

# **AXIS<sup>TM</sup> Diplomat 2008**

Accounting and Business Information Systems

## **New Features Overview**

Release Date: 6th October 2008



## Introduction

This document outlines just some of the major benefits that you can expect to see by upgrading to AXIS Diplomat 2008 from the previous edition of software, AXIS Diplomat 2006.

This list is by no means exhaustive and further enhancements will continue to be added after the initial release in the form of on-going level updates; please check with the Axis First web site at <http://www.axisfirst.co.uk/diplomat2008> for the latest product information. Level updates within the AXIS Diplomat 2008 release will be free to all of those users with current support contracts.

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

The key developments of AXIS Diplomat 2008 are designed to help you work faster and to work smarter:

- **Move towards Job-Orientated Functions**
- **Better Document Management & Less Paper**
- **Improved Efficiency for Everyone!**
- **Support for Latest Technology**
- **Better Performance**

To view our Product Lifecycle Statement, including details of when support ends for earlier versions of AXIS Diplomat, please visit our web site at <http://www.axisfirst.co.uk/software/lifecycle/>.

Customers with Software Assurance are entitled to an upgrade to their software licence to AXIS Diplomat 2008 under the terms of their agreement. To request an update to AXIS Diplomat 2008, 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.



## **Management Overview – 5 Reasons to Upgrade**

This document contains detailed information on the key advances to be found in AXIS Diplomat 2008, compared with AXIS Diplomat 2006. There are literally hundreds, if not thousands, of additional enhancements that are simply too numerous to mention. If you are still running AXIS Diplomat 2004 then you will also gain all of the benefits of AXIS Diplomat 2006 when you upgrade. These are covered by an equivalent document, which can be found by visiting [www.axisfirst.co.uk/diplomat2006](http://www.axisfirst.co.uk/diplomat2006) and selecting "Upgrades".

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

### **1. Move towards Job-Orientated Functions**

The best example of this is the new Sales Desk Monitor, gathering together in one place all of the aspects of the sales role, including access to outstanding quotations, orders, CRM calls and customers. By re-orientating the software to match the job roles of the users, it becomes more productive, more relevant and easier to learn.

### **2. Better Document Management & Less Paper**

Documents of all kinds are key to every business and AXIS Diplomat 2008 includes a number of features to help you get documents to your customers and suppliers more efficiently, and to keep track of incoming documents more efficiently.

These improvements are designed to reduce your paper output, which increases efficiency, reduces cost and improves your environmental credentials. They include options to deliver documents more easily by email or by fax, new and improved electronic trading (EDI) options and further electronic communications for government returns, including VAT and EC Sales Lists.

### **3. Improved Efficiency for Everyone!**

The numerous productivity tools new at AXIS Diplomat 2008 make everyone's job easier. These improvements include enhancements to the user interface to provide column filtering, data filtering and column totalling within scrolling data lists.

### **4. Support for Latest Technology**

The world of technology continues to move forward, with the release of Microsoft Windows 2008 Server. AXIS Diplomat 2008 introduces developments to make the most of these latest developments, not least of which is the availability of 64 bit server operating systems, which help get the best performance out of the latest generation of processors.

### **5. Better Performance**

A number of different modifications have been carried out within the core of AXIS Diplomat to ensure that users in all environments see noticeable performance improvements.



## Details of Enhancements

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

Black	A standard facility within AXIS Diplomat 2008; available to all
Red	An optional extra, available as an add-on to AXIS Diplomat 2008 but not available at previous versions
Blue	A new facility within AXIS Diplomat that requires one or more existing optional modules
Teal	A standard facility within AXIS Diplomat 2008 that has already been pre-released to those customers with Software Assurance





## Section A : Kernel (Core) Enhancements

### A1. Performance Improvements

A number of performance improvements have been developed within the kernel data handling code that provide improved speed of operation across the board.

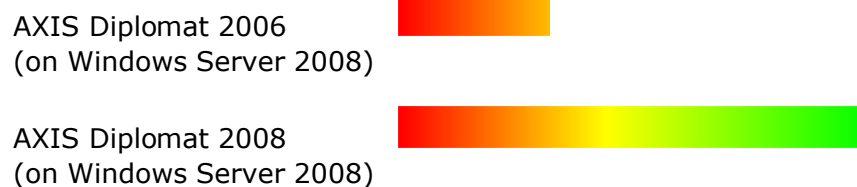
Our developments have ensured that all users, regardless of the environment that they use will see a speed improvement of anywhere from 10% to 450%.

The improvements are cumulative, so on systems using Terminal Services on Microsoft Windows Server 2008, with a mixture of thin clients and PCs, all of these improvements will add together.

Our benchmarks on 'real world' processing indicate the following improvements over an above AXIS Diplomat 2006:

#### Roll-Back Data Protection and Microsoft Server 2008

Improvements have been made to roll-back data protection to take advantage of additional facilities within Microsoft Server 2008 to achieve a 300% speed improvement on systems running with roll-back data protection enabled. Not only does this give a huge performance benefit in day-to-day use but also reduces the times where you may wish to suspend data protection for performance reasons.



*Figure 1 : comparative throughput of updates to data files*

#### Terminal Services Users ('Thin' Clients)

Further improvements have been developed specifically for use by AXIS Diplomat on servers using Windows Terminal Services or Citrix technologies. This increasingly popular configuration whereby users use 'thin clients' (or PCs running RDP / ICA thin client software) now shows even greater performance advantages.

New techniques have been developed for communication between AXIS Diplomat tasks running on Terminal Services that result in a 450% performance gain for those systems. These improvements apply to Terminal Services running on Microsoft Server 2003 or Microsoft Server 2008.



*Figure 2 : comparative throughput of data read from files*

**Networked Users**

Improvements have also been made to the way in which the AXIS Diplomat services receive communications from network clients (PCs). Due to the nature of these improvements, the greater the load on the server, the greater benefit. On a 4 client network, a 10% improvement has been measured, whilst on an 8 client network, a 30% improvement is seen.

**4 Workstation Network**



**8 Workstation Network**



*Figure 3 : comparative throughput of data read from files*

*Please note that, depending on a wide range of variables, including your hardware, operating systems, and the nature of the work load that you place on your AXIS Diplomat system, the performance gain you see may vary from the figures show.*

## A2. Auto-Extending Transaction Files

In previous versions of AXIS Diplomat, data files have always had their disk space requirement pre-allocated. This was a sensible precaution in times when disk capacity was a limited resource, to ensure that vital functions did not run out of space. The down side to this was that, periodically, the Administrator needed to monitor the capacity of these transaction files using the File Capacities & Usage Report and, when necessary, allocate more space to the files.

With most server disks now having plenty of spare capacity, transaction files are now capable of auto-extending - adding the extra capacity to the files as and when it is needed.

## A3. Operating System Support

AXIS Diplomat 2008 now offers support for the latest Microsoft Operating Systems, including, for the first time, native service support for 64-bit versions of Microsoft Windows Server 2008.

AXIS Diplomat 2008 is also the first version to be supported on Citrix servers.

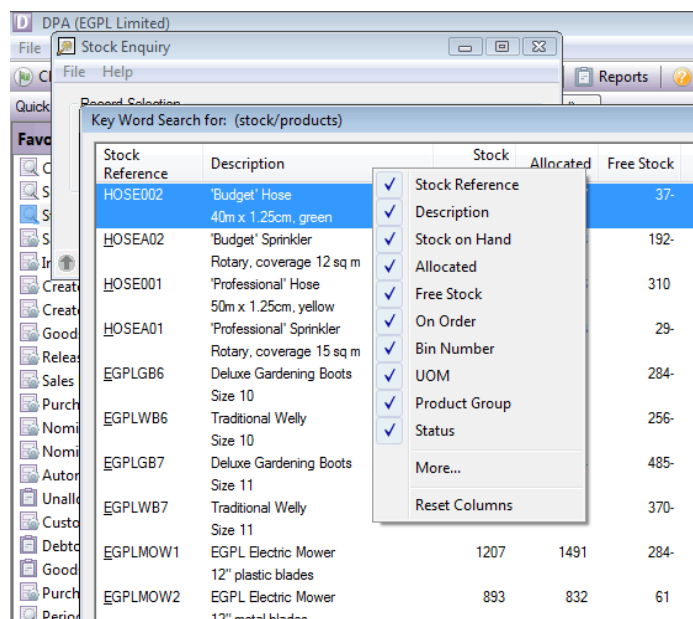
A full list of supported environments is shown in Section G of this document.

## A4. User Interface Improvements

A number of new features of the user interface were introduced at the previous version and these have proven particularly popular, especially the ability to manipulate scrolling lists of data, with such facilities as column sorting, column re-ordering, export to Microsoft Excel and Print Preview.

