

axis[®] diplomat 2014

Accounting and Business Information Systems

New Features Overview

01.10.2014



Foreword

Welcome to **axis diplomat 2014!**

This release is the culmination of the past two years development work since the launch of **axis diplomat 2012**.

There are hundreds of improvements to the product across all of its modules but for this release we've focused on two themes;

- **availability**
- **scalability**

You've asked us to reduce the requirement to take **axis diplomat** taken off-line (for example to take a backup). We've been able to eliminate the requirement to take **axis diplomat** off-line in order to take a backup!

You asked us to reduce the occasions when **axis diplomat** needs to run in single user mode (for example during an accounting period end). We've been able to make numerous functions that were previously single-user only now run multi-user and that includes the period end functions for all of the ledgers!

With so many new developments, across so many aspects of the system, we're confident that everyone will find something of interest in this new release. The following introduction does, however, highlight some of the major enhancements that we think will be of interest to all of our users.

Regards

The axis diplomat Development Team

Introduction

This document outlines the major new features and benefits that you can expect to see by upgrading to **axis diplomat 2014** from the previous edition of software, **axis diplomat 2012**.

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 the axisfirst web site at <http://www.axisfirst.co.uk/axisdiplomat> for the latest product information. Level updates within the **axis diplomat 2014** release will be free to all **axis diplomat 2014** licensees with current support contracts.

Similarly, **axis diplomat 2012** continued to be enhanced and improved during its life and so, if you are upgrading from an early level of **axis diplomat 2012**, 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 2014**, 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 2016.

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.



axis diplomat 2014 has been tested as Microsoft Windows 8 Compatible

The following list highlights our **Top Ten Favourite New Features** of **axis diplomat 2014**:

1. Backup with no downtime (VSS Support) (see page 72)

Instigate a full backup whilst everyone is still using the system and that backup happens in the background, allowing you to carry on with what you really need to do, rather than waiting for the backup to complete.

2. Multi-User Period Ends (see page 14)

You no longer need to ask everyone to exit from the **axis diplomat** system in order to run your Sales, Purchase or Nominal Period End.

3. Customer Calendar (see page 17)

You can now see a simple visual overview of forth-coming events for a customer, including sales orders and quotations becoming due and deferred calls becoming active.

4. Image Management (see page 48)

All new Image Management for stock and, where the appropriate additional modules are in use, eBusiness Groups, Stock Lines and Equipment Compatibility allows you to have multiple images in a multitude of different sizes (and on different axis vMerchant websites).

5. New Scheduler Favourites Toolbar (see page 11)

Greater customisation to allow you to get to the functions that you regularly use faster and more conveniently.

6. Date-Sensitive Pricing (see page 47)

Record future price updates now so you don't need to remember to run stock updates at just the right moment.

7. Disaster Recovery (see page 75)

We hope you never need to take advantage of this feature but, if a disaster such as fire or flood does strike, it's at least good to know that your data loss will be kept to a minimum!

8. GRNI (Goods Received Not Invoiced) Monitor (see page 44)

This all-new Monitor provides ready access to all of the management information that you need to identify not only Goods Received Not Invoiced but also Goods Invoiced Not Received.

9. User Profile Enhancements (see page 13)

Now, when you publish new group or system-wide monitors, they automatically publish the configuration of the scrolling data lists so you can be sure that everyone looking at that monitor is seeing exactly the same information.

10. Sales and Purchase Invoice Attachments (see pages 23 and 43)

These developments further reduce the need to go to a filing cabinet for information and offer one more step on the road to the paperless office!

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.

Upgrading to axis diplomat 2014

Customers with Software Assurance are entitled to an upgrade to their software licence to **axis diplomat 2014** under the terms of their agreement. To request an update to **axis diplomat 2014**, 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.



Details of Enhancements

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



A standard facility within **axis diplomat 2014**, available to all



A facility within **axis diplomat 2014** that has already been pre-released to those customers with Software Assurance



A new facility within **axis diplomat** that requires one or more existing optional modules



An optional extra, available as an add-on to **axis diplomat 2014** but not available at previous versions

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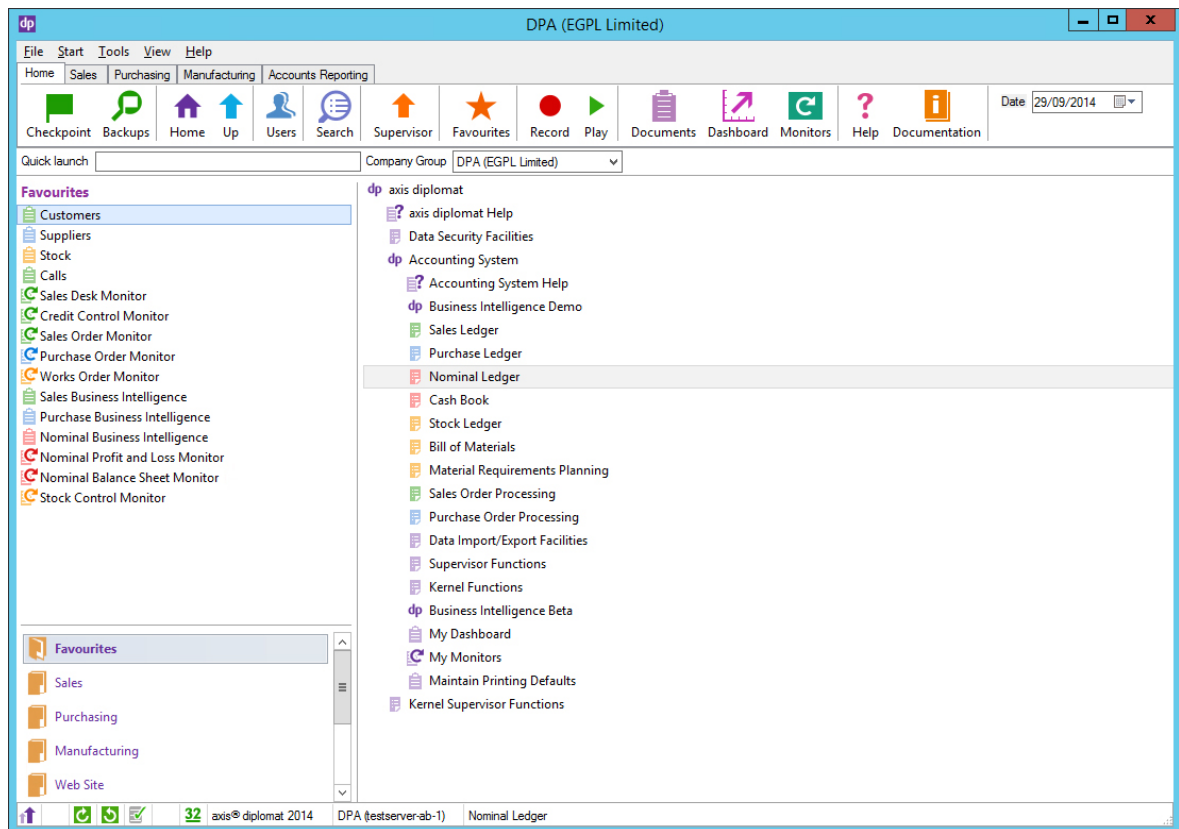
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Section A - User Interface Improvements

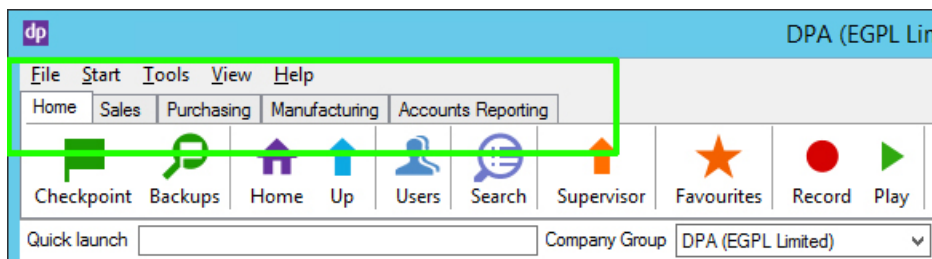
1. User Configurable Scheduler Toolbar



The **axis diplomat** Scheduler (i.e. the place from which all **axis diplomat** functions are launched) has been extended to include new User Configurable toolbars:

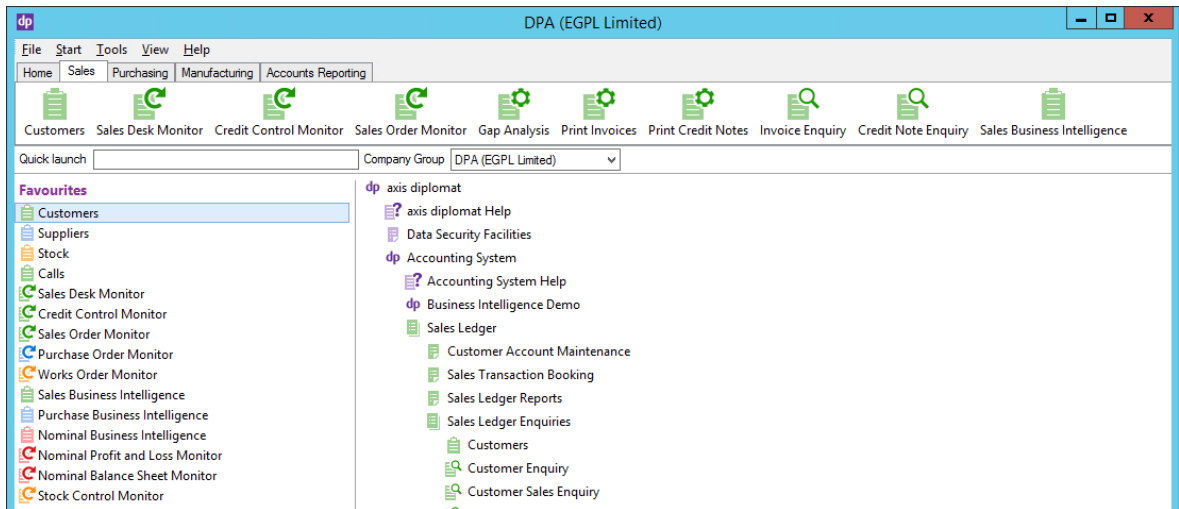


The traditional **axis diplomat** toolbar icons are now on the “Home” toolbar whilst additional toolbars are user configurable.



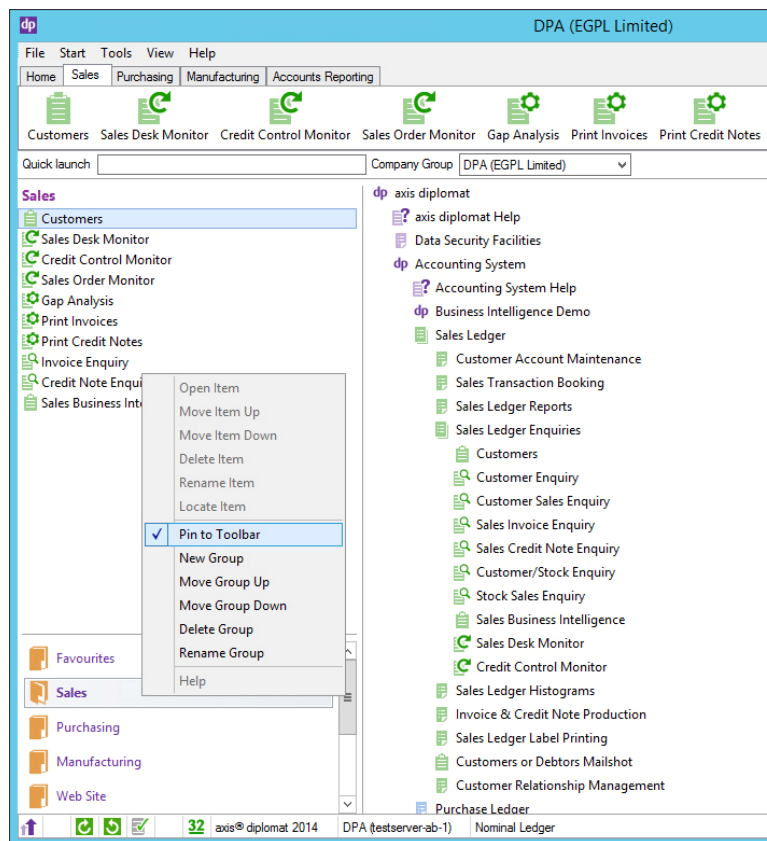
This user has created toolbars for Sales, Purchase, Manufacturing and Accounts Reporting

Selecting the Sales Toolbar gives the user a list of the functions that they have decided to add to that toolbar:



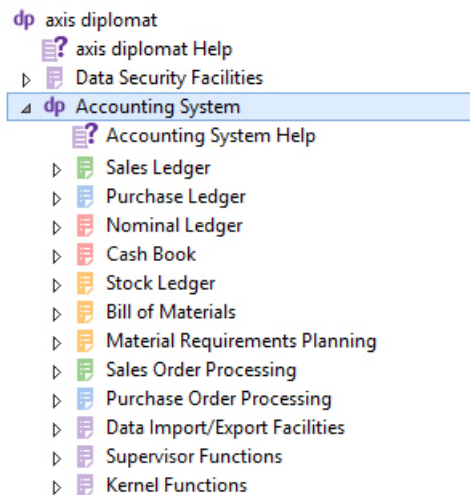
Used in this way, custom toolbars provide the user with a second area on screen, in addition to the left-hand Favourites list, where they can position commonly-use functions within quick and easy reach.

Custom toolbars are Favourites Groups that have been “pinned”. The operator simply creates a new Favourites folder in the usual way and a right-click option allows it to be pinned as a custom toolbar:



2. Colour-Coded Modules

To help identify particular functions more quickly in your custom toolbars, as well as within the traditional Favourites and Menu areas of the scheduler, we have colour-coded the icons within each area of the system:



Customer-focused modules (such as Sales Ledger, Service Contract Management and Sales Order Processing) are indicated by green icons. Supplier-focused modules have blue icons, Stock-related modules (including Bill of Materials and MRP) feature orange icons whilst core accounting areas (Nominal Ledger and Cash Book) use red icons.

3. User Profile Views for Scrolling Data Lists

Many users have taken advantage of the developments introduced as part of **axis diplomat 2012** to create their own monitors which are then shared amongst a number of users.

Now, with **axis diplomat 2014**, when you share a new monitor amongst other users, those users will see that monitor including the scrolling data list configuration that you had created. This includes the columns that you had enabled or disabled, the column ordering and any sort or filtering options.

Once a user has accessed the shared monitor, they are able to adjust those scrolling data lists for their own purposes (for example, to accommodate a smaller screen).

Section B - Nominal & General Accounts

1. Multi-User Period Ends

It has become clear that one of the major obstacles to uninterrupted use of the **axis diplomat** system is the need to run ledger period end functions in supervisor (single user) mode. Either this meant a significant period where the system was unavailable during the day (three times a month) or accounts staff would run each period end out of hours in order to minimise disruption.

In line with the underlying theme of **axis diplomat 2014** increasing system availability to users, we are pleased to announce that all three period end functions (Sales/Stock, Purchase and Nominal) can now be run fully multi-user, whilst others are using all aspects of the system. Normal data locking will ensure that users are not able, for example, to file new invoices part-way through the month end process.

2. Enhancements to Department/Cost Centre Analysis

i. Amending Department/Cost Centre by Line on Invoices

On systems with the optional feature to allow Departments and Cost Centres by Sales Order Line, it is now possible to amend the codes on invoices (subject to appropriate permissions) by using the Sales Invoice Enquiry function and clicking on the Edit button.

ii. Default Department/Cost Centre

A default department code and/or default cost centre can now be recorded against each supplier account to help ensure that supplier's invoices (for example) are correctly coded.

For those using the Default Department/Cost Centre by Line option (who have the ability to also record default department and cost centre codes against individual stock records), the supplier default is used for the overall document but the setting on the stock record, when set, will take precedence on an individual line.

3. PayPal Account Reconciliation

Customers with the PayPal Payment Service Provider (PSP) module can now benefit from new Bank Account Reconciliation functionality.

PayPal allow you to download the details of your financial transactions (which they refer to as a Monthly Financial Summary) and the **axis diplomat** Bank Account Reconciliation function allows you to import that file, dramatically reducing the time spent on reconciling your PayPal payments.

4. New Mobile Dashboard App

axis diplomat 2012 introduced a mobile app to allow Business Intelligence Dashboards from **axis diplomat** to be published to mobile devices.

To coincide with the launch of **axis diplomat 2014**, we have a new release of that mobile app with the following new developments:

- an all-new user interface makes selecting, viewing and moving between, multiple dashboard elements much easier
- added support for Windows 8 mobile devices in addition to Apple and Android devices
- free support for pre-defined web site dashboards showing statistics for your axis vMerchant website(s), including
 - number of orders today
 - value of orders today
 - number of orders for the last 30 days, day by day
 - value of orders for the last 30 days, day by day
 - number of orders for the last 13 weeks, week by week
 - value of orders for the last 13 weeks, week by week

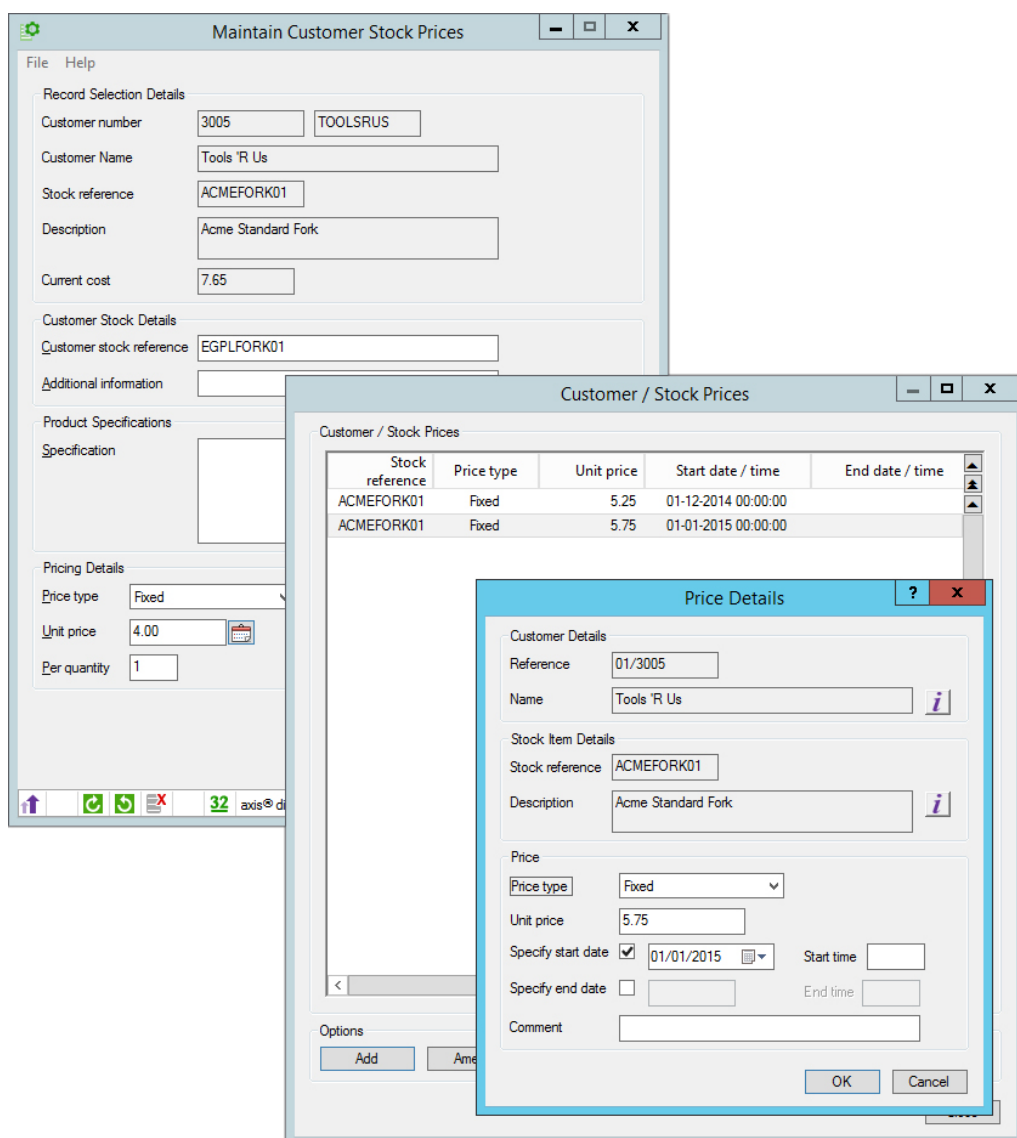


Section C - Sales Ledger & Sales Order Processing

1. Customer-Specific Date-Sensitive Pricing +

New with **axis diplomat 2014** is the ability to record any number of future prices against Stock (see page 47) and this is also available on Customer-Specific Price Lists. Each Customer/Stock Price can have a start time and date and, optionally, an end time and date.

This allows you to pre-load a customer's forth-coming price changes without the need to run an update (such as a CSV Import) at exactly the time you want the new pricing to come into force.



Here we are using Date-Sensitive Pricing to record the fact that this customer's pricing for this product changes on the 1st December and again on the 1st January

2. Customer Enquiry Enhancements

i. Calendar



A new tab within Customer Enquiry is now available to highlight forth-coming calendar events for the customer.

