their accounts.

This enhancement also allows you to filter the list of sales transactions by the Order Origin (whether back office, point of sale or web) so it also provides an easy way to see the recent sales that have gone through your axis vMerchant website(s).

- The Sales Ledger Archive Enquiries menu has been removed and the functions moved to the standard Sales Ledger Enquiries menu. Since all systems now archive all transactions as standard, removing this now esoteric distinction makes functions easier to find.
- By reformatting the way in which call categories are stored, the performance of the Sales Desk Monitor (and other monitors with Call-based tabs) has been significantly improved, particularly when applying filters based on call categories.
- The way in which Multiple-Element Custom Categories are stored has also been changed, to make them easier to query from third-party applications via the raw SQL tables.

Section D - CRM

D1 Campaign Management

For customers with the Campaign Management module, telesales calls generated from Campaigns can now have attachments in the same way that general CRM calls can.

The Membership List tab in Campaign Maintenance now includes columns to show the Account Short Name and to indicate whether emailshots are allowed.

Campaign Details					
Campaign number: 1					
Description: Domant Accounts					
Total members: 188					
Campaign Members					
Customer Number	Short Name	Customer Name	Contact	Email Shots	Email
3022	OKXDISTRIB	OKX Distribution Ltd	Sarah Waddington	✓	sarah.waddington@okxdist
3023	RLRSYSTEMS	RLR Systems Limited	Brian Waddington	✓	brian.waddington@rlrsystem
3024	WRSHOLDING	WRS Holdings Company	Julie Waddington	✓	julie.waddington@wrsholdr
3025	JMCHOLDING	JMC Holdings Co.	Wendy Waddington	✓	wendy.waddington@jmcho
3026	ERPSOFTW...	ERP Software Ltd	Tom Gilberts	✓	tom.gilberts@erpsoftware.c
3027	HTFTRANSP	HTF Transport Companv	Wendv Waddington	✓	wendv.waddington@htftran

D2 Emailing Contact Information

axis diplomat 2010 added contact synchronisation with user's Outlook contacts (via Microsoft Exchange Server) to help staff that are regularly out of the office keep in touch with customers and suppliers.

axis diplomat 2012 now adds the ability for a user to email full contact details (including phone numbers, email address, postal address & postcode) directly from within customer or supplier enquiries.

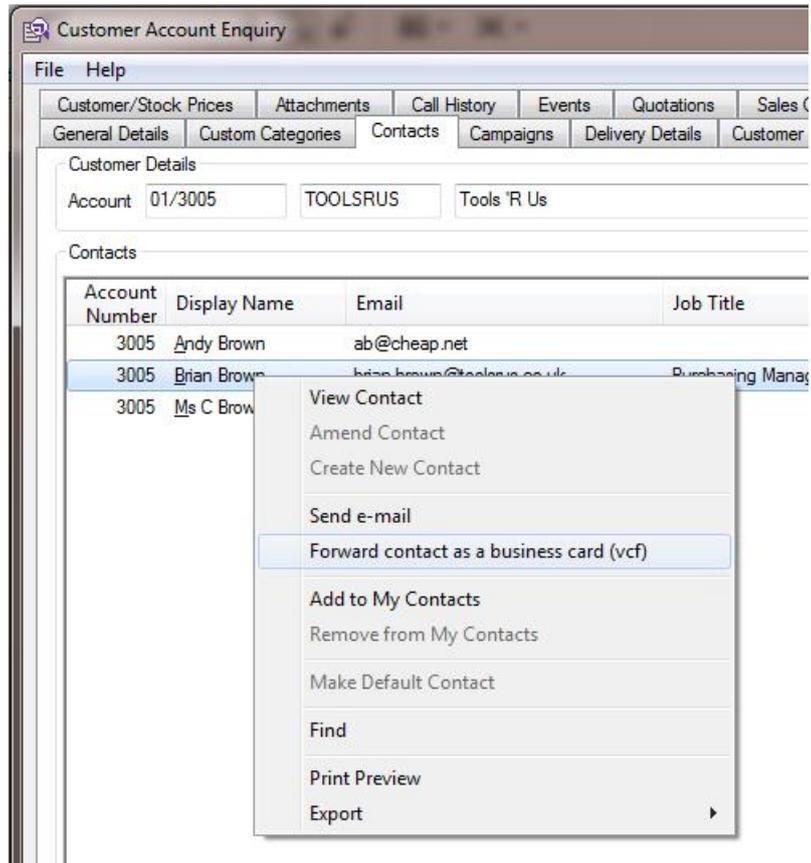
In particular, this provides a quick and easy method for a user to send a contact's details to the SmartPhone of a colleague out in the field.

Anyone out of the office no longer needs to find a pen and paper before phoning the office to have someone dictate a client's contact details over the phone - all of the details can be sent as a "vCard" or "vcf" and SmartPhones can then call, email or text that person by simply opening the email-attached vCard.

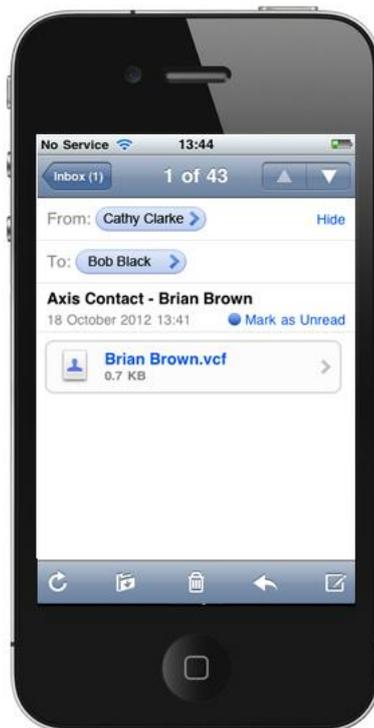
For those unfamiliar with vCards, the definition is:

vCard is a file format standard for electronic business cards. vCards are often attached to e-mail messages ... they can contain name and address information, phone numbers, e-mail addresses, URLs ...

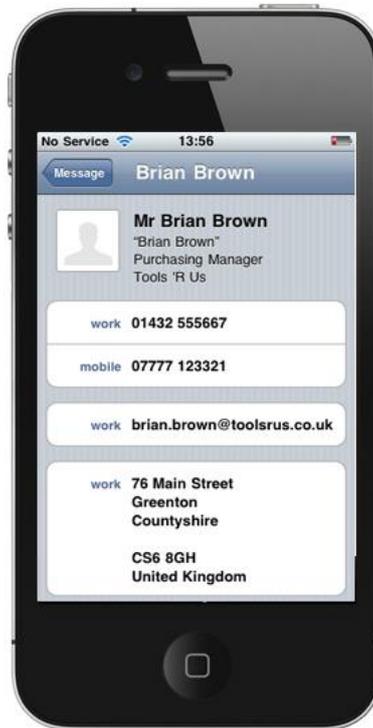
Popular SmartPhones, including those by Apple, Android, Microsoft and Blackberry support vCards.



Within axis diplomat, the operator simply right-clicks on a contact and selects "Forward contact as a business card (vcf)"



This arrives on your SmartPhone as a simple .vcf attachment



You can then open the attached .vcf and call, email or text directly

When emailing CRM Call shortcuts to staff, the email will now also have the vCard automatically attached for the contact associated with the call.

This means that, again, if you are out of the office and you are sent a call shortcut that requires you to contact the person associated with that call, you can now do this by opening the vCard attached to the email - no need to call the office for contact details.



D3 Enhancements to Emailing Call Shortcuts

Emailing Call Shortcuts to members of staff is an ideal way of aiding the management of calls when staff do not have access to the axis diplomat system, particularly when out of the office. In addition to the development outlined above, where vcf files are now automatically attached to call shortcut emails, the content of the email itself is now controlled by a HTML template, so it is possible to configure the look of the emails generated by axis diplomat.

A further enhancement is that the default recipient is now automatically set to the email address of the operator who is responsible for the call, if that is not the person sending the call. In most cases, this avoids the necessity to select a recipient altogether.

If you email Call Reports to customers then the template for these emails can also be modified, allowing you to apply corporate branding and other design elements to your emails.

The templates for both Call Reports and Call Shortcuts can be found in AxisFileStore\{kernel licence}\{company id}\html.

D4 Event-Based Call Progression

axis diplomat 2012 features a revolutionary change to the way in which CRM Calls are updated.

At previous versions, you would open a call, make various changes (such as changing the subject or the responsibility) and save it; only if you wanted to add comments would you create an event.

With **axis diplomat 2012**, all updates to calls are now done by creating an event.

The most significant benefit of this is that when you look at the history of a call, you can now see, at a glance, changes made to the call, by whom and when.

You may, for example, have been dealing with Mr Smith at a customer account regarding a complaint. At some point, the call was changed to Mr Jones. Mr Smith subsequently complains that no one has got back to him about the issue and so you can now see who changed the responsibility from Mr Smith to Mr Jones, find out why and be able to reassure the customer.

On systems with the Email Archive Interface module and/or the Telephony Interface module, email and phone calls related to this CRM call will also appear in the list of events.

Similarly, if you use Call Categories to control the flow of calls through your organisation, you can now see exactly when a call moved between its various states, and when priorities were increased or decreased, giving a full history of when things happened.