AXIS Diplomat 2008 adds further enhancements to the Scrolling Data Lists user interface, including the ability to filter columns and to automatically total numeric columns.

Column Filtering gives the user the ability to turn off columns from a particular scrolling list, making the information shown more concise and relevant.

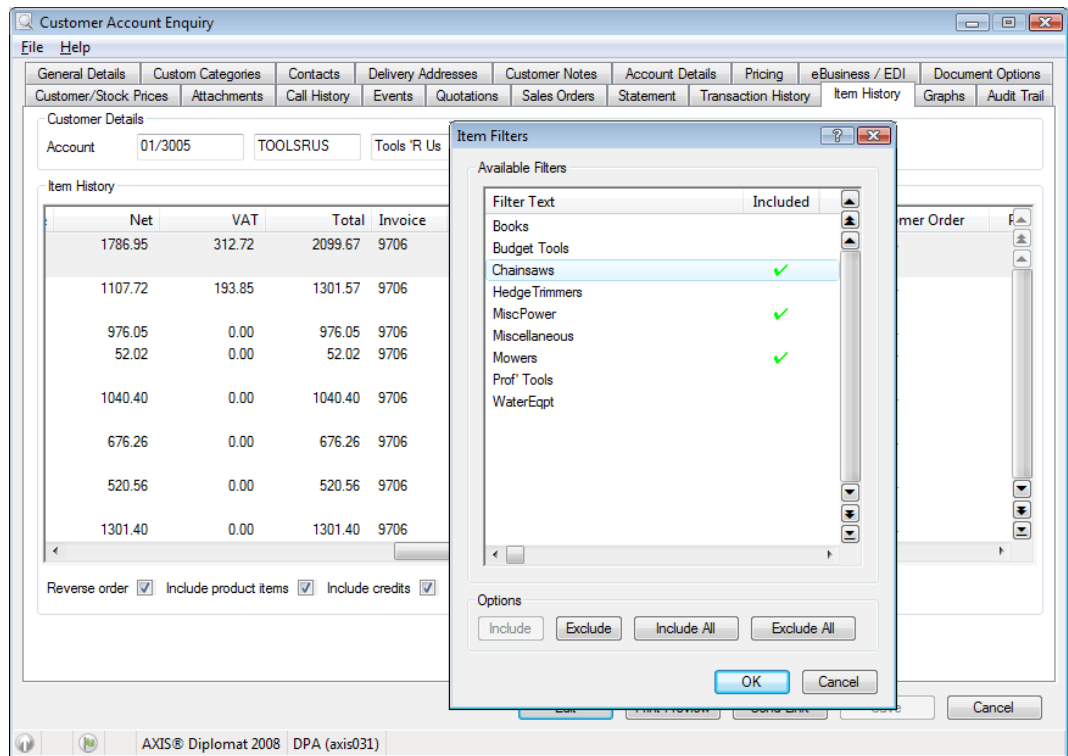


This has also given our Software Engineers the freedom to add increasing numbers of columns to scrolling lists since, if they are not relevant to a particular user, they can turn them off.

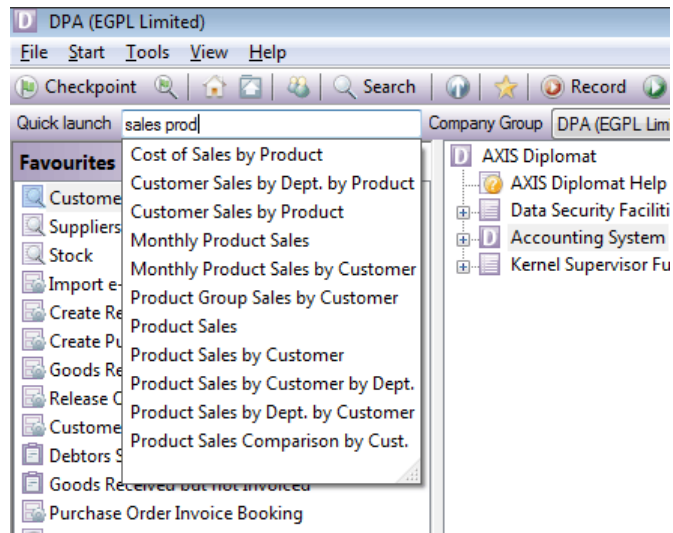
As with all previous Scrolling Data List improvements, the system remembers, for each scrolling list, for each user, their previous settings so, once you have filtered out a particular column in a particular function, it remains turned off until you decide to switch it back on again.

The second significant development to the Scrolling Data List user interface is the addition of Data Filters. This concept, which will be familiar to anyone that has used Microsoft Excel Filters, allows you to reduce the number of rows of data being shown.

Here, for example, filters are being set on the Item History tab within Customer Enquiry to only show items from specific Product Groups:



AXIS Diplomat 2008 also now features a Quick Launch facility on the toolbar, to allow you to locate functions quickly. It even features predictive searching to help you when you are not sure of the exact name of the function - as you type, it displays a list of possible matches, which narrow down as you type - if you see the function that you are looking for, you can simply click on it within the list. This functionality utilises recent developments within the operating system and is available to users running Microsoft Windows Vista or as a thin client on Microsoft Windows Server 2008 via Terminal Services.



## A5. Batch Procedure Improvements

Batch Procedures are a popular mechanism for automatically running functions, and, in particular, they provide the means by which particular reports can be emailed to specific users automatically, overnight or weekly.

The Batch Procedure recording engine now allows you to specify that a data range is to be "this month" or "this year". This makes it possible to have reports sent to you automatically that give you information for the current month or the current year, regardless of when the report was created.

## A6. Copy Systems

If you wish to create a copy of your AXIS Diplomat data, for example at Year End, then this can now be done very easily. When restoring a backup (.AXB file) you are now asked if you wish to restore to a copy system and, if yes, you can change the middle letter of the three letter company ID.

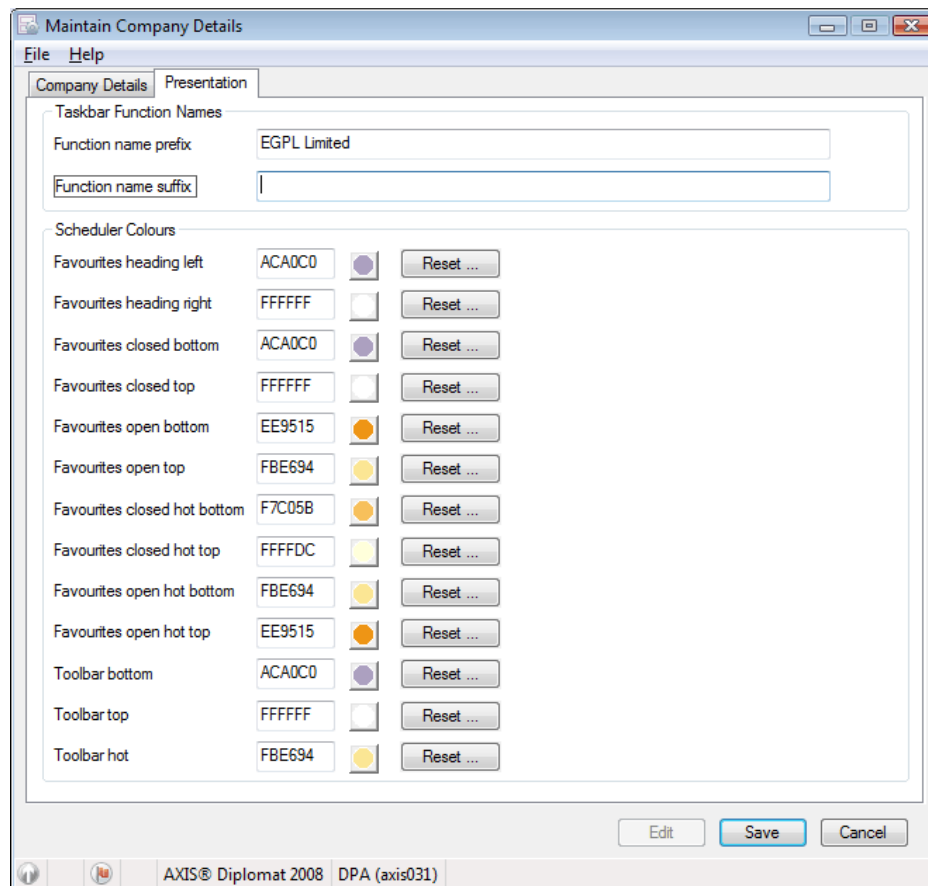
For example, if your live system is "CO1" then you might decide to make the copy "CC1". This scheme was chosen since it avoids confusion between, for example, company accounts and payroll, since this is designated by the first letter, which remains unchanged, whilst by leaving the last digit constant, it is clear, when you have multiple sets of data, where the data originated from.

