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axis® diplomat 2010

Accounting and Business Information Systems

New Features Overview

12.11.2010

Introduction

This document outlines the major new features and benefits that you can expect to see by upgrading to **axis diplomat 2010** from the previous edition of software, **axis diplomat 2008**.

This document is by its nature relatively detailed; for a more concise overview, please visit our web site at www.axisfirst.co.uk/software/diplomat2010/upgrades/ where you will find the "New features at a glance" brochure.

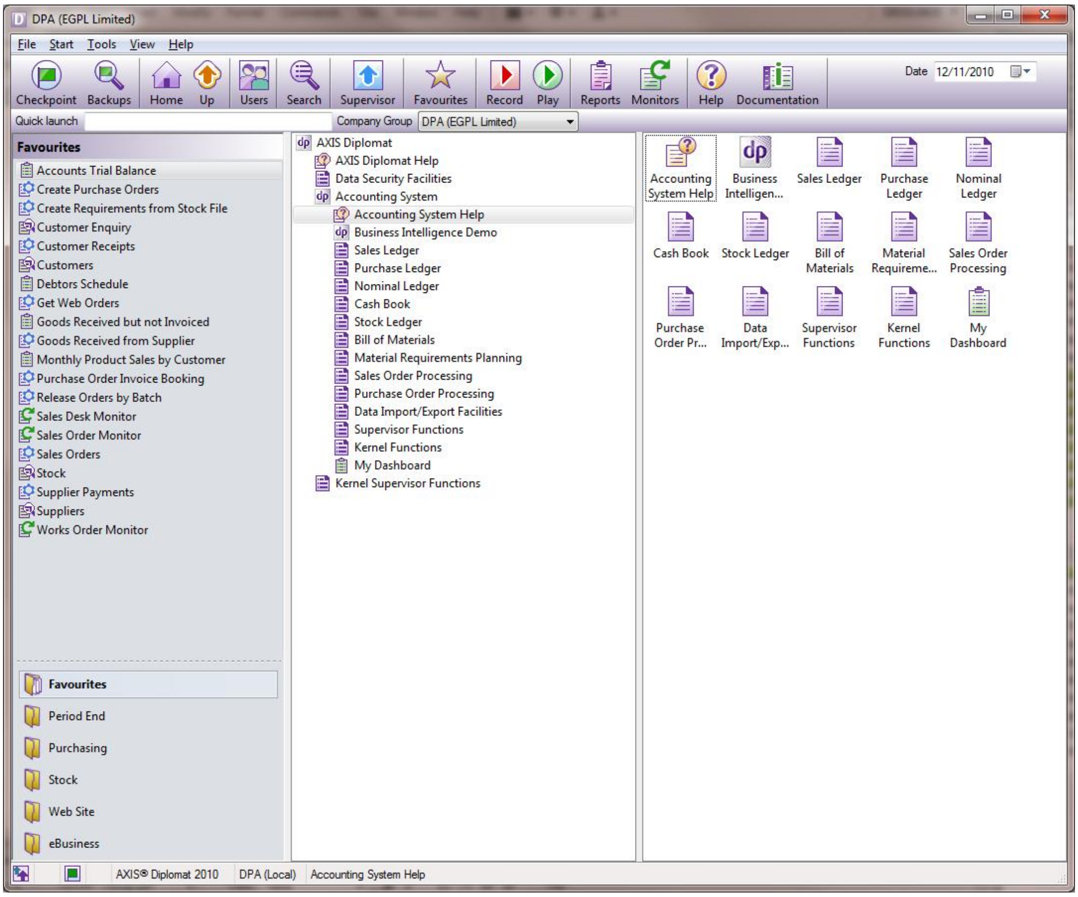
This document is by no means exhaustive and further enhancements will continue to be added after the initial release in the form of on-going level updates; please check on the **axis first** web site for the latest product information.

Level updates within the **axis diplomat 2010** release will be free to all of those users with current support contracts.

In addition to the normal on-going level updates for **axis diplomat 2010**, 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 2012.

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 Axis First web site at http://www.axisfirst.co.uk/software/assurance and will also feature in newsletter emails from time to time.

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".



axis diplomat 2010 scheduler

Summary of New Features of axis diplomat 2010

The choice of new features for axis diplomat 2010 is driven by a number of factors:

- "Wish List Calls": from time to time, our Customer Services department take a query from a customer asking if the software does something where the answer is no. In these cases that support call will be moved into a "Wish List" category. These wish list calls are reviewed on a regular basis (typically quarterly) and, in cases where a number of customers have asked for similar things or a single customer has made a request that seems like a really good idea, we consider adding that request to our development schedule.

- Part-funded customer projects.

- Strategic Development – because of the close interaction we have direct with our customer base, we have a fundamentally good understanding of what would make our customer's lives easier.

- Current Market Needs – there are some things that we know every customer is going to need or benefit from sooner or later. This includes keeping up with market changes and legislation changes – we anticipate, for example, future developments with VAT and schedule developments accordingly.

- Internal axis first requirements – as an intensive user of axis diplomat within our own business, we constantly identify developments that would save us time or money. Since we would only do this if they made economic sense given that we have to effectively fund these developments ourselves, these should offer even greater savings to other axis diplomat users.

The developments within axis diplomat 2010 are inevitably influenced by the economic climate and how that affects the needs of our customers. This release includes a number of features and benefits aimed at helping customers maximise their cashflow, maximise their return on investment (not just on their axis diplomat software but their IT systems in general) and increase the efficiency of their staff.

This is also the first new release of our software that has retained support for all hardware and operating systems supported by the previous version: the new release will, for example, still run on Windows XP or Windows Server 2003 and it will still run on a display with 1024x768 resolution.

The software does, however, incorporate a number of developments which allows it to leverage newer hardware where available. Anyone with the much larger displays that are now commonplace, for example, will be able to maximise the information that they see on-screen with a noticeable improvement in productivity.

Customers with Software Assurance are entitled to an upgrade to their software licence to **axis diplomat 2010** under the terms of their agreement. To request an update to **axis diplomat 2010**, Software Assurance customers should visit our web site at http://www.axisfirst.co.uk/software/assurance/ and follow the link to request their upgrade. The online request form also allows training to be ordered at the same time.

The following list highlights our **Top Ten New Features** of **axis diplomat 2010**:

1. Resizeable Windows
2. Powerful New Search Enquiries
3. Customisable Monitor Tabs
4. New Customisable “My Monitors” function
5. Credit Control Monitor
6. Enhanced Sales Ledger Payments
7. Supplier Relationship Management
8. Purchase Invoice Register
9. Contact Synchronisation with Outlook/Exchange
10. Real-Time SQL Updates

Everyone’s favourite new features will of course vary as everyone’s 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.

New Features of axis diplomat 2010

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 2010**; available on all axis diplomat 2010 systems
Teal	A standard facility within **axis diplomat 2010** that has already been pre-released to those customers with Software Assurance
Blue	A new facility within **axis diplomat** that requires one or more existing optional modules
Red	An optional extra, available as an add-on to axis diplomat 2010 but not available at previous versions

Section A – User Interface Improvements

A1 Resizeable Windows

A remarkable productivity gain is possible by simply allowing operators to see more information, more easily, on-screen.

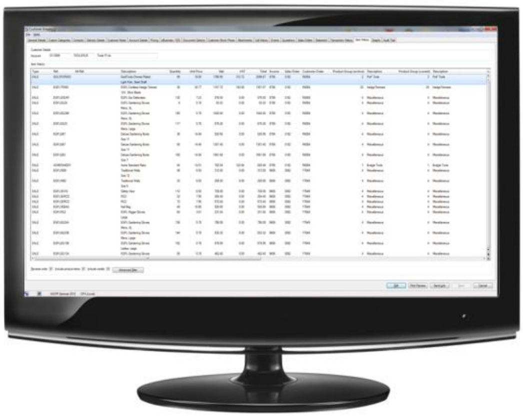
There is a rapidly increasing popularity of larger monitors, either traditional 4:3 aspect monitors (such as 19" TFTs), increasing numbers of widescreen monitors and monitors that can be swivelled to offer portrait-style presentation.

A significant development for axis diplomat 2010 is the re-engineering of functions that can take advantage of this – particularly those screens that show long or wide scrolling data lists, such as the main enquiry functions and all of the 'monitor' functions.

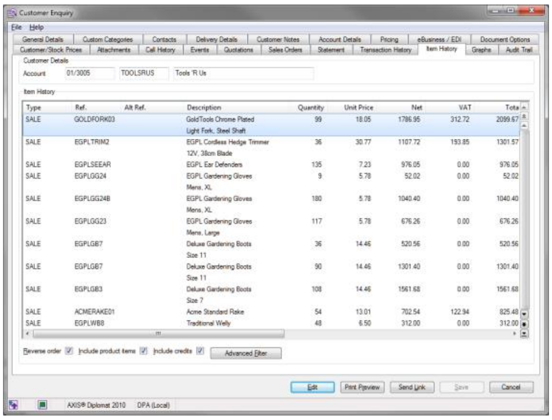
These functions can be dragged to a suitable size or you can simply click on the 'maximise' button to fill the screen.