Calendar events include dates when:

- Sales Invoices are due for payment
- Quotations become due
- Deferred calls become active
- Campaign calls are due for the next contact
- Service Contracts reach their anniversary (for systems with the Service Contract Management module)
- Scheduled Deliveries are due to be made (for systems with the new Scheduled Deliveries module)
- Sales Order Lines are due for delivery (for sales order lines that are not part of a scheduled delivery)

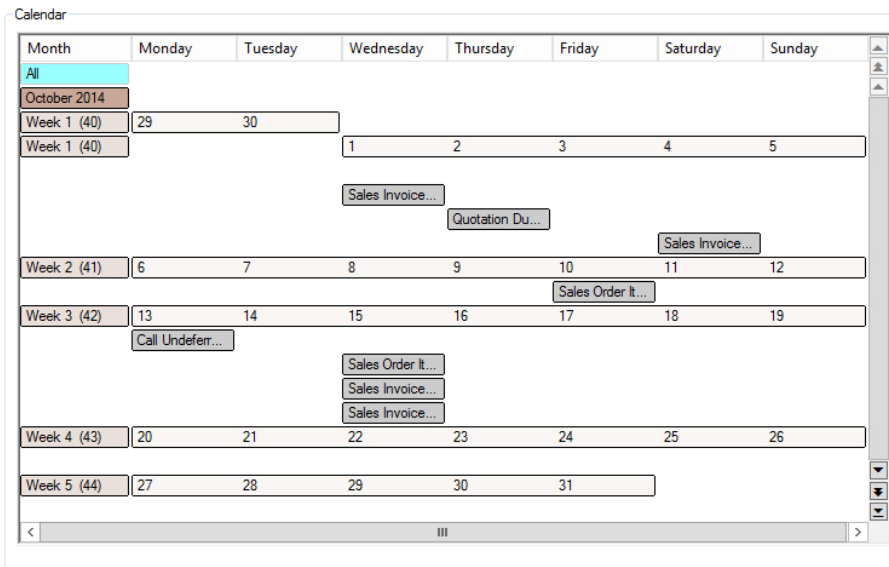
The screenshot shows the 'Customer Enquiry' window for account '01/3005'. The interface is split into two main panes: 'Calendar' and 'List'.

Calendar View: Shows a calendar for October 2014. Events are marked with small boxes and labels: 'Sales Invoice', 'Quotation Du.', 'Sales Invoice', 'Sales Order L.', 'Call Undefer.', 'Sales Order L.', 'Sales Invoice', and 'Sales Invoice'.

List View: A table listing the events. The columns are Object, Calendar Event, Reference, Start Date/Time, and Description.

Object	Calendar Event	Reference	Start Date/Time	Description
Sales Invoice	Payment Due	15780	01/10/2014 00:00	Customer Reference: W7480 Value: GBP173.
Quotation	Due	10158	02/10/2014 00:00	Customer Reference: MOWERS
Sales Invoice	Payment Due	16058	04/10/2014 00:00	Customer Reference: E4759 Value: GBP300.9
Sales Order Item(s)	Due	10157	10/10/2014 00:00	Customer Reference: 645
Call	Undeferal	4	13/10/2014 00:00	Discussion on new EGPL products
Sales Order Item(s)	Due	10157	15/10/2014 00:00	Customer Reference: 645
Sales Invoice	Payment Due	16215	15/10/2014 00:00	Customer Reference: 04620 Value: GBP578.5
Sales Invoice	Payment Due	16291	15/10/2014 00:00	Customer Reference: B5725 Value: GBP1780
Call	Undeferal	2	03/11/2014 00:00	Faulty Chainsaw
Call	Undeferal	3	28/11/2014 00:00	Special Christmas Promotion
Sales Invoice	Payment Due	9754	13/01/2015 00:00	Customer Reference: 2465 Value: GBP27.25
Sales Invoice	Payment Due	9755	13/01/2015 00:00	Customer Reference: 3TYRTRY Value: GBP1.

Customer Enquiry's new Calendar, showing the split Calendar View/List View



The left-hand pane shows a calendar view (days of the week going across, months starting from the current month, going down). Week numbers relative to the current month and ISO 8601 week numbers are shown.

Object	Calendar Event	Reference	Start Date/Time	Description
Sales Invoice	Payment Due	15780	01/10/2014 00:00	Customer Reference: W7480 Value: GBP173.00
Quotation	Due	10158	02/10/2014 00:00	Customer Reference: MOWERS
Sales Invoice	Payment Due	16058	04/10/2014 00:00	Customer Reference: E4759 Value: GBP300.90
Sales Order Item(s)	Due	10157	10/10/2014 00:00	Customer Reference: 645
Call	Undeferral	4	13/10/2014 00:00	Discussion on new EGPL products
Sales Order Item(s)	Due	10157	15/10/2014 00:00	Customer Reference: 645
Sales Invoice	Payment Due	16215	15/10/2014 00:00	Customer Reference: O4620 Value: GBP578.50
Sales Invoice	Payment Due	16291	15/10/2014 00:00	Customer Reference: B9725 Value: GBP1780.00
Call	Undeferral	2	03/11/2014 00:00	Faulty Chainsaw
Call	Undeferral	3	28/11/2014 00:00	Special Christmas Promotion
Sales Invoice	Payment Due	9754	13/01/2015 00:00	Customer Reference: 2465 Value: GBP27.26
Sales Invoice	Payment Due	9755	13/01/2015 00:00	Customer Reference: 3TYRTRY Value: GBP1.00

The right-hand pane shows a list of the future events as a scrolling list

Clicking on a date in the left-hand (calendar view) pane filters the right-hand (list view) pane to just the events for that date whilst clicking on a Week Number (the left-hand column of the Calendar view) filters the list view to all of the events for that week.

Double-clicking on a single entry in either the calendar view or the list view will open the relevant Sales Order, Sales Invoice, Quotation, Call or Sales order. Right-click context menus offer further options to drill-down into the data whilst 'tool tip' help within the Calendar View shows a more detailed description of the event.

Object	Calendar Event	Reference	Start Date/Time	Description
Sales Invoice	Payment Due	15780	01/10/2014 00:00	Customer Reference: W7480 Value: GBP173
Quotation	Due	10158	02/10/2014 00:00	Customer Reference: MOWERS
Sales Invoice	Payment Due	16058	04/10/2014 00:00	Customer Reference: E4759 Value: GBP300.
Sales Order Item(s)	Due	10157		Customer Reference: 645
Call	Underral	4		new EGPL products
Sales Order Item(s)	Due	10157		Customer Reference: 645
Sales Invoice	Payment Due	16215		Customer Reference: O4620 Value: GBP578.
Sales Invoice	Payment Due	16291		Customer Reference: B9725 Value: GBP1780.
Call	Underral	2		new
Call	Underral	3		has Promotion
Sales Invoice	Payment Due	9754		Customer Reference: 2465 Value: GBP27.26
Sales Invoice	Payment Due	9755	13/01/2015 00:00	Customer Reference: 3TYRTRY Value: GBP

A right-click on a Sales Invoice that is due for payment allows drill-down to the invoice enquiry or to any existing part-payment allocations via the Allocation Enquiry

Week	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Week 2 (41)	6	7	8	9	10	11	12
Week 3 (42)	13	14	15	16	17	18	19
Week 4 (43)	20	21	22	23	24	25	26

Simply hovering over an event in the Calendar View shows more information on that event

ii. Custom Categories



Within the Customers function, the scrolling data list of search results now includes columns for each of the Custom Categories that you have defined.

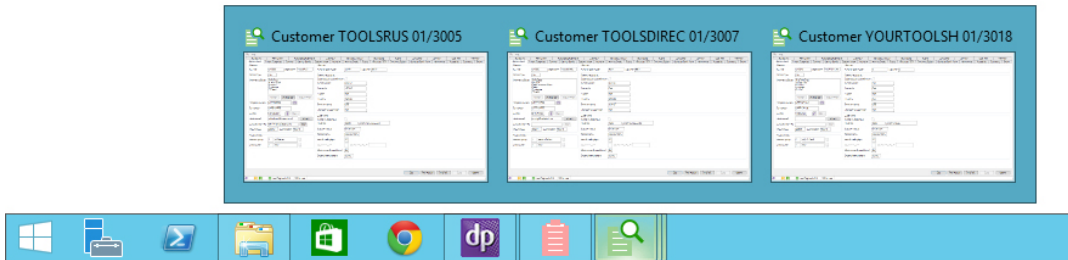
Customer Number	Customer Name	Customer Group Description	Customer Order Source Description	Lead Source	Size	Geographic Area
01/3156	Silver Tools Limited Unit 81d	Mail Order	Alan	Local Advert	Large	North West
01/3237	Quick Tools Inc. Unit 51	Garden Centres	Charles	Website	Large	Wales
01/3358	Skype Tools Co. Unit 27h	DIY Stores	Beth	Cold Call	Medium	Midlands
01/3418	Portable Tools Limited Unit 1	DIY Stores	Eric	Local Advert	Small	South East
01/3451	Skype Tools Co. Unit 34h	Mail Order	Charles	Cold Call	Large	North East
01/3454	Hi-Tech Tools .com Unit 27	Garden Centres	Charles	Yellow Pages	Large	Wales

This example shows a system with additional Custom Categories defined for the Lead Source, Size and Geographic Area for each account.

iii. Customer Enquiry Function Title



The main Customer Enquiry function now changes its title, once a customer has been selected, to include the customer's name - this makes it much easier to find the correct Customer Enquiry on the Windows Taskbar when running a number of copies and trying to switch between them.



iv. Customer/Stock Prices



The Customer/Stock Prices tab within Customer Enquiry has been extended to show additional columns for the Retail, Trade, Current and Standard Cost for each item. This allows, at a glance, a comparison between the prices agreed with a customer and the normal selling prices and costs.

Customer TOOLSRUS 01/3005									
File		Help							
Quotations		Sales Orders		Outstanding Order Items		Statement		Transaction History	
General Details		Custom Categories		Contacts		Delivery Details		Customer Notes	
Branches		Account Details		Pricing		eBusiness / EDI		Document Options	
Customer Details									
Account	01/3005	TOOLSRUS	Tools 'R Us						
Customer/Stock Pricing									
Our Reference	Alternative Reference	Customer Reference	Description	Price	Per	Retail Price	Trade Price	Current Cost	Standard Cost
ACMEFORK01	ACMEFORK01	EGPLFORK01	Acme Standard Fork	4.00	1	12.76	9.57	7.65	7.65
EGPLMOW4	EGPLMOW4	EGPLMOW4	"Wimbledon" Electric Mo...	128.50	1	170.17	136.14	102.10	102.10

A Customer Enquiry showing that an item is now in danger of being sold below cost

v. Outstanding Order Items



A new tab has also been added to show Outstanding Order Items, listing outstanding sales orders line-by-line:

This is particularly useful, for example, when a customer is querying an order but does not know their order number, only the item that they ordered.

Order Number	Customer Order Number	Order Date	Stock Reference	Description	Ordered Quantity	Delivered Quantity	Outstanding Quantity	Unit Price
9693	V7920	20-08-14	GOLDFORK03	GoldTools Chrome Plated Light Fork, Steel Shaft	4	0	4	21.23
9693	V7920	20-08-14	BOOK013	Fruit Trees Made Easy	2	0	2	5.45
9693	V7920	20-08-14	GOLDFORK01	GoldTools Chrome Plated Standard Fork, Steel Shaft	5	0	5	25.49
9693	V7920	20-08-14	ACMESET01	Acme Standard Hand Tool Set (trowel, fork, potting trowel)	4	0	4	19.12
9693	V7920	20-08-14	ACMEFORK01	Acme Standard Fork	4	0	4	11.30
9693	V7920	20-08-14	EGPLMOW4	"Wimbledon" Electric Mower 5-blade steel cutting cylinder	5	0	5	139.12
9693	V7920	20-08-14	GOLDFORK02	GoldTools Chrome Plated Standard Fork, Wood Shaft	1	0	1	21.23

vi. Branch Accounts



The Branches tab within Customer Enquiry now shows the Account Short Name as well as the Account Number. Tabs with options to include Branch information (such as the Contact tab) now offer this option when viewing a branch account; previously, this option was limited to when viewing a Head Office account only.

3. Credit Rating



Customer accounts can now hold credit rating information. Three new fields, indicating the Long Term credit rating, Short Term credit rating and the date that this information was last updated, can be found on the Account Details tab.

The recording and display of this information is controlled by a Sales Ledger parameter "Additional credit rating information active". This is found on the "Customer Maintenance" tab of Maintain Sales Ledger Parameters.

Account: 01/3005 TOOLSRU5 Tools 'R Us

Account classification: Standard UK Customer

Company registration number: 2370905 [Lookup]

VAT registration number: GB 515 8599 [Check...]

Export Details

EC Country Code: []

Nature of Trans. []

Account Operation

Short term credit rating: 65

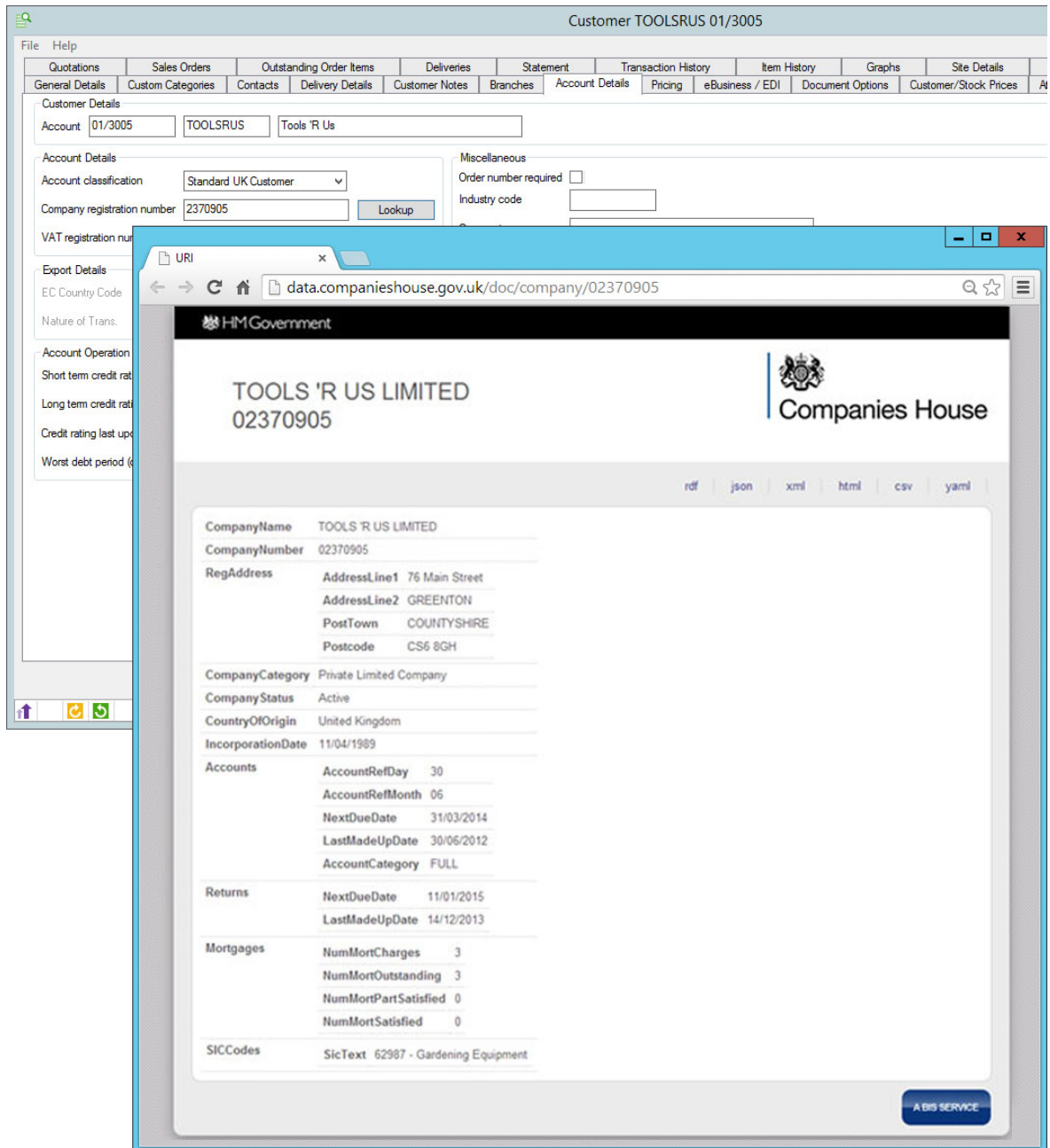
Long term credit rating: 75

Credit rating last updated: 240914

Worst debt period (days): 811

4. Company Registration Number

We now provide the ability to record a customer's Company Registration Number. A button next to the number allows a real-time lookup to be done via Companies House.



The screenshot shows the 'Customer TOOLS'RUS 01/3005' record in the software. The 'Company registration number' field contains '2370905' and has a 'Lookup' button next to it. An inset browser window displays the Companies House website for 'TOOLS'R US LIMITED' (02370905).

Field	Value
CompanyName	TOOLS'R US LIMITED
CompanyNumber	02370905
RegAddress	AddressLine1 76 Main Street AddressLine2 GREENTON PostTown COUNTYSHIRE Postcode CS6 8GH
CompanyCategory	Private Limited Company
CompanyStatus	Active
CountryOfOrigin	United Kingdom
IncorporationDate	11/04/1989
Accounts	AccountRefDay 30 AccountRefMonth 06 NextDueDate 31/03/2014 LastMadeUpDate 30/06/2012 AccountCategory FULL
Returns	NextDueDate 11/01/2015 LastMadeUpDate 14/12/2013
Mortgages	NumMortCharges 3 NumMortOutstanding 3 NumMortPartSatisfied 0 NumMortSatisfied 0
SICCodes	SicText 62987 - Gardening Equipment

5. Sales Invoice Attachments

It is now possible to attach external files to sales invoices. This can be useful in a variety of applications such as, for example, when dealing with finance companies and there is additional correspondence relating to an invoice (rather than the originating sales order).

Attachments may be inserted manually (by drag-and-drop, cut-and-paste or by using the Insert button on the Attachments tab) or automatically from a suitable scanning solution. For more information on scanning options, please see Document Scanning into axis diplomat on the axisfirst website at:

<http://www.axisfirst.co.uk/technology/scanning/>

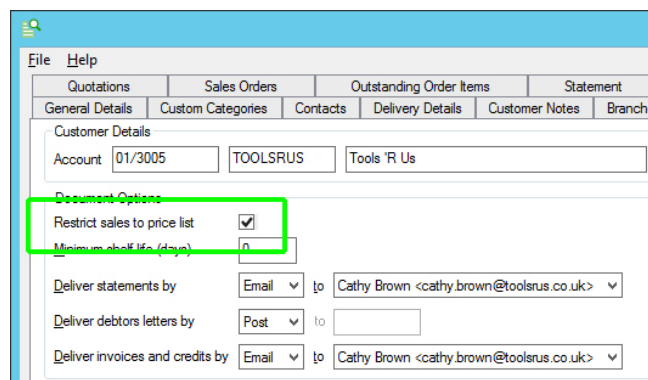
6. Sales Order Maintenance Enhancements

i. Supplier Stock Reference Selection in Sales Order Maintenance

When adding items to a sales order, you can now select items by searching on supplier's stock references. This is ideal if you have customers calling and quoting your supplier's references rather than your own (for example, if this happens to be a manufacturer's part number or a part number shown on parts diagrams within a user manual). By creating a dummy supplier account for a competitor, this would also handle situations where your customers may be quoting a competitor's part number (from their catalogue, for example).

ii. Restrict Sales to Price List

A new option has been added to Customer Accounts (accessed via the Document Options tab) to restrict sales to just those stock items for which Customer Price List entries exist. An example where this would be useful would be if you supply a large corporate or multi-branch customer where the branches are only allowed to buy a pre-agreed list of items and the head office will refuse to authorise invoices for other items.



The screenshot shows the 'Customer Details' section with the following information:

File Help							
Quotations		Sales Orders		Outstanding Order Items		Statement	
General Details		Custom Categories		Contacts		Delivery Details	
Customer Notes		Branches					
Customer Details							
Account	01/3005	TOOLSRSUS	Tools 'R Us				
Document Options							
Restrict sales to price list	<input checked="" type="checkbox"/>						
Minimum shelf life (days)	0						
Deliver statements by	Email	to	Cathy Brown <cathy.brown@toolsrus.co.uk>				
Deliver debtors letters by	Post	to					
Deliver invoices and credits by	Email	to	Cathy Brown <cathy.brown@toolsrus.co.uk>				



iii. Location Stock

For systems with Multi-Location Stock, when adding a stock item to a sales order (or quotation) it is now possible to view the stock available at all locations by simply clicking on the "All Locations" button on the Add/Amend Item dialog. This shows the stock on hand, free stock and the quantity on order with suppliers for each location.

The screenshot shows the 'Insert Item' dialog box with the 'Stocking Levels' section expanded. A sub-dialog titled 'Stock Levels for Stock Item GOLDFORK01' is overlaid, displaying a table of stock levels across four locations: Main Depot, Greenton, Littleton, and Quarantine. The table columns are Location, Stock on Hand, Free Stock, and On Order.

Location	Stock on Hand	Free Stock	On Order
Main Depot	-20	20	0
Greenton	12	12	0
Littleton	7	7	0
Quarantine	1	1	0

iv. Amendment of 'Deliver To'/'Invoice To' Addresses



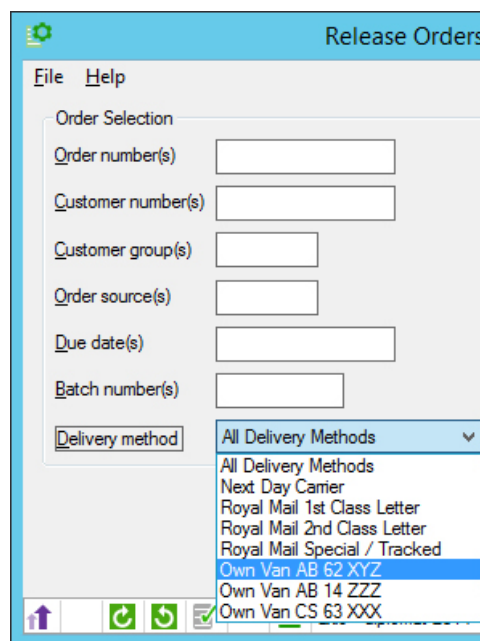
When entering or amending sales documents (sales orders, quotations, invoices, credit notes, etc.) it is now possible to amend an address that has been pre-populated (either by selecting a customer account or from a pre-defined address on the account). Previously, it would be necessary to re-enter the address completely if there was a slight difference (for example, when you are sending to a different department within the same building as the usual delivery address).

7. Releasing and Setting Despatch Quantities by Delivery Method



The function to release orders and, on systems with the Despatch Quantity Recording option, the functions to set and to clear despatch quantities by batch (along with the despatch quantities report) have all been modified to allow selection by Delivery Method.

This will assist anyone looking to process their orders in a sequence dependent upon how they are to be delivered - for example, if your carrier collects your deliveries at 3pm, you may want to process orders for delivery by carrier before processing those going by post.