D5 Call Workflow

The full benefits of Event-Based Call Progression can be seen when used with the optional new Call Workflow module. This feature allows you to define the path for calls through your organisation and can impose restrictions on what categorisation can be set on a call at each point in its progress.

The facility is highly configurable and designed to ensure that calls cannot get miscategorised or lost. When used in conjunction with the call monitors, this facility allows you to provide each group of workers with a prioritised list of tasks to work on and a restricted set of places that those tasks can be progressed to.

This is a very new development. Please contact your account manager for more information.

Section E - Purchase Ledger & Purchase Order Processing

E1 Creditors Monitor

The new Creditors Monitor function is the Purchase Ledger equivalent of the Credit Control Monitor introduced at axis diplomat 2010, and which has proven extremely popular.

The Creditors Monitor acts like an interactive Creditors Schedule and allows you to perform all of the filtering and sorting operations familiar from other monitor functions. Also, as with other monitor functions, you can add additional tabs and save them for future use. You can, for example, set up a number of Creditor tabs for suppliers in certain groups, or only supplier accounts with a particular age of outstanding transaction.

Additional tabs do not, of course, need to be lists of Creditors - you can add a simple list of Suppliers (possibly filtered to particular groups, for example) or a list of outstanding purchase orders.

This means that the Creditor Monitor can become the main function used by those whose day-to-day job function involves dealing with your suppliers accounts, making all of the information that they need available at their fingertips.

Supplier Name	Account Number	Current Balance	Current Month Balance (Dec)	Last Month Balance (Nov)	2 Month Balance (Oct)	3+ Month Balance (Sept and Ol...)	Credit Limit
Acme Garden Tools Limited	8003	52346.98	0.00	52346.98	0.00	0.00	20000.00
Books 'n' Us	8005	4526.50	0.00	4526.50	0.00	0.00	1000.00
GoldTools Limited	8004	1855.29	0.00	1737.79	0.00	117.50	35000.00
		58728.77	0.00	58611.27	0.00	117.50	

E2 Purchase Invoice Attachments

axis diplomat 2012 allows you to attach any type of file to the purchase invoice for future reference.

If you are getting an increasing number of purchase invoices from suppliers via email or EDI then you can now simply drag and drop them onto the invoice within axis diplomat and avoid having to print them.

Invoices still arriving on paper can be scanned and attached.

Purchase invoices received into axis diplomat via Electronic Document Interchange are now automatically attached to the purchase invoice when the EDI interface processes it.

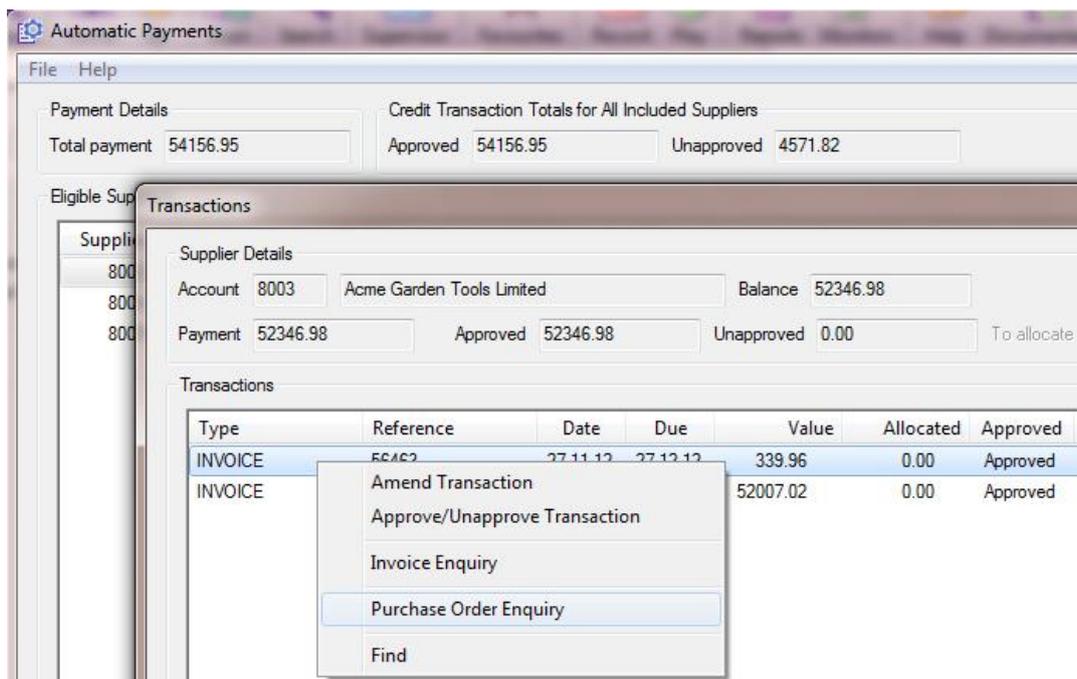
E3 Other Purchase Invoice Enhancements

To help reconciling invoices from suppliers, particularly in a back-to-back (or drop-shipping) environment, the Purchase Invoice Enquiry now includes a SmartLink to the originating Purchase Order if there is a one-to-one relationship between the supplier's invoice and your original purchase order.

The Purchase Order enquiry then also features a SmartLink to your original Sales Order if it is a back-to-back purchase order.

E4 Automatic Payments Enhancements

Enhancements have been made to Automatic Payments to provide easier access to purchase order and purchase invoice information including attachments. The dialogues are now resizable and additional columns appear for 'Purchase order' and 'Attachments' with drill-down into the Purchase Order and the Purchase Invoice to view any attachment.

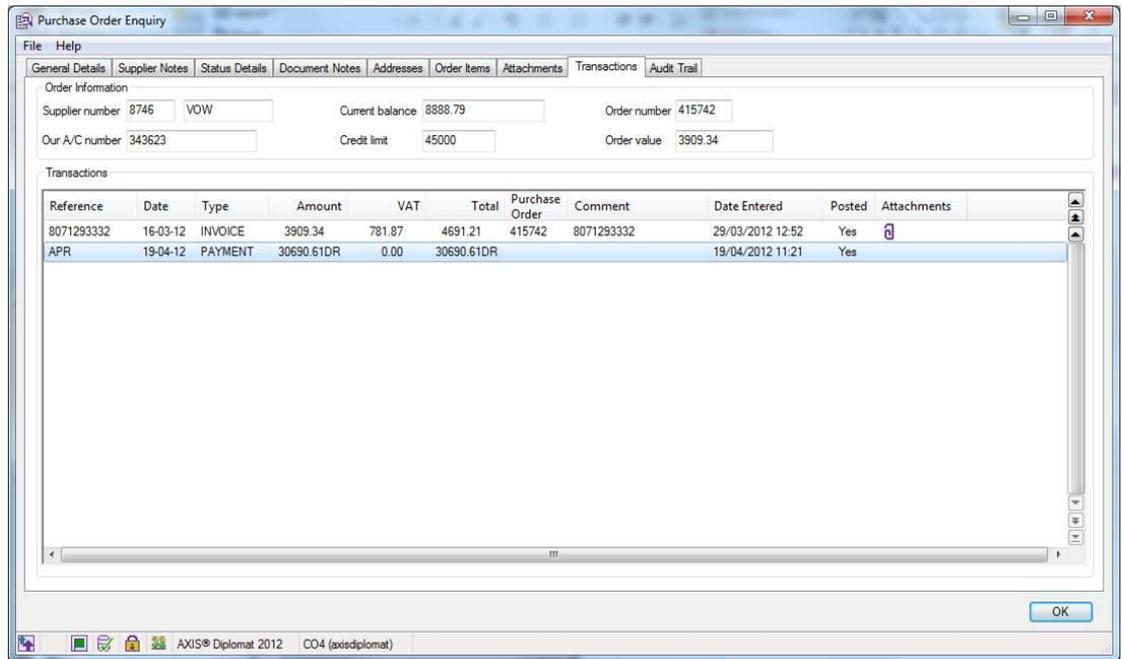


E5 Purchase Order Maintenance / Enquiry Transactions Tab

An additional tab, "Transactions", has been added to Purchase Order Enquiry / Maintenance.

This provides information on invoices and payments which relate to the purchase order (with drill-down into the purchase invoice).

This makes it much easier to deal with queries arising with suppliers by putting more information at your fingertips.



E6 Purchase Order Maintenance / Enquiry Enhancements

The Purchase Order Enquiry and Maintenance functions now have additional columns for Received Quantity and Invoiced Quantity.

The Purchase Order Status Enquiry has been made redundant by adding the extra functionality to the Purchase Order Enquiry – one function now does it all!

E7 Online Purchase Order Processing

The Online Order Processing function for EDI ordering is now re-sizeable to maximise the information on-screen. Additional columns have also been added for the Stock Description and Supplier's Description.

The Online Purchase Order Processing function can now also process all suppliers in one operation, significantly streamlining the task of dealing with multiple suppliers via EDI.

E8 New EDI Modules

Available as additional options at **axis diplomat 2012** are EDI interfaces with **Computer 2000, PBTI Xenia and JetTec**.