This allows you to change from this:

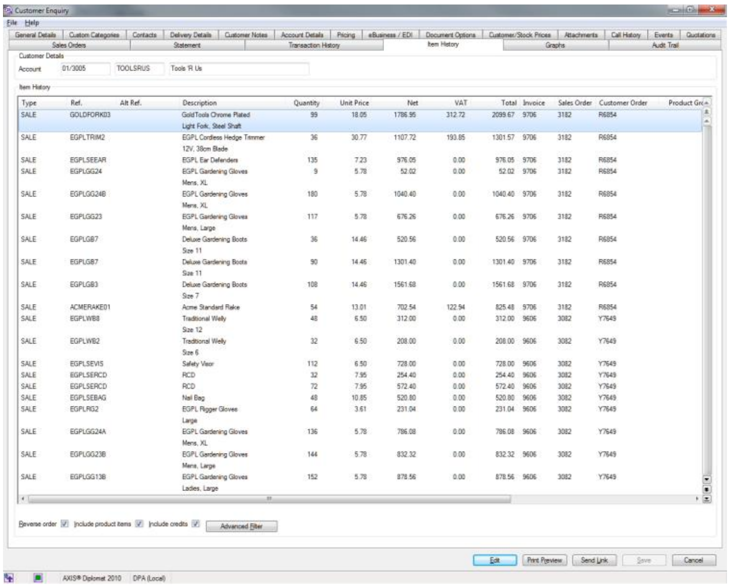
to this:



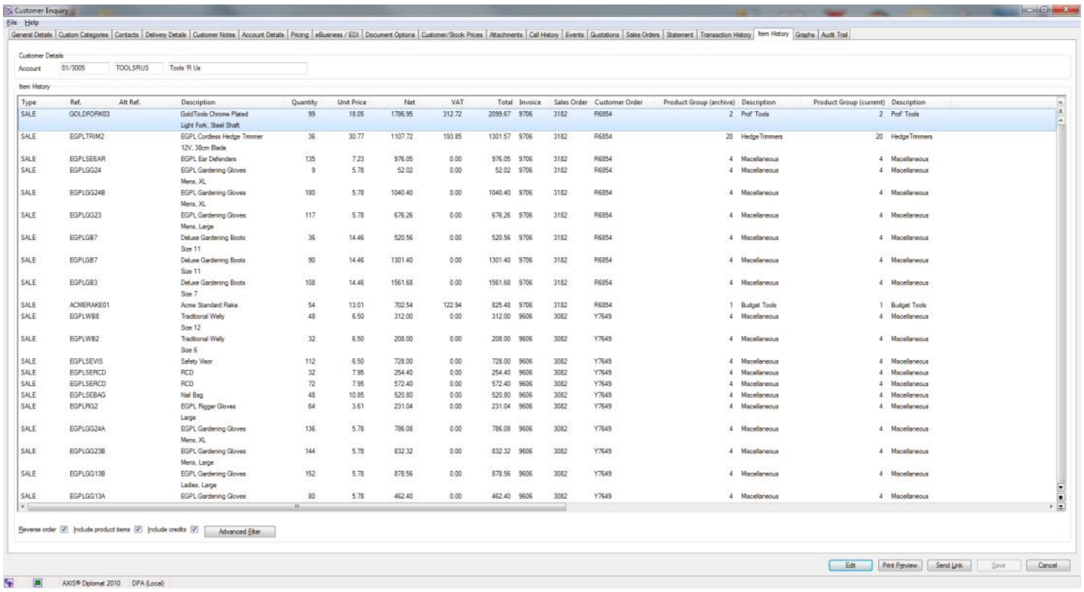
To see how this translates into real-life improvement, here is a standard Customer Enquiry as seen on a small screen running at 1024x768:



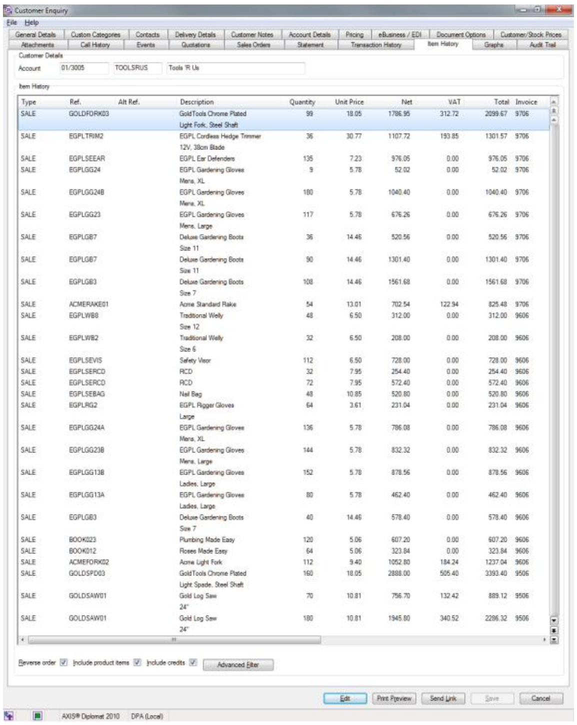
This is the same function on a typical 19” monitor running 1280x1024:



This is the same function running on a widescreen monitor at 1920x1080:



Finally, here is the same function running on a portrait-format monitor, running at 1024x1280:



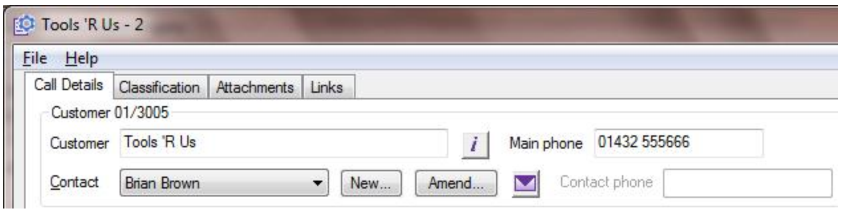
All of these screenshots are shown to the same scale.

As can be from the example above, providing the operator with more information on screen isn't simply a case of reducing the amount of time they need to use the scroll bar. Operators are able to absorb larger amounts of information at a glance and often pick up on detail that they would otherwise miss.

A2 Smart Links

Smart Links have been added at various key points in the system to simplify the task of drilling down into more information from a dialogue.

Look out for the buttons with a purple ***i*** on them. Here, for example, is a Call Enquiry from the CRM system:



Here, the Smart Link is associated with a Customer, so it allows us quick access to the Customer Enquiry for this customer.

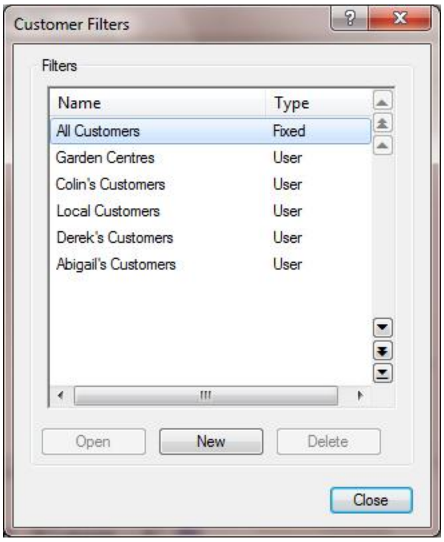
A3 Smart Filters

Smart Filters allow you to pre-define a set of filters and save them with a meaningful name. Anywhere that uses Smart Filters and offers selection of the same type of data (customers, suppliers, purchase orders, etc.) will then offer that Smart Filter as one of the choices.

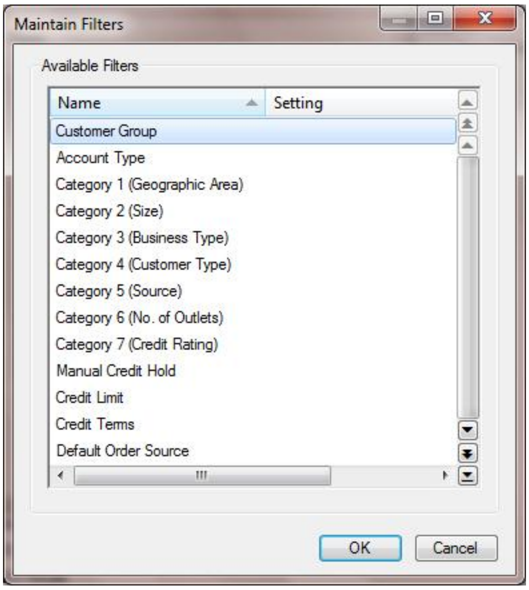
Smart Filters are unique to each operator, so they can create the Filters that are relevant to their day-to-day requirements.

Functions and dialogues offering Smart Filter support are generally those offering interactive data lists (typically monitor functions and the new generic search functions) and can be identified by the Smart Filter button:

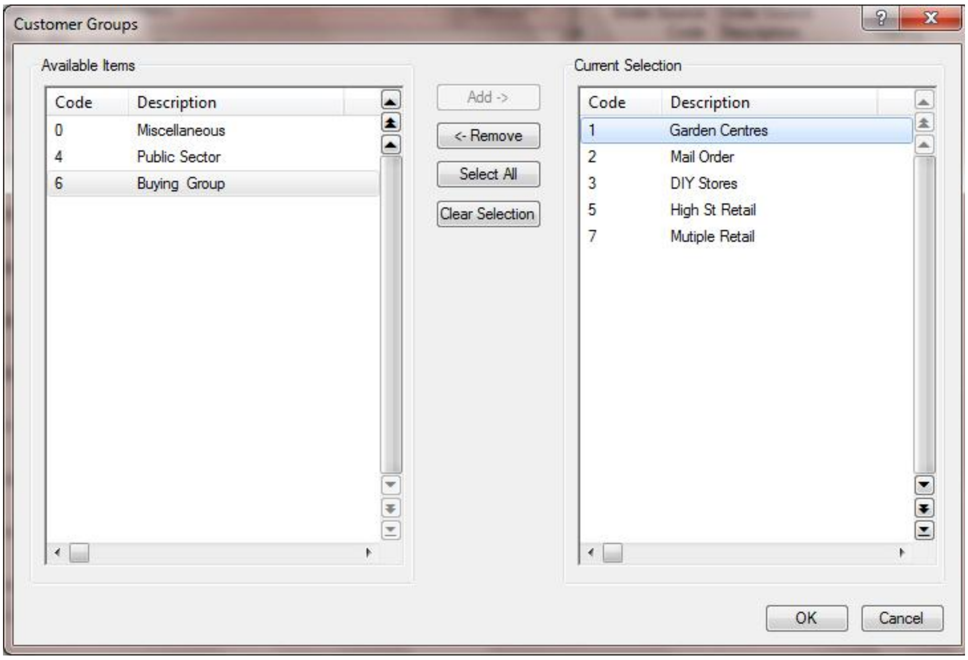
You can click the Smart Filter icon to add or amend any of your Smart Filters. In this example, the Smart Filter is associated with a list of Customers and so it will show Customer Smart Filters:



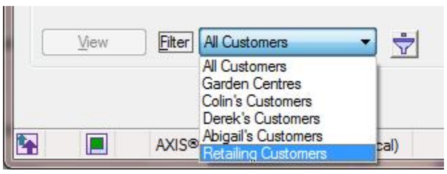
Adding or amending a Smart Filter offers the ability to filter by any of the common fields for that type of filter. In the case of a Customer, this would show you:



To set a filter on Customer Group, for example, you would double-click on the Customer Group option and be able to include or exclude any Customer Groups, not just those in a continuous list:



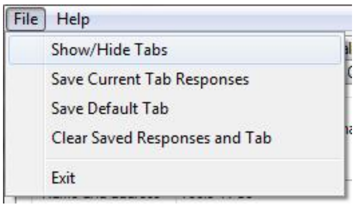
Saving this with a unique name, such as "Retailing Customers", makes this selection available anywhere in the system where Smart Filters are used on a dynamic list of customers.