Release Orders by Batch being used to release just those orders being sent on a specific van

8. Sales Order Monitor Enhancements

i. Number of Releases



An additional column has been added to Sales Order tabs to show the number of releases that have been made for each order. This allows you to keep track of how many orders are being despatched in multiple shipments. This is a prime Key Performance Indicator for many organisations since too many orders being shipped in multiple drops indicates both a stock management issue and unnecessary carriage costs being incurred.

Sales Order	Order Date	Customer Account	Customer Name	Completed Date	Releases
10013	24-09-14	3388	Discount Materials	24-09-14	3
9897	24-09-14	3057	Secret Logistics Limited	24-09-14	2
9928	24-09-14	3420	James Kent Limited	24-09-14	2
9834	24-09-14	3199	WD Developments Partners	24-09-14	1
10043	24-09-14	3165	LCS Developments .com	24-09-14	1

Here we have created a Sales Order Monitor tab specifically to view Sales Orders completed in the last two weeks to identify those orders that were fulfilled using the greatest number of separate shipments by using column sorting

ii. Stock Available to Pick



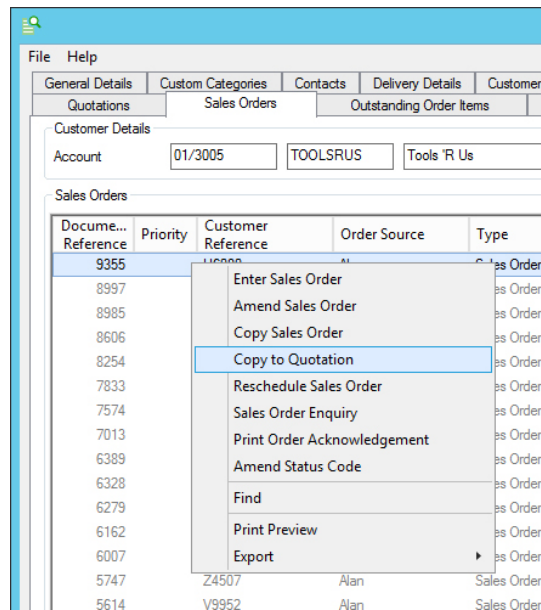
The Sales Order Monitor now shows an indication of the potential value of goods that are available to ship for each sales order. Where insufficient stock is available to fulfil an entire sales order, this allows decisions to be made as to which sales orders should be prioritised. Also, in the case of sales orders not allowed to be part-shipped, a decision can be made as to whether it is desirable to change the status of the order to allow part-shipments.

Customer Name	Sales Order	Outstanding Value	Available Stock Value	Customer Credit Limit Exceeded
Mann & Sons Engineering Inc.	9856	5221.31	3392.47	
Stephens Holdings Partners	9860	4796.05	3389.00	
Apollo Frost Partners	10141	4540.01	3298.67	
QGK Manufacturing	10058	3791.09	3163.35	
I. Cayman International Partne	9881	3633.66	3095.41	Credit limit exceeded
Vancouver & Vancouver Europe	9964	5694.92	3036.46	
Discount Materials	10013	4802.51	2934.60	
WD Developments Partners	9834	4135.16	2915.26	
Cayman Reed Inc.	9987	3377.64	2863.13	
Giant Planet Co.	10123	3364.10	2734.55	
Secret Logistics Limited	9897	3496.72	2695.94	

Here, for example, we can see that we can ship over £3,000 worth of the order for Mann & Sons so we could take the view that it was worth incurring the additional delivery cost incurred by splitting the order.

iii. Copy to Quotation Context Menu Options

Lists of both Sales Orders and Quotations now provide right-click (context menu) options to copy either an existing Sales Order or a Quotation to a new Quotation. This applies to both enquiry functions (such as the Sales Order tab within Customer Enquiry) and to monitor functions, such as the Sales Desk Monitor.



A right-click on a Sales Order within the Sales Orders tab of Customer Enquiry allows a new Quotation to be created based on that Sales Order

iv. Date Completed

When the filters of a Sales Order tab are set to include completed orders, an additional column will now indicate the date that each order was completed. In addition, you can also filter orders to just those completed in the last n days.

v. Sales Order Notes

A tab option has been added to allow up to 12 lines of sales order notes to be shown.

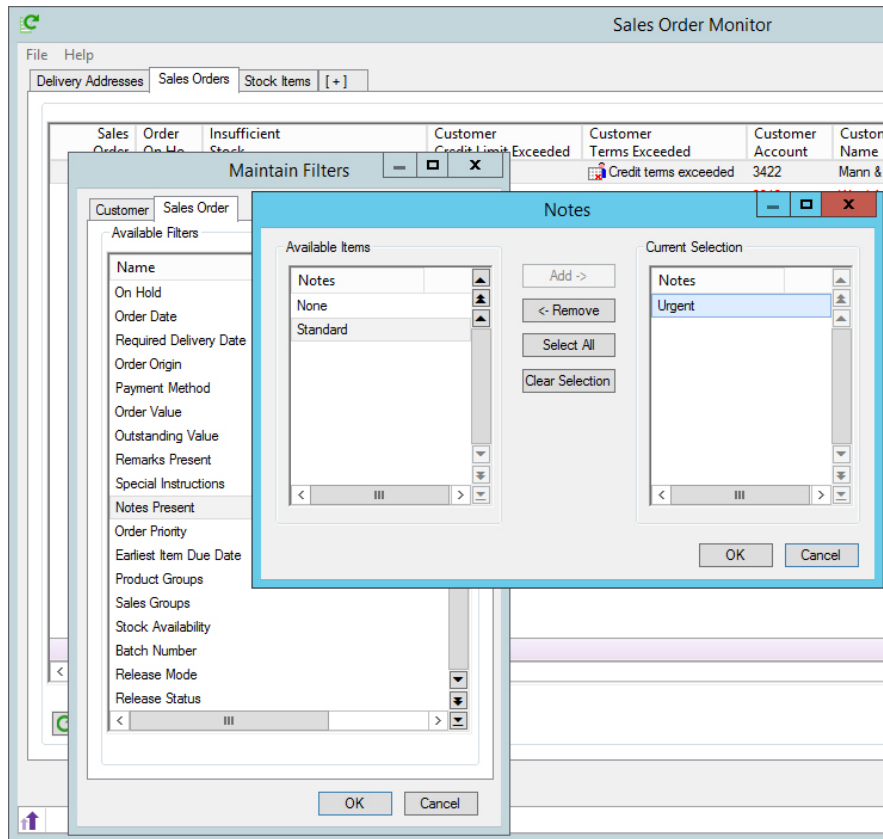
vi. Changing Sales Order Priority

A right-click option has been added to allow the Sales Order Priority to be changed.



vii. New Filter Options

- A filter has been added to provide filtering by Sales Group
- A filter has been added for order remarks present or not present
- A filter has been added to special instructions present or not present
- A filter has been added to document notes present or not present



Sales Order Monitor being filtered to just show Sales Orders with Urgent Notes.

9. Quotation Items Monitor



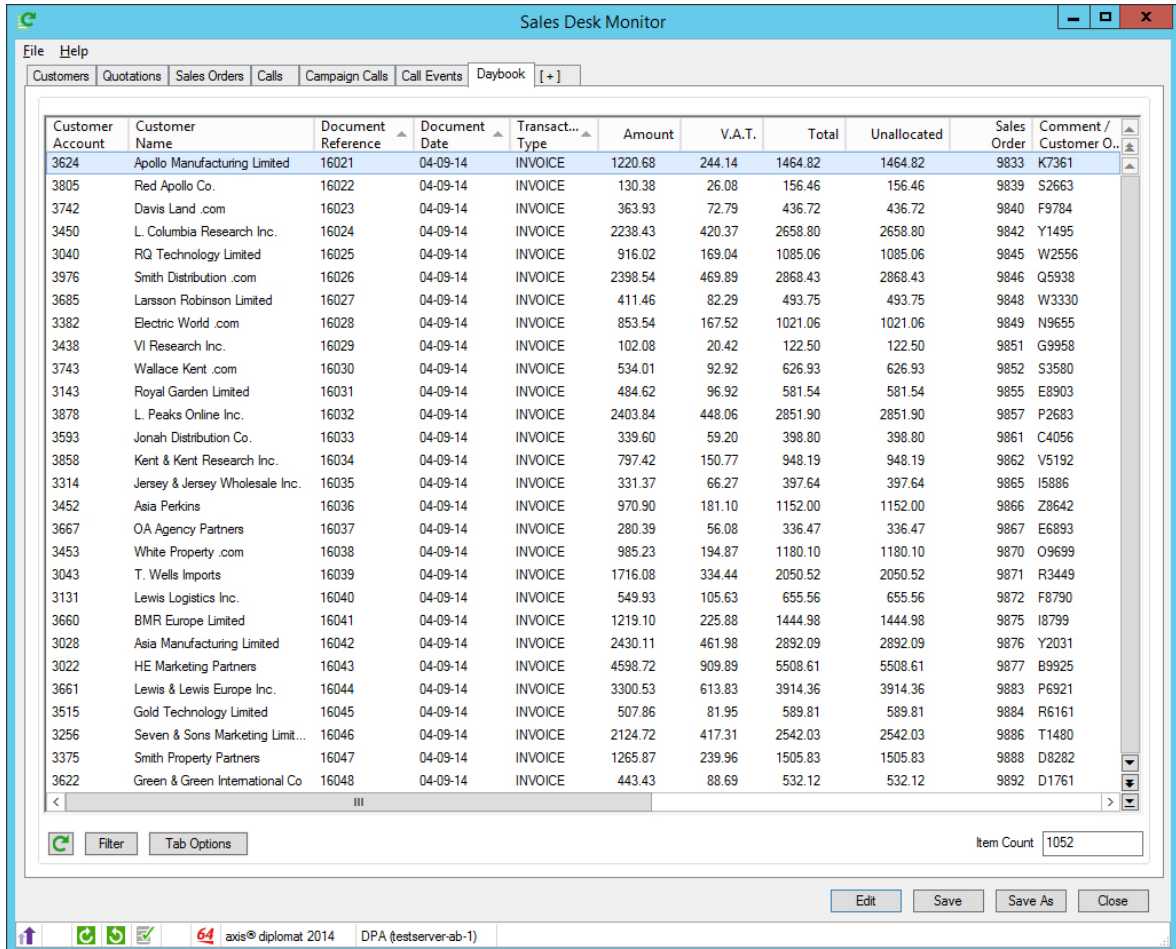
It is now also possible to add a monitor tab listing individual items from outstanding quotations.

Customer Account	Customer Name	Quote Number	Stock Reference	Stock Description	Line Value	Stock Location	Location On Hand	Location Free Stock	Location On Order
3284	Secret International Co.	3300	HOSE002	'Budget' Hose 40m x 1.25cm, green	2000.00	0 - Main Depot	182	0	0
3233	Budget Planet Inc.	3302	EGPLCS2	EGPL Electric Chainsaw 240v, 35cm bar	772.20	0 - Main Depot	226	0	0
3371	Glen Distribution Partners	3299	GOLDFORK01	GoldTools Chrome Plated Standard Fork, Steel Shaft	203.92	0 - Main Depot	235	0	0
3371	Glen Distribution Partners	3299	GOLDFORK02	GoldTools Chrome Plated Standard Fork, Wood Shaft	169.84	0 - Main Depot	268	0	0
3371	Glen Distribution Partners	3299	ACMEFORK01	Acme Standard Fork	102.08	0 - Main Depot	252	0	0

This shows a Sales Desk Monitor with a tab added for Quotation Items, sorted to show the largest value quote line first

10. Sales Transaction Lines Monitor

A new type of monitor tab can now be added to any of your custom monitors showing Sales Transactions. In many respects, this is much like a traditional Sales Daybook Report, but one that can be sorted, filtered, customised and exported to Excel!



Customer Account	Customer Name	Document Reference	Document Date	Transact... Type	Amount	V.A.T.	Total	Unallocated	Sales Order	Comment / Customer O...
3624	Apollo Manufacturing Limited	16021	04-09-14	INVOICE	1220.68	244.14	1464.82	1464.82	9833	K7361
3805	Red Apollo Co.	16022	04-09-14	INVOICE	130.38	26.08	156.46	156.46	9839	S2663
3742	Davis Land .com	16023	04-09-14	INVOICE	363.93	72.79	436.72	436.72	9840	F9784
3450	L. Columbia Research Inc.	16024	04-09-14	INVOICE	2238.43	420.37	2658.80	2658.80	9842	Y1495
3040	RQ Technology Limited	16025	04-09-14	INVOICE	916.02	169.04	1085.06	1085.06	9845	W2556
3976	Smith Distribution .com	16026	04-09-14	INVOICE	2398.54	469.89	2868.43	2868.43	9846	Q5938
3685	Larsson Robinson Limited	16027	04-09-14	INVOICE	411.46	82.29	493.75	493.75	9848	W3330
3382	Electric World .com	16028	04-09-14	INVOICE	853.54	167.52	1021.06	1021.06	9849	N9655
3438	VI Research Inc.	16029	04-09-14	INVOICE	102.08	20.42	122.50	122.50	9851	G9958
3743	Wallace Kent .com	16030	04-09-14	INVOICE	534.01	92.92	626.93	626.93	9852	S3580
3143	Royal Garden Limited	16031	04-09-14	INVOICE	484.62	96.92	581.54	581.54	9855	E8903
3878	L. Peaks Online Inc.	16032	04-09-14	INVOICE	2403.84	448.06	2851.90	2851.90	9857	P2683
3593	Jonah Distribution Co.	16033	04-09-14	INVOICE	339.60	59.20	398.80	398.80	9861	C4056
3858	Kent & Kent Research Inc.	16034	04-09-14	INVOICE	797.42	150.77	948.19	948.19	9862	V5192
3314	Jersey & Jersey Wholesale Inc.	16035	04-09-14	INVOICE	331.37	66.27	397.64	397.64	9865	I5886
3452	Asia Perkins	16036	04-09-14	INVOICE	970.90	181.10	1152.00	1152.00	9866	Z8642
3667	OA Agency Partners	16037	04-09-14	INVOICE	280.39	56.08	336.47	336.47	9867	E6893
3453	White Property .com	16038	04-09-14	INVOICE	985.23	194.87	1180.10	1180.10	9870	O9699
3043	T. Wells Imports	16039	04-09-14	INVOICE	1716.08	334.44	2050.52	2050.52	9871	R3449
3131	Lewis Logistics Inc.	16040	04-09-14	INVOICE	549.93	105.63	655.56	655.56	9872	F8790
3660	BMR Europe Limited	16041	04-09-14	INVOICE	1219.10	225.88	1444.98	1444.98	9875	I8799
3028	Asia Manufacturing Limited	16042	04-09-14	INVOICE	2430.11	461.98	2892.09	2892.09	9876	Y2031
3022	HE Marketing Partners	16043	04-09-14	INVOICE	4598.72	909.89	5508.61	5508.61	9877	B9925
3661	Lewis & Lewis Europe Inc.	16044	04-09-14	INVOICE	3300.53	613.83	3914.36	3914.36	9883	P6921
3515	Gold Technology Limited	16045	04-09-14	INVOICE	507.86	81.95	589.81	589.81	9884	R6161
3256	Seven & Sons Marketing Limit...	16046	04-09-14	INVOICE	2124.72	417.31	2542.03	2542.03	9886	T1480
3375	Smith Property Partners	16047	04-09-14	INVOICE	1265.87	239.96	1505.83	1505.83	9888	D8282
3622	Green & Green International Co	16048	04-09-14	INVOICE	443.43	88.69	532.12	532.12	9892	D1761

A Sales Desk Monitor configured for an additional tab to show Sales Transactions - this particular tab has been sorted by date, then by transaction type and finally by Document Reference - this, for example, brings all of the credit notes for a given date together

11. Suspected Duplicate Address Report

The Suspected Duplicate Address Report is designed to identify potential duplicated customer accounts and has now been extended to allow inclusion/exclusion of live, closed and prospect accounts. In particular, this allows you, by closing duplicated accounts, to avoid known duplicates being reported.

12. Amend Contact Details

A new Supervisor Function (Supervisor Functions > Sales Ledger > Sales Ledger Utility Functions) has been added to block amend the contact details. This allows selections of your customer account contacts' Salutation Type to be toggled between formal and informal addressing.

A formal salutation is typically Dear {title} {surname} (e.g. "Dear Mr Smith") whilst an informal salutation would be Dear {first name} (e.g. "Dear John").

For customers with the optional eProcurement module, this function can also be used to amend a range of contacts to indicate whether those customers are able to access account information (such as statements) online.

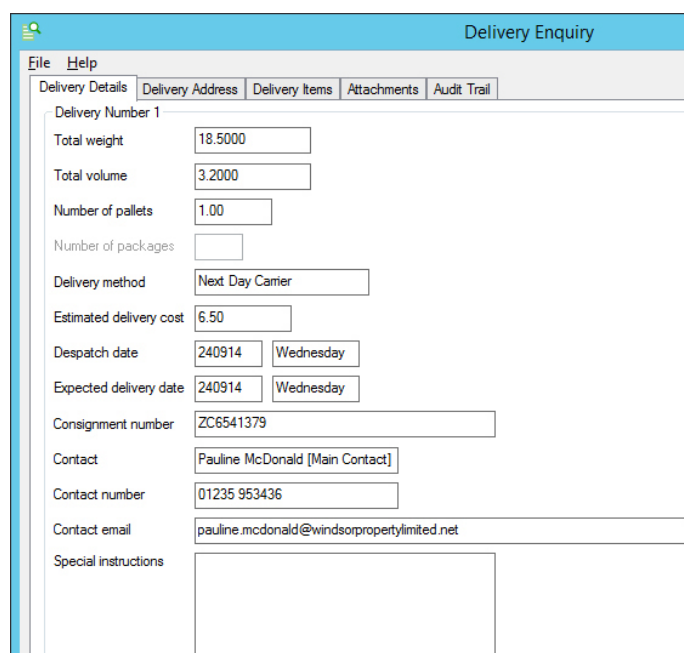
13. Deliveries

i. Delivery Enquiry

For systems with the additional Despatch & Delivery Management module, it is now possible to drill down into an all-new Delivery Enquiry function, showing overall details about the delivery (total weight, volume, delivery address and contact, etc.) as well as a complete breakdown of the items within the delivery.

Access to the Delivery Enquiry is via a right-click option on the Deliveries tab within Customer Enquiry, the Deliveries Monitor, from Goods on Account and from the Deliveries tab within Sales Order maintenance and enquiry functions.

It is now also possible to attach additional files to delivery records, and these are then visible via the Delivery Enquiry. This could be used to attach scanned copies of signed delivery notes (when you operate your own delivery vans, for example), either manually or by using an appropriate scanning solution.







The screenshot shows the 'Delivery Enquiry' window with a menu bar (File, Help) and a tabbed interface. The 'Delivery Details' tab is active, displaying the following information:

Field	Value
Delivery Number 1	
Total weight	18.5000
Total volume	3.2000
Number of pallets	1.00
Number of packages	
Delivery method	Next Day Camer
Estimated delivery cost	6.50
Despatch date	240914 Wednesday
Expected delivery date	240914 Wednesday
Consignment number	ZC6541379
Contact	Pauline McDonald [Main Contact]
Contact number	01235 953436
Contact email	pauline.mcdonald@windsorpropertylimited.net
Special instructions	

ii. Deliveries Status

Both the Deliveries Monitor and the Deliveries tab within Customer Enquiry now include columns showing the time and date that a delivery was consigned along with the ID of the user that consigned it.

These also include a further column for "Delivery Status", using both an icon and text. The Delivery Status is one of the following:

- Scheduled 
- Provisional 
- Awaiting Consignment 
- Consigned 

Scheduled and Provisional are available on systems with the optional Scheduled Deliveries module (see page 34) and any overdue scheduled delivery is now shown in red.

14. Best Delivery Method Calculation

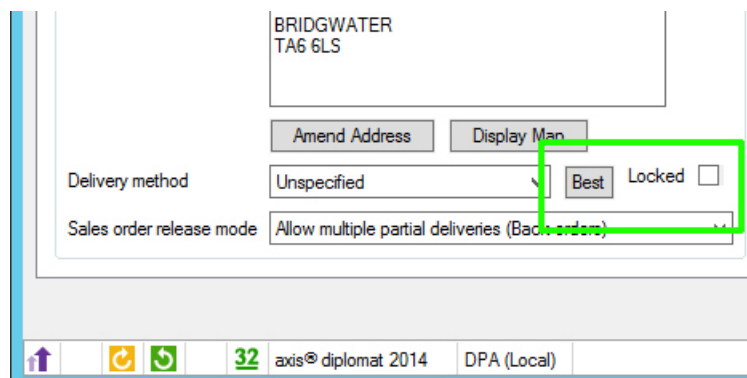


Best Delivery Method selection allows those who use the Despatch and Delivery Management module in conjunction with one or more Delivery Service Provider (DSP) Interfaces, to have the system select the best delivery method.

The decision that the software makes is based on a number of factors including whether each delivery method is valid for the delivery address, the size and weight of the item(s) being sent and the lowest cost to deliver those item(s).

Identifying suitable delivery methods based on the size and weight is done using an industry-recognised 3D Bin Pack algorithm, supporting item rotation and 'per container' weight cut-offs.

When entering or amending a Sales Order, the 'Best' button next to the Delivery Method selection will show a list of all available delivery methods, indicating those that are unsuitable (and why) and highlighting the best delivery method'. This decision can be manually overridden if required.