This means that you can now place orders and receive invoices electronically with these suppliers.

E9 Purchase Requirements

Maintain Purchase Requirements will now indicate which stock items contain Stock Notes.

E10 Purchase Order Monitor Enhancements

For customers running with Multi-Location Multi-Bin Stock, Goods Received from Supplier can now be accessed via a right-click option within the Purchase Order Monitor.

E11 Purchase Ledger Business Intelligence

Purchase Ledger Business Intelligence has been extended to include an additional tab for "Nominal Accounts".

Drilling down into a list of transactions from any tab now also shows the Nominal Account associated with each transaction.

No...	Description	Turnover	Quantity	Weight
21	Purchases for resale	11,018,570.35	2068308	
35	Rent and Rates	83,914.89	17	
36	Light and Heat	22,042.58	14	
40	Wages and Salaries	396,900.00	14	
45	Telephone	3,920.00	14	
47	Advertising	4,042.63	19	
53	Vehicle Hire and Leasing	65,390.00	26	
55	Accountancy	5,290.00	1	
74	Office Equipment	3,785.00	33	

Supplier Name	Stock Reference	Stock Description	Nominal Account	Nominal Description
Acme Garden Tools Limited	ACMEFORK01	Acme Standard Fork	21	Purchases for resale
Acme Garden Tools Limited	ACMEFORK01	Acme Standard Fork	21	Purchases for resale
Acme Garden Tools Limited	ACMEFORK01	Acme Standard Fork	21	Purchases for resale
Acme Garden Tools Limited	ACMEFORK01	Acme Standard Fork	21	Purchases for resale
Acme Garden Tools Limited	ACMEFORK01	Acme Standard Fork	21	Purchases for resale
Acme Garden Tools Limited	ACMEFORK01	Acme Standard Fork	21	Purchases for resale

As covered under Sales Ledger Business Intelligence, the Purchase Ledger Business Intelligence information is now updated in real-time.

E12 Emailing Contact Information

As covered under Sales Ledger enhancements, in section D2, contact details for contacts associated with Supplier Accounts can now be emailed as a vCard (.vcf) file. In particular, this simplifies contacting suppliers whilst out of the office.

E13 Import Purchase Orders

A new function to allow purchase orders to be imported from CSV files has been introduced.

This will be useful in a variety of scenarios, including:

- If you prepare a spreadsheet of your stock requirements and send it to a number of suppliers for tender; you can then import that spreadsheet into axis diplomat as a purchase order against the successful supplier.

This is particularly common amongst Electronic Office Supplies (EOS) and Office Products dealers who maintain their own stock.

- If you place your purchase orders online via a web portal and that supplier sends back a spreadsheet or CSV file of your order confirmation.

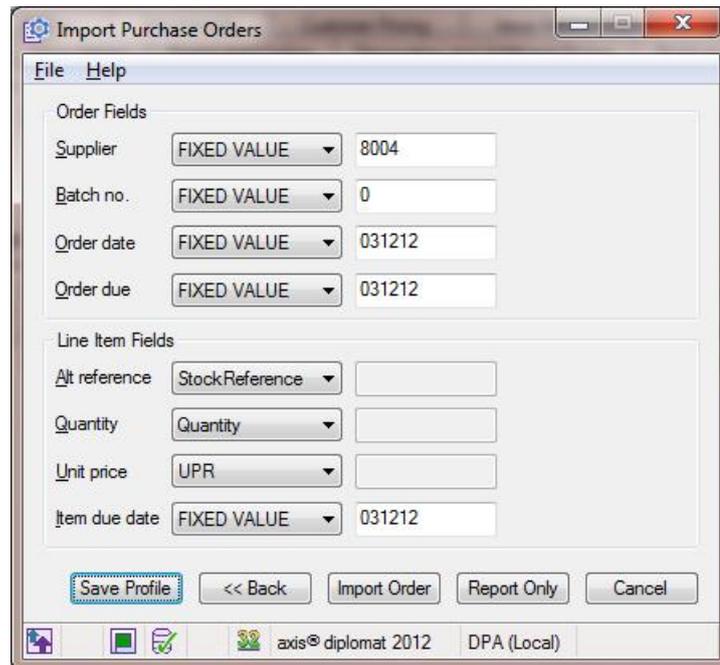
Since you may be dealing with a number of regular suppliers who each provide you with your order details in a different format, the import program allows you to match the required fields to columns in the file and to then save that as a profile that you can re-use in future without needing to re-enter the mapping.



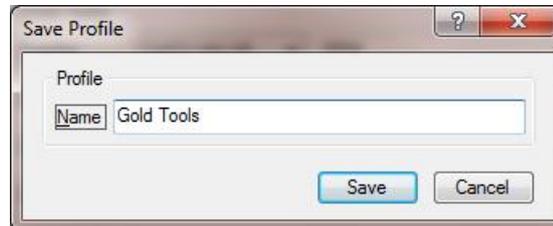
The import function initially prompts for an import file



then asks you to specify the file format ...



before matching the fields required to the columns in the file - if required fields are not present then they can be set to Fixed Values by the Import function



If this is a format that will be used again in the future, then it can be saved as a Profile ...



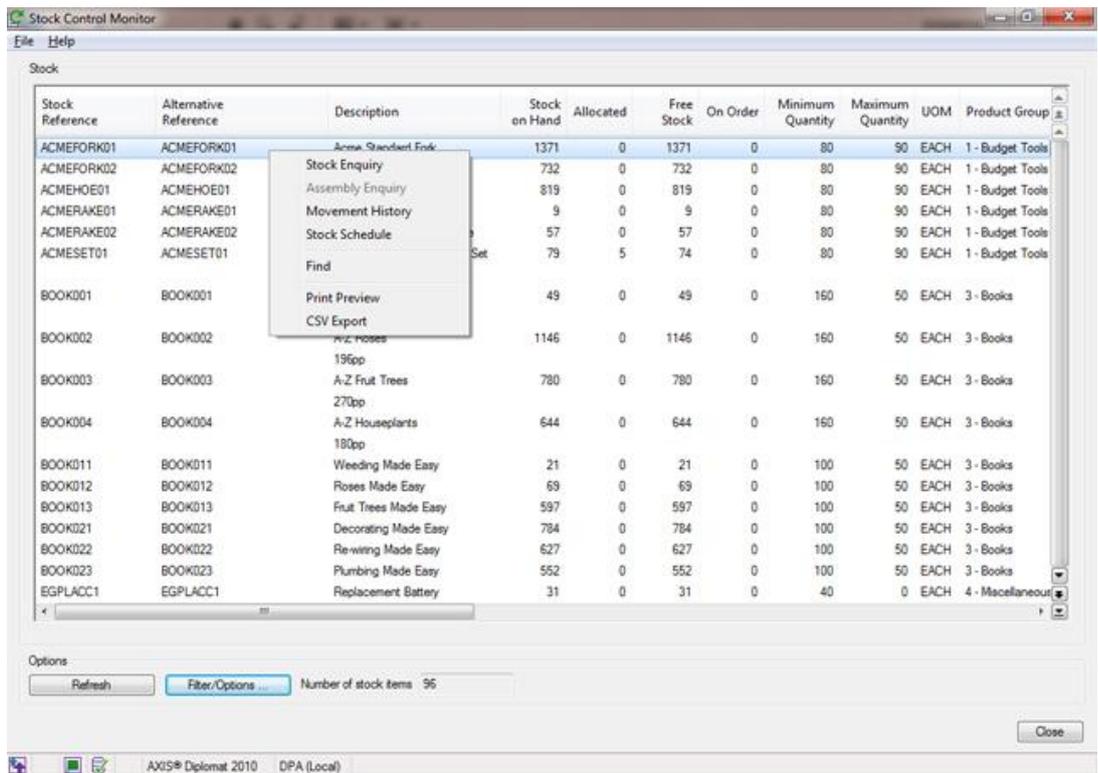
... which avoids the need to specify the file format and field matching parameters again

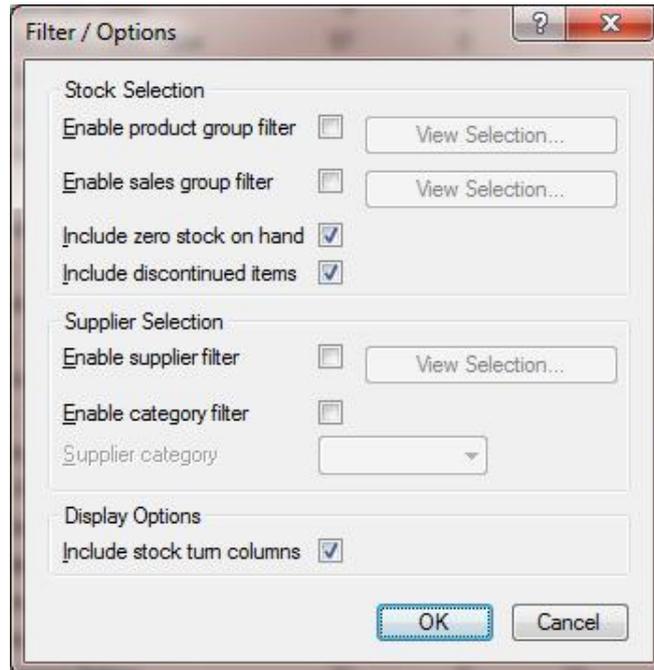
Section F - Stock Ledger, Bill of Materials & MRP

F1 Stock Control Monitor

Previously only available to customers with the 'Stock Forecasting' module, the stock control monitor is now standard.*

The Stock Control Monitor works very much like an interactive Stock Report. It allows you to view, sort and filter using an extensive selection of columns, including stock figures, pricing, attributes and sales group/product group. You can then drill down into individual stock items.