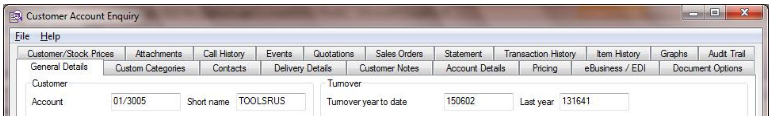
A4 Hide Tab

Many of the functions within axis diplomat are extremely powerful and give access to a vast array of information. In some circumstances, particularly where new members of staff are concerned, this could, in the past, be overwhelming. New employees could be intimidated by the range of information available to them and have difficulty finding the information they are after.

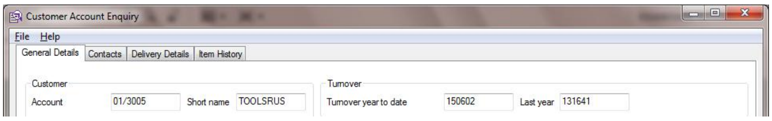
This can now be easily remedied by hiding the tabs of information that do not apply to particular operators. Anyone can hide their own tabs by choosing "Show/Hide Tabs" from the File menu within any function that has multiple tabs:



This allows you to go from this, for example:



to this:



By making the software simpler for them to use, new employees are able to become more productive, more quickly.

Section B – Accounts (General)

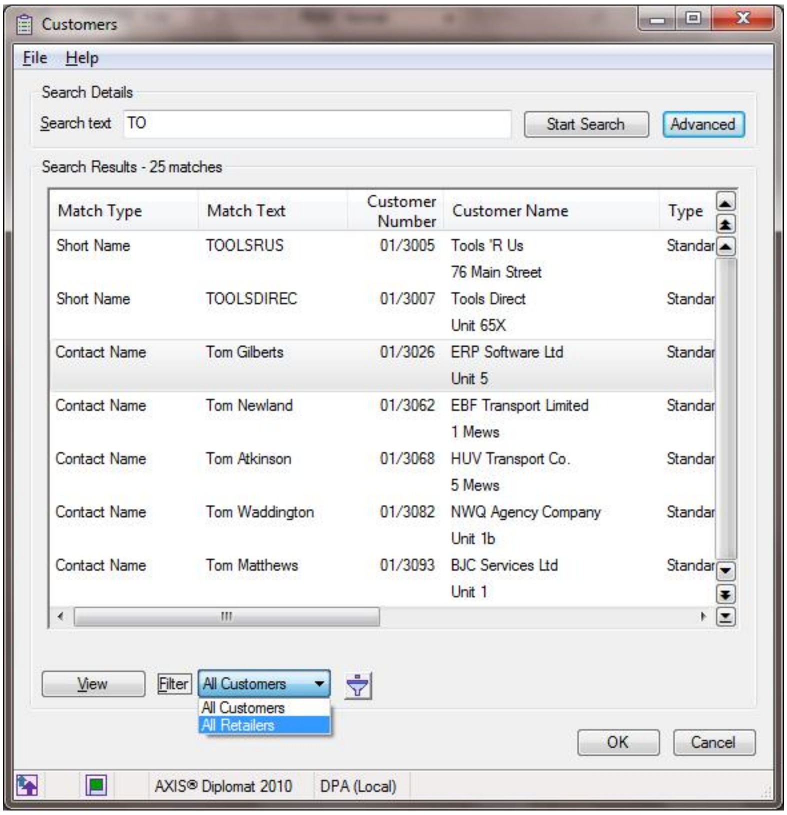
B1 Powerful New Search Enquiries

Four new functions have been introduced that provide powerful new ways to find Customers, Suppliers, Stock Items and CRM Calls.

Called simply "Customers", "Suppliers", "Stock" and "Calls", these four functions effectively 'front-end' the existing enquiry functions by taking one search term and searching all available indices simultaneously.

The results, that appear in real-time, as search results come in from the various queries, can be further filtered using Smart Filters.

Here, for example, a search has been done on the phrase "TO", which has matched the Short Name of two accounts, and the Contact Name of a number of other customers.



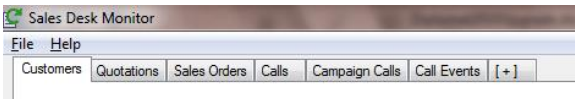
In one concurrent operation, for example, the Customer function will search for matches within the Customer Number, Short Name, Post Code, Fax Number, Telephone Number, Address, Contact Names and Email Address fields. It will also look for any customers with sales orders containing a matching Document Reference or Customer Document Reference.

B2 Re-Engineered Monitor Functions with Custom Tabs

The core monitor functions introduced in axis diplomat 2008 have been re-engineered for axis diplomat 2010 to take advantage of real-time SQL updates (see section K). This has substantially improved performance, particularly where complex filters have been applied.

Whilst the overall look and feel of the monitor functions has remained the same, the most significant difference to the operator is that you can now add your own additional tabs to the monitors.

Alongside the existing tabs, you will find an additional tab, labelled "[+]", that allows you to create your own:



These additional tabs can be based on any of the existing tabs but with different filters applied.

This development will be of particular interest to those people already using the monitor functions but find that they are frequently having to change the filters for different applications. Now they can simply create copy tabs with those different filters already applied and simply switch between them.

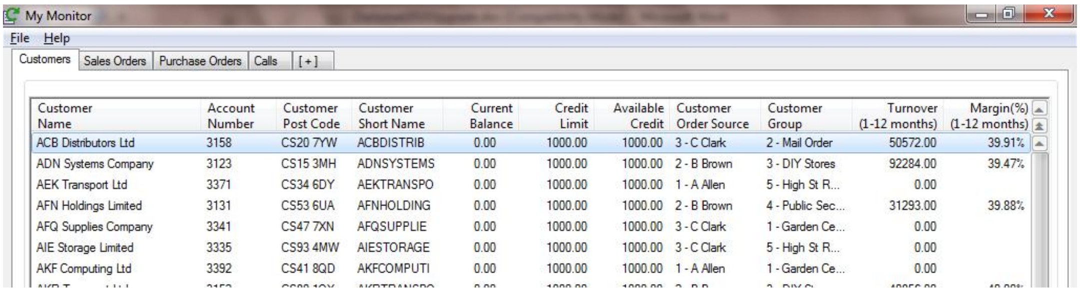
A good example of this would be a Sales Manager that is responsible for four sales people: John, Brian, Alice and Cathy. They could now create four additional tabs within their Sales Desk Monitor called "John's Quotes", "Brian's Quotes", "Alice's Quotes" and "Cathy's Quotes", with the filters set accordingly. Now, they can review the outstanding quotes for each of their members of staff with a single mouse click.

This functionality is not restricted to the Sales Desk Monitor – the Sales Order Monitor too can have additional tabs. You could, for example, set up an additional tab for "Orders on Hold".

B3 My Monitors

In addition to being able to add your own tabs to existing monitors, there is a new separate function called “My Monitors”. This allows you to build your own custom monitors entirely from scratch, using any tabs from any of the re-engineered standard monitor functions.

For example, you can create a monitor that includes customers, sales orders, purchase orders and calls:



The filters that can be applied in standard monitors, custom monitor tabs and in My Monitors can all be saved as Smart Filters, meaning that the selection that you have applied can be re-used elsewhere.

One advantage of using Smart Filters is that if you change the filter selection at a later date and update the Smart Filter, anything that uses that Smart Filter will be updated to use that new selection automatically.