Best Delivery Method button in Enter Sales Order

Delivery Method Selection Results

Destination Details City/Town: <input type="text" value="BRIDGWATER"/> County/State: <input type="text"/> Postal/ZIP Code: <input type="text" value="TA6 6LS"/> Country: <input type="text" value="UNITED KINGDOM"/>	Consignment Details Total Weight: <input type="text" value="0.4260"/> kg Total Volume: <input type="text" value="0.0018"/> m ³ Pallets: <input type="text"/> Packages: <input type="text"/> Value: <input type="text" value="20.85"/> £																																																																
Delivery Details Earliest delivery date: <input type="text"/> Latest delivery date: <input type="text"/>																																																																	
Delivery Methods <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Description</th> <th style="width: 5%;">Best</th> <th style="width: 10%;">Estimated Delivery Cost</th> <th style="width: 25%;">Reason for Exclusion</th> </tr> </thead> <tbody> <tr style="background-color: #ADD8E6;"> <td>RM - Royal Mail 48 Parcel</td> <td style="text-align: center;">✓</td> <td style="text-align: center;">2.03</td> <td></td> </tr> <tr> <td>RM - Int. Zone Sort (Parcel)</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>RM - Int. Track&Sign (Parcel)</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>RM - Int. Track&Sign (Letter)</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>RM - Int. Track (Parcel)</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>RM - Int. Track (Letter)</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>RM - Int. Signed (Parcel)</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>RM - Int. Signed (Letter)</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>RM - Int. Max Sort LargeLetter</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>RM - Int. Max Sort (Parcel)</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>UPS - Standard</td> <td></td> <td style="text-align: center;">4.54</td> <td></td> </tr> <tr> <td>UPS - Standard Saturday</td> <td></td> <td></td> <td>Saturday delivery not required</td> </tr> <tr> <td>UPS - Express</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> <tr> <td>UPS - Express Saturday</td> <td></td> <td></td> <td>Saturday delivery not required</td> </tr> <tr> <td>UPS - Express Plus</td> <td></td> <td></td> <td>Delivery method not valid for delivery address as no matching zone could be found</td> </tr> </tbody> </table>		Description	Best	Estimated Delivery Cost	Reason for Exclusion	RM - Royal Mail 48 Parcel	✓	2.03		RM - Int. Zone Sort (Parcel)			Delivery method not valid for delivery address as no matching zone could be found	RM - Int. Track&Sign (Parcel)			Delivery method not valid for delivery address as no matching zone could be found	RM - Int. Track&Sign (Letter)			Delivery method not valid for delivery address as no matching zone could be found	RM - Int. Track (Parcel)			Delivery method not valid for delivery address as no matching zone could be found	RM - Int. Track (Letter)			Delivery method not valid for delivery address as no matching zone could be found	RM - Int. Signed (Parcel)			Delivery method not valid for delivery address as no matching zone could be found	RM - Int. Signed (Letter)			Delivery method not valid for delivery address as no matching zone could be found	RM - Int. Max Sort LargeLetter			Delivery method not valid for delivery address as no matching zone could be found	RM - Int. Max Sort (Parcel)			Delivery method not valid for delivery address as no matching zone could be found	UPS - Standard		4.54		UPS - Standard Saturday			Saturday delivery not required	UPS - Express			Delivery method not valid for delivery address as no matching zone could be found	UPS - Express Saturday			Saturday delivery not required	UPS - Express Plus			Delivery method not valid for delivery address as no matching zone could be found
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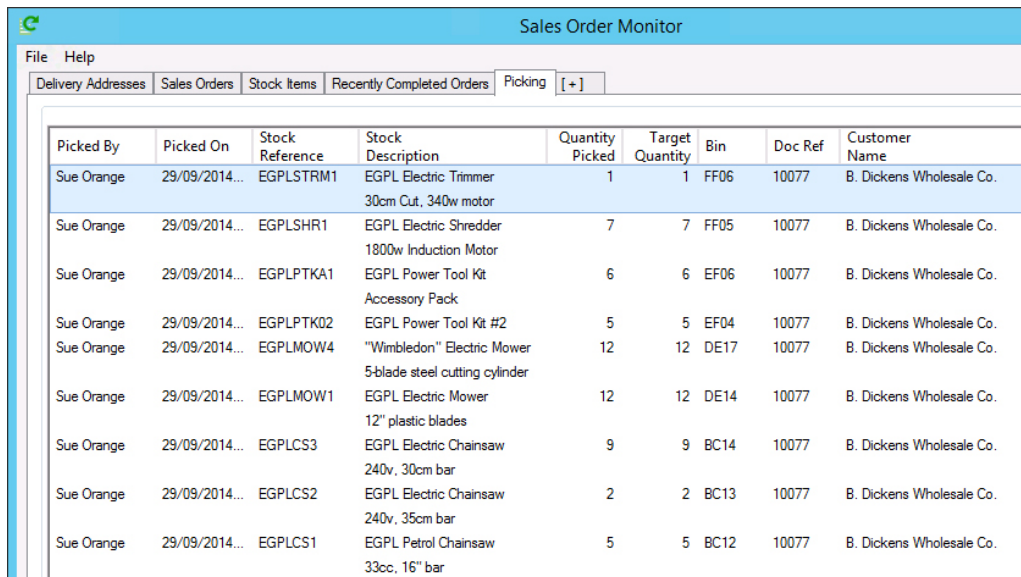
Results of a Best Delivery Method search, showing the reason why each rejected delivery method has been excluded and the estimated delivery cost for each valid delivery method

Upon selection of the delivery method you also have the option to lock the delivery method so that it cannot be subsequently overwritten at the point of consigning.

For customers with one or more axis vMerchant websites (or other eBusiness interfaces, including Amazon and eBay) it is also possible to configure the system to automatically assign the best delivery method as part of the Import eBusiness Orders process.

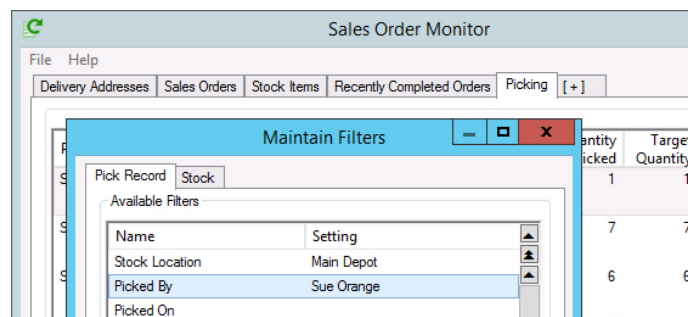
15. Picks Monitor

For users of the Warehouse Handheld Order Picking module, a new monitor tab can now be added to your existing monitors (or a new monitor created) showing Picking activity. This can be useful for a range of applications, such as looking for efficiencies within the picking process or looking at the activities of particular pickers.



Picked By	Picked On	Stock Reference	Stock Description	Quantity Picked	Target Quantity	Bin	Doc Ref	Customer Name
Sue Orange	29/09/2014...	EGPLSTRM1	EGPL Electric Trimmer 30cm Cut, 340w motor	1	1	FF06	10077	B. Dickens Wholesale Co.
Sue Orange	29/09/2014...	EGPLSHR1	EGPL Electric Shredder 1800w Induction Motor	7	7	FF05	10077	B. Dickens Wholesale Co.
Sue Orange	29/09/2014...	EGPLPTKA1	EGPL Power Tool Kit Accessory Pack	6	6	EF06	10077	B. Dickens Wholesale Co.
Sue Orange	29/09/2014...	EGPLPTK02	EGPL Power Tool Kit #2	5	5	EF04	10077	B. Dickens Wholesale Co.
Sue Orange	29/09/2014...	EGPLMOW4	"Wimbledon" Electric Mower 5-blade steel cutting cylinder	12	12	DE17	10077	B. Dickens Wholesale Co.
Sue Orange	29/09/2014...	EGPLMOW1	EGPL Electric Mower 12" plastic blades	12	12	DE14	10077	B. Dickens Wholesale Co.
Sue Orange	29/09/2014...	EGPLCS3	EGPL Electric Chainsaw 240v, 30cm bar	9	9	BC14	10077	B. Dickens Wholesale Co.
Sue Orange	29/09/2014...	EGPLCS2	EGPL Electric Chainsaw 240v, 35cm bar	2	2	BC13	10077	B. Dickens Wholesale Co.
Sue Orange	29/09/2014...	EGPLCS1	EGPL Petrol Chainsaw 33cc, 16" bar	5	5	BC12	10077	B. Dickens Wholesale Co.

A Sales Order Monitor with an additional tab added to show recent Picking activity



Filter options allow the Pick Monitor to be filtered by Stock Location, by specific Pickers or by Date; items shown can also be filtered to specific product ranges

16. Order Release by User Report

Available on systems with Despatch & Delivery Management, this report can be run for a range of release dates and shows, for each operator, the number of orders, order lines and total order item quantities released.



17. Scheduled Deliveries

The new Scheduled Deliveries module allows you to group sales order lines from a number of separate sales orders into a single delivery scheduled for a specific date. Having created a scheduled delivery you can:

- Print a Picking Note by Delivery Reference
- Print a Delivery Note by Delivery Reference
- Pick by Delivery Reference
- View the Details of a Scheduled Delivery from with Customer Enquiry and the Deliveries Monitor
- See whether an outstanding Sales Order Line is scheduled for delivery and, if so, on which delivery.

Customer TOOLSUS 01/3005

File Help

General Details Custom Categories Contacts Delivery Details Customer Notes Branches Account Details

Quotations Sales Orders Outstanding Order Items Deliveries Statement Trans

Customer Details

Account 01/3005 TOOLSUS Tools 'R Us

Outstanding Order Items

Delivery Number	Delivery Method	Scheduled Despatch Date	Item Due Date	Order Number	Order Date	Stock Reference	Description
2	2 - Van 1	05-09-14	05-09-14	9531	02-09-14	BOOK011	Weeding Made E...
			05-09-14	9531	02-09-14	HOSE001	'Professional' Hose 50m x 1.25cm, yell...
2	2 - Van 1	05-09-14	05-09-14	9531	02-09-14	EGPLCS3	EGPL Electric Ch... 240v, 30cm bar
					-09-14	EGPLTRIM1	EGPL Hedge Trim...
					-09-14	GOLDWDG01	Gold Log Splitting ...
					-09-14	HOSE002	'Budget' Hose
					-09-14	HOSEA02	'Budget' Sprinkler Rotary, coverage ...
			05-09-14	9531	02-09-14	EGPLPTK02	EGPL Power Tool...
2	2 - Van 1	05-09-14	05-09-14	9531	02-09-14	BOOK003	A-7 Fruit Trees

Maintain Delivery Schedule

Sales Order Enquiry

Stock Enquiry

Find

Print Preview

Export

Maintaining the Delivery Schedule from the new Outstanding Order Items tab in Customer Enquiry

The Scheduled Deliveries module is ideal for those sending large or complex shipments, where multiple orders are frequently consolidated together, or where shipments are planned well in advance of when the order is actually to be despatched.

Scheduled Deliveries may be picked using a handheld device and an interactive "Handheld Pick Delivery" function, or in a paper-based environment, from the new Picking Note document.

Handheld Pick Delivery

File Help

Picking List

Picked Items

Items to Pick

Bin	Stock Reference	Picked Qty	Target ...	Description
B153	EGPLCS3	0	4	EGPL Electric Chainsaw
B684	GOLDSAW01	0	3	Gold Log Saw
C175	BOOK011	0	2	Weeding Made Easy
C287	HOSEA01	0	5	'Professional' Sprinkler
C832	BOOK003	0	3	A-Z Fruit Trees

Print Picking Notes

File View Tools Help

Picking Note

DELIVER Tools 'R Us
TO: 76 Main Street
Greenton
Countyshire
CS6 8GH

EGPL Ltd
Everything for your Garden!

DELIVERY NUMBER 2
DESPATCH DATE 05/09/2014
DELIVERY METHOD Van 1
CUSTOMER ACCOUNT 01/3005
LAST AMENDED ON 02/09/2014
LAST AMENDED BY ANDY

ORDER #	STOCK REF	QUANTITY	DESCRIPTION	PACKED BY
9531	BOOK011	2	Weeding Made Easy Part of the Made Easy series, in software cover.	
9531	EGPLCS3	4	EGPL Electric Chainsaw 240v, 30cm bar Our own brand Short Bar Electric Chainsaw, suitable for domestic use only.	
9531	BOOK003	3	A-Z Fruit Trees 270pp Part of the A-Z Series written by well known TV celebrity gardener, Pete Frome.	
9531	HOSEA01	5	'Professional' Sprinkler Rotary, coverage 15 sq m This delux sprinkler is designed to be left in situ all year round.	
9532	GOLDSAW01	3	Gold Log Saw 24" The Professional's choice of Log Saw	

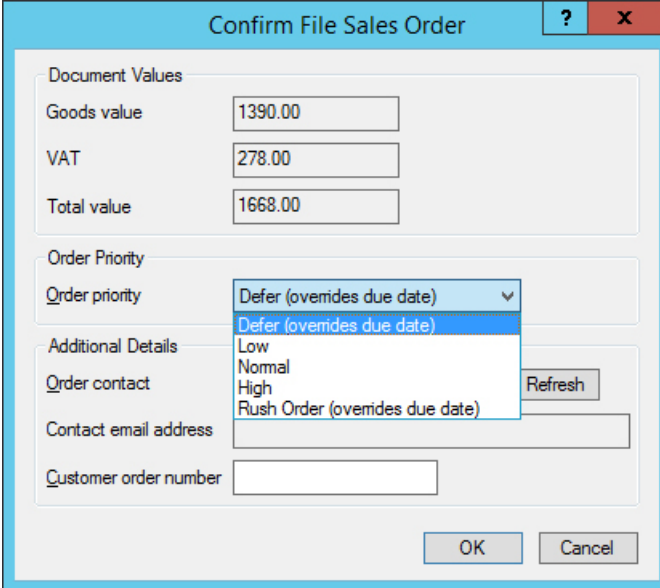
PAGE 1 of 1

↑
axis® diplomat 2014 DPA (Local) Page 1 of 1

18. New Order Priorities

For systems featuring handheld stock control, there are two new sales order priorities available – “Rush” (effectively Very High) and “Defer” (or Very Low).

Both Rush and Defer are recognised by the handheld order picking process as overriding the due dates set on the orders. In essence, Rush orders are prioritised even if they are not yet due whilst orders flagged as Defer are ignored even if they are due.



A Sales Order being set to "Defer" at the time of filing; this could also be done at a later point via a right-click option from Sales Order Monitor

19. Documentation Enhancements

i. Despatch Pro-Forma Invoice

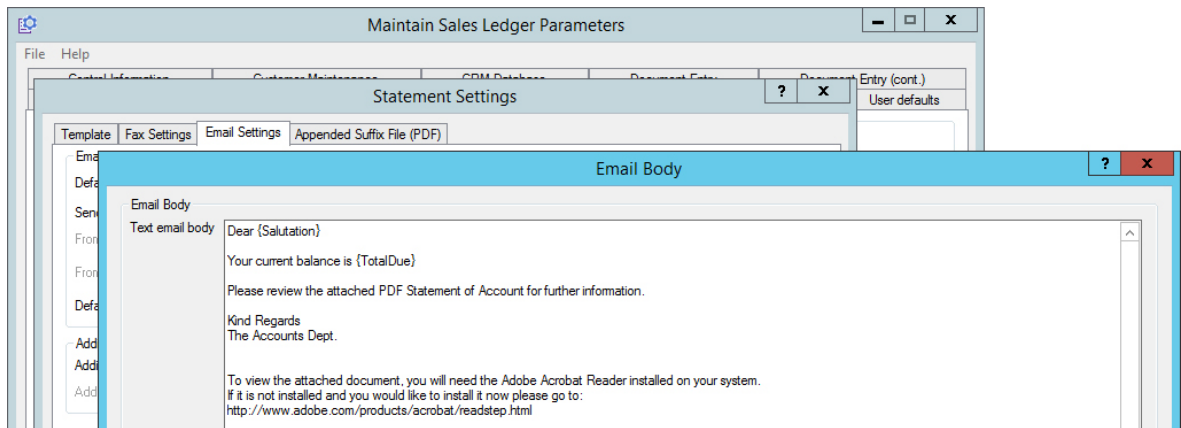
Any system running with Despatch Quantity Recording can now produce a pro-forma invoice based on the despatch quantities set, rather than the ordered or outstanding quantities.

ii. Credit Days

An additional field has been made available to Document Designer templates for the number of credit days that applies to a particular transaction. This allows, for example, a line to be added to invoices reading "This invoice must be paid within *n* days of the invoice date".

iii. Statement Email Substitutions

It is now possible to include, within the body of the email sent with statements (when using Document Delivery), substitutions for the recipient's salutation ({{Salutation}}) and the total amount due ({{TotalDue}}). This makes it possible to create covering emails with more impact and with a greater chance of being noticed.



iv. Collection Notes

It is now possible to produce collection notes from negative sales orders using a new Document Designer document type.

20. Marketplace Interfaces - Amazon and eBay Order Import

Two additional new modules being made available now allow you to interface with your Amazon Marketplace Store(s) and/or eBay Store(s) and import sales orders directly into your **axis diplomat** system (in the same way as orders will be imported directly from your axis vMerchant website).

Depending on volumes, importing sales orders alone can provide both a significant time-saving and reduce errors caused by re-keying data. Both modules, however, are also capable of notifying the respective marketplace when order shipments occur.

Additionally, the Amazon Interface module (which communicates with Amazon's SellerCentral via MWS – Marketplace Web Services) is also able to upload the latest stock availability figures.

Section D - CRM

1. **Send Emailshot and Send Emailshot by Campaign**

These functions have been modified to allow a maximum number of retries to be configured for each email being sent.

2. **Call Template Substitutions**

Call Templates can now include an additional substitution for the customer's postcode, {Postcode}. Call Templates allow you to create standard Microsoft Word documents as attachments to calls. Registered users of the website can read [More Information on Call Templates](#) within the online documentation section.

3. **Real-Time Gap Analysis & Best Sellers Enquiry**

Gap Analysis and the Best Sellers Enquiry have been re-engineered to use real-time data.

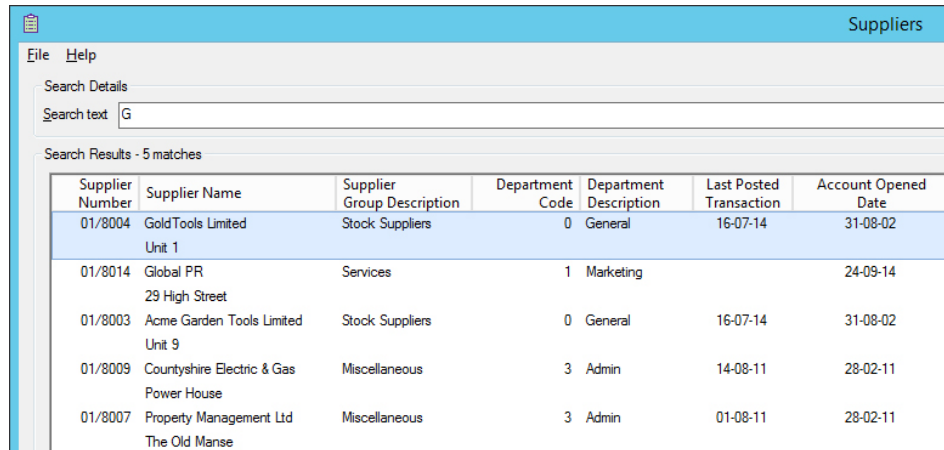
This mean you can run analyses that include today's data and also means that you do not have to wait for the tables to be compiled the first time that the function is run on a given day.

Section E - Purchase Ledger & Purchase Order Processing

1. Supplier Enquiry Enhancements

i. More Informative Search Results

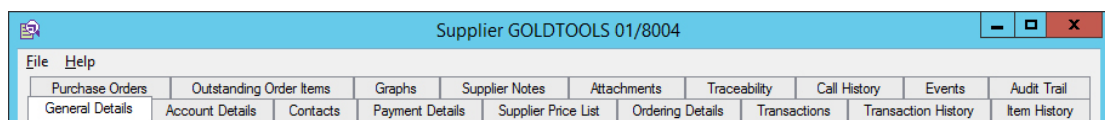
The Suppliers function has been modified to show the Account Opened date, default department and default cost centre within the search results.



Supplier Number	Supplier Name	Supplier Group Description	Department Code	Department Description	Last Posted Transaction	Account Opened Date
01/8004	GoldTools Limited Unit 1	Stock Suppliers	0	General	16-07-14	31-08-02
01/8014	Global PR 29 High Street	Services	1	Marketing		24-09-14
01/8003	Acme Garden Tools Limited Unit 9	Stock Suppliers	0	General	16-07-14	31-08-02
01/8009	Countysire Electric & Gas Power House	Miscellaneous	3	Admin	14-08-11	28-02-11
01/8007	Property Management Ltd The Old Manse	Miscellaneous	3	Admin	01-08-11	28-02-11

ii. Supplier Enquiry Function Title

Supplier Enquiry has had the same modification as Customer Enquiry on the Sales Ledger to change the function title to include the name of the supplier in context.

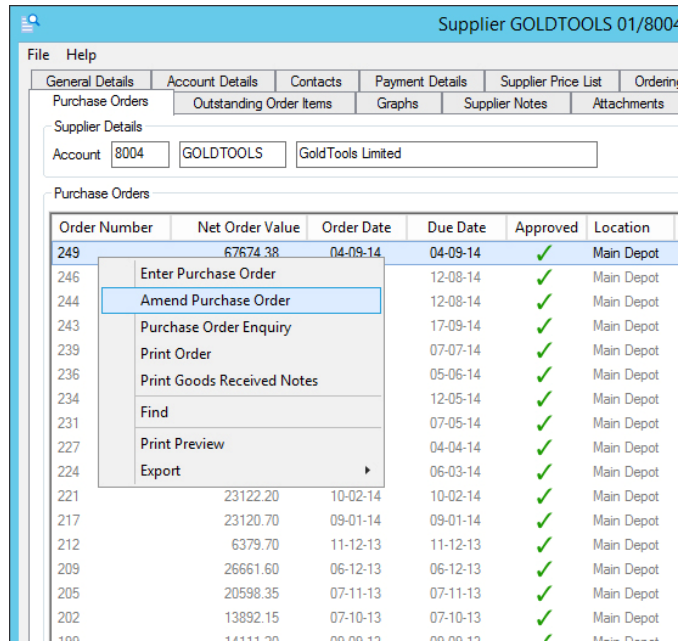


iii. Supplier Price List

The Supplier Price List tab within Supplier Enquiry has been extended to include a column indicating whether each stock item has been discontinued. This allows the list to be easily filtered or exported to spreadsheet for maintenance.

iv. Purchase Order tab Enhancements

It is now possible to add new purchase orders and to amend existing purchase orders from within Supplier Enquiry (subject to appropriate security permissions). This can be done by either using the Enter/Amend buttons at the bottom of the screen or via a right-click on a Purchase Order within the list.