Particularly useful applications for this facility include creating a copy of your system for your own training purposes and to evaluate or test new business processes.

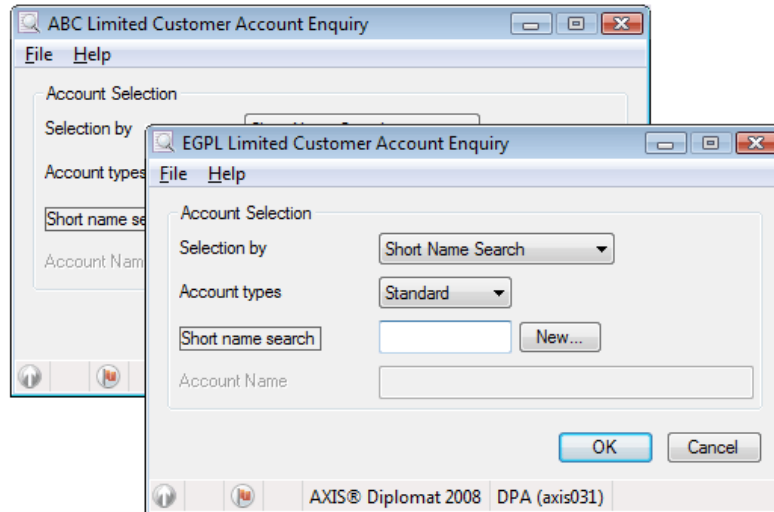
## A7. Company-Specific Customisation

One particular concern for users with multiple sets of company data running on their AXIS Diplomat system is how to differentiate them. No one wants to find that they have entered a large amount of data into the wrong company's accounts!

AXIS Diplomat 2008 now allows you to customise the colour scheme used by the AXIS Diplomat Scheduler:



You are also able to specify text that gets added to the title bar of every function that you run - so you can see at a glance that you are using the correct function. For example, here are two copies of the Customer Account Enquiries function for two different sets of company data. Both have been modified to show "ABC Limited" and "EGPL Limited" in the title bar to make them stand out:



You can also use this to more easily differentiate a copy system from a live system (see section A6 above).

This applies equally to all packages so, for example, if you run multiple Payroll systems, you can use this to easily differentiate between, for example, a weekly and a monthly payroll.

## Section B : General Enhancements – All Ledgers

### B1. Audit Trail

Additional tabs, labelled "Audit Trail", are now appearing throughout the system. These indicate when the item in question, be it a customer account, a stock item or a sales order, for example, was updated, and by whom.

The screenshot shows the 'Sales Order Enquiry' window with the 'Audit Trail' tab selected. The window displays the following information:

- General Details:**
  - Customer: 3005, Tools 'R Us
  - Our order number: 3297
  - Customer order no.: 78954
  - Our reference: ANDY
- Audit Trail:**

Description	Date and Time	Operator	Function
Sales Order created	12/09/2008 12:08	ANDY	Enter Sales Order
Sales Order amended	12/09/2008 12:09	ANDY	Amend Sales Order
Sales Order amended	12/09/2008 13:06	ANDY	Amend Sales Order

### B2. Document Archiving

When documents are created via the Document Designer, the internal display format is Adobe PDF. With Document Archiving, these PDF files are retained on the system, in exactly the format that they were originally produced.

This means that you can always see exactly how a quote, for example, appeared when you originally sent it to a customer, regardless of whether it has subsequently been amended, converted to a sales order or otherwise changed. Even if the document design template has been subsequently altered, you will still see the archived document in the way that it was originally sent.

### B3. Document Delivery

Printing documents on paper, sorting, folding, inserting in envelopes and paying for postage is labour-intensive, expensive and not environmentally friendly.

With the Document Delivery developments, you can now specify that a particular customer receives, for example, statements by email, invoices by fax\* and debtors letters (see section C2) by post. Documents chosen to be sent by email or fax will have a specific contact associated with them.



When you produce a set of documents, such as your monthly statement run, you click a single button labelled "Deliver Documents" and the software will, in one operation, email the ones to be emailed, fax the ones to be faxed\* and print the remainder for posting.

Document Number	Reference	Date	Customer Reference	Customer Address	Value	Pages	Operator	Processed	Deliver By	Contact
INV6553	123	13-07-00	01/3003	The Easy Grow Garden Centre	88.80	1			Fax	Mr F Green
INV6554	3	13-07-00	01/3006	Green Things	5184.00	1			Email	Janet Jones
INV6555	123	13-07-00	01/3003	The Easy Grow Garden Centre	108.00	1			Fax	Mr F Green
INV6556	24325/G	13-07-00	01/3004	Green Fingers	315.00	1			Email	Mr G Green
INV6557	54/ABBG54	13-07-00	01/3005	Tools 'R Us	75.60	1			Email	Ms C Brown
INV9706	R6854	08-09-08	01/3005	Tools 'R Us	9725.58	2	ANDY		Email	Ms C Brown
INV9707	R4816	08-09-08	01/3184	YPO Computing Ltd	1162.80	1	ANDY		Post	
INV9708	G8088	08-09-08	01/3125	VTP Distribution Ltd	1406.40	1	ANDY		Email	Brian Langley
INV9709	G5048	08-09-08	01/3052	YVK Software Company	6924.69	1	ANDY		Fax	Emily Hutchinson
INV9710	Y4412	08-09-08	01/3136	NNG Marketing Ltd	32730.39	4	ANDY		Post	
INV9711	T2814	08-09-08	01/3065	VQU Engineering Company	6457.75	2	ANDY		Email	Alan Matthews
INV9712	E7067	08-09-08	01/3137	EVD Consultants Limited	26184.30	3	ANDY		Email	Ingrid Langley
INV9713	Z4892	08-09-08	01/3186	YNW Agency Co.	12482.55	3	ANDY		Post	
INV9714	C2297	08-09-08	01/3221	SRP Systems Ltd	5886.95	3	ANDY		Post	
INV9715	M2917	08-09-08	01/3215	NLR Transport Co.	5887.00	2	ANDY		Post	
INV9716	T2606	08-09-08	01/3188	BTI Software Limited	14316.85	3	ANDY		Post	
INV9717	V2510	08-09-08	01/3157	SPI Engineers Ltd	14372.70	4	ANDY		Post	
INV9718	N4263	08-09-08	01/3039	KKF Software Co.	4564.70	2	ANDY		Post	
INV9719	D5357	08-09-08	01/3220	ARN Transport Ltd	17276.24	4	ANDY		Post	
INV9720	H7820	08-09-08	01/3212	IFQ Computing Company	1437.95	1	ANDY		Post	
INV9721	F2304	08-09-08	01/3192	OAF Holdings Co.	3940.58	1	ANDY		Post	
INV9722	R7326	08-09-08	01/3206	URE Consultants Co.	10164.48	1	ANDY		Post	
INV9723	K5536	08-09-08	01/3127	KFO Holdings Ltd	5254.55	2	ANDY		Post	

Document Delivery applies equally to Supplier documents as to Customer documents so, for example, you can deliver a batch of purchase orders at the click of one button.

\* *Faxing requires suitable fax software and the AXIS Diplomat Document Faxing module*

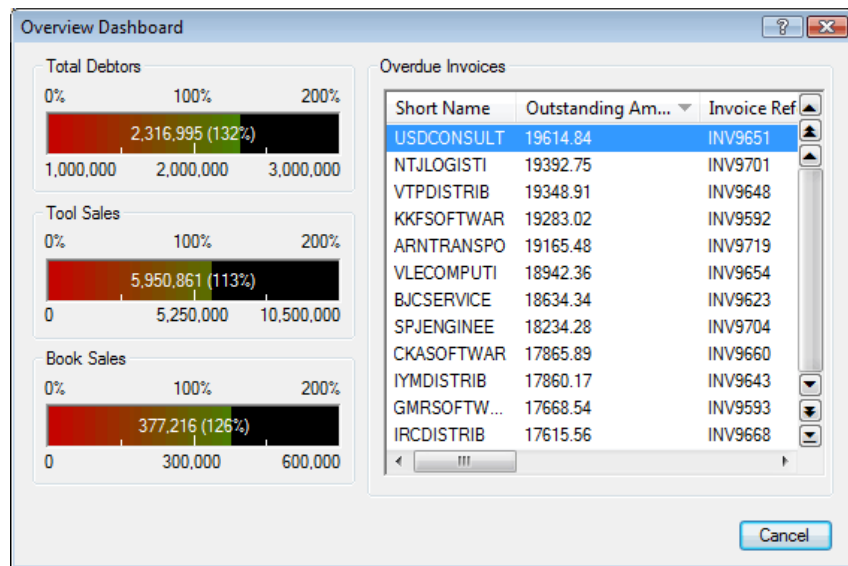
## B4. Document Scanning

The new Document Scanning module interfaces to 3<sup>rd</sup> party document solutions to allow workgroup multi-function scanner/printers from HP and Xerox to scan directly to Customer, Supplier and CRM Call attachments – *straight from the control panel of the device!*

## B5. Dashboard Enhancements

Business Intelligence was one of the headline new developments in AXIS Diplomat 2006 and is allowing many users, in many companies, to now see, at a glance, how they are performing, in ways that are meaningful to them.