You can also, for example, by setting the appropriate filters, choose to view just the stock items that can be purchased from a particular supplier

* Please note that some extended functionality still requires Stock Forecasting.

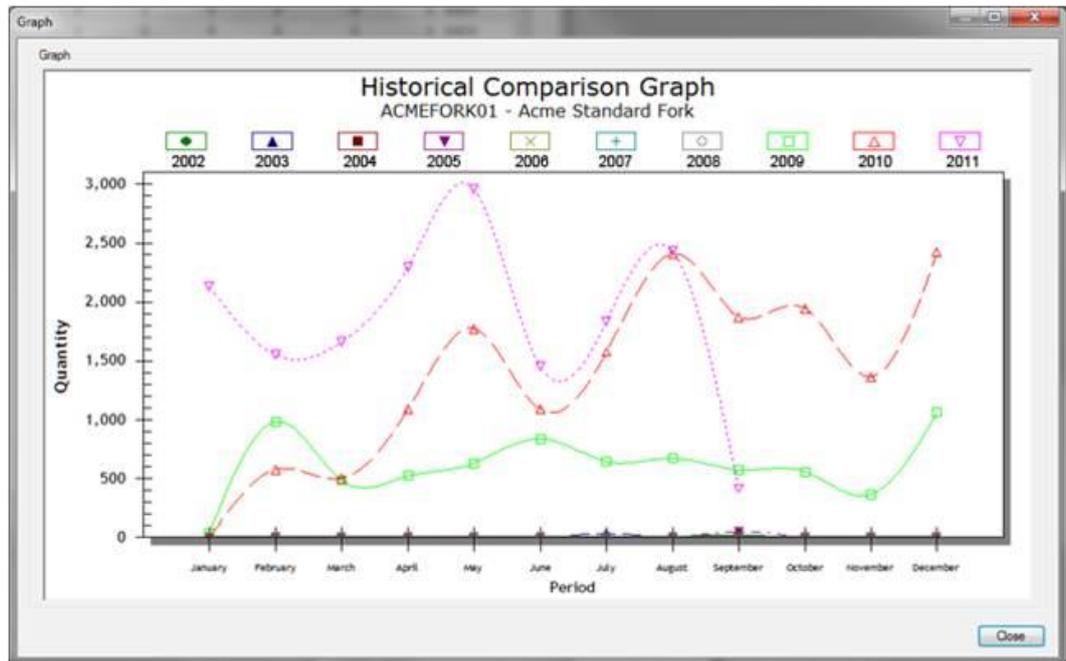
F2 Stock Control Monitor Enhancements

Even customers that previously had the Stock Control Monitor as part of the Stock Forecasting module will see a number of enhancements have been introduced, in addition to making the facilities standard for all **axis diplomat 2012** users.

Customers with Price Feeds can now select to show Individual Supplier Stock – extra columns are added showing the stock levels for the first five suppliers selected in the suppliers filter.

Also, for customers with Price Feeds, an additional column can be shown indicating the supplier with the best price.

It is now possible to produce a Historical Comparison Graph by simply right-clicking on a particular stock item within the monitor:



A number of additional filters have been added to the Stock Control Monitor, including:

- show re-saleable only
- show stocked items, non-stocked (product) items or both
- show unsourceable stock only
- show only discontinued items, show only items that are not discontinued or both

For customers with the Stock Forecasting module, the Stock Control Monitor is now able to show Stock Turn information with three additional columns for sales over last 12 months, average stock on hand over last 12 months and stock turn (last 12 months sales / average stock on hand).

F3 General Stock Ledger Enhancements

Stock Searches (through Stock Enquiry and Stock Record Maintenance) have been modified to optionally only include resaleable items.

F4 Additional Stock References & Stock Aliases

Two previously optional facilities are now included as standard, Additional Stock References and Stock Aliases. Both are designed to make it easier to deal with stock items that are known by a multitude of different part numbers.

Additional Stock References allows you to hold the following against your stock records, in addition to the standard and alternative stock references:

- AXIS bar code (for your own internal use)
- EAN/GS1 bar code (for use by your customers as well as internally)
- UPC bar code (for use by your customers as well as internally)
- Manufacturers Reference

In addition, not previously available with the Additional Stock References option, there is now also a Case bar code, for situations where items are stocked both individually and in cases/cartons with different inner and outer bar codes.

EAN/GS1 bar codes can be either recorded, if provided by a supplier or allocated outside of the system, or generated by the axis diplomat system itself if you are registered with the GS1 organisation (www.gs1uk.org).

Stock Aliases allows you to record any number of additional part numbers that a particular stock item is known by. This might be in situations where the manufacturer has changed the part number over time, for what is essentially the same item or where the part is a 3rd party item equivalent to an OEM product.

Another use for Stock Aliases might be if you create your own multi-buy packs and you want to ensure that your sales staff (and your customers if using an axis vMerchant website) find the packs when using the part code for the standard single product. Unlike other part codes, Stock Aliases do not need to be unique so, for example, a 4 pack, 8 pack and 20 pack can all have the same Stock Alias of the single product.

The Stock Aliases facility is particularly useful to customers using the Equipment Compatibility module or for Electronic Office Supplies (EOS) customers using the Printer Compatibility Database since the Stock Aliases can help ensure that their own products or multi-packs can be found via the Equipment lookup or Printer Wizard.

F5 Superseded Stock

A further module, previously optional, that is now included as standard, is Superseded Stock.

Superseded Stock allows you to indicate that one stock item has been superseded by another and to alert users when trying to enter sales orders.

If the original item is still flagged as resaleable, the operator will be warned and given the option of switching to the new product; if the original item is no longer resaleable, they will be forced to use the new product.

F6 Stock Demand Forecasting

A new Stock Demand Forecasting module is now available as an additional option with **axis diplomat 2012**. This module offers more sophisticated forecasting options than the existing Stock Forecasting module, including the ability to enter forecast demand by customer and/or customer groups. This is ideal for those with complex forecasting requirements (perhaps due to the highly seasonal nature of their product lines) or where their customers supply them with their forecasts of what they expect to take over coming months.

Further information can be found on the axisfirst website at www.axisfirst.co.uk/software/diplomat2012/modules/

F7 Stock Transaction Traceability Enhancements

Customers with the Stock Transaction Traceability module can now set a parameter to prefix serial numbers with "S/N" on invoices.

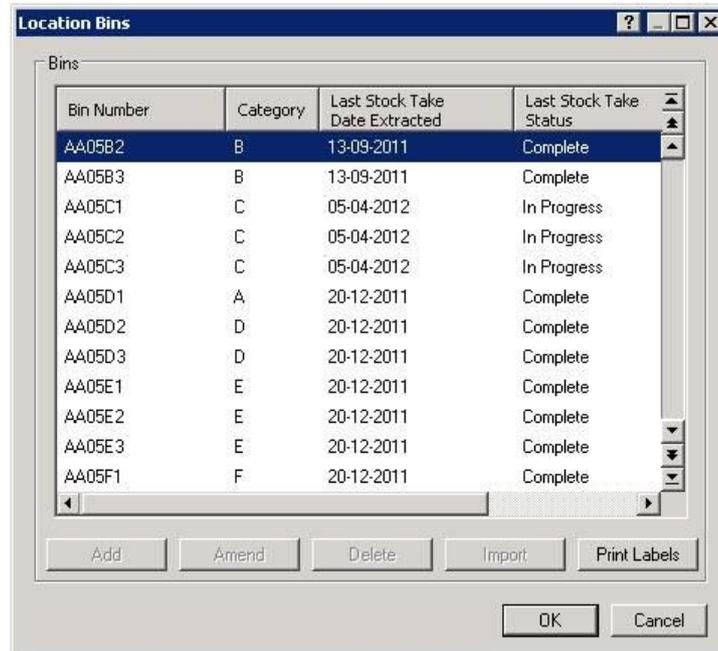
This is particularly desirable for customers using very short serial numbers, where the serial number on its own is not immediately recognisable as a serial number.

When Batch Traceability is used in conjunction with Best Before End Dates, you can now record minimum acceptable shelf life by Product Group.

Goods Received functions warn the user if Best Before End Dates are entered which do not meet the minimum requirements.

F8 Warehouse Management Enhancements

Bin Categories have been introduced which allow prioritisation of bins (A – Z), forcing picking to the highest category bin regardless of stock rotation rules.



Use this facility, for example, to prevent pickers being sent to bins which are less accessible when there is more accessible stock available.

The Deliveries Monitor has been modified to add columns for currency and goods value.