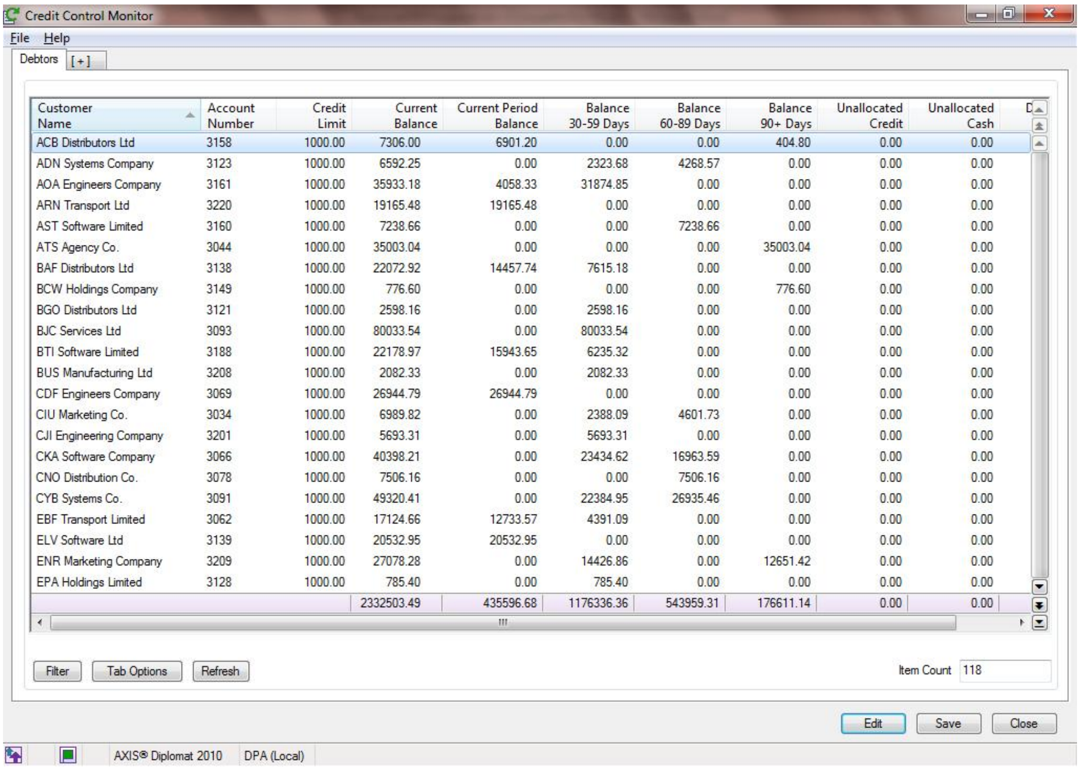
If, for example, you are an Account Manager who looks after customers in groups 1, 3, 7 and 10, you could create a Smart Filter called “My Accounts” and apply that Smart Filter to the Customer tab in your Sales Desk Monitor, and several different tabs in your “My Monitors” tabs. If, at a later date, you also take responsibility for customers in group 15, you would simply update the Smart Filter and all of the monitor tabs would be updated automatically.

Section C – Sales Ledger & Sales Order Processing

C1 Credit Control Monitor & Credit Control Facilities

Alongside the re-engineered monitor functions (see section B) is an all-new monitor designed specifically for credit control.

As with the other re-engineered monitor functions, you can add your own tabs, each with their own selection criteria but essentially the monitor operates like an interactive debtors schedule, listing customers and their debt breakdown.



Customer Name	Account Number	Credit Limit	Current Balance	Current Period Balance	Balance 30-59 Days	Balance 60-89 Days	Balance 90+ Days	Unallocated Credit	Unallocated Cash
ACB Distributors Ltd	3158	1000.00	7306.00	6901.20	0.00	0.00	404.80	0.00	0.00
ADN Systems Company	3123	1000.00	6592.25	0.00	2323.68	4268.57	0.00	0.00	0.00
AOA Engineers Company	3161	1000.00	35933.18	4058.33	31874.85	0.00	0.00	0.00	0.00
ARN Transport Ltd	3220	1000.00	19165.48	19165.48	0.00	0.00	0.00	0.00	0.00
AST Software Limited	3160	1000.00	7238.66	0.00	0.00	7238.66	0.00	0.00	0.00
ATS Agency Co.	3044	1000.00	35003.04	0.00	0.00	0.00	35003.04	0.00	0.00
BAF Distributors Ltd	3138	1000.00	22072.92	14457.74	7615.18	0.00	0.00	0.00	0.00
BCW Holdings Company	3149	1000.00	776.60	0.00	0.00	0.00	776.60	0.00	0.00
BGO Distributors Ltd	3121	1000.00	2598.16	0.00	2598.16	0.00	0.00	0.00	0.00
BJC Services Ltd	3093	1000.00	80033.54	0.00	80033.54	0.00	0.00	0.00	0.00
BTI Software Limited	3188	1000.00	22178.97	15943.65	6235.32	0.00	0.00	0.00	0.00
BUS Manufacturing Ltd	3208	1000.00	2082.33	0.00	2082.33	0.00	0.00	0.00	0.00
CDF Engineers Company	3069	1000.00	26944.79	26944.79	0.00	0.00	0.00	0.00	0.00
CIU Marketing Co.	3034	1000.00	6989.82	0.00	2388.09	4601.73	0.00	0.00	0.00
CJI Engineering Company	3201	1000.00	5693.31	0.00	5693.31	0.00	0.00	0.00	0.00
CKA Software Company	3066	1000.00	40398.21	0.00	23434.62	16963.59	0.00	0.00	0.00
CNO Distribution Co.	3078	1000.00	7506.16	0.00	0.00	7506.16	0.00	0.00	0.00
CYB Systems Co.	3091	1000.00	49320.41	0.00	22384.95	26935.46	0.00	0.00	0.00
EBF Transport Limited	3062	1000.00	17124.66	12733.57	4391.09	0.00	0.00	0.00	0.00
ELV Software Ltd	3139	1000.00	20532.95	20532.95	0.00	0.00	0.00	0.00	0.00
ENR Marketing Company	3209	1000.00	27078.28	0.00	14426.86	0.00	12651.42	0.00	0.00
EPA Holdings Limited	3128	1000.00	785.40	0.00	785.40	0.00	0.00	0.00	0.00
			2332503.49	435596.68	1176336.36	543959.31	176611.14	0.00	0.00

The monitor can show any of the columns traditionally associated with the Customer tab in Sales Desk Monitor but, in addition, you can show balance breakdown by period and a figure for the Debt-Value-Days (a function of the length of time the debt is overdue and the value of the debt, giving an indicate of the seriousness of the debt). The monitor can also show the next contact date, derived from the soonest contact date of any outstanding Accounts calls.

Access to these additional columns has also been reverse-engineered into the Customer tab of Sales Desk Monitor, to allow your Sales team access to the credit control information for their accounts.

By right-clicking on a customer in the list, it is possible to drill-down into the customer enquiry for that customer. It is also possible to go directly to any Accounts calls open with that customer. This means that the Credit Control monitor can be used by credit controllers for debt chasing, using this function to control the calls they make to customers.

Filters available within the Credit Control Monitor allow you to filter the tab to all customers, all debtors, just customers with a 30+ day balance, etc. By making use of the ability to create additional tabs within the monitor, you could, for example, create a Credit Control Monitor with tabs for "All Debtors", "30 Day Debtors", "60 Day Debtors", and so on.

In addition to the new Monitor function, we have added the ability to flag specific outstanding invoices as "disputed". This is done by simply right-clicking on an invoice within the Statement tab of Customer Enquiry.

Disputed invoices may be ignored (configurable via the filters) in the Credit Control Monitor when calculating the outstanding balances and may also be ignored when producing a Debtors Schedule. Disputed invoices are also flagged on the Statement tab of Customer Enquiry.

C2 Formatted Addresses

Formatted Addressing has been available as an optional extra at previous versions but is now provided as standard on all systems.

Traditionally, axis diplomat has held addresses as six lines of text. With Formatted Addresses, this changes to separate fields for Organisation, Additional Lines 1-5, City/Town, County/State, Postcode/Zip Code and Country.

All of these lines are also consolidated back into a six line Address Label, used for addressing invoices, mailing labels, etc., to fit within the rules of postal services and delivery service providers.

The software has, built-in, all of the internationally-agreed rules defined for every country in the world on how to build an address label from these different fields, knowing where, for example, the postal code should be placed.

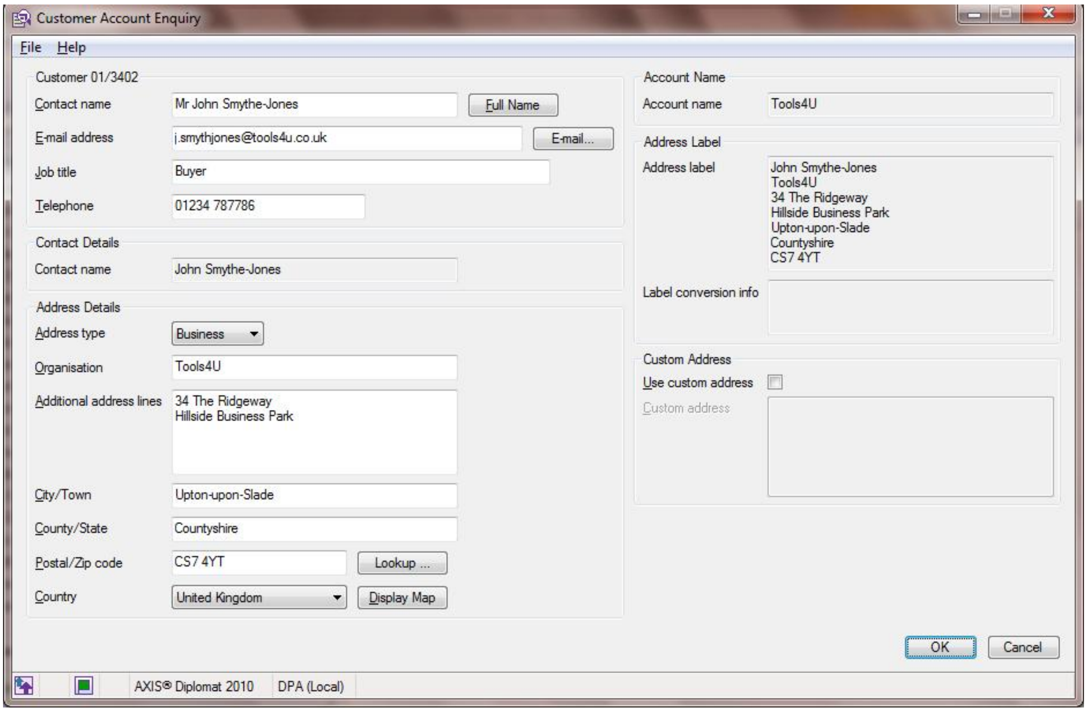
Moving to formatted addresses has a number of advantages – for example, it makes it possible to interface with 3rd party systems, such as software provided by carriers. For customers using the ODBC interface to carry out external analysis of their data, perhaps using Microsoft Excel, analysis by town or county becomes a possibility, whereas previously it would not be clear, for a given customer, which line of the address held those items.