With AXIS Diplomat 2008, you can now embed data tables as well as graphs and gauges, into Dashboards. This provides a quick and easy way for users to see data with more detail than can be provided graphically, for example a list of the top customers, the largest debtors or creditors or the best selling stock items.



## B6. Document Designer Suffix Files

Documents produced using the Document Designer can now have a standard page (or pages) produced automatically following each document. Typically, this would be used to follow each document with terms and conditions, but could also be used to include an order form or any other supplement.

These additional pages can be different for each document type.

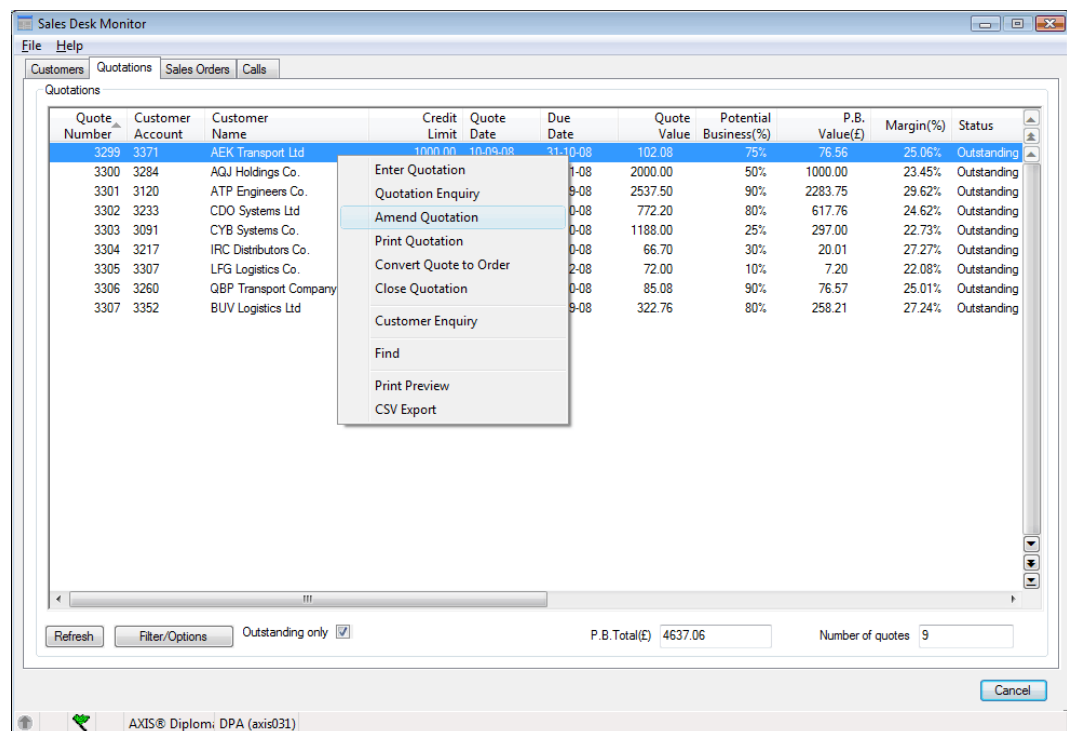
## Section C : Sales Ledger / Sales Order Processing

### C1. Sales Desk Monitor

The new Sales Desk Monitor is designed to be the primary function within AXIS Diplomat for use by the Sales team and provides quick and easy access to the key functions associated with dealing with your customers.

The Sales Desk Monitor allows you to view and manage your Customers, Prospects, Quotations, Sales Orders and current CRM Calls. In addition, if you have the Campaign Management module, then you can also manage your marketing campaign calls - all from the one function.

In line with the other new Monitor functions, Sales Desk Monitor regularly refreshes its view of the data so, for example, as new Sales Orders are entered by anyone on the system, they appear within the Sales Order tab of the Monitor.

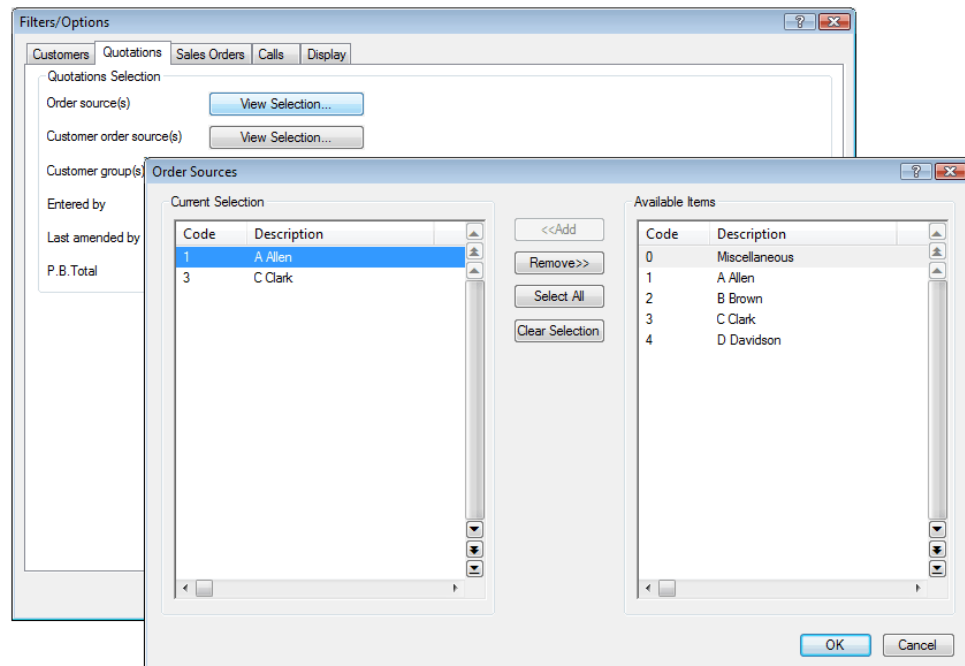


Furthermore, each operator can define filters so that the Sales Desk Monitor only shows the information that is relevant to them - the customers that they are responsible for, their quotations, their sales orders, etc.

These filter settings are saved on a per-operator basis, so that, once set in the way that operator prefers, the Sales Desk Monitor always give them access to the information in the way that they want.

Enhancements to the Security Permissions have also been developed to allow restriction of which customers can be seen by a given operator. Restrictions can be applied based on the customer's order source code, group code, default department or location, and whether or not they are a prospect.

This ensures that a particular member of the Sales Department can only see transactions relating to their customers, regardless of how they configure their filters.



## C2. Debtors Letters

In today's economic environment, strict credit control is more essential than ever and being able to produce powerful and effective debtors letters quickly and easily is key to this.

You can now design your Debtors Letters as a series of Microsoft Word templates (.dot) in a similar way to that used for CRM Call Attachments. Typically, these will equate to different letters to accounts with 30 day, 60 day and 90 day balances.

AXIS Diplomat can then merge information from your sales ledger into these letters automatically. When used in conjunction with the Document Delivery option, these letters can be sent direct, by email or by fax (subject to suitable fax software being available), without further operator intervention. Not only does this save time, but, by improving your credit control, it can improve your cash flow by helping to ensure that your debtors letters are produced quickly, accurately, and on time, every month.