F9 Works Order Monitor Production Status

The Works Order Monitor has been extended to include a Production Status, with 'traffic light' indicators to show:

Red	Stock not available
Amber	Stock requires manufacture i.e. there is no stock available but there are outstanding child Works Orders for the stock and there is sufficient stock available for those Works Orders. When those works orders are complete then there will be sufficient stock available
Green & Amber	Stock is available but despatch quantities are not set (if using Despatch Quantity Recording)
Green	Stock is available (and despatch quantities are set if using Despatch Quantity Recording)

Section G - Nominal Ledger

G1 Nominal Ledger Business Intelligence

Designed to sit alongside the existing Sales and Purchase Ledger Business Intelligence functions, the Nominal Ledger Business Intelligence Enquiry offers the equivalent functionality: You can create your own custom Selectors, or just use the pre-defined Period Range selectors, to allow you to drill down into your Nominal Ledger transactions.

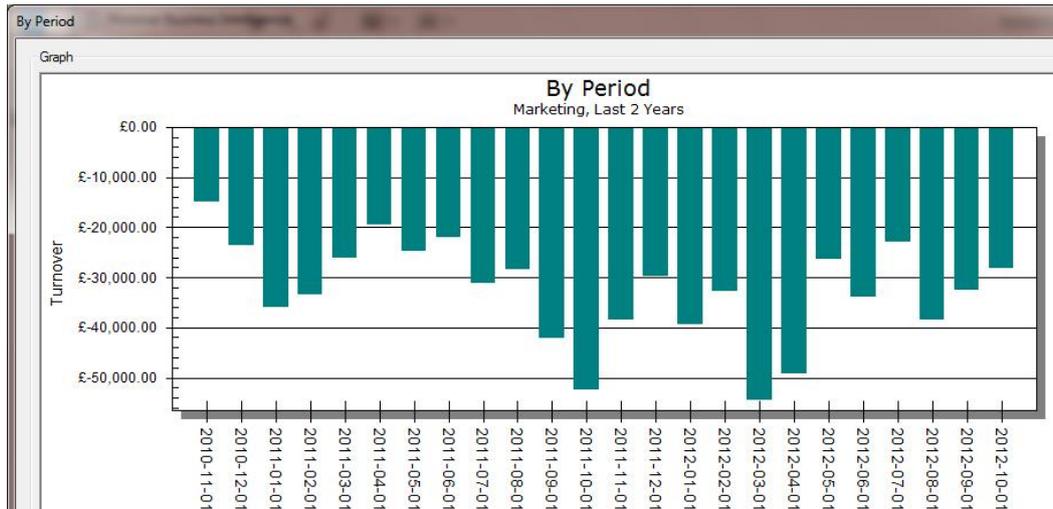
For example, if you wanted to see how your Marketing expenditure had fluctuated on a month-by-month basis over the last two years, this would be a simple exercise using the Nominal Business Intelligence function (depending on how you have analysed that expenditure when the original costs were booked on).



This shows a standard selector for the timeframe and a custom selector that has been created to identify Marketing expenditure (in this case it simply corresponds to a Nominal Group but could just as easily be a combination of Account Codes, Departments or Cost Centres)

This will produce a set of tabs, breaking the last two years of marketing transactions down by Nominal Account, Nominal Group, Department, Cost Centre, Period and Financial Year:

Period Start	Year Ending	Period	Turnover
1st November 2010	2011	7	-14,863.84
1st December 2010	2011	8	-23,573.22
1st January 2011	2011	9	-36,003.13
1st February 2011	2011	10	-33,370.72
1st March 2011	2011	11	-26,037.76
1st April 2011	2011	12	-19,555.70
1st May 2011	2012	1	-24,724.94
1st June 2011	2012	2	-22,030.69



A simple right-click option allows this to be shown as a graph

G2 New Nominal Ledger Monitors

Two new monitors have been added to the system, both providing interactive, customisable views of the Nominal Ledger - the Nominal Profit and Loss Monitor and the Nominal Balance Sheet Monitor. These are separate functions since it is then easy for the administrator to use Menu Privacy should one need more restricted access than the other.

Between these two monitor functions, all of the functionality of the Draft Accounts Report is covered but in a way that allows the operator to interact and change the view to their current needs - by filtering, re-ordering and sorting columns, as well as by applying specific filters and behaviours.

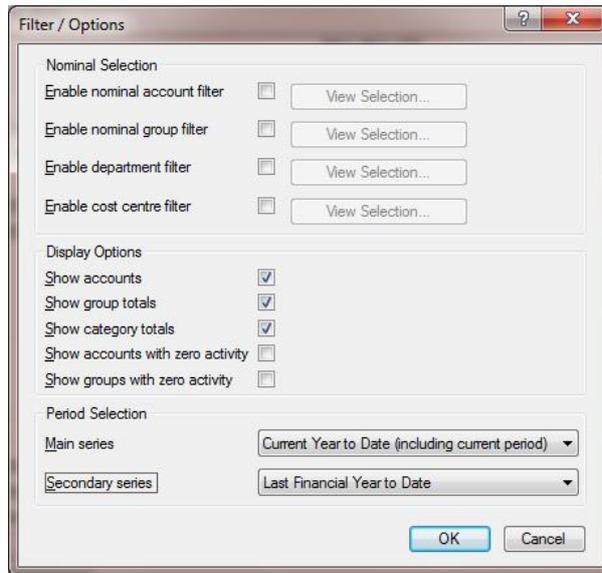
Nominal Profit and Loss Monitor

File Help

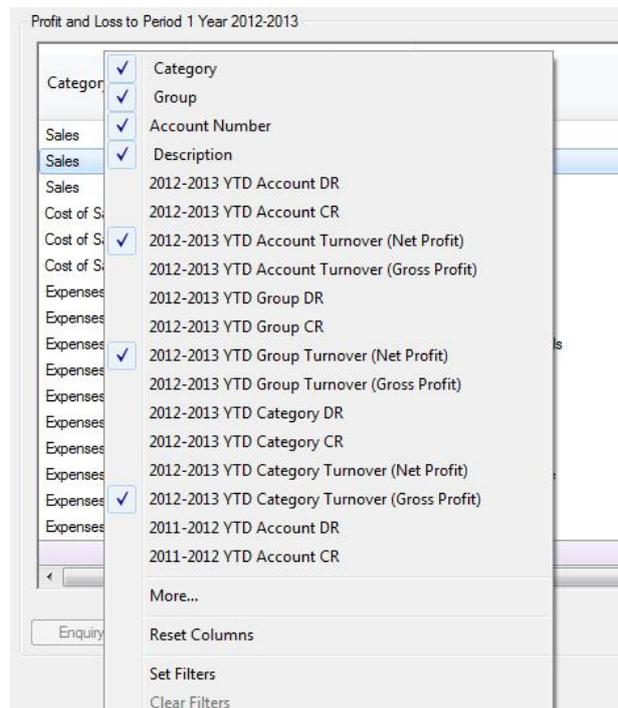
Profit and Loss to Period 1 Year 2012-2013

Category	Group	Account Number	Description	2012-2013 YTD Category Turnover (Net Profit)	2012-2013 YTD Account DR	2012-2013 YTD Account CR	2012-2013 YTD Account Turnover (Net Profit)
Sales	TOTAL TURNOVER	10	Sales			253815.10	253815.10
Sales	TOTAL TURNOVER						
Sales				253815.10			
Cost of Sales	COST OF SALES	21	Purchases for resale		51859.01		51859.01-
Cost of Sales	COST OF SALES						
Cost of Sales				51859.01-			
Expenses	PREMISES	35	Rent and Rates		5600.00		5600.00-
Expenses	PREMISES	36	Light and Heat		850.00		850.00-
Expenses	PREMISES	37	Repairs and Renewals		950.00		950.00-
Expenses	PREMISES	38	Cleaning		500.00		500.00-
Expenses	PREMISES						
Expenses	STAFF COSTS	40	Wages and Salaries		12750.00		12750.00-
Expenses	STAFF COSTS						
Expenses	ADMINISTRATION	43	Postage and Carriage		1460.00		1460.00-
Expenses	ADMINISTRATION	44	Stationery		45.00		45.00-
Expenses	ADMINISTRATION	49	Other Expenses			50.00	50.00
				179851.09	74014.01	253865.10	179851.09

Enquiry Filter/Options

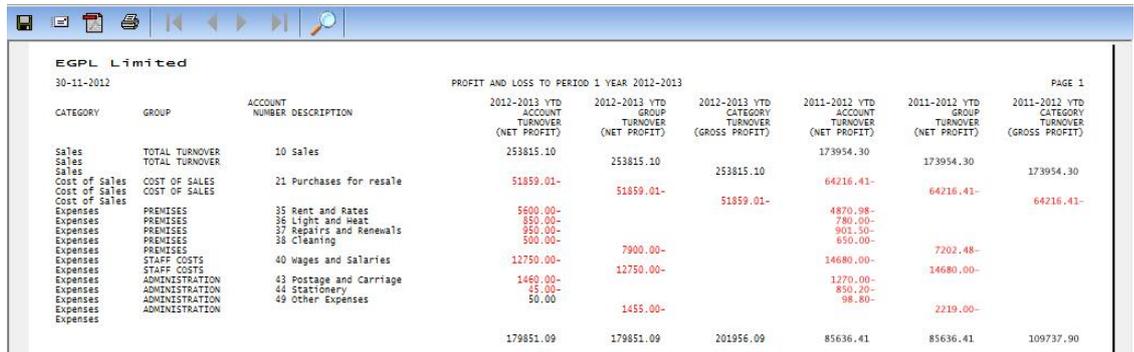


You can apply filters and selection criteria to the list of accounts shown, and these selections are remembered for the next time you run the monitor