C3 Rapid Account Creation

Alongside formatted addresses, a new dialogue has been developed for adding a new customer account quickly to the system – this is particularly well-suited to those operating in a telesales environment. By taking all of the information regarding the individual, their organisation, if appropriate, and their address on one screen, this both speeds up data entry and reduces the chances for human error.

This new dialogue also works particularly well when the system is linked to postcode address retrieval via PostcodeAnywhere.

By processing this information more efficiently, staff spend less time on calls and present a more efficient image to the caller.



C4 Quotation Order Forms

A new development in the area of documentation is the introduction of an all-new document type - Quotation Order Forms.

In addition to being able to design Quotations and Quotation Pro Formas, this new document type allows you to produce a third document from your quotations. Typically, a Quotation Order Form will have a similar layout to a Quotation or Pro Forma but with an added signature box at the bottom.

The aim is to allow you to present this to your customer for their signature in lieu of an official Purchase Order. This can prove a valuable aid to closing new business since the sales person can "strike while the iron is hot" by asking the customer to sign the document there and then, without waiting for them to arrange for a Purchase Order to be raised.

C5 Quotations from Word Templates

Designed for businesses where an official Quotation document generated by the Document Designer does not offer sufficient flexibility, there is now an option to build your Quotation template using Microsoft Word.

This facility is particularly suited to those businesses that wish to send out large proposal documents, containing a lot of standard text, rather than simpler documents containing just a list of items and prices.

C6 Sales Document Edit/Enquiry

In the past, there have been two entirely different enquiry functions - Sales Order Enquiry and Sales Order Status Enquiry, with each of these functions showing different information about the same order. These have now both been replaced by a single completely new Sales Order Enquiry that now shows all of the relevant information regarding that Sales Order, in one place.

Furthermore, this new Sales Order Enquiry function is based on the maintenance program which means that there is now an Edit button to instantly switch from looking at the Sales Order, to being able to update it (subject to appropriate user permissions, of course).

There is also a new Quotation Enquiry. Again this is based on the maintenance program so also features an Edit button; this allows you to immediately update a quote without the need to switch to a different function.

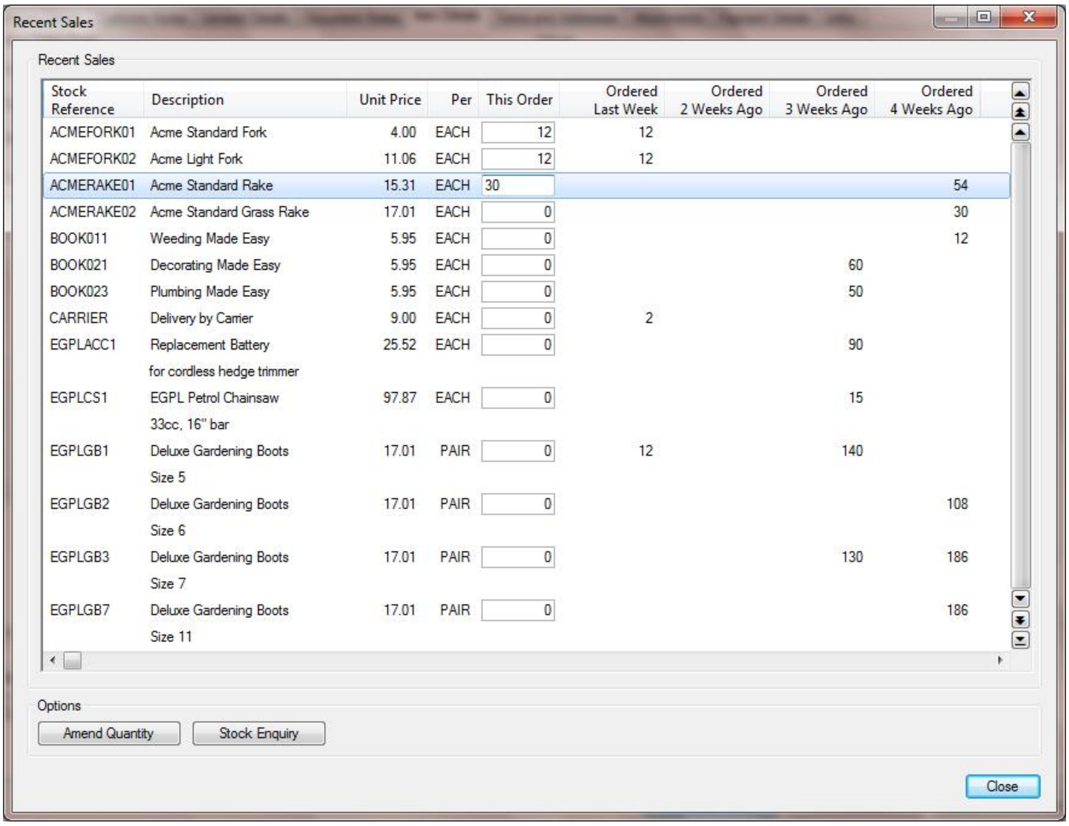
Enquiries with an Edit button allowing you to go straight into document maintenance mode also feature for users of the Workshop Job and Service Contract modules.

C7 Sales Document Entry – Recent Sales

A significant new development within the Quotation and Sales Order Entry functions is aimed at those users that frequently deal with repeat business from regular customers.

Now, in addition to browsing the Archive History, you can select Recent Sales when adding item(s) to your Sales Order or Quotation. This shows all the items that the customer has purchased recently - by default, it will show the previous 4 weeks but a system parameter allows you to change this to show any number of weeks, depending on your typical business cycle.

For example, if you call your customers on a 4-weekly basis, you might find it convenient to show the last 8 weeks of sales to catch anything that they didn't order last month.



Recent Sales

Recent Sales

Stock Reference	Description	Unit Price	Per	This Order	Ordered Last Week	Ordered 2 Weeks Ago	Ordered 3 Weeks Ago	Ordered 4 Weeks Ago
ACMEFORK01	Acme Standard Fork	4.00	EACH	12	12			
ACMEFORK02	Acme Light Fork	11.06	EACH	12	12			
ACMERAKE01	Acme Standard Rake	15.31	EACH	30				54
ACMERAKE02	Acme Standard Grass Rake	17.01	EACH	0				30
BOOK011	Weeding Made Easy	5.95	EACH	0				12
BOOK021	Decorating Made Easy	5.95	EACH	0			60	
BOOK023	Plumbing Made Easy	5.95	EACH	0			50	
CARRIER	Delivery by Carrier	9.00	EACH	0	2			
EGPLACC1	Replacement Battery for cordless hedge trimmer	25.52	EACH	0			90	
EGPLCS1	EGPL Petrol Chainsaw 33cc, 16" bar	97.87	EACH	0			15	
EGPLGB1	Deluxe Gardening Boots Size 5	17.01	PAIR	0	12		140	
EGPLGB2	Deluxe Gardening Boots Size 6	17.01	PAIR	0				108
EGPLGB3	Deluxe Gardening Boots Size 7	17.01	PAIR	0			130	186
EGPLGB7	Deluxe Gardening Boots Size 11	17.01	PAIR	0				186

Options

Amend Quantity | Stock Enquiry

Close

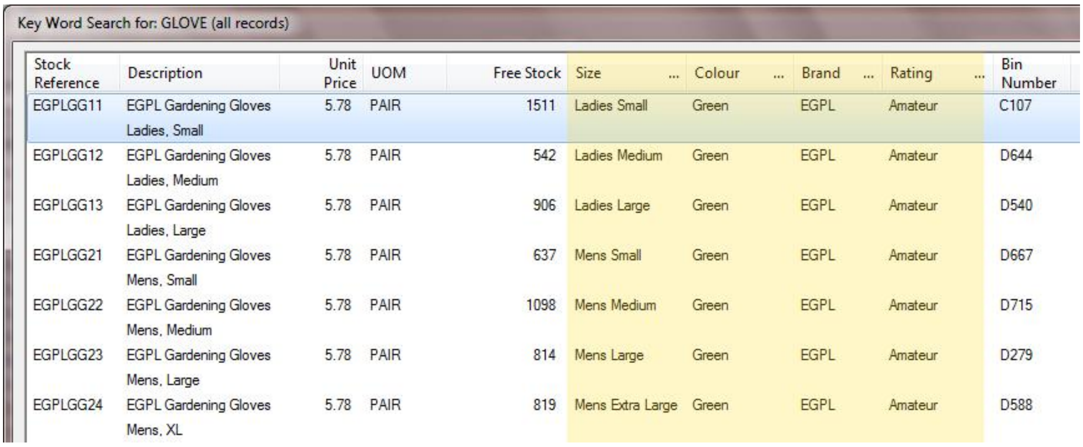
Not only does this show the quantities of the various items this customer has purchased over recent weeks, it also allows you to enter quantities against each line at the same time, in a similar manner to filling in a column in a spreadsheet.

As with many dialogues throughout the system in axis diplomat 2010, this dialogue is resizable and so is a perfect candidate for taking advantage of large displays, especially widescreen displays where the additional width will allow a greater number of recent sales periods to be shown.

C8 Sales Document Entry – Stock Attributes in Stock Searches

When searching for stock items in Sales Document maintenance functions (Quotations, Sales Orders, Invoices, etc.), the search results now include the settings of any Stock Attributes that have been defined. This makes it easier to find the right product more quickly and more accurately.

In the screenshot below, the highlighted section shows the four attributes defined on this system for Size, Colour, Brand and Rating. Of course, the standard filtering options could be used to further refine this list by right-clicking on the appropriate heading.