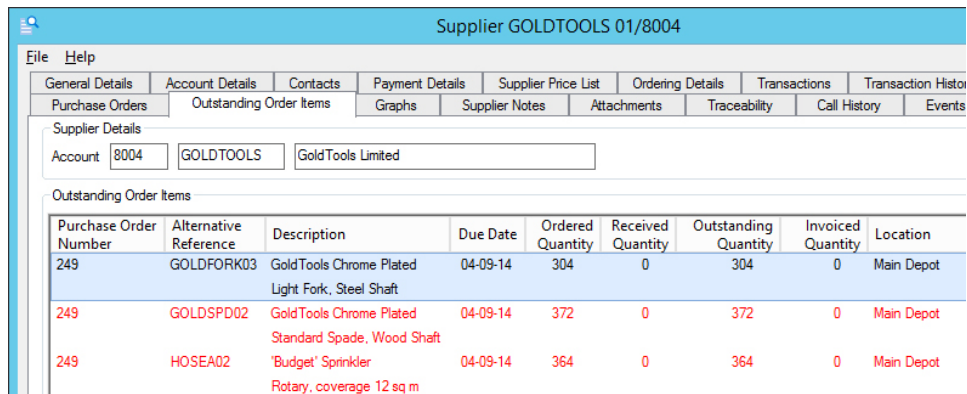
The list of Purchase Orders has also been modified to show closed/completed Purchase Orders in grey and overdue Purchase Orders in red. The number of days overdue shown as a negative value in the “Due (days)” column.

The Purchase Order list now also shows additional columns for

- approved status
- sent/exported status
- printed status
- acknowledged
- cost centre
- created by
- created date
- last amended by
- last amended date

v. Outstanding Order Items from Supplier Enquiry 

A new tab has been added to Supplier Enquiry showing outstanding purchase order lines from across all purchase orders. From this list, it is possible to drill down into a Purchase Order Enquiry, or to amend the Purchase Order (again, subject to the user's security permissions).

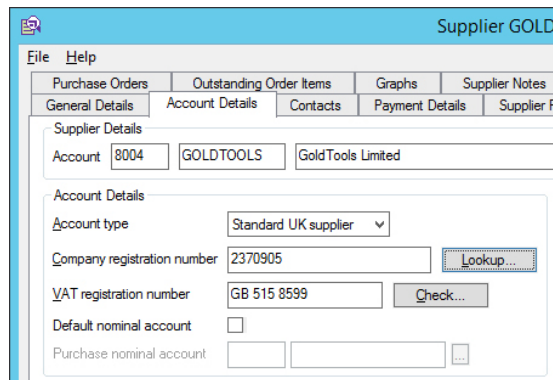


Purchase Order Number	Alternative Reference	Description	Due Date	Ordered Quantity	Received Quantity	Outstanding Quantity	Invoiced Quantity	Location
249	GOLDFORK03	GoldTools Chrome Plated Light Fork, Steel Shaft	04-09-14	304	0	304	0	Main Depot
249	GOLDSPD02	GoldTools Chrome Plated Standard Spade, Wood Shaft	04-09-14	372	0	372	0	Main Depot
249	HOSEA02	Budget Sprinkler Rotary, coverage 12 sq m	04-09-14	364	0	364	0	Main Depot

2. Company Registration & VAT Numbers 

Supplier accounts can now record both the Company Registration and VAT numbers.

As with the matching enhancement to Customer Enquiry, the Supplier Enquiry function now also includes the ability to lookup a company registration number using the Companies House website.



Supplier GOLD

File Help

Purchase Orders Outstanding Order Items Graphs Supplier Notes

General Details Account Details Contacts Payment Details Supplier F

Supplier Details

Account 8004 GOLDTOOLS GoldTools Limited

Account Details

Account type Standard UK supplier

Company registration number 2370905

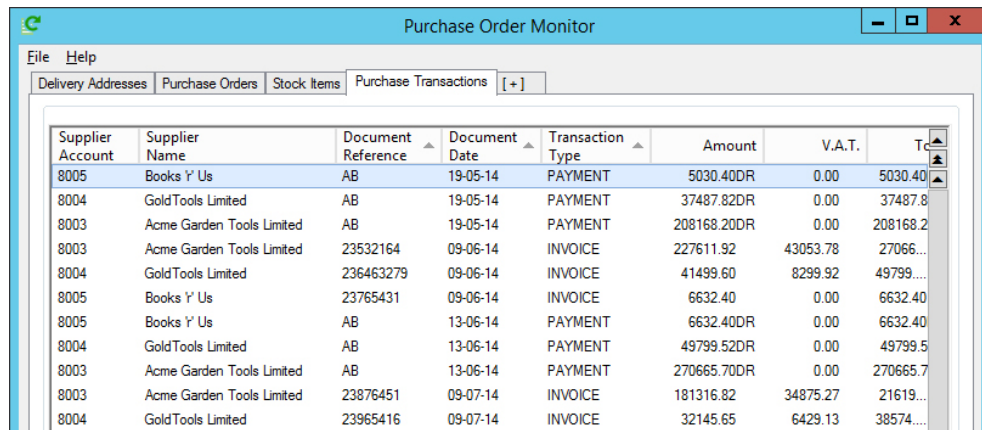
VAT registration number GB 515 8599

Default nominal account

Purchase nominal account

3. Purchase Transaction Lines Monitor

As with Sales Transactions (see page 29) a new type of monitor tab can now be added to any of your custom monitors to show Purchase Transactions. In many situations, this can be used instead of a traditional Purchase Daybook Report, but can of course be sorted, filtered, customised, searched and exported.



Supplier Account	Supplier Name	Document Reference	Document Date	Transaction Type	Amount	V.A.T.	Totals
8005	Books 'r Us	AB	19-05-14	PAYMENT	5030.40DR	0.00	5030.40
8004	GoldTools Limited	AB	19-05-14	PAYMENT	37487.82DR	0.00	37487.8
8003	Acme Garden Tools Limited	AB	19-05-14	PAYMENT	208168.20DR	0.00	208168.2
8003	Acme Garden Tools Limited	23532164	09-06-14	INVOICE	227611.92	43053.78	27066...
8004	GoldTools Limited	236463279	09-06-14	INVOICE	41499.60	8299.92	49799....
8005	Books 'r Us	23765431	09-06-14	INVOICE	6632.40	0.00	6632.40
8005	Books 'r Us	AB	13-06-14	PAYMENT	6632.40DR	0.00	6632.40
8004	GoldTools Limited	AB	13-06-14	PAYMENT	49799.52DR	0.00	49799.5
8003	Acme Garden Tools Limited	AB	13-06-14	PAYMENT	270665.70DR	0.00	270665.7
8003	Acme Garden Tools Limited	23876451	09-07-14	INVOICE	181316.82	34875.27	21619...
8004	GoldTools Limited	23965416	09-07-14	INVOICE	32145.65	6429.13	38574....

Here we can see a Purchase Transactions tab added to a Purchase Order Monitor

4. Alphabetic Purchase Ledger Report

The Alphabetic Purchase Ledger Report has been modified to allow the transactions to be listed in transaction date sequence within each supplier.

5. Supplier Price List Search in Purchase Requirements

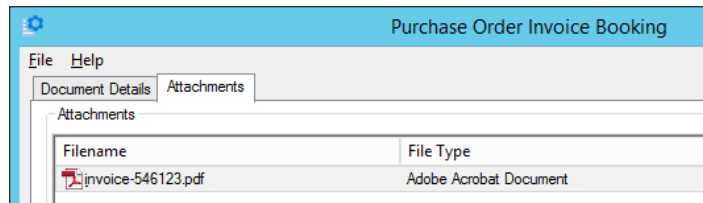
Users with the optional Purchase Requirements add-on to Purchase Order Processing can now add additional items to the requirements list by searching using the Supplier's Stock Reference.

6. Automatic Payments

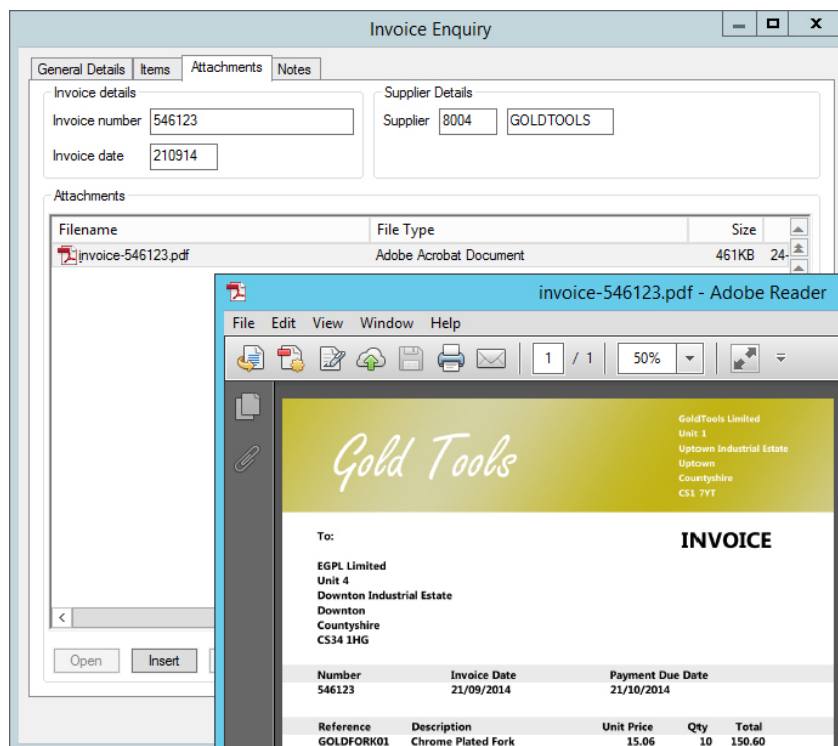
When reviewing a list of suppliers with the Automatic Payments function, you are now also shown the Current Balance and Credit Limit. Additionally, the credit limit is also shown when viewing a particular transaction.

7. Purchase Invoice Attachments

It is now possible to add Purchase Invoice Attachments at the time of entering the invoice (either through the Purchase Ledger or via Purchase Order Processing). By allowing this to be done as part of the initial document entry process, rather than needing to go back into the invoice once filed, this both speeds up the process and helps reduce errors.



A PDF copy of a supplier's invoice attached as part of the Purchase Order Invoice Booking process

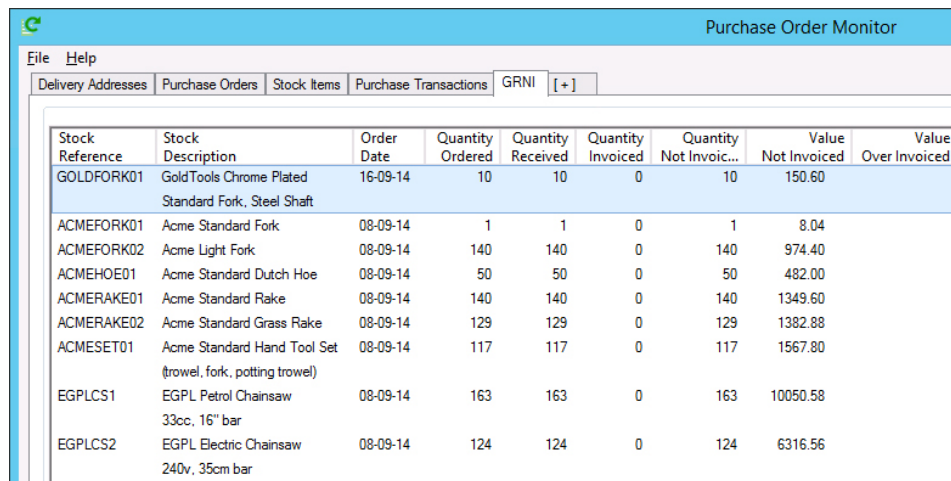


Subsequently viewing a supplier's invoice from Invoice Enquiry

8. GRNI Monitor (Goods Received Not Invoiced)

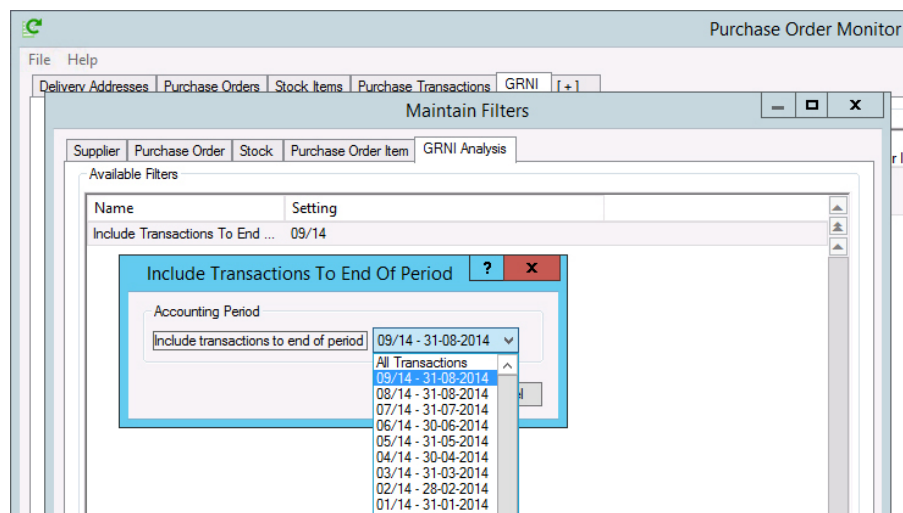
This new monitor allows you to view the GRNI (Goods Received Not Invoiced) and GINR (Goods Invoiced Not Received) position. As well as presenting the information in a more interactive manner than the traditional reports, this monitor also allows you to view historical information more easily by setting the filter options appropriately.

The GRNI Monitor is available as a stand-alone monitor but can also be added to other monitors (such as the Purchase Order Monitor) in the same manner as other additional monitor tabs.



Stock Reference	Stock Description	Order Date	Quantity Ordered	Quantity Received	Quantity Invoiced	Quantity Not Invoic...	Value Not Invoiced	Value Over Invoiced
GOLDFORK01	GoldTools Chrome Plated Standard Fork, Steel Shaft	16-09-14	10	10	0	10	150.60	
ACMEFORK01	Acme Standard Fork	08-09-14	1	1	0	1	8.04	
ACMEFORK02	Acme Light Fork	08-09-14	140	140	0	140	974.40	
ACMEHOE01	Acme Standard Dutch Hoe	08-09-14	50	50	0	50	482.00	
ACMERAKE01	Acme Standard Rake	08-09-14	140	140	0	140	1349.60	
ACMERAKE02	Acme Standard Grass Rake	08-09-14	129	129	0	129	1382.88	
ACMESET01	Acme Standard Hand Tool Set (trowel, fork, potting trowel)	08-09-14	117	117	0	117	1567.80	
EGPLCS1	EGPL Petrol Chainsaw 33cc, 16" bar	08-09-14	163	163	0	163	10050.58	
EGPLCS2	EGPL Electric Chainsaw 240v, 35cm bar	08-09-14	124	124	0	124	6316.56	

Purchase Order Monitor with an additional tab added for GRNI



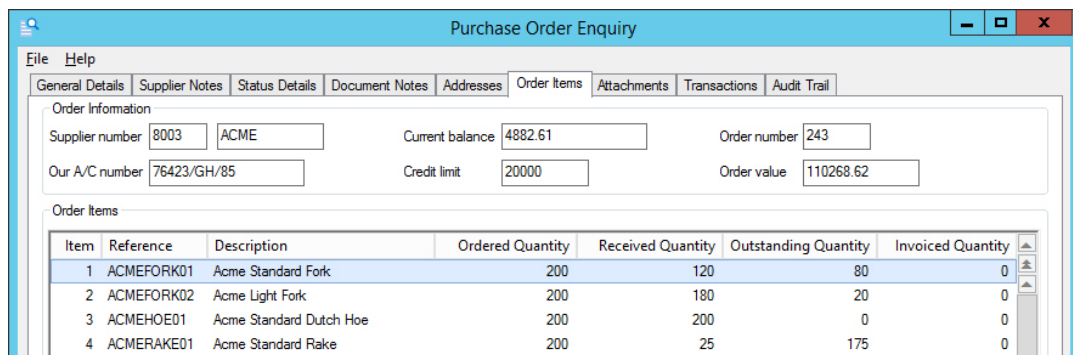
The Filter Options for the GRNI Monitor allow you to view transactions as at a particular period end, allowing you to see which goods have been subsequently invoiced

9. New "Order Created By" Field ★✔

Purchase Orders now record the Operator ID of the person that created the purchase order originally, in addition to the Operator ID of the person that last amended it. This new field is also shown in the Purchase Order Monitor, where the list of purchase orders can also be filtered to just those created by selected Operator IDs.

10. Purchase Order Enquiry ★✔

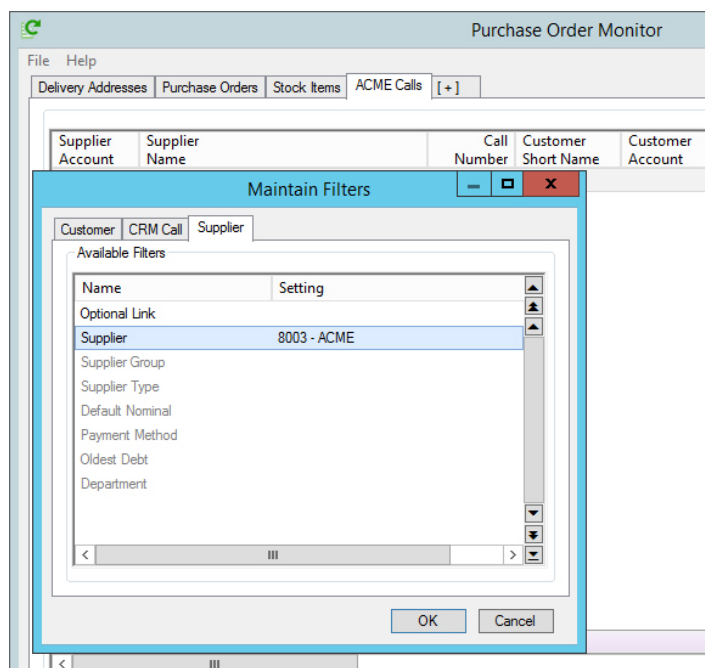
The Purchase Order Enquiry function has been extended to include an Outstanding Quantity column in addition to Ordered and Received columns.



Not only does this make it easier to see how many items are still outstanding on a partially received Purchase Order but it also makes it easier to filter or sort the display to only include items that are outstanding or are complete.

11. Call Monitor by Supplier ★✔

It is now possible to create a monitor tab listing calls filtered to just this linked to certain suppliers.



12. Clear Purchase Requirements



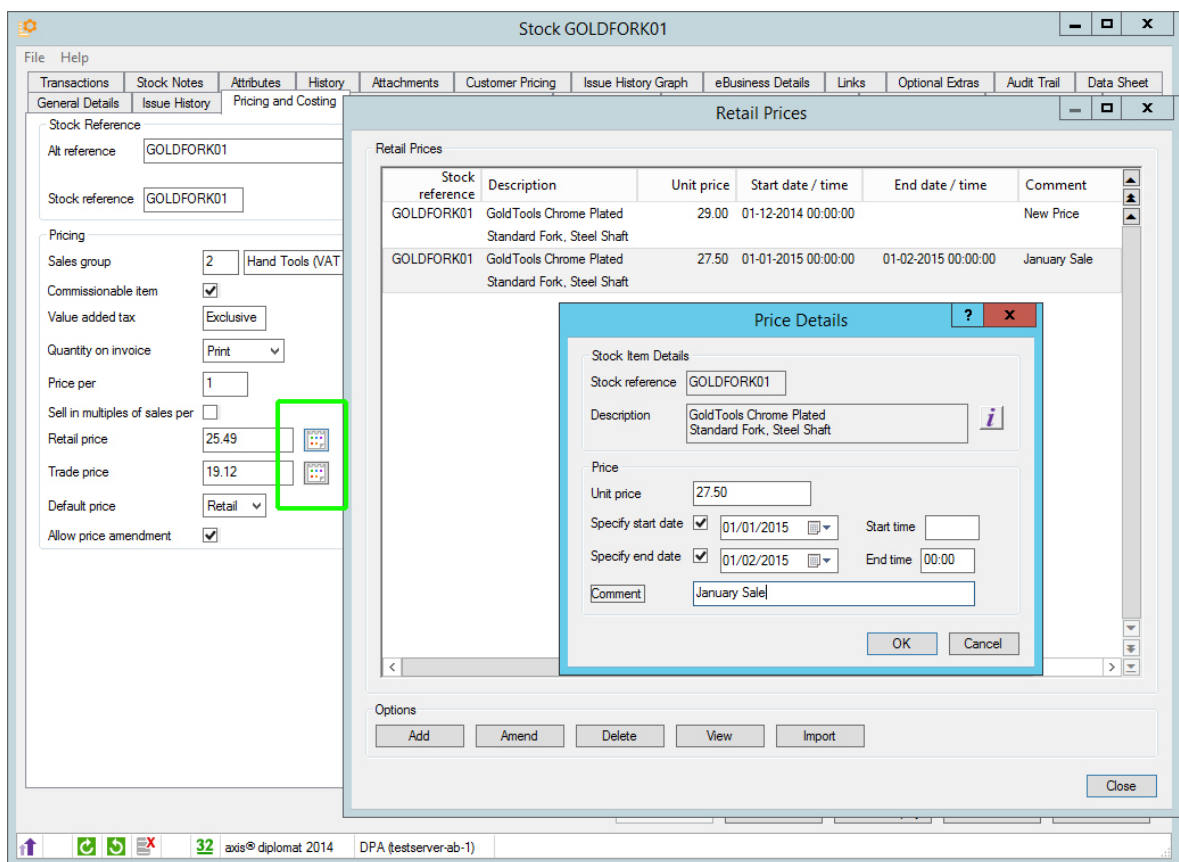
This function has been re-worked to allow it to run whilst others are using the system; previously, it was a single-user function.

Section F - Stock Ledger, Bill of Materials & MRP

1. Time and Date-Sensitive Pricing +

With **axis diplomat 2014**, it is now possible to record future pricing for both Trade and Retail against Stock items.

This is not only ideal for recording future price changes but, since each future price may also have an optional end date, it can also be used for fixed-term promotions. It means that your staff have full visibility of future price changes and means that they don't inadvertently use an old price. It also means that you don't need to update your stock pricing at precisely the moment the new pricing comes into effect.