Here, for example, the Profit and Loss monitor is filtered to show Net Profit (by account and group) this year to date and for the same period in the previous year, along with the gross profit by category:

This allows us to produce a precisely customised P&L:

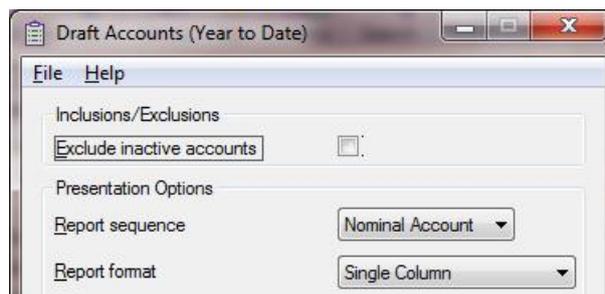


EGPL Limited			PROFIT AND LOSS TO PERIOD 1 YEAR 2012-2013						PAGE 1
30-11-2012			2012-2013 YTD	2012-2013 YTD	2012-2013 YTD	2011-2012 YTD	2011-2012 YTD	2011-2012 YTD	
CATEGORY	GROUP	ACCOUNT NUMBER DESCRIPTION	ACCOUNT TURNOVER (NET PROFIT)	GROUP TURNOVER (NET PROFIT)	CATEGORY TURNOVER (GROSS PROFIT)	ACCOUNT TURNOVER (NET PROFIT)	GROUP TURNOVER (NET PROFIT)	CATEGORY TURNOVER (GROSS PROFIT)	
Sales	TOTAL TURNOVER	10 Sales	253815.10	253815.10		173954.30	173954.30		
Sales	TOTAL TURNOVER				253815.10			173954.30	
Cost of Sales	COST OF SALES	21 Purchases for resale	51859.01-	51859.01-		64216.41-	64216.41-	173954.30	
Cost of Sales	COST OF SALES							173954.30	
Expenses	PREMISES	35 Rent and Rates	5600.00-		51859.01-	4870.98-		64216.41-	
Expenses	PREMISES	36 Light and Heat	850.00-			780.00-			
Expenses	PREMISES	37 Repairs and Renewals	950.00-			901.50-			
Expenses	PREMISES	38 Cleaning	500.00-			650.00-			
Expenses	PREMISES			7900.00-			7202.48-		
Expenses	STAFF COSTS	40 wages and Salaries	12750.00-	12750.00-		14680.00-	14680.00-		
Expenses	STAFF COSTS								
Expenses	ADMINISTRATION	43 postage and Carriage	1460.00-			1270.00-			
Expenses	ADMINISTRATION	44 stationery	45.00-			850.20-			
Expenses	ADMINISTRATION	49 Other Expenses	50.00	1455.00-		98.80-			
Expenses	ADMINISTRATION						2219.00-		
			179851.09	179851.09	201956.09	85636.41	85636.41	109737.90	

By using the new capability for View Profiles on Scrolling Data Lists (see Section A above), you can even create separate profiles for your preferred layout(s) should you wish to produce regular reports in specific formats.

G3 Inactive Nominal Accounts

It is now possible to flag nominal accounts as Inactive, provided that they have no current balance. These Inactive Accounts may then be excluded from reports.



G4 Historical VAT Report

A new Historical VAT Report has been added which can produce a VAT report for a previous period or year (subject to the transactions being available – usually the current year and the two previous years).

G5 Drilldown to Journal Enquiry from Transaction Lists

Functioning in a similar way to the Allocation Enquiry functionality, right-click on any Journal transaction within a transaction list (such as Nominal Account Enquiry, Customer Account Enquiry and Supplier Account Enquiry) and you are now offered the ability to drill down to a Journal Enquiry which will show you all of the related journals.

G6 Enhancements to Nominal Account Enquiry

The Nominal Account Enquiry now shows Cost Centres (if in use) in a separate column; previously the description was shown below the Department. Not only does this improvement mean that twice as many transactions can now be shown onscreen at once, but it is also now possible to sort and filter by Cost Centre.

The function has also been resizable (so it can now show as much information as you can fit on your screen) and been given totals on both the VAT and Net Amount columns.

G7 Replacement for Journal Posting Reports

On completing a batch of Journals, you are now taken to the Journal Batch List, which is an interactive scrolling data list. Here you can turn individual columns on and off, sort or re-order columns to achieve your preferred layout before printing or exporting to CSV or Excel.

Your preferences are remembered, allowing you to continually produce Journal Posting Reports in your own preferred layout.

Section H - eBusiness

H1 Real-Time Available Stock Figures

With **axis diplomat 2012**, any changes to your stock availability figures can now automatically updated to your axis vMerchant website without needing to wait for the next publish.

These updates happen in the background with no user intervention every few minutes so the available stock figures on your website are always up-to-date.

If your axis vMerchant website already shows available stock figures to your customers then no changes are required to your axis vMerchant website - as soon as you upgrade to **axis diplomat 2012**, this change will happen automatically.

If your website does not currently show available stock, and you would now like it to, this can be easily designed in to your site - please contact us to discuss the likely number of Time Unit-Based Support units this might require.

Some examples of possible ways of representing your currently available stock include:

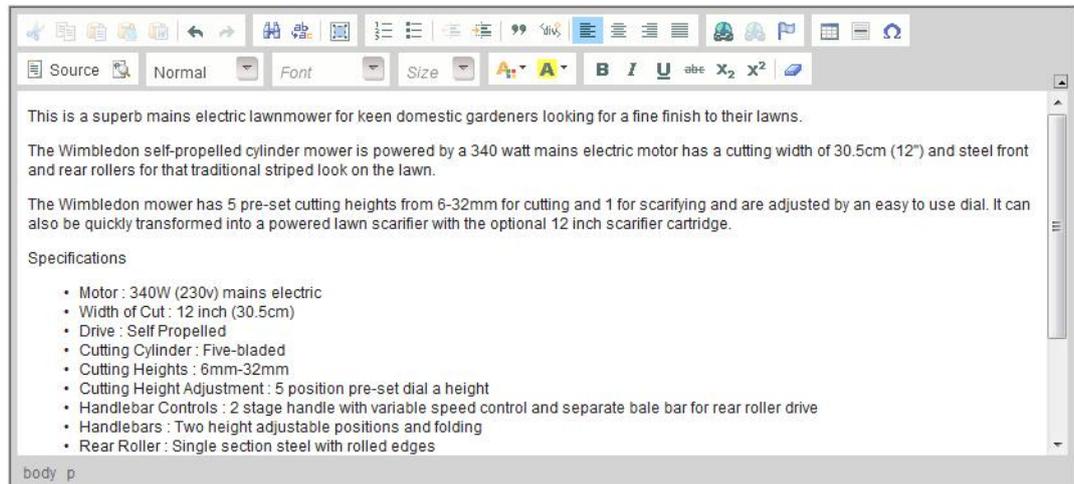
The image shows a product card for 'Helix Clear Up Black R40077'. The card includes the following text: Product Code: 244600, Cost: £2.99, Pack Size: 1, Helix Clear-up Desk Tidy 5 Tube Holders 2 Shallow Trays Black Ref R40077, Multipurpose desktop organiser. Five tube holders of differing sizes and two shallow easy scoop trays for smaller items. Centre compartment is big enough to take most mobile phones. Black, Pack Weight: 0.112 kg, Pack Dimensions: 126x136x111 mm. At the bottom of the card is a quantity selector with '1' in a box, plus and minus buttons, and an 'ADD' button. To the right of the card are four callout boxes with lines pointing to the product card:

- Stock Availability: **Good**
- Stock on Hand: **45**
- Stock Availability: **GOOD** (with a green bar)
- Availability: **Next Day** (with a green checkmark)

Stock on hand can be shown as the actual value, or as varying text, graphics or a combination of both, dependent on preset thresholds

H2 New HTML Notes Editor

The previous HTML editor used for Stock and eBusiness Group Notes has been replaced. The new editor generates code that has greater W3C compliance and so improves the compatibility and accessibility of websites featuring that content.



H3 Invoice PDF Upload to Website

With **axis diplomat 2012**, customers have the option to purchase an additional module to upload invoices in PDF format to their axis vMerchant website(s) for customers to view.

This is ideal for credit account customers in a B2B environment since they can be linked against each outstanding line of their online statement.

H4 Minimum Order Value for Free Delivery

On systems with the optional eProcurement module, it is now possible to specify, on a customer-by-customer basis, a threshold order value (excluding VAT) above which no delivery charge will apply, regardless of what other delivery rules might dictate.