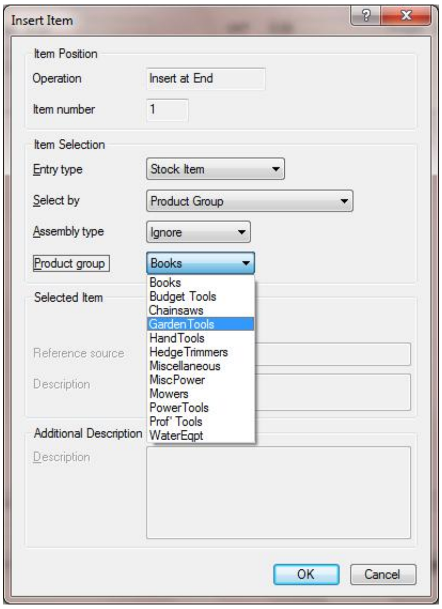

Key Word Search for: GLOVE (all records)

Stock Reference	Description	Unit Price	UOM	Free Stock	Size	Colour	Brand	Rating	Bin Number
EGPLGG11	EGPL Gardening Gloves Ladies, Small	5.78	PAIR	1511	Ladies Small	Green	EGPL	Amateur	C107
EGPLGG12	EGPL Gardening Gloves Ladies, Medium	5.78	PAIR	542	Ladies Medium	Green	EGPL	Amateur	D644
EGPLGG13	EGPL Gardening Gloves Ladies, Large	5.78	PAIR	906	Ladies Large	Green	EGPL	Amateur	D540
EGPLGG21	EGPL Gardening Gloves Mens, Small	5.78	PAIR	637	Mens Small	Green	EGPL	Amateur	D667
EGPLGG22	EGPL Gardening Gloves Mens, Medium	5.78	PAIR	1098	Mens Medium	Green	EGPL	Amateur	D715
EGPLGG23	EGPL Gardening Gloves Mens, Large	5.78	PAIR	814	Mens Large	Green	EGPL	Amateur	D279
EGPLGG24	EGPL Gardening Gloves Mens, XL	5.78	PAIR	819	Mens Extra Large	Green	EGPL	Amateur	D588

(Please note: the highlighting is for the purposes of illustration only; the attributes are not highlighted by the software)

C9 Sales Document Entry – Search by Product Group

A new search type has been added to the list of options when searching for stock items to add to a Sales Document (Quotation, Sales Order, etc.) – Search by Product Group. You simply choose the Product Group and the software offers a list of all of the stock items within that Product Group.



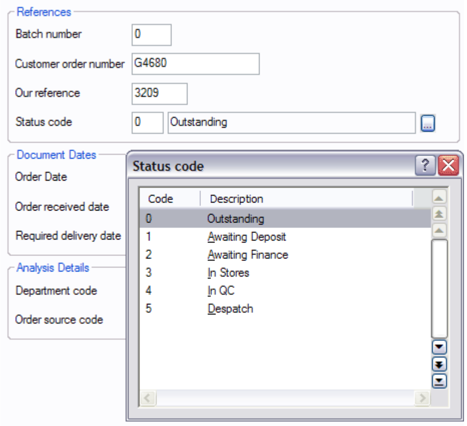
C10 Sales Document Entry – Filter results by Assembly Type

On systems that also include the Bill of Materials module, you can now filter stock searches when adding items to Sales Documents to only include BOM assemblies or to only include Kits.

On systems that also include the Custom Build module, search results can be limited to this type of assembly as well.

C11 Sales Document Status Codes

You can now define a number of Sales Order Status Codes and change the status code associated with a particular sales order as required. Filters within the Sales Order Monitor allow you to restrict the view of Sales Orders to those with particular status codes, helping to improve efficiency by identifying where sales orders are within the fulfilment process.

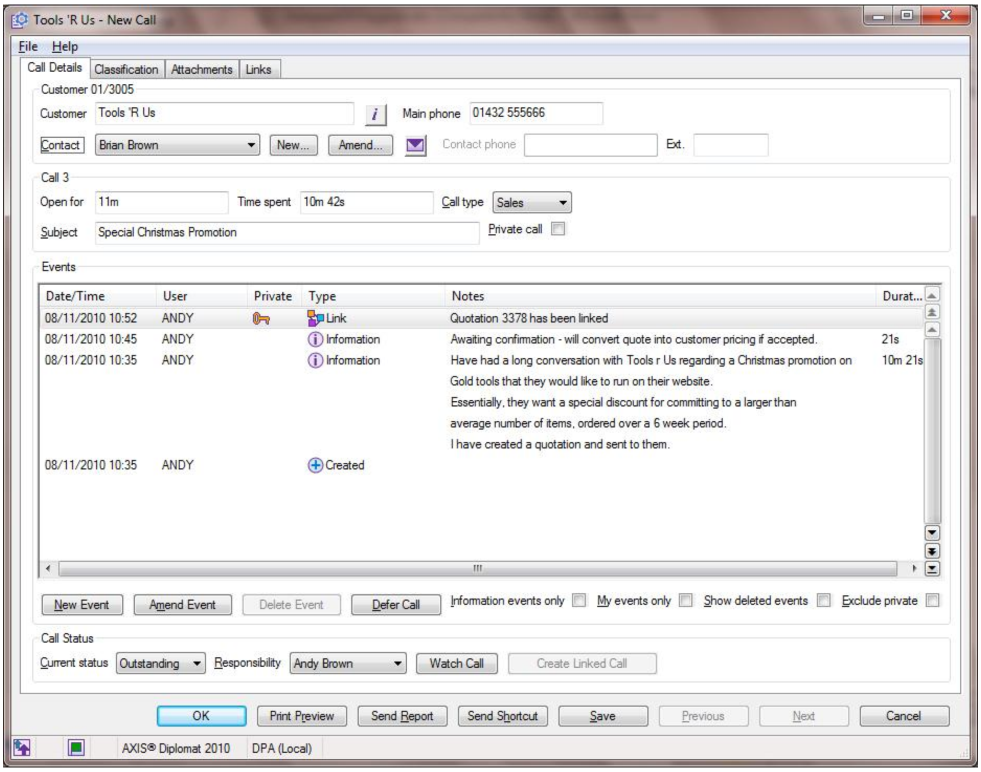


C12 Sales Order & Quotation Links to CRM

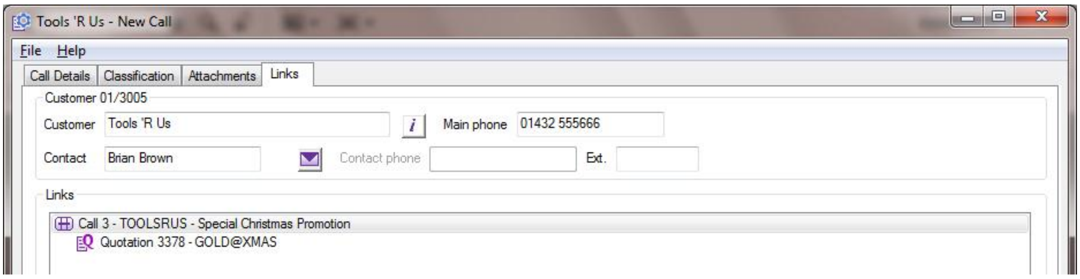
As part of some more substantial developments within the CRM call handling system (see also sections D, E and F) calls can now be linked to Sales Orders and/or Quotations.

This simplifies use of the system when an in-depth sales process involves both a call and a quote being raised on the system as you can now quickly access one from the other.

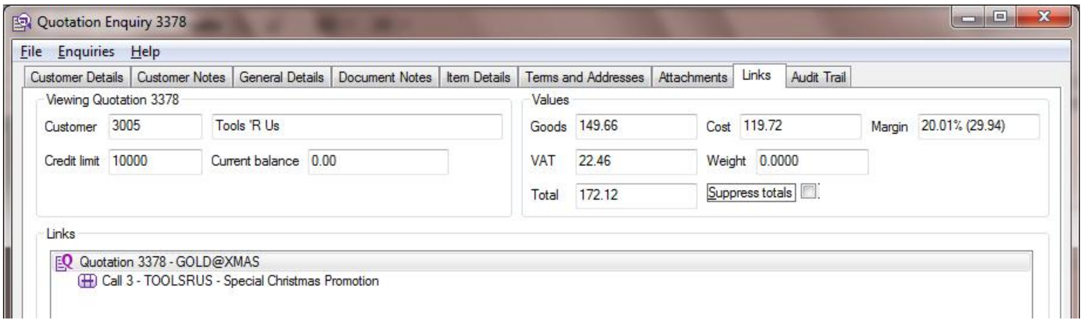
Here, for example, is a Sales-related Call:



Because this is a sales enquiry that has resulted in a quotation being raised, the call can be linked to the quote:



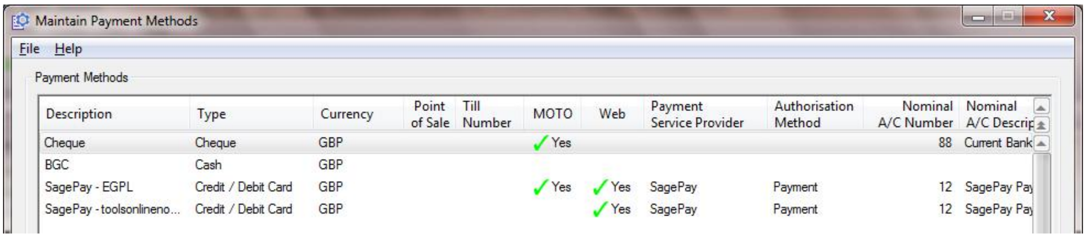
Anyone viewing the quote can also see the call associated with it:



This ability can also be used where calls relate to tasks associated with a sales order – a number of calls can be raised for the various elements of the project and linked together so anyone looking at the Sales Order has access to all of the associated calls that make up the project.