Date-Sensitive Pricing can be accessed wherever the calendar icon appears next to a price whilst functions such as Sales Order Entry will automatically use the correct price in force at the time

2. Image Management



axis diplomat 2014 features all-new Image Management.

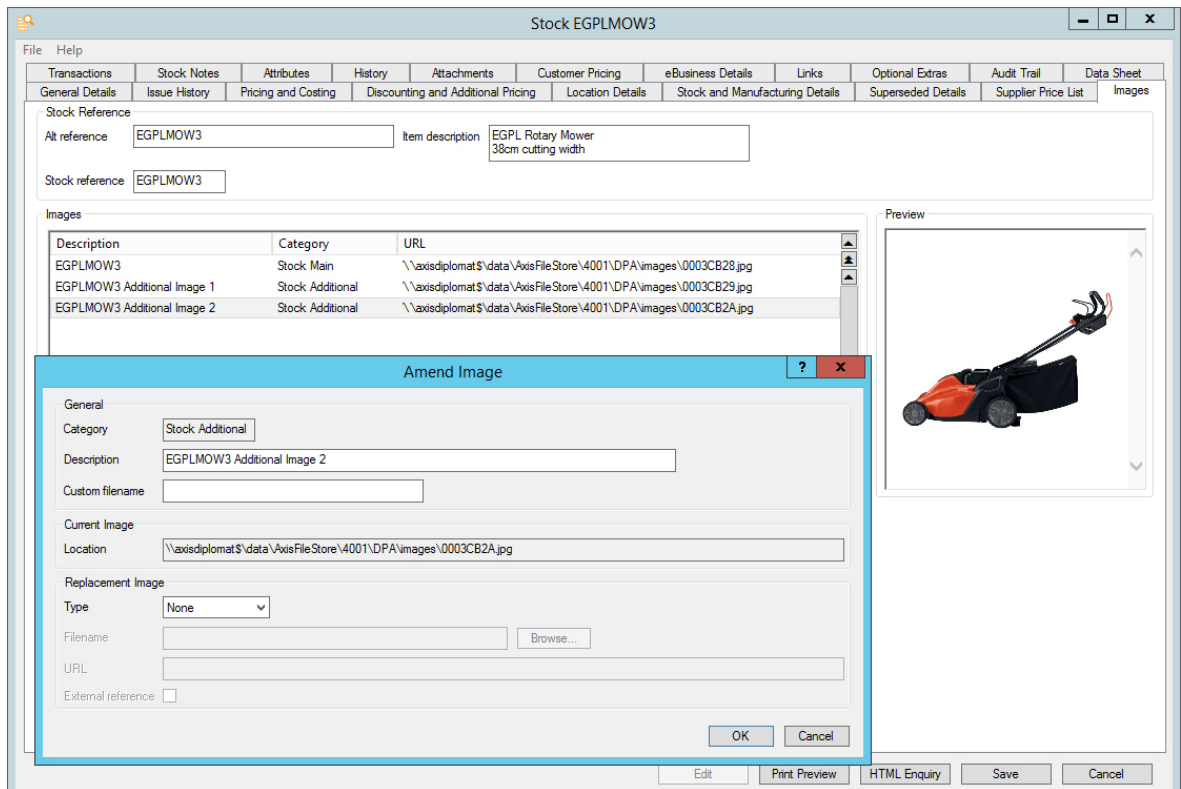
Previously, **axis diplomat** held images (for Stock and, with the optional eBusiness module, eBusiness Groups) in two fixed sizes (nominally referred to as Main and Thumbnail).

axis diplomat 2014 now holds all images purely at the native full resolution of the image(s) being added. For systems linked to axis vMerchant websites, these images are then resized to whatever sizes are defined for each particular website.

This has a number of benefits, including:

- if your requirements change (for example, your website is redesigned and needs larger images) you do not need to re-import all of your images; you simply change your website's configuration and publish
- if you need images in a number of different sizes, a copy of each image is automatically generated at those sizes when required (typically by the eBusiness Publish Site function)
- images can be site-specific so if you have several axis vMerchant websites and you want different images on different sites for the same items then this is now possible

Perhaps the greatest single benefit is that because images are no longer stored in pairs (main and thumbnail) then the maintenance of images is much simpler. This is bolstered further by an all-new Image Import function that can import image details from a CSV file or by looking in a named folder for images with filenames that match the destination records.



3. Support for PNG Image Files ★ ✓

The support for images attached to Stock Items and (for customers using the eBusiness module) eBusiness Groups has been enhanced to also allow PNG images as well as JPEG, GIF and BMP images. In some situations, PNG images can be beneficial when used on websites since they allow full colour images with transparent backgrounds - a combination not provided by other image types.

4. Stock Enquiry and Maintenance Enhancements

i. More Informative Search Results ★ ✓

Stock Searches now show a Discontinued column:

Key Word Search for: MOWER						
Stock Reference	Description	Discontinued	Size	Colour	Stock on Hand	Allor
EGPLMOW1	EGPL Electric Mower 12" plastic blades	Not discontinued			89	
EGPLMOW2	EGPL Electric Mower 12" metal blades	Not discontinued			77	
EGPLMOW3	EGPL Rotary Mower 38cm cutting width	Not discontinued			66	
EGPLMOW4	"Wimbledon" Electric Mower 5-blade steel cutting cylinder	Not discontinued			14	

The Stock function can now show between one and six lines of the product specification as an additional column within the results. The number of lines shown can be configured by a system parameter (Supervisor Functions > Amend Company Parameters > Maintain Stock Ledger Parameters):

The screenshot shows a software window titled 'Stock' with a menu bar containing 'File' and 'Help'. Below the menu is a 'Search Details' section with a 'Search text' field containing 'MOWER'. Underneath, it says 'Search Results - 6 matches'. A table displays the results:

Match Type	Match Text	Stock Reference	Description	Specification (2 lines)	Stock on Hand
Stock Description	Mower	EGPLMOW1	EGPL Electric Mower 12" plastic blades	Our lowest price mower, ideal for the small garden.	89
Stock Description	Mower	EGPLMOW2	EGPL Electric Mower 12" metal blades	A superb domestic mower, ideal for small and medium sized	77
Stock Description	Mower	EGPLMOW3	EGPL Rotary Mower 38cm cutting width	This professional-grade mower is designed for the jobbing	66

The Stock function configured to show just the first two lines of the Product Specification

The scrolling data list of results produced by the Stock function now includes (subject to user permissions) the trade and retail prices, both VAT inclusive and VAT exclusive. This now provides very fast access to basic pricing information on products and is particularly useful in a trade counter environment, for example, where a customer is enquiring on the price of various options that may be available.

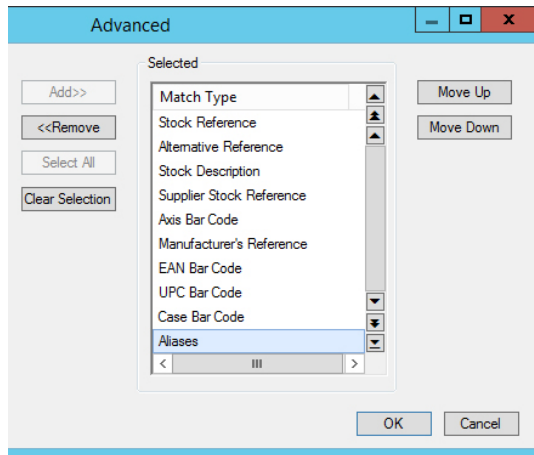
The screenshot shows the same 'Stock' application window with 'MOWER' in the search field. The results table now includes pricing columns:

Stock Reference	Description	Retail Price (inc VAT)	Trade Price (inc VAT)	Retail Price (ex VAT)	Trade Price (ex VAT)	Free Stock
EGPLMOW1	EGPL Electric Mower 12" plastic blades	71.44	53.58	59.53	44.65	99-
EGPLMOW2	EGPL Electric Mower 12" metal blades	91.86	68.89	76.55	57.41	85-
EGPLMOW3	EGPL Rotary Mower 38cm cutting width	132.72	99.54	110.60	82.95	117-
EGPLMOW4	"Wimbledon" Electric Mower 5-blade steel cutting cylinder	204.20	163.37	170.17	136.14	176-

This example shows how the Stock function can be used for a quick-and-easy overview of the selling prices of the various mowers being sold by this company.

The Stock function searches now include Customer Stock References in addition to the other fields already being searched.

The Stock function is now also capable of specifically searching the Alias field using the Advanced search:

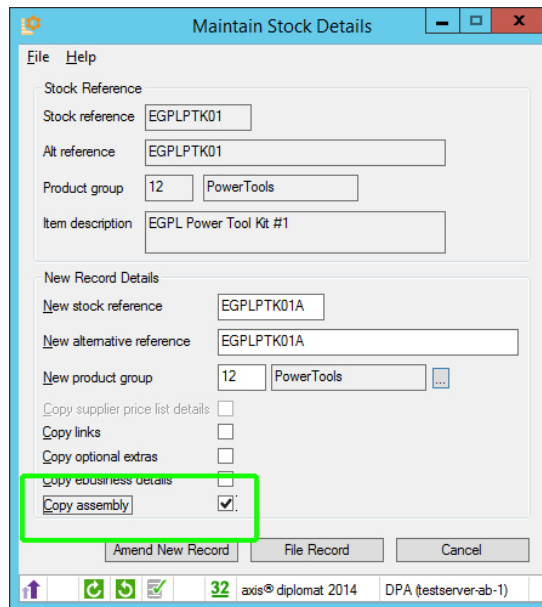


The Transactions and History tabs within Stock Enquiry have been extended to show the Order Source code and description associated with each sale.

ii. Copy Stock and Assembly



For customers with the Bill of Materials module, using the Maintain Stock Details function to copy a stock record will now also, optionally, allow the assembly structure to be copied as well.



**iii. Assembly Enquiry/Maintenance from Stock Enquiry/
Maintenance**



For users of the Bill of Materials module, viewing or amending an Assembly is now easier as it can now be done from Stock Enquiry or Maintain Stock Details. An Assembly button appears at the bottom of the Stock functions when the item in question is an assembly and this allows drill-down into the Assembly maintenance function. If Stock Enquiry was used then the assembly is shown in Enquiry mode and the addition of an Edit button allows the assembly to be updated. Access to the assembly enquiry and maintenance functions in this way is controlled by the user's security permissions.

iv. Currency Pricing in Stock Record Maintenance



For users with the Foreign Currency module, a new tab has been added to Stock Enquiry and Maintain Stock Details allowing the currency pricing information for that item to be shown and to be maintained.

By default, the price that an item is sold at in a foreign currency is derived by applying the current exchange rate to the Sterling price. Currency pricing allows this to be overridden with a specific fixed price for a given currency, irrespective of the current exchange rate. For this reason, the Currency Pricing tab in the Stock enquiry and maintenance functions also shows the base ledger-equivalent of each currency price so that it is possible to see, at a glance, the degree of variance based on the current exchange rate.

5. Multi User Import Bill of Materials Assemblies

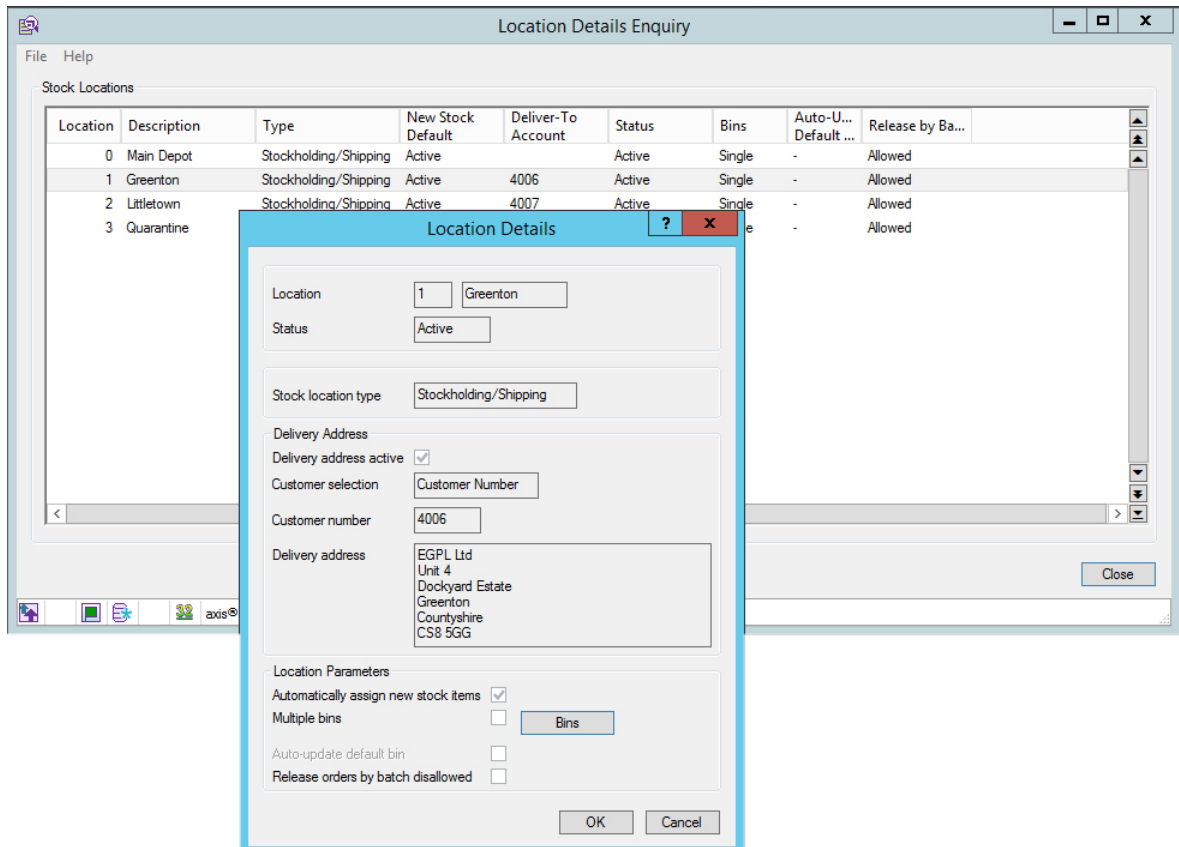


The function to allow users of the Bill of Materials module to import the structures of assemblies (or kits) from a CSV file has been updated to allow it to operate whilst others are using the system.

Previously, this function required single user (supervisor) mode operation and so this is another area where **axis diplomat 2014** increases availability by reducing the situations where users are required to exit from the system.

6. Location Details Enquiry

A new enquiry has been added to the Stock Ledger Enquiries menu for users with the Multi-Location, Multi-Bin module. This function will show all of the configuration information relating to each of your stock locations. In order to access this information before, it was necessary to use the Maintain Stock Locations function - as a supervisor function, this may not have been available to all of the users that needed the information.



7. Catalogue Page Numbers

Stock Records may now hold a catalogue page number, or range of page numbers, which would normally be used to indicate the page(s) in a printed catalogue where the item can be found. The fields can either hold a single number or a range, for example 12,17.

The screenshot shows the 'General Details' tab for a stock item. The 'Country of Origin (CoO)' field is highlighted with a green box and set to 'Unspecified'. Other fields include 'Alt reference' (GOLDFORK03), 'Stock reference' (GOLDFORK03), 'Overall Stock Levels' (On hand: 58, Inward: 0, Allocations: 362), 'Specification' (Gold's Light (Border) Fork. Guaranteed for life!), 'Traceability mode' (None), 'Product group' (2 Prof Tools), 'Purchase nominal a/c' (21 Purchases), 'Unit weight' (0.0000 kg), and 'Catalogue page number(s)' (14,15).

The Document Designer has also been modified to allow page numbers to be shown on sales documents such as Quotations and Invoices.

8. Country of Origin

It is now possible to record the Country of Origin against your stock records.

This can be done by simply choosing from a predefined list of countries. This field is then available to add to Document Designer-based Sales documents (such as delivery notes and invoices) as well as purchase orders (this is useful, for example, where purchase orders are copied to shipping agents).

The screenshot shows the 'General Details' tab for a stock item. The 'Country of Origin (CoO)' field is highlighted with a green box and set to 'China [CN]'. Other fields include 'Alt reference' (EGPLMOW4), 'Stock reference' (EGPLMOW4), 'Overall Stock Levels' (On hand: 397, Inward: 0, Allocations: 397), 'Specification' (Built to provide years of service, this mower includes a 5 year warranty and comes complete with a 75ft cable and a voucher for blade sharpening at any approved service centre), 'Traceability mode' (None), 'Product group' (19 Mowers), 'Purchase nominal a/c' (21 Purchases), 'Unit weight' (0.0000 kg), 'Date created' (260911), and 'Catalogue page number(s)'.

In addition, the Country of Origin can appear as a column within the Stock Control Monitor and within the standard CSV Stock Export file.

The Country of Origin may also be set en masse by importing from a CSV file or by using Stock Record Block Amendment.

9. Commodity Codes and TARIC Codes

The Commodity Code held against Stock Records was previously limited to 8 characters in line with Intrastat regulations, and only available on systems with the Intrastat module. It has now been made generally available and extended to 14 characters so that it can also be used to hold the TARIC code for imports/exports outside of the EU (in which case the first 8 characters will form the Combined Nomenclature (CN) commodity code for Intrastat purposes).

This code is now also available as a field to add to Document Designer-based Purchase Orders.

More information on EU Commodity Codes and TARIC Codes can be found at

<https://www.gov.uk/classification-of-goods>

http://en.wikipedia.org/wiki/TARIC_code

10. Dimensions on Stock Records

For systems with the Delivery Service Provider (DSP) Foundation (i.e. those with one or more carrier interfaces), stock items can now hold the dimensions of each item as three separate fields – Depth/Length, Width and Height (in mm).

This information is also used by the Best Delivery Method calculation (see page 31).

11. Stock Control Monitor

i. Sales Group

The scrolling data list within the Stock Control Monitor has been extended to show the Sales Group for each item. It is also possible to filter the list of stock items shown by Sales Group(s).

ii. Last Receipt Date

It is now also possible to show the date of the last receipt transaction (when showing Stock Turn information).

iii. Weight Information

The Stock Control Monitor has been extended to show weight information - for those customers with the "Net Unit Weight on Stock" module, the Stock list now shows the Gross and Net Unit Weight whilst drilling down into the Movement History now shows, for each transaction, the original and outstanding gross weight and the original and outstanding net weight.

For customers without the "Net Unit Weight on Stock" module, the Stock list shows the Unit Weight whilst the Movement History list shows total original and outstanding weight for each transaction.

12. Data Import/Export Enhancements

i. Export Stock Aliases

A new function has been added to allow details of any Stock Aliases to be exported to CSV.

ii. Export Bill of Materials to CSV

For customers using the Bill of Materials module, there is now a function to export the BOM details to a CSV file. This is in the same format as the file supported by the equivalent import function so can be used as a basis for making bulk changes via spreadsheet before importing back into **axis diplomat**.

iii. Import Stock Details from CSV

The Stock import function has been extended in two ways:

Customers with the Stock Traceability module can now import traceability details for new stock items or update the traceability details of existing stock items provided that they have no existing transactions. This includes the ability to specify the traceability mode (serial numbered or batch numbered), whether Best Before Dates apply and, if they do, the Shelf Life (number of days from date of manufacture to Best Before date).

Customers using the Department/Cost Centre by Line facility can also now import the default department and cost centre against each stock item, as well as the flag to indicate whether the department and/or cost centre should be forced to override the overall department/cost centre on an order.

13. Serial Numbering on Documents

Further control over the printing of serial numbers on Sales Invoices, Delivery Notes from Invoice and Delivery Notes from Goods on Account has now been introduced. For each of these documents, system parameters now exist to indicate whether serial numbers should be listed and, if they are, whether they are to be consolidated. When consolidating serial numbers, they are changed from a list, one per line, to a comma-separated list, potentially reducing the number of lines on the document, particularly when serial numbers are short.

14. Location Bin Barcode Label Printing

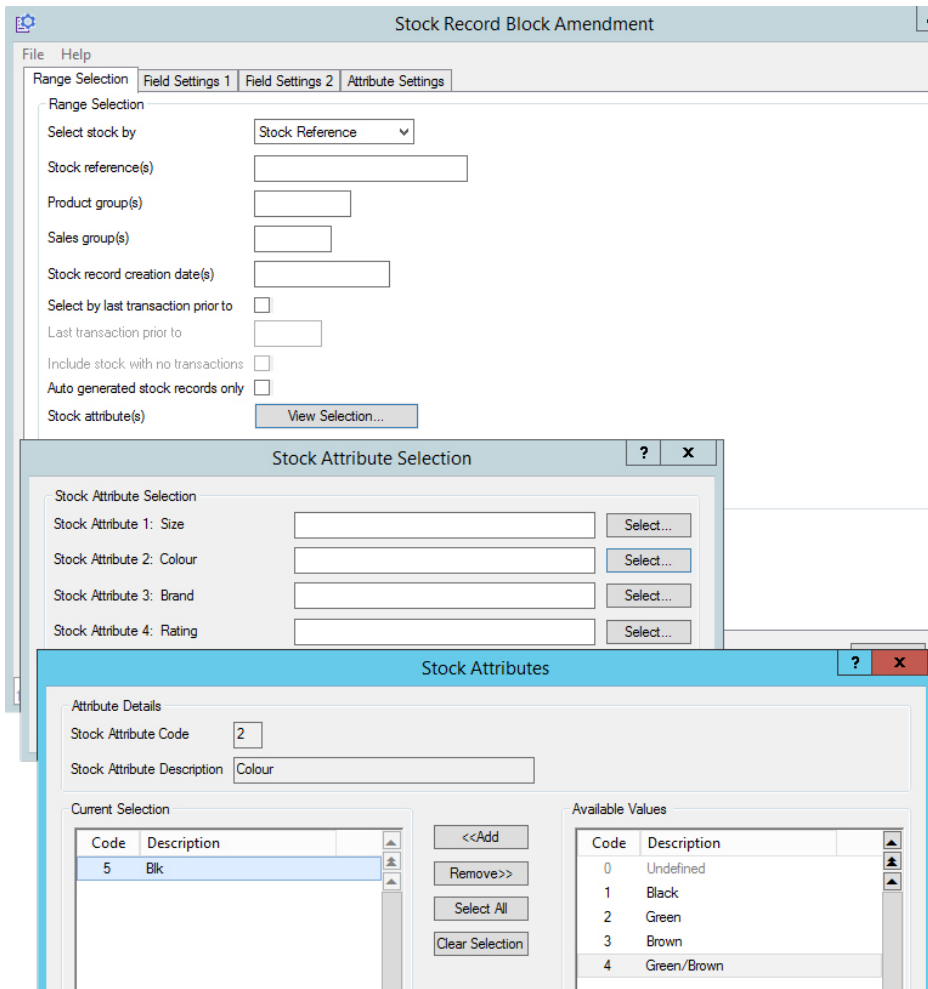
A new function, Print Location Bin Labels, is now available on systems with the Multi-Location, Multi Bin module to allow them to print barcoded bin labels. As with the Location Details Enquiry, this offers access to the facilities for users without access to the Supervisor Functions menu.