**Print Debtors Letters**

File Help

Document Selection Message Details

Range Selection

Customer number(s)

Customer group(s)

Order source(s)

Inclusions/Exclusions

Credit period (days) ☐

Include accounts with credit balances ☐

Include accounts with zero balances ☐

Account credit status

Accounts with current debts only ☒

Accounts with debts up to 1 period overdue ☒

Accounts with debts up to 2 periods overdue ☒

Accounts with debts over 2 periods overdue ☒

Presentation Options

Statement date

Completed transactions

Next > Cancel

AXIS® Diplomat DPA (axis031)

**Print Debtors Letters**

File Help

Documents

Document Number	Date	Customer Reference	Customer Address
DTL01/3005	25-09-08	01/3005	Tools 'R' Us
DTL01/3023	25-09-08	01/3023	RLR Systems Limited
DTL01/3026	25-09-08	01/3026	ERP Software Ltd
DTL01/3027	25-09-08	01/3027	HTF Transport Company
DTL01/3028	25-09-08	01/3028	HAP Systems Co.
DTL01/3030	25-09-08	01/3030	EWT Services Limited
DTL01/3031	25-09-08	01/3031	LTE Manufacturing Limited
DTL01/3034	25-09-08	01/3034	CIU Marketing Co.
DTL01/3037	25-09-08	01/3037	MXQ Supplies Ltd
DTL01/3039	25-09-08	01/3039	KKF Software Co.
DTL01/3040	25-09-08	01/3040	SXL Systems Co.
DTL01/3043	25-09-08	01/3043	SGW Supplies Co.
DTL01/3044	25-09-08	01/3044	ATS Agency Co.
DTL01/3046	25-09-08	01/3046	EWP Distribution Limited
DTL01/3050	25-09-08	01/3050	USD Consultants Co.
DTL01/3051	25-09-08	01/3051	OGV Marketing Ltd
DTL01/3052	25-09-08	01/3052	YVK Software Company
DTL01/3055	25-09-08	01/3055	NUT Supplies Ltd
DTL01/3056	25-09-08	01/3056	UTT Software Company
DTL01/3057	25-09-08	01/3057	NIU Computing Limited
DTL01/3058	25-09-08	01/3058	WBV Supplies Company
DTL01/3059	25-09-08	01/3059	RXQ Services Co.
DTL01/3060	25-09-08	01/3060	RGT Engineers Ltd

Totals

Total documents 118 Documents left to process 118

Options

Preview Document Deliver All Documents ...

**Print Debtors Letters**

File View Tools Help

Paper type Plain

Unit 4  
Downton Industrial Estate  
Downton  
Countyshire  
CS34 1HG  
Tel: 01234 433433

**EGPL Ltd**  
Everything for your Garden!

Our Ref: DTL01/3028  
Accounts Department  
HAP Systems Co.  
Unit 5  
170 St Andrews Street  
North Looe  
Cornwall  
PL28 7VQ

25th September 2008

**For the attention of the Chief Accountant**  
**Overdue Account**

Dear Sir or Madam

Please be advised that the amounts detailed below are now outstanding on your account and we trust that this is an oversight on your part.

Your current balance is 9940.43 of which 9940.43 is now overdue. The outstanding transactions on your account are:

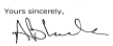
DATE	TYPE	REF	DEBIT	CREDIT	BALANCE
12-08-08	INVOICE	9632	9940.43		9940.43

Please arrange payment for the outstanding amount immediately and ensure that the remainder is paid within the terms of your account. Should you have any queries, please contact our Accounts department.

Please note that once you have an unpaid invoice that is more than 60 days old, your account is automatically put on credit hold.

If you have made payment in the last two days, please disregard this letter.

Yours sincerely,

  
Andy Black  
Director  
EGPL Limited

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Finish

### C3. Document Designer Statements

An additional aspect of credit control is ensuring that you get accurate statements to your customers, and that those statements give your customers all of the information necessary to settle their current balance.

Perhaps you have wished to show details of how customers can pay funds directly into your bank accounts, with details of the sort codes and IBAN numbers to use, and so on. Or perhaps you would like to include additional information on each of the transactions listed on the statement. By designing your own statements, using the Document Designer, you can now do this.

### C4. eMailshots by Sales Order

Have you ever wanted to send an email to every customer with an outstanding order, or perhaps every customer with an outstanding order for a particular range of products?

The Send Emailshot function is now capable of doing this, allowing you, for example, to notify customers of delays in availability on certain products, or to notify customers how the despatch of their orders will be affected by a Christmas or summer shut down.

### C5. Postcode Lookup Enhancements

For those customers already subscribing to the postcode lookup service provided by PostcodeAnywhere, these lookups can now be used to quickly, easily and accurately complete "invoice to" and "deliver to" addresses.

This option requires the Mail Order Processing module.

### C6. Direct Debits

If you have customers that pay you by direct debit, or if you have customers that currently pay by standing order that you would like to move to paying by direct debit, then a module is now available to handle this.

This does require that you have suitable BACS software available - typically from your bank or, for example, BACS IP.

## C7. PSP (Protx) Account Reconciliation

If you currently use Protx for online payment card processing of credit and/or debit cards then you are now able to use their online statements to automatically reconcile the payment transactions.

This option requires either the Mail Order Processing or eBusiness module.

## C8. Settle Credit Accounts by Card Payment

Another tool in the credit control box is the ability to allow settlement of outstanding invoices by payment card. In the past, many companies have not wanted to offer this option because of the commission charges that their acquiring bank will charge. In today's economic climate, however, many businesses now consider that it is more cost-effective to collect the money by card than to have a protracted credit control process, with the time, effort and cashflow effects which that entails.

*Customers with AXIS VMerchant-based online shopping sites can now also offer their customers the ability to settle their credit accounts online.*

**Take Card Payment**

File Help

**Account Details**

Account number: 3005 TOOLS'RUS

Name and address: Tools 'R Us  
76 Main Street  
Greenton  
Countyshire  
CS6 8GH

Date: 12/09/2008

Reference: CARD

Department: 0 Administration

Batch number: 0

**Payment Details**

Card type: Visa

Card number:

Valid from date:

Expiry date:

Issue number:

Cardholder name:

Verification code:

Payment amount: 8532.48

Plus discount allowed: 0.00

Allocated amount: 0.00

**Outstanding Transaction Details**

Date	Type	Ref.	Goods Val...	VAT	Total Amount	Outstandi...	Due Date	Allocation
12-08-08	INVOICE	9606	8348.24	184.24	8532.48	8532.48	11-09-08	0.00
08-09-08	INVOICE	9706	9725.58	629.51	10355.09	10355.09	08-10-08	0.00

Auto Allocate Calculate Payment

Take Payment Cancel

AXIS® Diplomat DPA (axis031)

This option requires either the Mail Order Processing or eBusiness module.

## **C9. Automated Price & Stock Level Feeds to Customers**

Do you have regular customers that you would like to keep automatically up-to-date with the latest pricing? The Automated Price & Stock Level Feed provides a mechanism to automatically generate a file containing details of stock items, the individual customer's current price and your stock availability.

This process can be further automated, for example, to run over night, every night and to produce emailed management reports confirming changes.

If you are using the "AXIS to AXIS XML" module with customers that also run AXIS Diplomat then they will be able to import that information directly into their system as a Supplier Price List.

In a competitive market, this facility can help ensure that you are the supplier that your customer chooses to buy from, by making the information available at your customer's fingertips.

This option requires the AXIS to AXIS XML module.

## **C10. Branch/Head Office Accounts**

This facility has been available for a number of years as an optional extra but is now standard on all systems at AXIS Diplomat 2008.

It provides the ability to define one customer account as being a branch account of a second account, the head office. Tick boxes on the accounts allow you to define whether invoices go to the head office or to the branch and whether statements go to the branch.

Transactions and turnover figures for the Head Office account will show the total, including all branches, whilst the branch account will only show those relating to that branch. Relevant reports allow branch accounts to be excluded, preventing the turnover from being 'double-counted'.

## **C11. Quotation Enhancements**

When maintaining quotations, you now have the ability to record a probability percentage against the quote. This figure is used by the Quotation Analysis reports and the Sales Desk Monitor to accumulate a total probable business figure.

Quotations may now also be closed, by a simple right-click from the Quotations tab of Customer Account Enquiry or via the Sales Desk Monitor, to remove old quotations that are no longer relevant from the list.