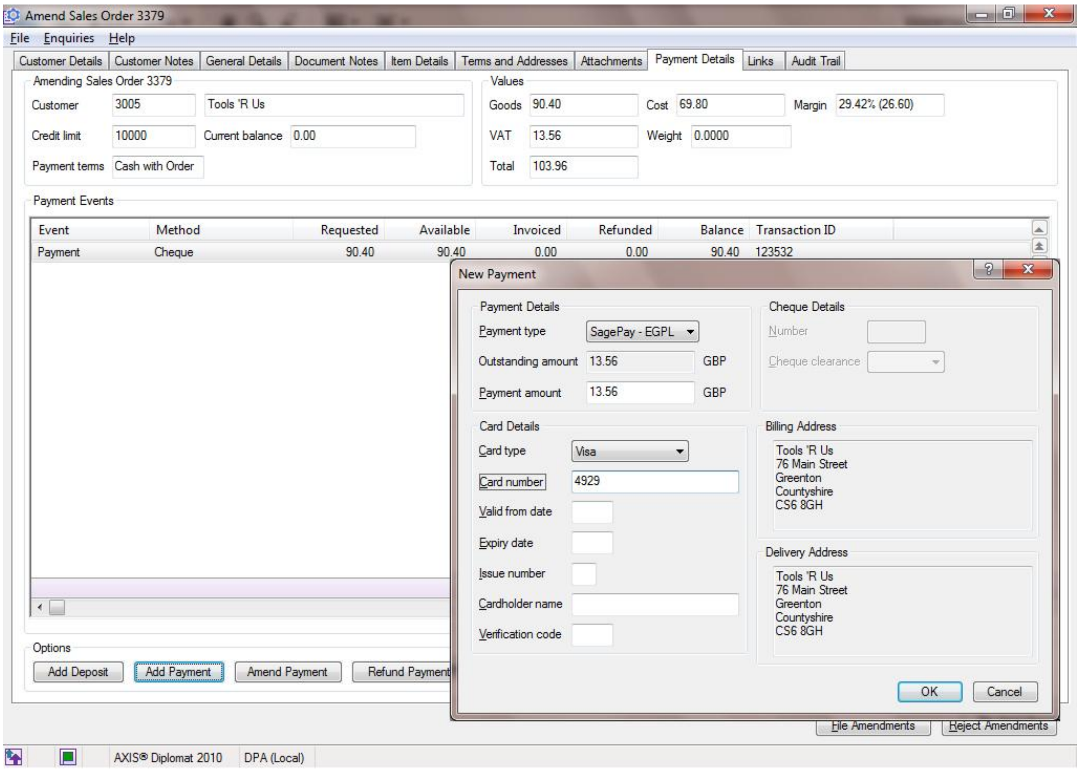
C13 Enhanced Sales Ledger Payments

You are now able to define any number of Payment Methods on the system. A Payment Method can be, for example, "Cheque", "Cash", "BGC", "Postal Order" etc. You can also have more than one Payment Method defined for the same type so, for example, you can now easily handle multiple SagePay accounts.



The Payments tab within Sales Order Maintenance now allows you to add multiple payment records to the order as and when they are received.

For example: a sales order has been received with a payment by cheque but the sender has forgotten the VAT and so there is a shortfall. A telesales operator calls the customer and the balance is taken by credit card over the phone:



C14 Automatic Cash Allocation for Card Payments

When card payments are booked against Sales Orders using the appropriate Payment Methods then payments created later (as part of releasing the Sales Order) are automatically allocated to the correct invoice.

Previously, this needed to be done manually so this represents a massive time-saver, especially for those processing large numbers of telephone card payments.

C15 VOW Mailer Support

With native support for VOW Mailer files, dealers can now import these into axis diplomat 2010 without first needing to convert them to CSV files. Once imported, any customer accounts configured to use that mailer will automatically pick up the mailing pricing.

C16 Sales Order Deposits

Deposits against Sales Orders can now be handled within the system, including the correct handling of VAT.

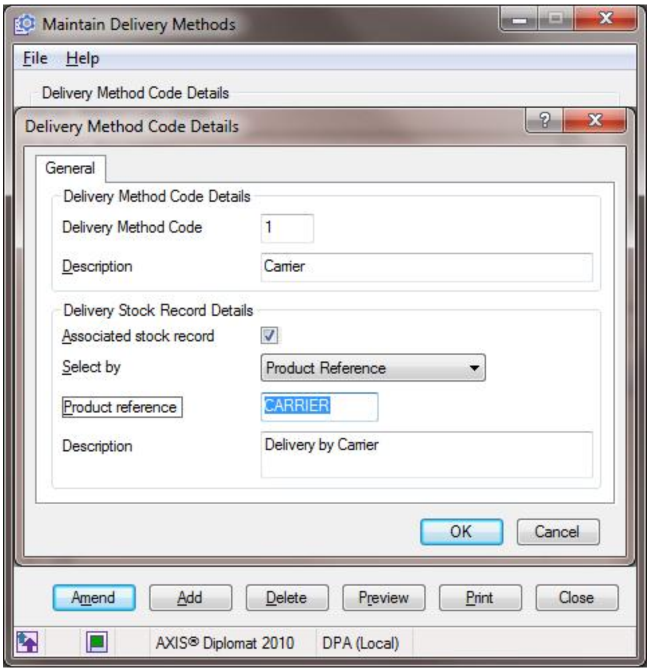
Appropriate Payment Methods are defined as being suitable for taking deposits and are associated with two product codes – one for the deposit and one for the corresponding reduction in outstanding order value (effectively, they cancel each other out when the order is eventually completed).

By appropriate use of the Sales Group codes on these deposit product codes, it is also possible to produce an accurate figure on the balance sheet for the liability associated with received deposits.

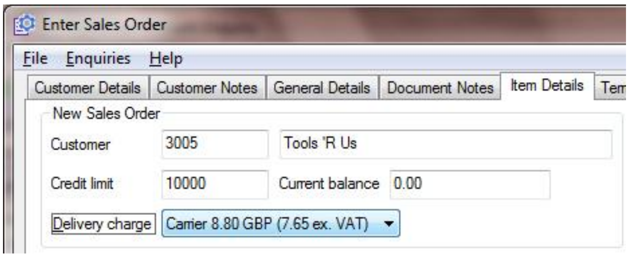
C17 Delivery Methods

Delivery Methods was an optional additional module introduced in axis diplomat 2008 but which is now being made standard on all axis diplomat 2010 system.

You can associate a product code with each Delivery Method, giving the cost of delivery. Selecting the appropriate Delivery Method then automatically adds the appropriate delivery charge to a Sales Order. All of the standard pricing models can be applied to that Delivery Charge, such as Customer/Stock pricing, if you have a specific delivery charge agreement with a particular customer. A parameter can also be set to force the selection of a Delivery Method on each Sales Order.



Ensuring that all orders have a valid Delivery Charge attached to them can help avoid costly mistakes by sales staff, forgetting to apply appropriate charges.

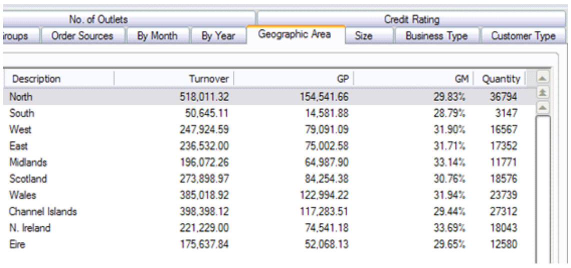


C18 Sales Business Intelligence Analysis by Custom Category

Anyone using Custom Categories to classify their customers in a variety of different ways will be pleased to find that the Sales Business Intelligence Enquiry now shows analysis by each of the Custom Categories that have been defined. This is in addition to the various existing methods of analysis, such as by Customer Group, Product Group, by month and by year.

This development allows you to gain greater understanding of the nature of your business in ways that are appropriate to your needs.

Here, for example, Sales Business Intelligence is being used to produce a breakdown of turnover, profit and margin for various regions of the UK:



Description	Turnover	GP	GM	Quantity
North	518,011.32	154,541.66	29.83%	36794
South	50,645.11	14,581.88	28.79%	3147
West	247,924.59	79,091.09	31.90%	16567
East	236,532.00	75,002.58	31.71%	17352
Midlands	196,072.26	64,987.90	33.14%	11771
Scotland	273,898.97	84,254.38	30.76%	18576
Wales	385,018.92	122,994.22	31.94%	23739
Channel Islands	398,398.12	117,283.51	29.44%	27312
N. Ireland	221,229.00	74,541.18	33.69%	18043
Eire	175,637.84	52,068.13	29.65%	12580

C19 Archived Unposted Transactions

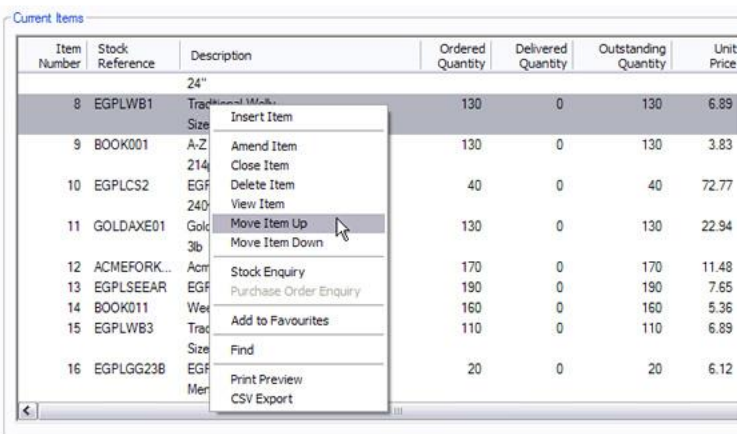
Sales ledger transactions are now archived as soon as they are filed and not when they are posted. This means that Unposted transactions will now automatically appear in the Transaction History and Item History tabs within Customer Enquiry, for example.

This has the benefit of allowing you to see and analyse on forward-dated transactions that typically will not be posted to the ledgers until next month.

C20 Other Sales Ledger Enhancements

Move Up/Move Down in Document Maintenance

Whilst our Programmers were working on the new combined Enquiry/Maintenance software for Sales Orders & Quotations, we took the opportunity to add new buttons (and associated right-click options) to move line items up and down within the documents whilst amending Sales Orders or Quotations. This provides an easy way to re-order the items within a document, without the need to delete and re-add.