15. Sales Group in Works Order Monitor

For those using the Compact MRP module, the Works Order Monitor has been extended to also show the Sales Group for each item being manufactured. In conjunction with the standard sorting and filtering capabilities found on any scrolling data list, this can help group similar products together in the Works Order Monitor view of the current schedule.

16. Block Amendment of Stock Attributes

The Stock Record Block Amendment function has been extended to allow selection by, and setting of, any of the ten Stock Attributes. This now makes it much easier to change your attribute data without needing to use a import functions. For example, if you had an attribute defined for "colour" and you found that you had two different attributes for black - one labelled as "black" and one as "blk" then you could easily amend all those flagged as "blk" to "black".



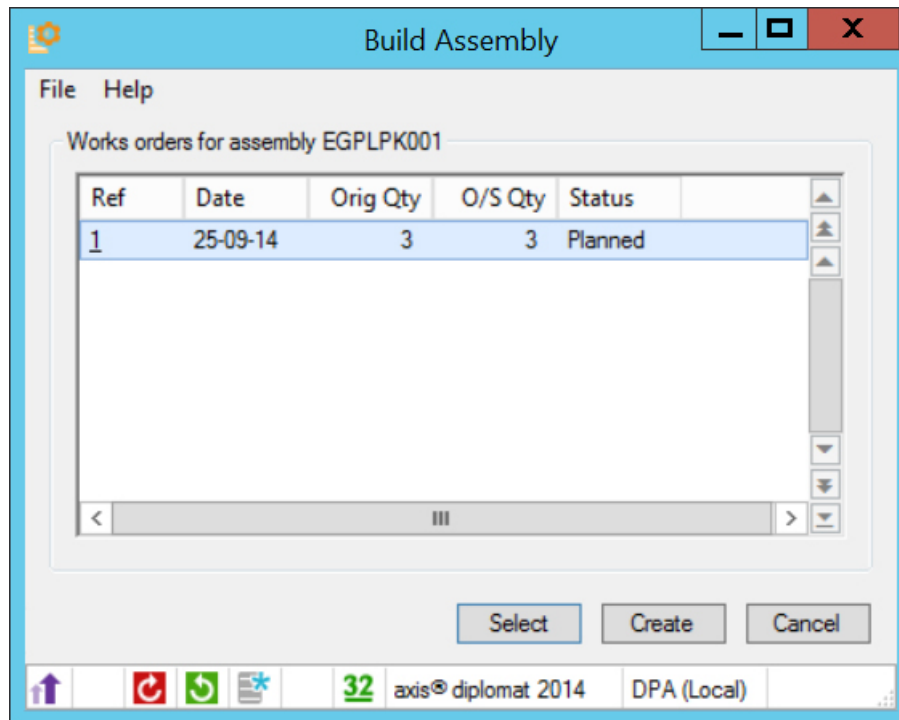
17. Build Assembly +

For those using the Compact MRP module, **axis diplomat 2014** offers a new function called 'Build Assembly'. This enables you to create a works order 'on-the-fly', allowing you to pick and issue components and, optionally, receive finished goods into stock at the same time.

This sits well alongside the standard MRP process and gives added flexibility when you need to "just get the job done" in a few simple steps. Build Assembly is also compatible with Stock Traceability and Auto-Generated Traceability Details modules.

The screenshot shows a Windows-style dialog box titled "Build Assembly". It has a menu bar with "File" and "Help". The main area is titled "Batch Details" and contains several input fields: "Order locn" with the value "0", "Warehouse" with a dropdown menu showing "Warehouse", "Components" with the value "0", another "Warehouse" dropdown menu showing "Warehouse", "Item ref" with the value "EGPLPK001", and "Qty to make" with the value "2". At the bottom right of the dialog are "OK" and "Cancel" buttons. The taskbar at the bottom of the screen shows the application name "axis diplomat 2014" and the current window title "DPA (Loca)".

The Build Assembly function simply prompts for the stock item to be built and the quantity required.



If you are picking and assembling for an existing works order, you are able to select from the list of Works Orders or you can create a new works order.

If you are also using the Handheld Stock Control module then a further benefit is that you can use a handheld device for the entire operation.

18. Auto-Generated Traceability Details in MRP +

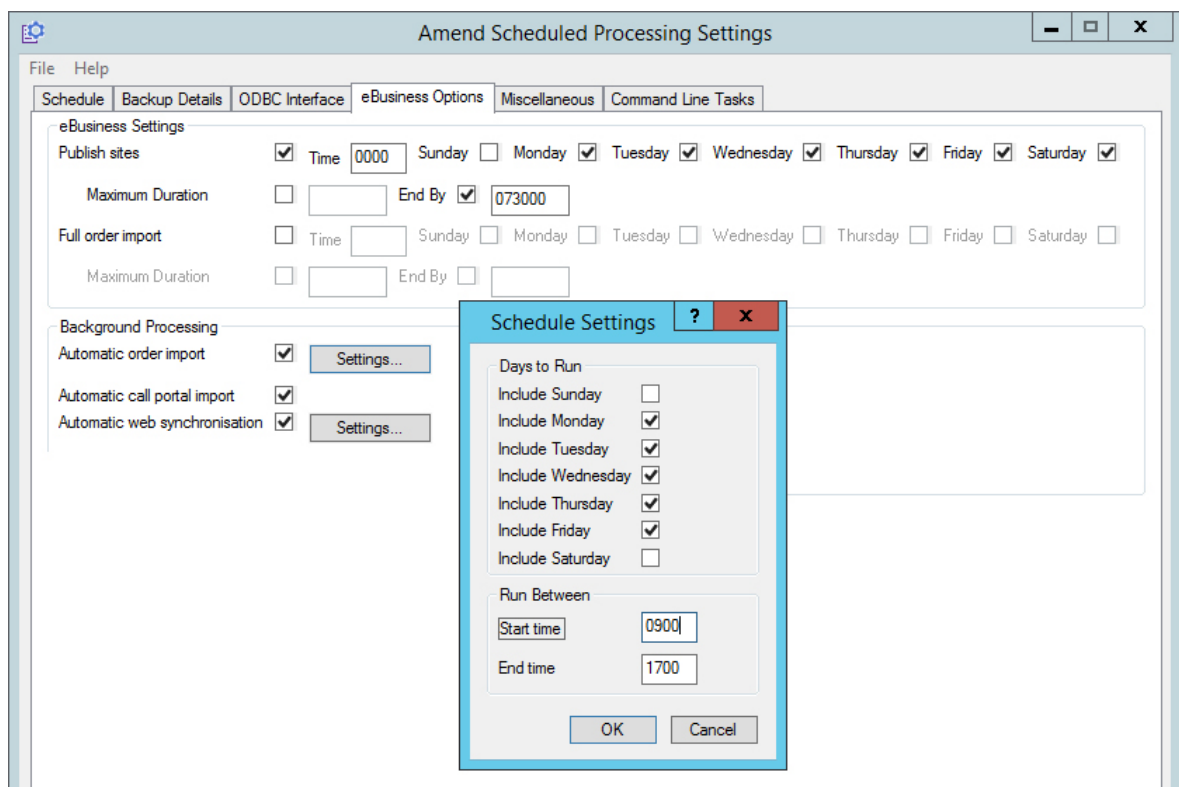
A new module, available as an option for **axis diplomat 2014** systems, allows batch numbers and/or serial numbers to be automatically allocated when receiving stock against Works Orders (using the Goods Received from Works function).

Section G - eBusiness

1. Import eBusiness Orders

It is now possible, via the Kernel Utilities function "Amend Scheduled Processing Settings", to configure the start and end times for automatic order imports to run. Previously, once you had configured a site to automatically import orders then that process would run throughout the day and night. This has now been enhanced to allow you to specify both the days of the week and the times of day when web orders will be imported.

This, for example, allows you to ensure that orders are not automatically imported outside of normal office hours or to avoid other tasks that may affect the import process.



2. Orders on Hold Threshold

It is now possible to define a threshold and for any eBusiness orders above that threshold to be automatically placed on hold. This is ideal, for example, if you wish to apply some form of manual security check to unusually large orders being placed on your website(s).

3. axis vMerchant Image Publishing Performance

The Publish Site and Publish All Sites functions have, in the past, used FTP to upload images (such as stock and eBusiness Group images). Images files are relatively small and it takes as long to determine whether the online image is older than the current one as it does to re-upload a new copy. For this reason, the publish routines always uploaded all of the images, regardless of whether they have changed and need to be uploaded, simply because it was quicker than trying to determine which ones have changed.

The image uploading mechanism has now been completely re-worked to use an alternative technology to upload images into the SQL Server on the axis vMerchant website. This technology (called Binary Large ObjectS, or BLOBS!) is faster than using FTP but the significant benefit comes from the fact that it now allows us to only upload those images that have changed since the last publish.

With this latest update, you can now leave your scheduled publish settings to include images knowing that the publish will not spend a large percentage of the time uploading images that don't need to be uploaded.

This also has the added benefit of removing any requirement for the upload to use an FTP connection - which can eliminate communication issues caused by your firewall configuration.

4. eBusiness Sitemaps

This module, which was previously optional, is now standard on all systems with the axis vMerchant module. It allows the axis vMerchant to automatically generate an XML Sitemap. These sitemap files, which essentially provide a set of links to all of the pages on your site, are used by search engines to navigate your site and so can have a significant effect on your search engine rankings.

In addition to automatically generating all of the product and product-related page links, you can also list your own additional pages within **axis diplomat** for inclusion in the sitemap (to cover, for example, CMS content).



5. Discontinued eBusiness Groups

It is now possible to mark selected eBusiness Groups as Discontinued. Once an eBusiness Group is marked as Discontinued, it is no longer possible to assign stock items to that group.

The screenshot shows the configuration interface for an eBusiness Group. The 'General Settings' section is highlighted with a green box, indicating the 'Discontinued' status is active. The 'Group Relationships' section shows a parent group 'Product Catalogue' with code '45' and reference 'LEFTNAV'. The 'Meta Data' section has empty fields for 'Meta Title', 'Meta Keywords', and 'Meta Description'.

A site parameter is provided to indicate whether Discontinued eBusiness Groups that still contain stock items should be published to your site.

A function is also provided to allow all Discontinued eBusiness Groups that are no longer in use (i.e. that do not have any stock assigned to them) to be deleted.

Finally, an import facility is provided, allowing bulk-setting of the discontinued status across a number of eBusiness Groups.

These facilities together provide a powerful and convenient mechanism for removing large numbers of eBusiness Groups at once.

6. Customer 'In Stock' Notifications



This additional module, available only at **axis diplomat 2014**, allows your axis vMerchant website to offer customers the option of being notified when out of stock items become available.

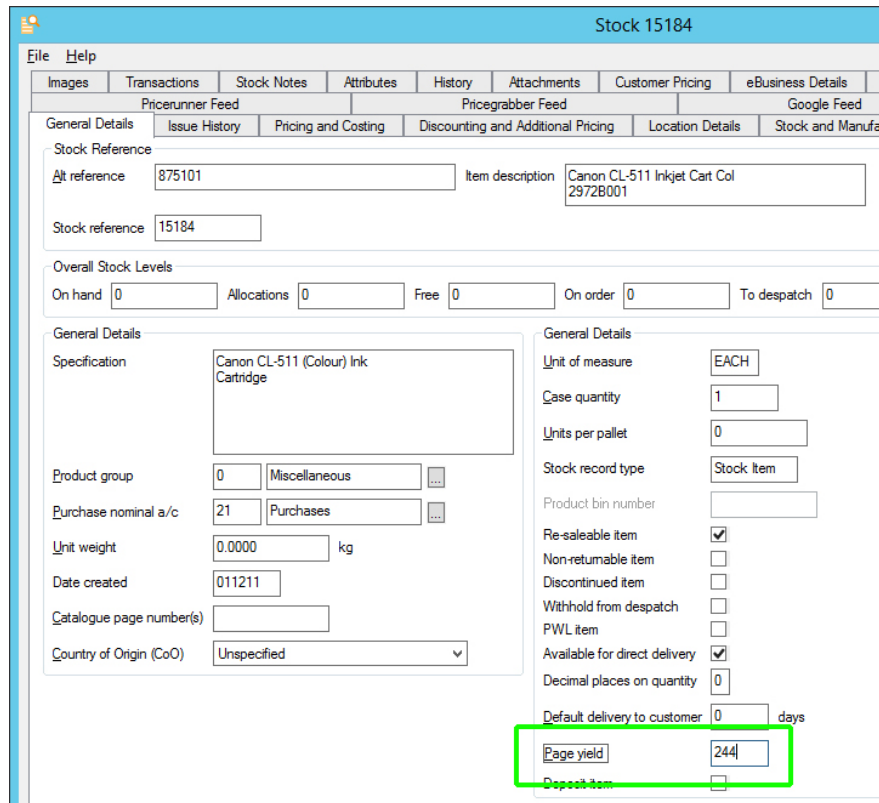
In addition to the **axis diplomat** module, your website(s) will require minor design changes to offer a "Tell me when this item becomes available" button alongside of, or instead of, a Buy button for items that are not currently in stock.

In addition to the email templates, **axis diplomat's** Site Maintenance function also allows configuration of the maximum number of days to hold these requests. This is to ensure that you do not send notifications to customers from requests that are too old.

Section H - Office Products

1. Page Yield

Stock records on Office Products systems now have a custom field specifically to hold Page Yield. Specifically designed with printer consumables in mind, the information can also be published to your axis vMerchant website.



The screenshot shows the 'Stock 15184' form. The 'Page yield' field is highlighted with a green box and contains the value 244. Other fields include 'Alt reference' (875101), 'Stock reference' (15184), 'Item description' (Canon CL-511 Inkjet Cart Col 2972B001), 'Overall Stock Levels' (On hand: 0, Allocations: 0, Free: 0, On order: 0, To despatch: 0), and 'General Details' (Specification: Canon CL-511 (Colour) Ink Cartridge, Product group: 0 Miscellaneous, Purchase nominal a/c: 21 Purchases, Unit weight: 0.0000 kg, Date created: 011211, Country of Origin (CoO): Unspecified, Unit of measure: EACH, Case quantity: 1, Units per pallet: 0, Stock record type: Stock Item, Product bin number: , Re-saleable item: checked, Non-returnable item: unchecked, Discontinued item: unchecked, Withhold from despatch: unchecked, PWL item: unchecked, Available for direct delivery: checked, Decimal places on quantity: 0, Default delivery to customer: 0 days, Deposit item: unchecked).

2. Support for Catalogue Page Numbers in Vow and Spicers Imports

The main wholesaler import functions will now identify the page numbers from the product files and store this information in the new Catalogue Page Number field (see page 53).

3. New Price Feed Options

Two new price feed options have been added:

- i. **Stock In The Channel**
- ii. **DMC**

To see that latest range of suppliers that Price Feeds and Electronic Ordering options are available for, please visit our website at:

<http://www.axisfirst.co.uk/software/eos/edi/>

Section I - Payroll

1. Employee Maintenance

The Employee Maintenance function has been extended to allow it to be resized to take full advantage of higher resolution screens. The qualifications list has been extended to show additional information on each qualification (avoiding the need to 'drill down' into the individual qualification) and to highlight expired qualifications in red.

2. A4 Plain Paper Payslips

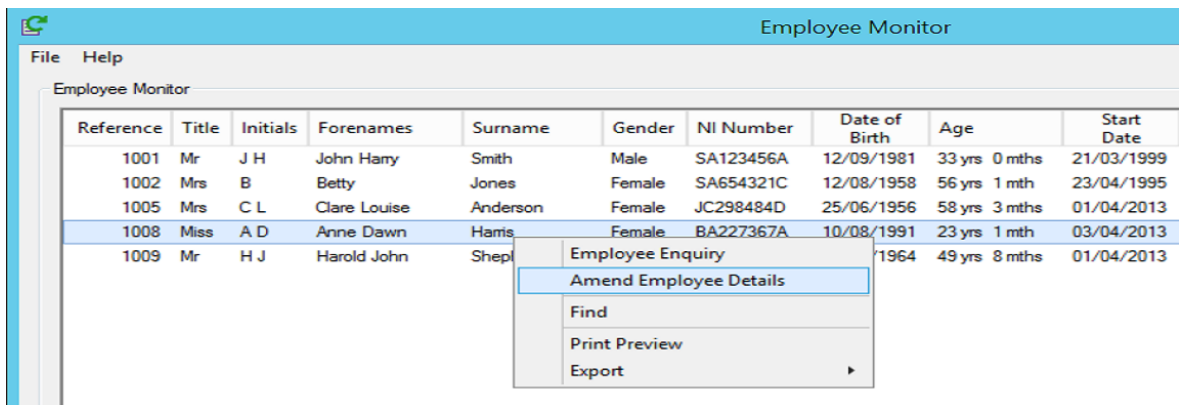
Support has now been added for printing payslips on plain A4 paper (using a laser or inkjet printer). The software ships with a standard graphical backdrop so this facility can be used straightaway. This may eliminate your need to buy pre-printed payslip stationery and will assist those users still using dot matrix printers to retire them. A4 laser printer security payslips (AXIS9) continue to be available.

PAY ADVICE						
NI NUMBER	CAT	TAX CODE	PERIOD	ENDING	PAY DATE	
DESCRIPTION				PAYMENTS	DEDUCTIONS	
<small>payments x after tax, + after N.I., * both deduction x before tax, + before N.I., * both</small>				YEAR TO DATE	THIS PERIOD	
DEPARTMENT	REFERENCE	PI/POINT	AC DEPT	TOTAL PAY (less deductions)		
				GROSS EARNINGS		
				TAXABLE PAY		
				INCOME TAX		
				NATIONAL INSURANCE		
				PENSION		
				NET PAY		
				AMOUNT PAID		
<small>Copyright © Systems AXIS (UK) LTD. All rights reserved</small>			<small>SA 0178-01000</small>		<small>180/1800 04/04/14 01.04</small>	

3. Employee Monitor

axis diplomat payroll 2014 boasts a new Employee Monitor to help keep track of all payroll employee details. This new monitor enables you to view, search, sort and filter the entire list of employees all from place.

By using the usual monitor facilities (including the ability to arrange the list with multiple sort levels, filter, hide and re-arrange columns and export directly to Microsoft Excel) the Employee Monitor can also be used to produce employee lists in a variety of formats for many different HR purposes.



The screenshot shows the 'Employee Monitor' window with a menu bar (File, Help) and a table of employees. A right-click context menu is open over the row for employee 1008, showing options: Employee Enquiry, Amend Employee Details, Find, Print Preview, and Export.

Reference	Title	Initials	Forenames	Surname	Gender	NI Number	Date of Birth	Age	Start Date
1001	Mr	J H	John Harry	Smith	Male	SA123456A	12/09/1981	33 yrs 0 mths	21/03/1999
1002	Mrs	B	Betty	Jones	Female	SA654321C	12/08/1958	56 yrs 1 mth	23/04/1995
1005	Mrs	C L	Clare Louise	Anderson	Female	JC298484D	25/06/1956	58 yrs 3 mths	01/04/2013
1008	Miss	A D	Anne Dawn	Hamis	Female	BA227367A	10/08/1991	23 yrs 1 mth	03/04/2013
1009	Mr	H J	Harold John	Sheph			1964	49 yrs 8 mths	01/04/2013

Using right-click facilities you are also able to access the 'Employee Enquiry' or even 'Amend Employee Details'

4. Interfaces to Workplace Pension Providers

April 2014 saw companies with fewer than 250 employees being affected by the legislation that enforces a legal duty to provide suitable pension provision for their workforce (known as Workplace Pensions).

As a result of this, we have been working with a number of pension providers to develop specific exports to pass information from the axis payroll to those pension providers.

We are now able to offer additional modules to interface with the following Workplace Pension Providers:

- People's Pension
- Scottish Widows
- Legal & General

Section J - Hire Management

1. Customer Insurance



For those hiring large items of plant, there can be a requirement for customers to hold their own hire-in plant insurance. Modifications have now been made to track which customers have provided a copy of their insurance, and when it expires.

Hire Categories have been extended to include a tick-box to indicate that hire-in plant insurance is required for a given category of hire item. Similarly, customer records have been extended to firstly indicate that a copy of their insurance has been received (that can be attached using the Attachments tab), along with the expiry date.

Hire maintenance functions have been enhanced to warn, if trying to hire an item in a relevant Hire Category, and the customer in question does not have insurance, has insurance but it has expired, or has insurance that is about to expire.

The Alphabetic and Numeric Customer Lists have been modified to allow reporting of only customers whose insurance falls within certain parameters:

A new Hire Report has also been added, specifically help identify those items currently on hire to customers whose insurance is due to expire in the near future.

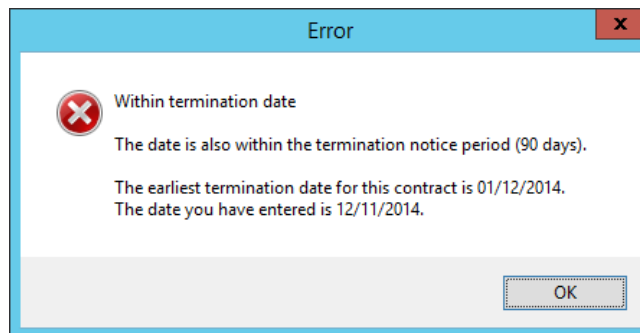
Section K - Service Contract Management

1. Minimum contract term and notice periods



axis diplomat 2014 allows you to protect against user's inadvertently allowing service contracts to be cancelled before their minimum term has expired, or without the minimum notice period being given.

Each service contract type can be defined with different “Minimum term” and “Termination notice period” settings



These settings are then enforced within service contract maintenance

The ability to override these restrictions is configurable on a user basis.