## Section D : CRM / Contact Management

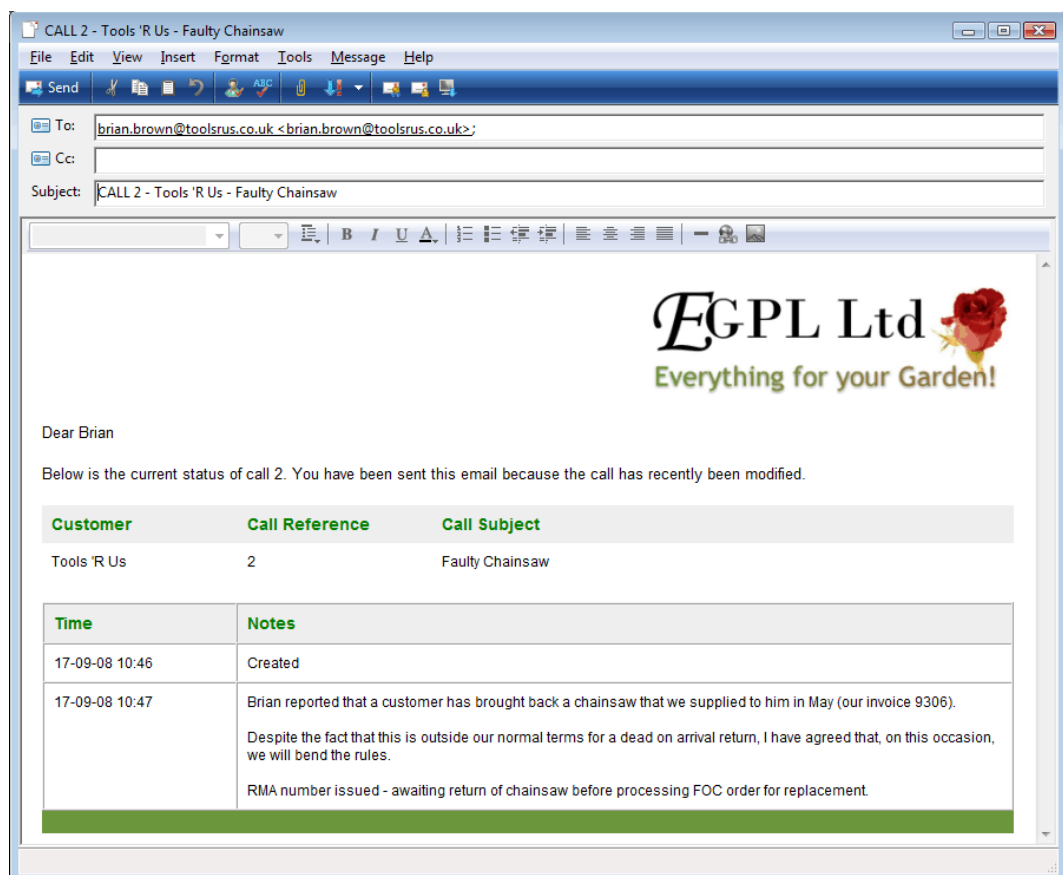
### D1. Events Tab

On systems that use Call History heavily, particularly across multiple departments, the new Events Tab within Customer Enquiry makes it easy to see the recent activity with an account, at a glance. This tab shows all of the events, in chronological order, from the account and provides the ability to drill down into the specific call(s).

### D2. HTML Formatted Call Reporting

With AXIS Diplomat 2008, you can now generate formatted emails containing the information from a specific call, along with standard header and footer sections. Any customers that have dealt with the Axis First Software Support department recently will be familiar with the update emails sent from our own AXIS Diplomat system.

This allows you to improve the communication with your customers in a wide range of customer services applications.



### D3. Call Linking

Whether you use the Call History functionality within AXIS Diplomat for Sales, Customer Service or Credit Control, you will benefit from the ability to link multiple calls together.

Multiple calls on the same subject, whether for the same customer or for different customers, can be linked together, allowing you to quickly move between them and to see, at a glance, that these other calls exist.

In a customer service department, for example, if you have a problem with a specific batch of product then the same fault might have been reported by several customers. Call linking allows you to cross-reference the various fault reports from the different customers so that, when you have a resolution, you can contact all of the affected customers.

In a sales environment, you may, for example, have announced a new product at an exhibition; calls for all of the customers that have shown an interest in that product can be linked together to make it easier to contact all of them when the product is available.

#### **D4. Watched Calls**

Using the Responsibility & Send Link functionality on calls is a great way of passing on tasks to other people or other departments. In the past, if you wanted to make sure that the task was dealt with, you would need to make a mental note to check later that the call had been updated.

With AXIS Diplomat 2008, you have the ability to “watch” a call. When you ask the system to watch a call, it asks for the point up to which the call should be watched, for example 5pm on Friday. If the call is updated during that time, you are sent an email to inform you. If the specified time is reached and the call has not been updated, you are again sent an email to tell you that it has not been updated within the specified time.

This allows you to delegate tasks using calls without the need to “keep tabs” on those asked to follow up on those tasks.

#### **D4. Service Levels**

For those customers with the Service Contract Management module, calls can be linked to Service Contracts, and service contracts can have SLA (Service Level Agreements) associated with them.

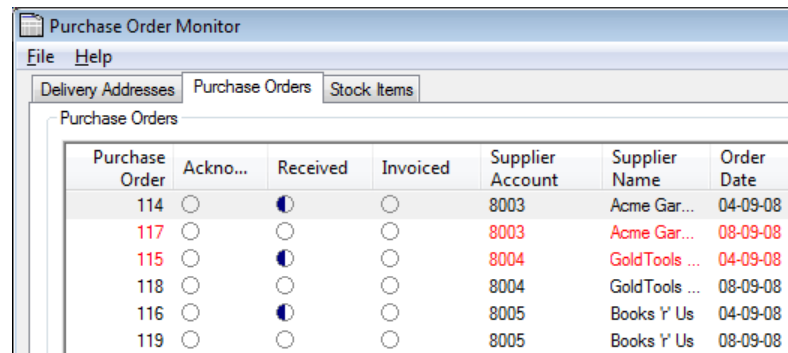
Management reports allow you to track response times to calls, both from Customer Services and Sales.

This provides analysis of the number of calls which fail to meet their SLA timescales, based on the time between the call being raised and the call next being updated.

## Section E : Purchase Ledger / Purchase Order Processing

### E1. Purchase Order Monitor

AXIS Diplomat 2006 featured the new Sales Order Monitor, which many customers have found a valuable tool in managing their sales and dispatch operations. With AXIS Diplomat 2008, there is now an equivalent Purchase Order Monitor to assist their purchasing operations.

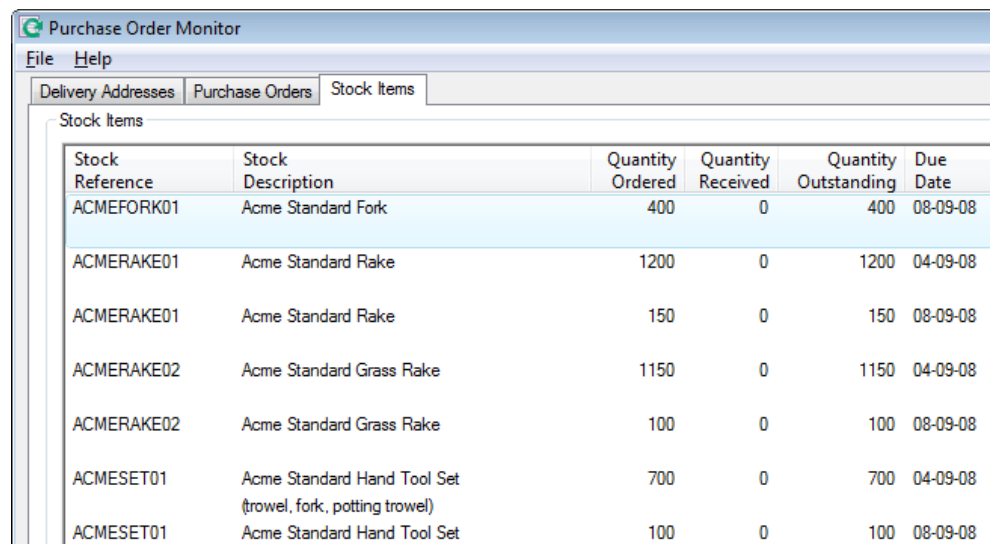


The screenshot shows the 'Purchase Order Monitor' window with the 'Purchase Orders' tab selected. The window has a menu bar with 'File' and 'Help'. Below the menu bar are three tabs: 'Delivery Addresses', 'Purchase Orders', and 'Stock Items'. The 'Purchase Orders' tab is active, displaying a table with the following data:

Purchase Order	Ackno...	Received	Invoiced	Supplier Account	Supplier Name	Order Date
114	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	8003	Acme Gar...	04-09-08
117	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	8003	Acme Gar...	08-09-08
115	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	8004	GoldTools ...	04-09-08
118	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	8004	GoldTools ...	08-09-08
116	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	8005	Books Y Us	04-09-08
119	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	8005	Books Y Us	08-09-08

As with the new Sales Desk Monitor (see section C1), the Purchase Order Monitor periodically refreshes its view of the data so that you can load the function at the start of the day and know that it will keep up to date with changes to the Purchase Order position.

The Stock Items tab, for example, is a valuable aid to the Purchasing Manager, by providing an immediate indication of items that are overdue, due in today or on order.