H5 'On Hold' Order Threshold

It is also possible to now specify an order threshold, above which orders are automatically placed on hold. This principal reason for doing this would be if you wanted exceptionally large orders to be placed on hold so that you could carry out security checks before processing the order.

H6 Pre-Calculated Pricing now standard

When publishing to an axis vMerchant website, the **axis diplomat 2012** publish program will now automatically pre-calculate the web selling price for retail customers (which may be different to the stock record's retail price). For customers with complex pricing models for their retail websites (such as cost-plus or discount matrix-based pricing) this can improve the performance of their website since the web server does not need to calculate any pricing information when building each individual web page.

This was previously available as a configuration option but is now standard.

H7 SmartLinks Added to Maintain Sites

Wherever the Maintain Sites function includes details of customer accounts, such as the dummy customer account that should be used to determine the web-selling price for retail axis vMerchant websites, SmartLinks have been added to provide quick access to the details of that account.

H8 eBusiness Group Colours

It is now possible to specify colour overrides by individual groups within the eBusiness Catalogue. Whilst this will not produce an automatic effect on your website (the website couldn't know where to use those colours), it does allow our designers to create new websites with colour-coded sections if required.



If you have an existing axis vMerchant website and would like to discuss design changes to take advantage of colour-coded product categories, please contact our Web Services team.

H9 Banner Management

Previously available as an optional module, Banner Management is now available as standard on all systems linked to axis vMerchant websites. Banner Management allows you to update series of graphical images to be shown in specific locations on your website. Note that your site would need to be designed to show these banners in appropriate places.

Section I - Payroll

I1 New Employee Status

There are now four additional checkboxes associated with an employee to indicate they have completed the various stages for joining your organisation:

- Contract Received
- Job Description Agreed
- 1st Reference Received
- 2nd Reference Received

I2 Additional Holiday Entitlement

“Extra holiday entitlement” can now be recorded against an employee. This may be appropriate where additional holiday has been awarded, for example, in lieu of extra time worked.



Holiday Entitlement	
Annual entitlement (days)	20
Entitlement brought forward	0.0
Extra entitlement this year	0.0

I3 RTI - Real Time Information

The Q1 2013 Legislation Update for **axis diplomat 2012 Payroll** will also feature enhancements necessary to support the government’s new RTI scheme, which comes into force in April 2013. These modifications will also be included in previous versions of the axis diplomat Payroll that are within mainstream support (axis diplomat Payroll 2008 and 2010).

I4 User Interface and Kernel Enhancements

Users with stand-alone Payroll systems should note that all of the User Interface enhancements described in Section A and all of the Kernel enhancements described in Section J are equally applicable to the axis diplomat Payroll system.

Section J - Kernel (Core) Enhancements

J1 Windows 64-Bit Client

The **axis diplomat 2012** setup program will automatically detect when it is being used to install the axis diplomat client on 64-Bit Microsoft Windows operating systems and, where appropriate, use 64-Bit variants of the axis diplomat client software.

J2 Increased Transaction File Capacity

All transaction files within **axis diplomat 2012** can now hold up to 4 Billion records. At previous versions, the limit varied depending on the particular transaction file but was generally no more than 32 Million, so this represents a one hundred-fold increase in the potential storage capacity at **axis diplomat 2012**.

This continues our philosophy of allowing as much information as possible to be retained indefinitely, so it is always available for analysis, enquiry and reporting purposes.

J3 Pending Supervisor Mode

This new development is designed to remove a frustration, particularly on larger systems, of running Supervisor Mode operations (such as period ends) when getting operators to exit the functions that they are in without other operators going into new functions.

axis diplomat 2012 addresses this by allowing operators to finish the functions that they are in whilst preventing new functions being loaded.

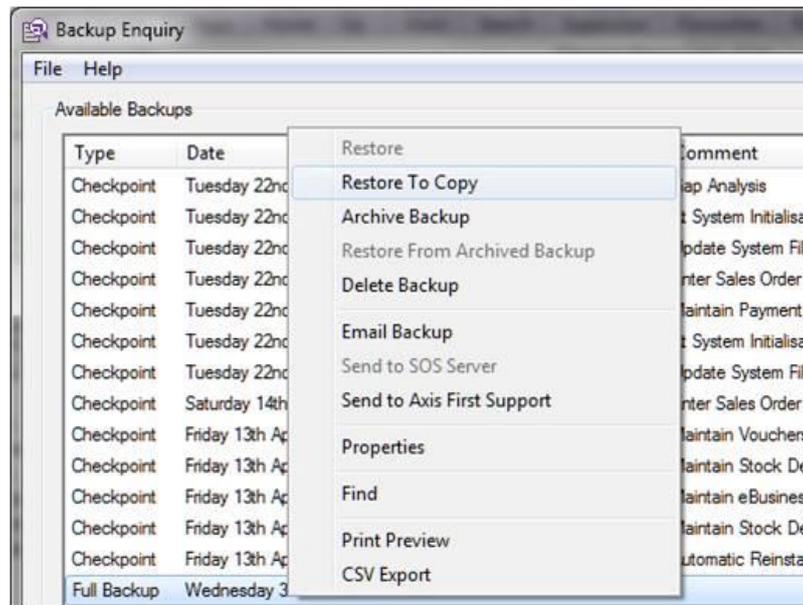
This means that the time taken to switch to Supervisor Mode can often be reduced, meaning that the system can be made available again more quickly.

J4 Easy Creation of Copy Systems

Many customers have made good use of the ability to create copy systems – for archive, testing or training purposes.

Previously, in order to create a copy system you need to navigate to the folder containing the backup file (.axb), which required an understanding of the axis diplomat folder structure.

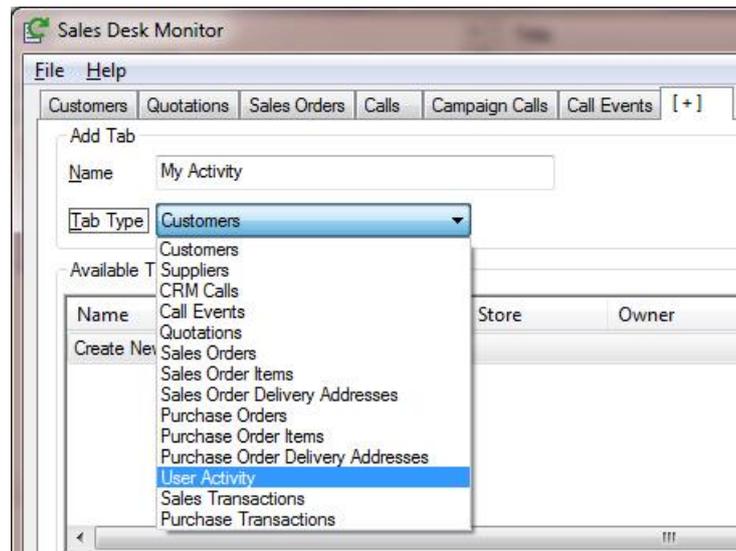
Copy systems can now be created by a simple right-click on the appropriate backup within the axis diplomat “Backup Enquiry” function.



J5 User Activity Tracking

It is now possible to add a tab to a monitor showing User Activity – this will list the CRM Call events and Audit Trail events created by a single user, or a group of users.

This can be used by managers to track what their staff have been doing or for users to have easy access to their own recent activities.



Date/Time	User	Object Type	Object Reference	Notes
18/06/201...	Andy Brown	Stock Record	EGPLMOW4	Record amended
18/06/201...	Andy Brown	Stock Record	EGPLMOW4	Record amended
18/06/201...	Andy Brown	Stock Record	EGPLMOW4	Record amended
24/05/201...	Andy Brown	Customer Contact	000BBD0003	Contact Amended
24/05/201...	Andy Brown	CRM Call	4	Had a long discussion with Cathy Brown about whether they would start to take our 'own brand' products. She is very keen to progress this provided that we can give them some assistance with merchandising. Agreed that I would also pass along to our Customer Services team to see what training could be provided on the pros and cons of our range of products over other brands that we stock.
24/05/201...	Andy Brown	CRM Call	4	
13/04/201...	Andy Brown	Purchase Order	121	Purchase order amended
13/04/201...	Andy Brown	Purchase Order	124	Purchase order amended
13/04/201...	Andy Brown	Purchase Order	123	Purchase order amended
13/04/201...	Andy Brown	Purchase Order	122	Purchase order amended
13/04/201...	Andy Brown	Purchase Order	121	Purchase order amended
13/04/201...	Andy Brown	Purchase Order	121	Purchase order amended
13/04/201...	Andy Brown	Purchase Order	124	Purchase order created
13/04/201...	Andy Brown	Purchase Order	123	Purchase order created
13/04/201...	Andy Brown	Purchase Order	122	Purchase order created
13/04/201...	Andy Brown	Supplier Contact	001F4D0001	Contact Created
13/04/201...	Andy Brown	Supplier Account	01/8013	Supplier created
11/01/201...	Andy Brown	Stock Record	EGPLMOW4	Record amended
14/12/201...	Andy Brown	Invoice	9755	Invoice created from Sales Order number 3380
14/12/201...	Andy Brown	Sales Order	3380	Released to Invoice number 9755
14/12/201...	Andy Brown	Sales Order	3380	Sales Order amended

J6 "Allow" User Permissions

User Security Permissions have traditionally worked on a Deny basis – i.e. a user is denied access to all of the functions that their group is denied access to plus all of the functions that they are personally denied access to.