2. Service Contract Maintenance - Improvements to screen layout

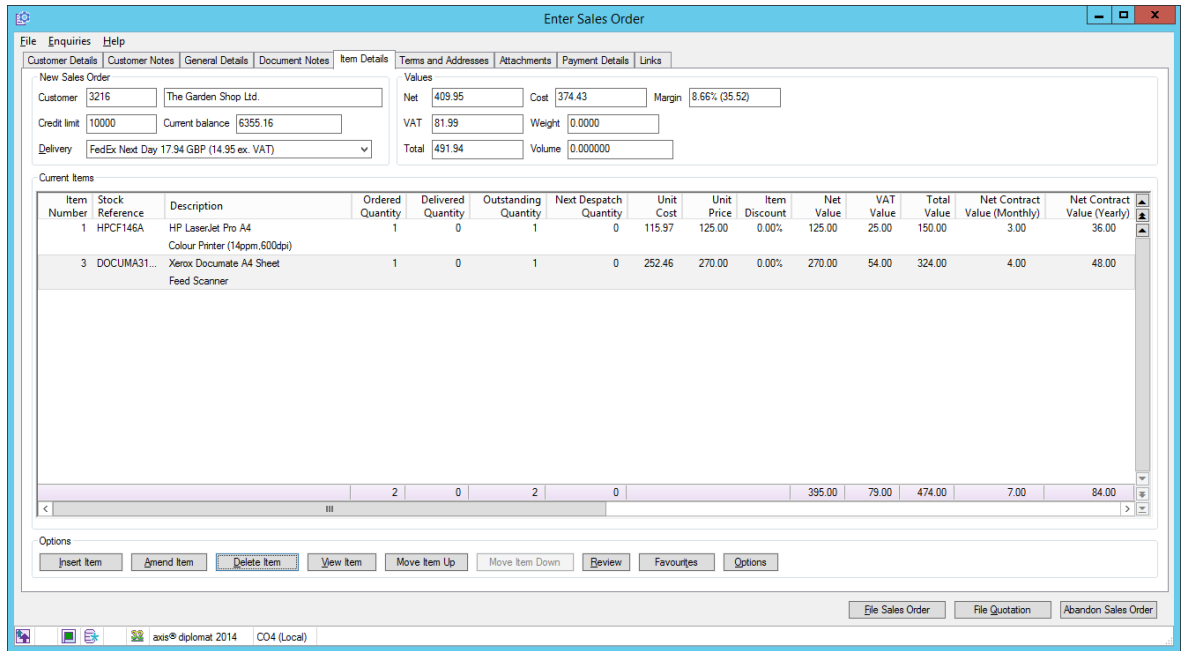


- The “Number of releases” prompt used in previous versions to control the termination of billing is replaced with the more user-friendly “Termination date” prompt which includes a calendar date picker. Once a date has been selected the ‘Number of Releases’ (invoices) remaining is calculated and displayed.
- A new “Contract Status” informs the user whether the contract is “Active”, “Under notice” or “Ended”.
- Direct access to the Service Contract Type enquiry is provided via a SmartLink icon.

3. Show Service Contract charges within Sales Quotations and Sales Orders.



Quotation and sales order maintenance now show the monthly and annual service contract charge against any line items which hold a service contract value.



4. Copy to Service Contract Request Context Menu Options

It is now possible to copy existing Service Contracts or Service Contract Requests to a new Request, either from the Contracts tab within Customer Enquiry or from a Contracts or Contract Requests tab within a monitor.

5. Disallow CRM Service Calls by Contract Type

A new setting against each Service Contract Type allows you to prevent the raising of Service calls against contracts of that type.

Section L - Kernel (Core) Enhancements

1. Backup with no down time! (Windows VSS Support)

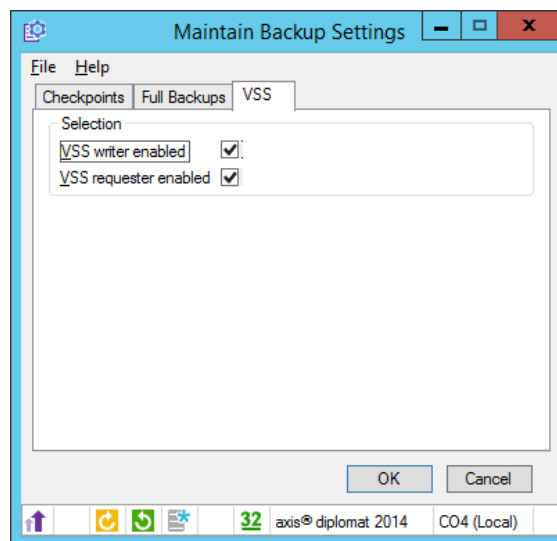
Backup **axis diplomat** whilst it's being used!

The time window during which **axis diplomat** is unavailable when taking a full backup has been reduced to a few seconds regardless of the database size and backups can be invoked whilst the system is in use.

This dramatically improves operational flexibility as a backup can be taken at any time without concern for system availability. In many cases the fact that a backup has been taken will be unnoticeable.

Under earlier versions the system would be unavailable whilst a full copy of the data was taken (this could vary from a few minutes to an hour or more depending on the database size and hardware performance) so forcing some operations to be undertaken outside of normal business hours.

axis diplomat 2014 achieves this by implementing support for Microsoft's VSS (Volume Shadow copy Service). VSS works by creating a 'snapshot' in time which then allows the backup to occur in the background whilst users continue their work.



Our implementation has even been designed to be resilient to system failures or reboots whilst a backup is in progress!

VSS backups are enabled by default on **axis diplomat 2014** systems.

2. **Smaller backups**

axis diplomat 2014 uses an improved backup file format with better compression. This means less storage space is used for backups and the time taken to transmit backups off site (e.g. to the axis SoS service) are significantly reduced.

3. **Faster restore too!**

axis diplomat 2014's improved backup file format means that if you do need to restore, the restore can be carried out more efficiently and get you back up and running more quickly.

4. **Improved Performance of Roll-Back Data Protection**

The writing of roll-back data protection log files has been improved by approximately 10%. This will be particularly noticeable with functions that perform significant quantities of updates, for example imports, consolidations and batch updates such as Releasing Sales Orders or Set Despatch Quantities by Batch.

5. **Scales to 250 users!**

axis diplomat now scales from 1 to 250 users. This more than doubles the previous maximum user limit of 100 allowing your business much more headroom for growth without outgrowing your business system!

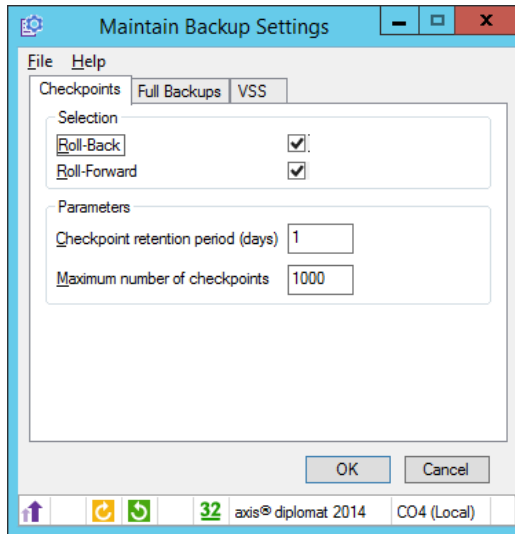
Of course more users on a system means more data being generated and greater potential for loss should disaster strike. That's why we're also improved the backup, data protection and disaster recovery facilities (see above and below).

6. **Dual-mode Data Protection**

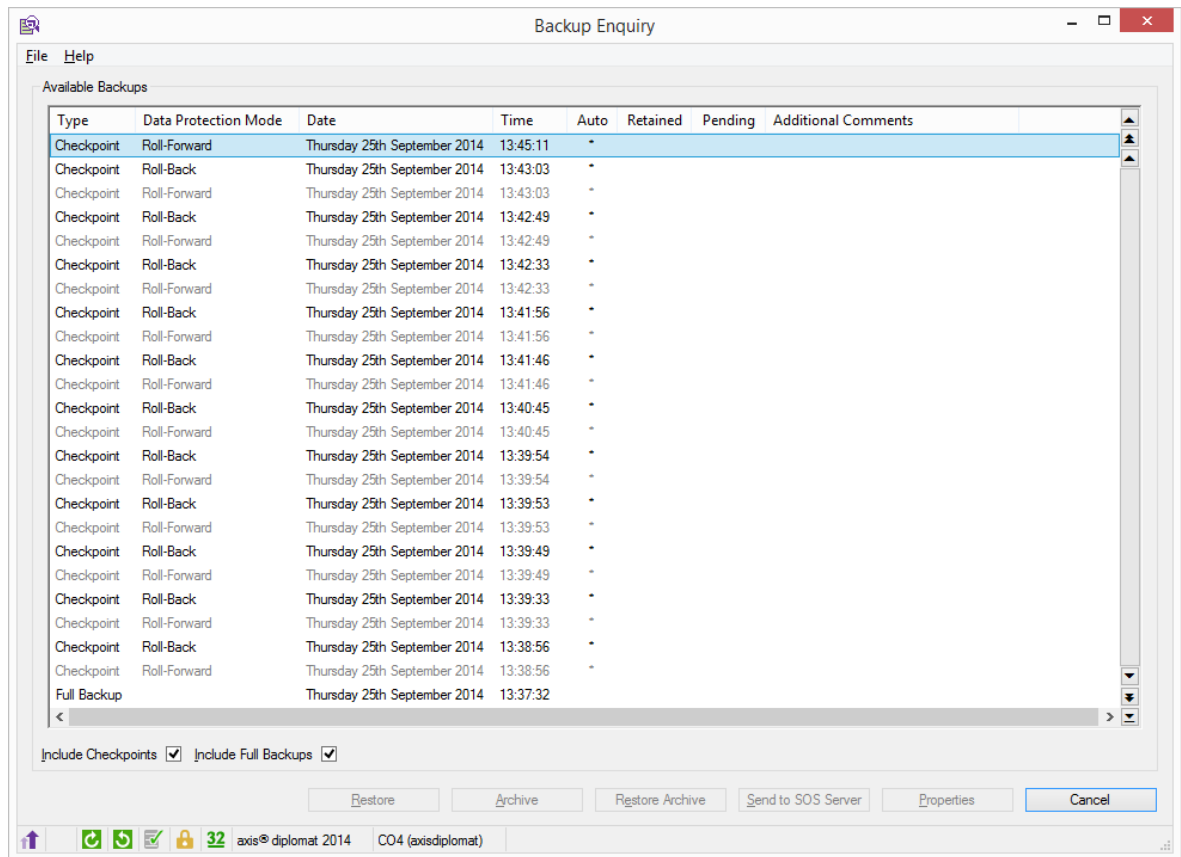
Prior to **axis diplomat 2014**, system administrators had to choose whether to employ roll-back data protection or roll-forward data protection. Each mode has different advantages and now both data protection modes can be run concurrently.

Roll-back provides data recovery by "undoing" updates to **axis diplomat** to a defined point in the past (a checkpoint) and this is the mode most commonly used.

Roll-forward allows you to recover from a full **axis diplomat** backup and then roll-forward to the most recent checkpoint. Enabling roll-forward data protection is a prerequisite for using **axis diplomat 2014**'s Disaster Recovery facilities and it's enabled as standard when you upgrade to **axis diplomat 2014**.



Roll-forward data protection is enabled by default at axis diplomat 2014.



The backup enquiry shows both roll-forward and roll-back checkpoints.

7. Disaster Recovery

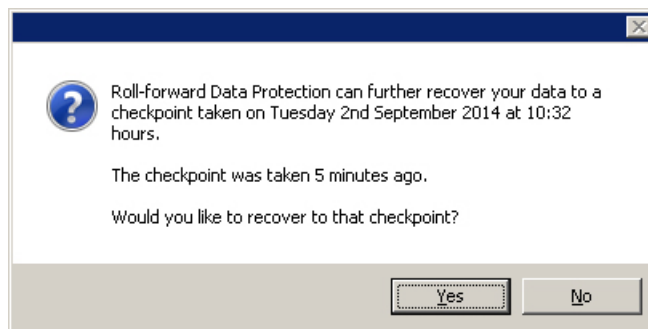


Seven out of ten small firms that experience a major data loss go out of business within a year. (source: DTI/PricewaterhouseCoopers). We don't want you to be one of them!

To help protect when disaster strikes, **axis diplomat** has had integrated data backup facilities since its inception and already supports automated off-site backup (in the form of the axis SoS service) however, prior to **axis diplomat 2014**, if the live system was no longer accessible, restoration was only possible to the previous full backup which might typically be from the previous night. In Disaster Recovery planning terminology, this meant that the business could not set a Recovery Time Objective (RTO) much less than one day.

For a 50 user business operating 09:00 to 17:00, if disaster struck at 17:00 that's 400 hours of lost work with a direct cost of over £13,000 (based on national average wage). That's before adding in lost business or the headache of reconciling 'external' transactions (such as card payments)!

axis diplomat 2014 can reduce the window of data loss from one day down to just a few minutes (the most recent checkpoint in fact). You don't need any additional **axis diplomat** software to implement this (its standard at 2014), just follow our best practise guide for configuring backup and data protection or engage one of our consultants to help in your Disaster Recovery planning and get your RTO reduced to just minutes!



The dialogue above illustrates the ability to “roll forward” data to a very recent checkpoint (having first restored the database from a previous backup).

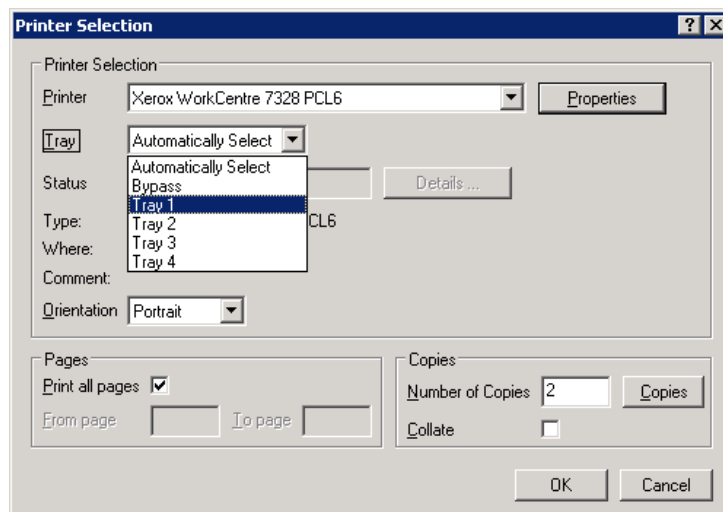


8. Multi-tray, Multi-copy & Duplex Printing

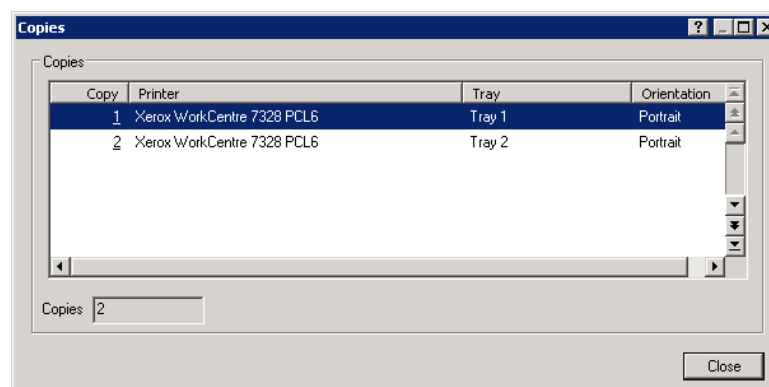
Multi-tray and multi-copy printing which was made available on user request at 2012 is now available as standard on all **axis diplomat 2014** systems.

The **axis diplomat** print dialogue now allows you to select a specific printer and output tray for each copy of the document. This is primarily designed to help in situations where multiple paper copies of a document are utilised in a business process (e.g. pink copy for customer, yellow copy for driver, white copy for files etc.). Laser printers can be loaded with different paper stock in different trays and multiple copies of a document (such as a Delivery Note) produced each time.

The number of copies, the chosen printer and the selected output tray is retained as the default for subsequent prints of that document. These defaults are stored separately for each user.



Where more than one copy is specified, the “Copies” button opens an additional dialogue which allows the user to specify a different printer and/or tray for each copy.



9. Consolidation of User Default Maintenance ✔

User default maintenance functions have been replaced with a single new function "Amend Accounts User Defaults". This allows user settings for each ledger to now be configured in one place rather than spread over a number of different functions making configuration quicker and more intuitive.

These parameters would normally be set for a specific user via a button with the User and Group Maintenance function.

The screenshot shows the 'Amend Accounts User Defaults' dialog box with the 'Stock Defaults' tab selected. The dialog has a menu bar with 'File' and 'Help'. Below the menu bar are tabs for 'Stock Defaults', 'Call Defaults', 'Sales Ledger Defaults', 'SOP Defaults', 'POP Defaults', and 'Service Contract Defaults'. The 'Stock Defaults' section contains the following fields:

- Stock Movements:**
 - From location: 0 - Bridgwater (dropdown)
 - To location: 1 - Bromsgrove (dropdown)
 - Document reference: (text input)
 - User is a picker:
- Stock Location:**
 - Default location: 0 - Bridgwater (dropdown)
 - Tick this box if the user is a picker. (checkbox)

At the bottom right are 'OK' and 'Cancel' buttons. The status bar at the bottom shows '32 axis® diplomat 2014 CO4 (Local)'.

The screenshot shows the 'Amend Accounts User Defaults' dialog box with the 'Call Defaults' tab selected. The dialog has a menu bar with 'File' and 'Help'. Below the menu bar are tabs for 'Stock Defaults', 'Call Defaults', 'Sales Ledger Defaults', 'SOP Defaults', 'POP Defaults', and 'Service Contract Defaults'. The 'Call Defaults' section contains the following fields:

- Call Defaults:**
 - Allow call responsibility:
 - Default call type for new calls: Sales (dropdown)
 - Tick this box to allow calls to be set to this users responsibility. (checkbox)
- Take the following actions when:**
 - Send call shortcut email?:
 - Amend call status to: Callback (dropdown)

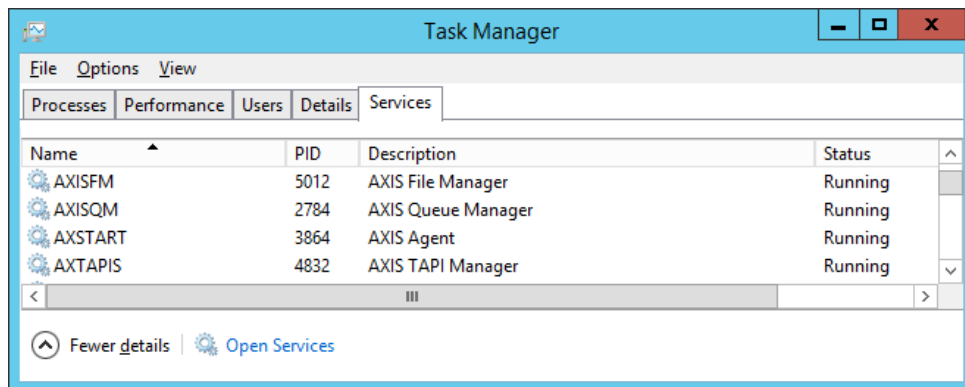
At the bottom right are 'OK' and 'Cancel' buttons. The status bar at the bottom shows '32 axis® diplomat 2014 CO4 (Local)'.

(Please note that user configuration options illustrated may be relevant only to additional modules or features.)

10. AXIS Service Control Service is now AXIS Agent

If you're responsible for managing your **axis diplomat** installation, you'll need to be aware that the "AXIS Service Control Service" has been renamed to "AXIS Agent". This is to better reflect that service's function; it's responsible for carrying out automated background and scheduled tasks such as overnight backups.

Here's what the list of **axis diplomat 2014** services look like when viewed in Windows Task Manager:



Section M - Upgrade Options and Pricing

1. Upgrade Pricing

Product	Upgrade from	
	axis diplomat2010	axis diplomat2012
axis diplomat 2014 Express Client	£645	£345
axis diplomat 2014 Small Business Edition Client	£1145	£645

2. Transition Pricing

Transition To	Transition From	
	axis diplomat 2014 Express	axis diplomat 2014 SBE
axis diplomat 2014 Small Business Edition Client	£345	

3. Software Assurance Pricing

Product	Per Client, Per Month
axis diplomat 2014 Express	£15.00
axis diplomat 2014 Small Business Edition	£25.00

Note: Software Assurance must be taken out at the time of upgrading to **axis diplomat 2014** or at the time a new **axis diplomat 2014** system is supplied.

4. Additional Services

Product	
Time Unit Based Implementation Services (40x15 minutes)	£795
Time Unit Based Remote Upgrade Assistance (8x15 minutes)	£195
Monthly Subscription to Online Dashboards (up to five users)	£20
Monthly Subscription to Online Dashboards (per additional user)	£1

Time Unit Based Remote Upgrade Assistance provides for online remote upgrade of an **axis diplomat** system to **axis diplomat 2014**. It is not intended as a substitute for training – onsite training is strongly recommended for all upgrades to **axis diplomat 2014** in order to maximize the return on investment.

5. Software Assurance Upgrades

A number of the new developments within **axis diplomat 2014** described above have already been released to those customers with Software Assurance.



This icon in the sections above indicates a development that has already been released to Software Assurance customers

Software Assurance customers will be entitled to software licence upgrades to the full release of **axis diplomat 2014** 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 2014**, please go to our web site at

<http://www.axisfirst.co.uk/software/assurance/>

and click on the link to request your upgrade.

Section N - Supported Environments

For the latest information on **axis diplomat 2014**'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/axisdiplomat/platforms/>

1. Dot Matrix Printers

We are giving advanced notice that **axis diplomat 2014** will be the last major version of our software to include official support for printing to dot matrix printers. From the next major release (due autumn 2016), dot matrix printing may be possible but will no longer be officially supported by axisfirst.

2. Tested as Microsoft Windows 8 Compatible

As part of our on-going participation in the Microsoft partner programme, we regularly submit the latest release of our software for testing and evaluation.

As a result of that test process, we are pleased to be able to say that **axis diplomat 2014** has been tested as Microsoft Windows 8 Compatible.



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

E & OE.

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Document Reference: Diplomat/2014/Upgrade/1.2