The screenshot shows the 'Purchase Order Monitor' window with the 'Stock Items' tab selected. The window has a menu bar with 'File' and 'Help'. Below the menu bar are three tabs: 'Delivery Addresses', 'Purchase Orders', and 'Stock Items'. The 'Stock Items' tab is active, displaying a table with the following data:

Stock Reference	Stock Description	Quantity Ordered	Quantity Received	Quantity Outstanding	Due Date
ACMEFORK01	Acme Standard Fork	400	0	400	08-09-08
ACMERAKE01	Acme Standard Rake	1200	0	1200	04-09-08
ACMERAKE01	Acme Standard Rake	150	0	150	08-09-08
ACMERAKE02	Acme Standard Grass Rake	1150	0	1150	04-09-08
ACMERAKE02	Acme Standard Grass Rake	100	0	100	08-09-08
ACMESET01	Acme Standard Hand Tool Set (trowel, fork, potting trowel)	700	0	700	04-09-08
ACMESET01	Acme Standard Hand Tool Set	100	0	100	08-09-08

## **E2. Unposted Transactions on Supplier Enquiry**

Most customers run their accounts in “split periods” for the first two weeks or so of each month, keeping the previous month’s Purchase Ledger open, waiting for the last of the supplier invoices to arrive. During this time, supplier transactions for the current period remain unposted.

By allowing you to see these unposted supplier transactions from within the Transactions tab in Supplier Enquiry, you have improved visibility of the current position with a particular supplier.

## **E3. Copy Purchase Order**

If you regularly place large similar orders with suppliers, then you will find the ability to copy a previous purchase order (even if it is complete) to a new purchase order will be a great time saver.

## **E4. Purchase Order Document Designer**

If you would like to show further information on your purchase orders, or to change the layout of your purchase orders, then you will benefit from the addition of purchase orders to the list of documents that can be created through the Document Designer.

## **E5. Extended List of XML Trading Partners**

Office Products dealers using the Price Feed mechanism to receive overnight price and stock feeds from wholesalers can also trade electronically with the EOS wholesalers Westcoast and Everything Imaging.

This option requires the AXEOS module.

## **E6. Unapproved Credit Notes**

Credit Notes booked to Supplier accounts can now be flagged as “Unapproved”, allowing them to be excluded from automatic payment functions. This simplifies the handling of a range of situations, including the receipt of credit notes against invoices that have not yet been received.

## **E7. Larger Purchase Invoice Numbers**

The field used to record your suppliers’ invoice numbers on the system has been increased, allowing even very large invoice numbers to be recorded in full on the system. You can now record your supplier’s invoice numbers with up to 20 characters.

## **Section F : Nominal Ledger**

### **F1. Online Submissions of VAT & EC Sales List (GovTalk)**

As the Government encourages more and more use of it's online submission mechanisms, we have now added both VAT and EC Sales List electronic submissions to our list of supported submissions.

The AXIS Diplomat Payroll software has been using GovTalk for several years for online year-end submissions and we have been notified by HMRC that users of our software have achieved a 100% error-free submission rate for the last three years! Due to this success rate, we are now confident in extending this functionality into the HMRC submissions from the Accounts package as well.

### **F2. Intrastat**

Virtually everyone that submits an Intrastat (Intra EC Trade Statistics) return needs to fine-tune the transactions recorded on the AXIS Diplomat system before submitting. This is to take account of movements for which no financial transactions took place, or financial transactions that resulted in no movement of goods.

This is now made much easier with two new Review functions - one for Arrivals and one for Dispatches.

This new facility requires the Intrastat module.

## Section G : Stock Ledger

### G1. Supplier Stock & Expected Supplier Stock

Customers with any of the Supplier Price Feed facilities can now see current Supplier Stock and Expected Supplier Stock figures whenever searching through Stock details.

Key Word Search for: C85 (stock/products)							
Stock Reference	Description	Stock on Hand	Free Stock	Allocated	Supplier Stock	Supplier Expected Stock	Supplier Expected Date
C13S050038	Epson Black Toner AcuLaser C8500/C8600	0	0	0	69	6	13-02-08
S050039	Epson Yellow Toner for AcuLaser C8500/C8600	0	0	0	59	2	13-02-08
S050040	Epson Magenta Toner for AcuLaser C8500/C8600	0	0	0	31	3	13-02-08
S050041	Epson Cyan Toner for AcuLaser C8500/C8600	0	0	0	51	1	13-02-08

### G2. Stock Attributes

In a similar way to Custom Categories on Customer Accounts, Stock Attributes can be thought of as up to ten additional group codes for your products.

Possible uses of Stock Attributes can include indicating size, colour, fit, material, environment rating, brand and manufacturer.

Stock Enquiry

File Help

General Details | Issue History | Pricing and Costing | Discounting and Additional Pricing | e-Business Details | Stock and Manu

Picture | Transactions | Stock Notes | Attributes | History | Attachments | Customer Pricing

Stock Reference

Stock reference: EGPLGG23 Item description: EGPL Gardening Gloves Mens, Large

Bin number: D279

Attributes

Size: 6 Mens Large

Colour: 2 Green

Brand: 5 EGPL

Rating: 2 Amateur

Value Selection

Code	Value
0	UNDEFINED
1	Acme
2	A-Z Books
3	Easy Books
4	Bits & Pieces
5	EGPL
6	Gold Tools

### G3. Multi-Lingual Stock Ledger

The Multi-Lingual Stock Ledger module is new at AXIS Diplomat 2008 and allows you to define a number of different language translations for all of the text within a stock item that is shown publicly – in other words, is shown on documents, such as invoices, or is shown on your AXIS VMerchant web site. You can define foreign language alternatives for a number of fields, including:

- Description (2 lines)
- Specification (6 lines)
- Unit of Measure
- Notes

- Stock Attributes (see G2 above).

In addition, you can specify different images for different languages (in the event that your images including text in them, such as a "Latest Style" splash).

Users of the eBusiness module in conjunction with AXIS VMerchant can also specify translations for eBusiness group text and images.

This works in conjunction with Foreign Language Documentation (which allows you to produce customer documentation, such as invoices, with foreign language headings) to allow you to produce documents that are entirely in your customer's language.

## **G4. Warehouse Management**

The Warehouse Management module is a major addition to the AXIS Diplomat portfolio and provides a host of functions designed around the use of wireless, ruggedised data capture devices with built-in bar code readers.

A variety of functions can be carried out using functions specifically for use in the hand-held environment, including goods inwards, picking and stock taking.

For further information, please see the module overview on the AXIS Diplomat web site at <http://www.axisfirst.co.uk/software/warehouse/>.



## **G5. Alternative Stock References**

For a number of years, AXIS Diplomat has offered the option of a second stock reference, of up to 30 characters. Typically, this facility is used to hold either the manufacturers part number, a bar code, or an internal part number if more than 10 characters is required.

This facility is now standard on all systems at AXIS Diplomat 2008.

*Note: On some older systems, this alternative reference replaced the second line of stock description - this is no longer the case. Users of systems that functioned in this way will find, when they upgrade to AXIS Diplomat 2008, that they regain the use of the second line of the stock description.*

## Section H : Bill of Materials & MRP Modules

### H1. Components Tab on Stock Enquiry

Users of either the Bill of Materials module or the SOP Kits module will appreciate the addition of a Components tab within Stock Enquiry, showing at a glance the items that make up the Assembly or Kit, as well as the stock availability (stock on hand, free stock etc.) for each component.

Stock Reference

Stock reference  Item description

Bin number

Components

Reference	Component Quantity	Description	Stock on hand	Allocated	Free Stock	On Order
BK001	1	Bicycle Frame	0	0	0	0
BK002	2	Bicycle Wheel	0	0	0	0
BK003	1	Bicycle Saddle	0	0	0	0
BK004	1	Bicycle Handlebar Kit	0	0	0	0

In a similar way, when you are looking at a Stock Enquiry for an item that is used as a component in one or more assemblies, you will notice a "Where Used" tab, which will identify the assemblies that this item is a component of.

### H2. Works Order Monitor

In the same way that the Sales Order Monitor provides a powerful management tool for the despatch and order processing department, the Works Order Monitor provides the Production Manager with a tool to view and manage the current Works Orders.