Allow Permissions means that they can be explicitly allowed access to functions that are generally denied to others in their group.

This makes it much easier to manage user permissions by allowing staff to be added to an appropriate group even when there are one or two exceptions to the list of functions that they require for their specific role.

This equally applies to Security Permissions, in which, for example, a specific operator can be given access to costing information even though the group they are in would generally prohibit that access.

J7 ODBC & SQL Interface

The scheduled ODBC export (typically run overnight) can now optionally allow any user or system tables to be exported in CSV format and optionally uploaded to an FTP server.

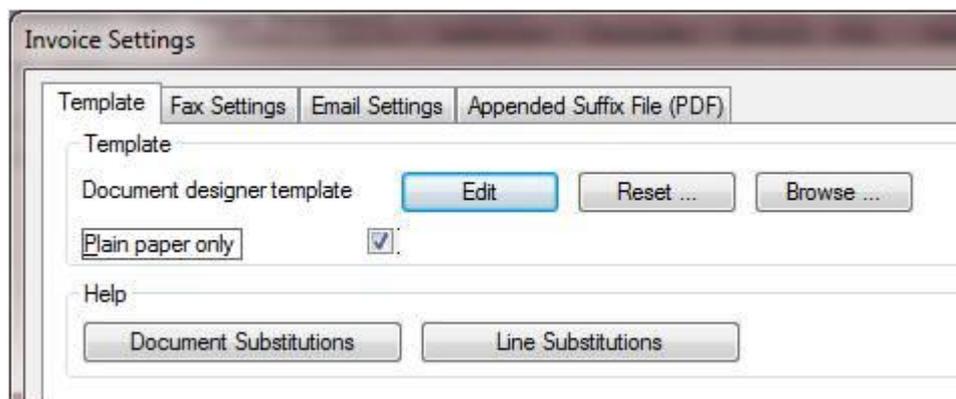
Potential applications for this new functionality include:

- corporate analysis figures for head office/parent organisation
- preparation of pricing files for customers to download

J8 Document Designer Enhancements

Document designer documents have until now been produced in two formats for use on plain paper and logo stationery.

A new system parameter allows you to specify only plain paper variants are required, halving the time taken when creating documents and halving the disk space used for archiving documents.



J9 Printing Enhancements

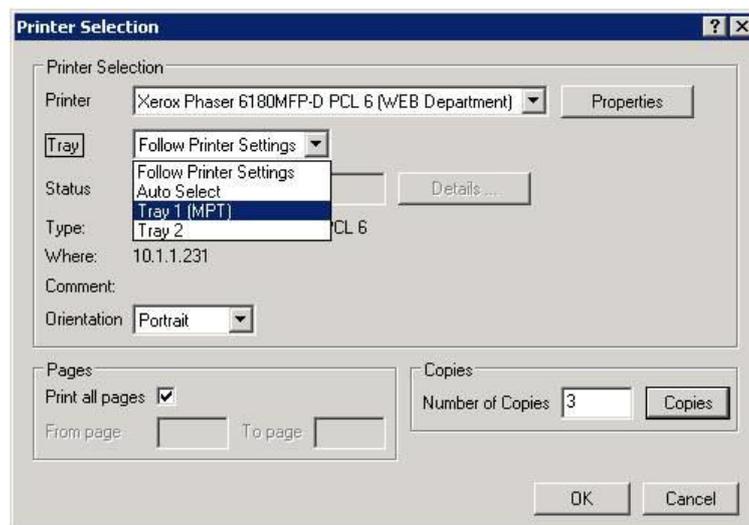
A number of enhancements have been made to the axis diplomat print engine, driven, in the main, by many customers' desire to move away from using dot matrix printers for multi-part stationery. Whilst relatively cheap to run, dot matrix printers have increasingly fallen out of favour as they are slow, noisy and mechanically fickle when compared with a commercial grade laser printer or printer/copier.

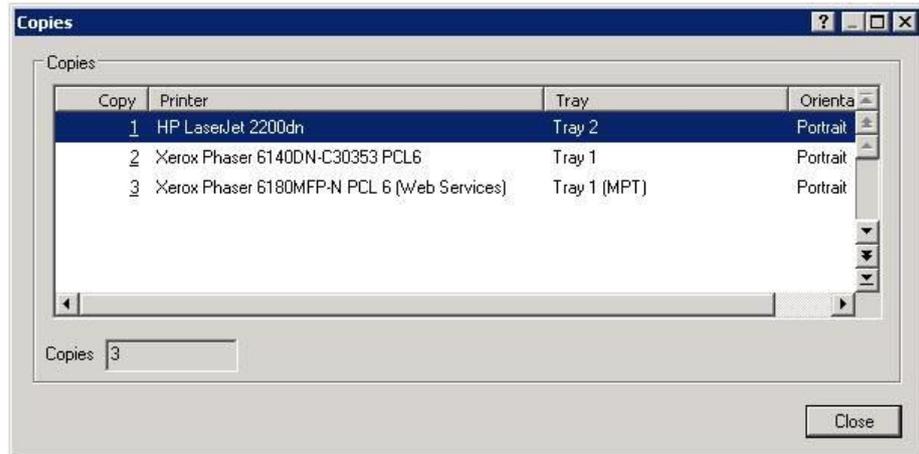
The main advantage that dot matrix printers have held is, because they are impact printers (i.e. they mechanically strike the paper) they are suitable for use with NCR multipart stationery.

Customer's have been requesting ways in which they could keep distinctive multi-part stationery (for example, the "customer gets the white copy, stores gets the blue copy and accounts gets the pink copy" scenario) but use laser printers.

The following enhancements to **axis diplomat 2012** allow this, and provide general benefits to all axis diplomat users:

- Output tray selection from axis diplomat print dialogue (no need to go into the printer-specific dialogue). This has the added benefit that axis diplomat will record your last tray selection for this type of document
- Print multiple copies of document designer documents
- Direct each copy to a specific output tray *or even an entirely different printer.*
- Duplex (double sided) printing when printing multiple documents (when individual documents may have an odd number of pages).





Printing from scrolling data lists now supports colour so, for example, when printing a list of stock items that includes items in blue (to indicate that they are dormant) then those items will print in blue on a colour printer.

A further example of this is shown in section G2, covering the Nominal Ledger Profit & Loss and Balance Sheet Monitors, where negative numbers are shown on-screen and printed in red.

J10 axis diplomat Folder Structure Improvements

The home folder will remain \AXISDiplomat. This will avoid upgrade issues with:

- Backup job configuration changes
- AV software configuration changes
- Open handles preventing the renaming of the existing axis diplomat folder during the upgrade process

Log files created by axis diplomat have been moved from the root of the axis diplomat folder into their own folder within the AxisFileStore area to make them easier to find.

Data set parameter files have been relocated out of the core data folder for the data set into a sub-folder. This helps alleviate issues with file permissions and, as those parameter files are monitored, achieves a small performance improvement.

Section K - Upgrade Options and Pricing

K1 Upgrade Pricing

Product	Upgrade from	
	axis diplomat2008	axis diplomat2010
axis diplomat 2012 Express Client	£495	£295
axis diplomat 2012 Small Business Edition Client	£995	£495
axis diplomat 2012 Medium Business Edition Client	£1,195	£695

K2 Transition Pricing

Transition To	Transition From	
	axis diplomat 2012 Express	axis diplomat 2012 SBE
axis diplomat 2012 Small Business Edition Client	£295	
axis diplomat 2012 Medium Business Edition Client	£495	£295

K3 Software Assurance Pricing

Product	Per Client, Per Month
axis diplomat 2012 Express	£12.50
axis diplomat 2012 Small Business Edition	£20.00
axis diplomat 2012 Medium Business Edition	£25.00

Note: Software Assurance must be taken out at the time of upgrading to **axis diplomat 2012** or at the time a new **axis diplomat 2012** system is supplied.

K4 Additional Services

Product	
Time Unit Based Implementation Services (40x15 minutes)	£695
Monthly Subscription to Online Dashboards (up to five users)	£20
Monthly Subscription to Online Dashboards (per additional user)	£1

K5 Software Assurance Upgrades

A number of the new developments within **axis diplomat 2012** described above have already been released to those customers with Software Assurance.

Software Assurance customers will be entitled to software licence upgrades to the full release of **axis diplomat 2012** at no additional charge. Software Assurance customers will need to purchase training to ensure that they maximise the benefits that they are able to realise from the use of the new release.

Please note that, in order to allow our Software Assurance customers to manage their upgrade timing, we do not automatically send out upgrades to those customers. To request your upgrade to **axis diplomat 2012**, please go to our web site at <http://www.axisfirst.co.uk/software/diplomat2012/upgrades> and click on the link to request your upgrade.

Section L - Supported Environments

For the latest updated information on axis diplomat 2012's supported environments, including additional information such as approved Thin Client software and Microsoft Office versions, please visit our website at:

<http://www.axisfirst.co.uk/software/diplomat2012/platforms/>

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

E & OE.

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