Works Order Monitor

File Help

Works Orders Component Items

Works Order Details

Works Order No.	Stock Reference	Stock Description	Quantity Ordered	Quantity Outstand...	UOM	Due Date	Status	Printed	Product Group
1469	EGPLPTK01	EGPL Power Tool Kit #1	36	36	EACH	11-09-08	Scheduled	-	12 - PowerTools
1470	EGPLPTK01	EGPL Power Tool Kit Accessory Pack					Scheduled	-	12 - PowerTools
1471	EGPLPTK01	EGPL Power Tool Kit #1					Scheduled	-	12 - PowerTools
1472	EGPLPTK01	EGPL Power Tool Kit Accessory Pack					Scheduled	-	12 - PowerTools
1473	EGPLPTK02	EGPL Power Tool Kit #2					Scheduled	-	12 - PowerTools
1474	EGPLPTK01	EGPL Power Tool Kit Accessory Pack					Scheduled	-	12 - PowerTools
1475	EGPLPTK02	EGPL Power Tool Kit #2					Scheduled	-	12 - PowerTools
1476	EGPLPTK01	EGPL Power Tool Kit Accessory Pack					Scheduled	-	12 - PowerTools
1477	EGPLPTK02	EGPL Power Tool Kit #2					Scheduled	-	12 - PowerTools
1478	EGPLPTK01	EGPL Power Tool Kit Accessory Pack					Scheduled	-	12 - PowerTools
1479	EGPLPTK02	EGPL Power Tool Kit #2					Scheduled	-	12 - PowerTools
1480	EGPLPTK01	EGPL Power Tool Kit	9	9	EACH	11-09-08	Scheduled	-	12 - PowerTools

Refresh Display Filter/Options

Number of orders 87

Cancel

AXIS® Diplomat 2008 DPA (axis031)



### **H3. Alternative Components**

This facility is designed to allow Works Orders to use an alternative stock item as a component should the component defined in the Bill of Materials have insufficient free stock.

Alternatives are defined against the stock item and any assembly which uses that item as a component can potentially use any defined alternative(s) as stock levels fluctuate.

### **H4. Handheld Works Order Picking**

For users of the Warehouse Management module, who also process large numbers of Works Orders, the Handheld Works Order Picking option will allow them to use the handheld devices to simplify the picking of components for works orders, typically by bar code. By the use of bar codes for picking, errors are reduced, whilst, since updates from the devices are in real-time using the wireless network, the stock position is more accurate.

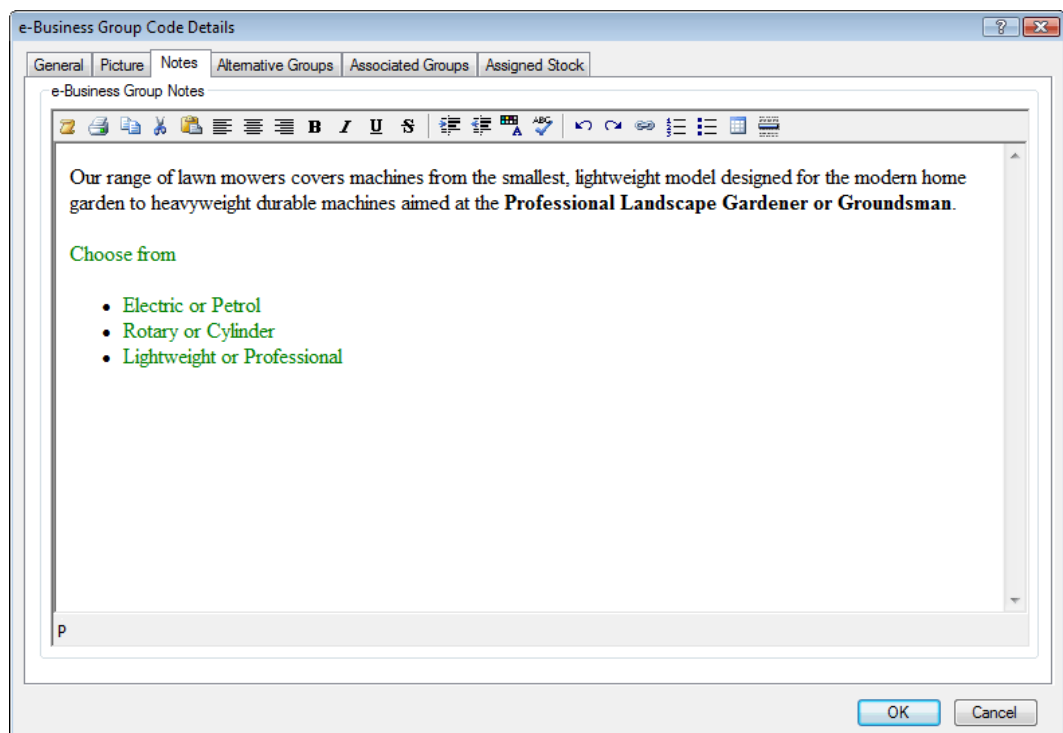
## Section I : eBusiness

### I1. HTML Formatted Notes

Your AXIS VMerchant web site can be configured to display the contents of your Stock Notes and/or eBusiness Group Notes as detailed product/category information.

For systems with the eBusiness feature, the editing of these Notes is now achieved with a built-in HTML editor, allowing you to include a wide range of text formatting options within these notes:

- left, right or centre-aligned text
- bold, italic, underline and strike-through text
- override font colours
- indented paragraphs
- numbered and bulleted lists
- tables



### I2. Enhanced Stock Images

The enhanced Stock Image support in AXIS Diplomat 2008 now allows any number of images to be held against each stock item, not just the two images (main image and thumbnail) previously held.

Further enhancements to image support, specifically for users of AXIS VMerchant, include:

- automatically resize images to a standard size and aspect ratio when adding or importing images
- automatically generate thumbnails of a pre-determined size and aspect ratio whenever you add a main image

- the option to make your AXIS VMerchant web site your main image store so that adding large numbers of images does not increase the size of your AXIS Diplomat database or backup files
- associate multiple images with eBusiness groups as well as with individual stock items

To see how multiple images can be rendered on your AXIS VMerchant web site, please visit <http://www.axisfirst.co.uk/egpl/Product.asp?Prd=EGPLMOW4>

This web page shows a lawn mower with a number of additional images below, shown as thumbnails – clicking on any thumbnail loads a large version of that image.

### **I3. PayPal**

In addition to working with Protx for credit and debit card processing, you can now link your AXIS VMerchant web site to a PayPal account.

### **I4. Optional Extras**

The Optional Extras facility allows you to link Stock Items to other Stock Items and to list them on your AXIS VMerchant web site, typically in a “Don’t forget to include:” category.

Example uses of this include the appropriate batteries for a remote controlled toy, or the appropriate SCART or HDMI cable for a TV or DVD player.

### **I5. Cross-Selling Links**

Cross-Selling Links work in a similar, but subtly different, way to Optional Extras. By allowing stock items and eBusiness groups to be cross-referenced, you can include on your web site a “you may also be interested in:” section. These are usually used for situations where the product or group in question is a complimentary product rather than an add-on. The way in which the cross-selling links are displayed on the web site is flexible – for example, you may choose to head up the section as “Customers who bought this also bought:”.

By specifying both Optional Extras and Cross-Selling Links on your web site, you can vastly increase the opportunities to “up sell”. When someone visits your physical shop, your assistant has the opportunity to add value to the sale by asking, for example, “would you like a spare cartridge for that?” or “would you be interested in the matching jacket?”. When a customer buys from your web site, your web site itself needs to fulfil this role.

## Section F : Upgrade Options and Pricing

### F1. Pricing

Product	Upgrade from	
	AXIS Diplomat 2004	AXIS Diplomat 2006
AXIS Diplomat 2008 Express Client	£495	£295
AXIS Diplomat 2008 Small Business Edition Client	£995	£495
AXIS Diplomat 2008 Medium Business Edition Client	£1,195	£695

### 2. Client Transition Pricing

Transition To	Transition From	
	AXIS Diplomat 2008 Express	AXIS Diplomat 2008 SBE
AXIS Diplomat 2008 Small Business Edition Client	£295	
AXIS Diplomat 2008 Medium Business Edition Client	£495	£295

### 3. Software Assurance

Product	Per Client, Per Month
AXIS Diplomat 2008 Express	£12.50
AXIS Diplomat 2008 Small Business Edition	£20.00
AXIS Diplomat 2008 Medium Business Edition	£25.00

**Note:** Software Assurance must be taken out at the time of upgrading to AXIS Diplomat 2008 or at the time a new AXIS Diplomat 2008 system is supplied.

### 4. Additional Services

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

## Software Assurance

A number of the new developments within AXIS Diplomat 2008 described above have already been released to those customers with Software Assurance.

Software Assurance customers will be entitled to software licence upgrades to the full release of AXIS Diplomat 2008 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 2008, please go to our web site at <http://www.axisfirst.co.uk/software/diplomat2008/upgrades> and click on the link to request your upgrade.

## **Section G : Supported Environments**

### **G1. Server**

Microsoft Windows Server 2008

Microsoft Windows Essential Business Server 2008

Microsoft Windows Small Business Server 2008

Microsoft Windows Server 2003

Microsoft Windows Small Business Server 2003

Citrix Access Essentials 2 and above

Citrix XenApp 5

Citrix Presentation Server 4.5

### **G2. Workstations**

Microsoft Windows Vista Business

Microsoft Windows Vista Ultimate

Microsoft Windows XP Professional

### **G3. Database Servers**

Microsoft SQL Server 2008

Microsoft SQL Server 2005

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

E & OE.

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