Debtors Schedule

The Debtors Schedule has been enhanced to optionally allow reporting by the "invoice to" account rather than the Sales Ledger account that the original transaction was booked to. This change will be of particular interest to companies that use finance companies, for example, where an invoice is booked against the end-user's account but the "invoice to" account is set to the finance company. In this situation, you can now produce a Debtors Schedule identifying the finance companies owing you money.

Support for Clydesdale Bank Telebank Software

The Electronic Payments module, which also operates in conjunction with the AXIS Diplomat Payroll package, now supports interfacing with Clydesdale Bank's Telebank software.

Consolidated Invoicing (Goods on Account)

Those using consolidated invoicing (Goods On Account) will now have the option of generating their consolidated invoices with sub-total lines for each order that makes up the invoice. This can help improve cash flow since the greater the clarity of your invoices, and the more information they contain, the less likely they are to be held up by your customer's accounts departments with queries.

Customer-Specific Cost-Plus Pricing

Customer/Stock price list entries can now be configured so that a particular customer is given a price calculated on a "cost plus" basis instead of as a net price or "discount from list". This provides greater flexibility in a competitive environment to be able to offer keen pricing to particular customers whilst guaranteeing margins when costs increase.

When entering such an item onto a Sales Order, you are also warned if this results in a higher price than the customer has previously paid so that they can be advised.

Extra Sales Order Maintenance Advisory Warnings

Helping to avoid costly mistakes being made is the philosophy behind a number of new advisory warnings that the system can now produce for your operators:

Sales Order maintenance functions can now warn you if entering an item onto an order for which the customer has a net price agreed (via the Customer/Stock price list) and which previously cost you less.

This change is designed to warn you when your margins are being squeezed because you have agreed a net price with the customer but your costs have increased.

The system can now also optionally warn you if attempting to enter a sales order for a customer when there are outstanding quotations present. Not only can this help avoid wasted effort entering an order from scratch when the information already exists on the system but can also alert you to the fact that pricing may already have been agreed with a customer.

You can now also opt to have Urgent Notes displayed at the point of releasing a sales order to invoice as well as at the original entry stage. If you use Customer Notes to record important delivery information, for example, this can help avoid costly mistakes when preparing consignments or loading delivery vans.

Section D – CRM

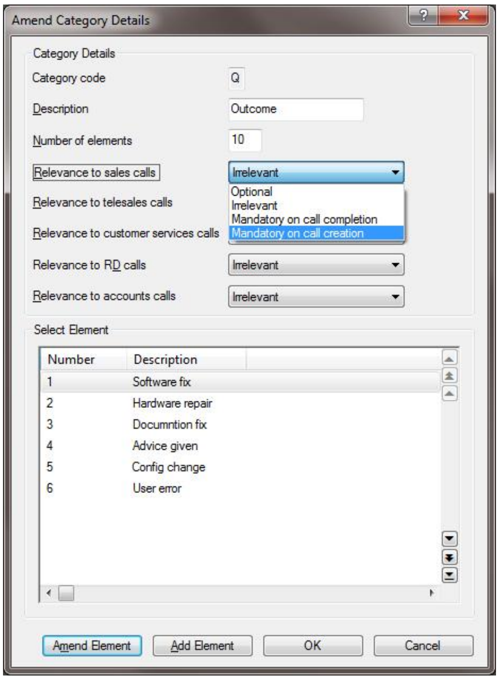
D1 Mandatory Call Classifications

Call categorisation is a useful tool for analysing the nature of business activities – particularly classification of completed calls.

For example, if you use calls for sales activities, this can give you a picture of why you did not get the orders that you missed and why you were successful with the ones that you did.

Similarly, if you are using the calls for fault tracking and customer service reports, this can give you a clear picture of the nature of the issues your Customer Services team deal with, and the eventual outcomes.

Traditionally, it has been down to the operator raising, progressing or closing calls to remember to categorise them appropriately. Now, you can specify certain categories as compulsory, either when a call is opened or when a call is closed. Moreover, you can specify whether particular calls are mandatory, or even relevant, for different types of call.



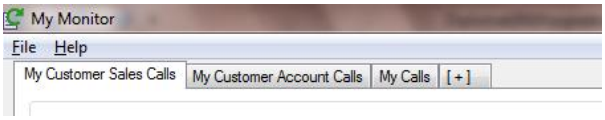
For example, you could create a call classification which is "Outcome" which is mandatory when a Services call is closed but is optional on an Accounts call.

D2 Improved Call Monitor Capability

In conjunction with the developments carried out for the "My Monitors" function, you can now create custom call-related monitor tabs within your own monitors.

This allows you to build your own Call Monitor showing exactly the calls that you want to see, with a number of different tabs, each showing different call selections.

For example, if you are a regional sales manager, you could create a call monitor that shows the Sales calls for your own customers on one tab, their Accounts on another tab and all outstanding calls that are your responsibility on a third tab:



D3 Consolidation of Events tab

The Events tab within Customer Enquiry has now been consolidated with the Email Archive tab on systems with the GFi MailArchive interface and, on systems with the Telephony Interface, also shows telephone events.

This means that there is now one tab within Customer Enquiry that (with the appropriate 3rd party software) can show all call events, emails to/from that customer and all telephone calls to/from that customer.

A Smart Filter at the bottom of the tab allows filtering of the calls shown.

D4 Email Marketing Enhancements

An increasing number of customers are seeing the benefits of regular email marketing campaigns to both their existing and prospective customers. An inevitable part of email marketing is that some emails are returned as undeliverable and some recipients will send back unsubscribe requests.

Several new developments help manage these situations a little more efficiently:

Firstly, you can now define a default Unsubscribe status against a customer account - any new contacts will then pick up that status. This is designed to cover the scenario in which a customer asks that you do not send emails to any of their staff - in the past, you would have to remember (perhaps with the aid of an Urgent Customer Note) to tick the box "Declines eMailshots" when creating a new contact. Now, by setting the default, you do not have to worry about future contacts that may be added to that account. Simply click the Defaults button on the Contacts tab within Customer Account Maintenance.

The second new development is a Data Import function to allow you to import a CSV file containing a list of unsubscribed or undeliverable email addresses. The file can be of any format as long as the first column contains the email addresses.

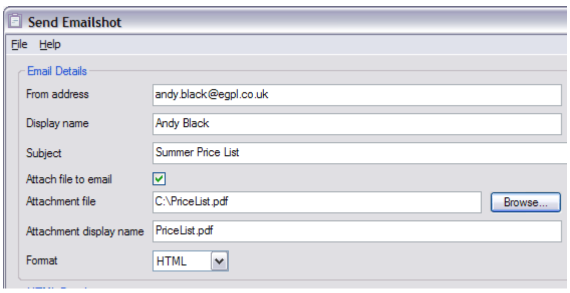
For customers using the Trading Identities module, this module will also allow the file to be imported relative to a specific Trading Identity; matching email addresses for customers belonging to other trading identities will be ignored.

In a further development for those involved in email marketing and using the Campaign Management module, the software has also been enhanced to be able to resume an emailshot from the point it left off.

Interruptions to emailshots can legitimately occur if, for example, an overnight backup process starts during the email transmission, as well as in cases of email server or internet connection failure and can be more likely to affect sending emailshots because of the length of time a send can take (particularly if sending to tens or hundreds of thousands of recipients).

Finally, the Emailshot function (and the Emailshot by Campaign function for those customers that also use the Campaign Management module) has now been enhanced to also allow the inclusion of an attachment file with each email sent.

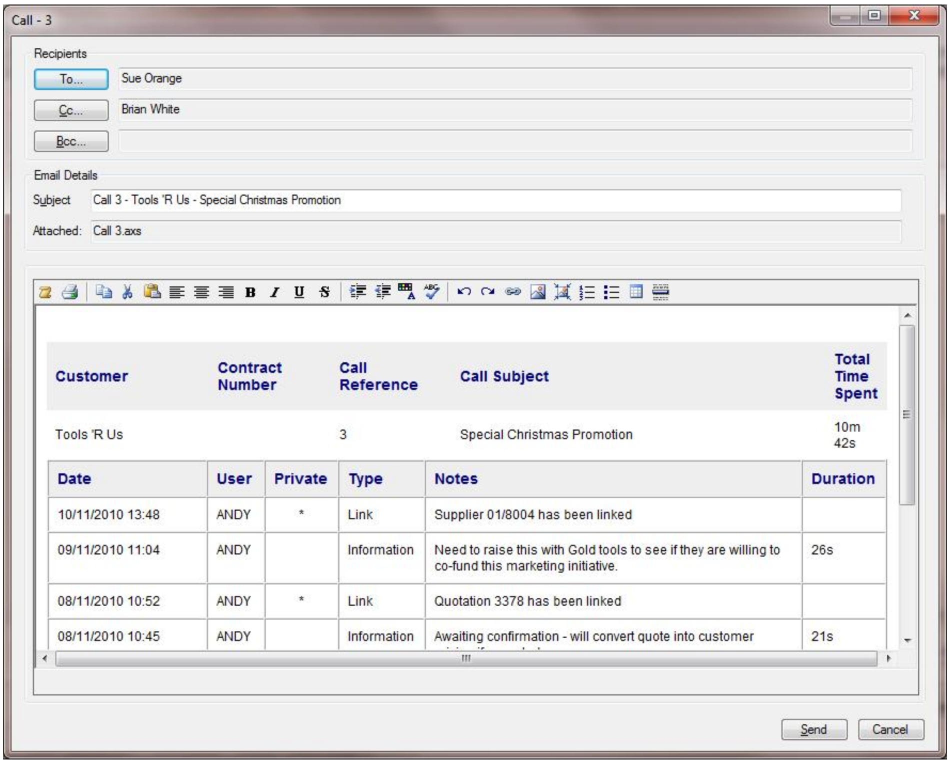
This is ideal for those users that wish to send an information sheet, price list or flyer as a PDF, for example, instead of needing to include the information within the body of the email.



D5 Call Details in Send Shortcut Email

When using the "Send Shortcut" option to email a colleague with a link to a call, you will now find that the email body itself contains the details of the call, including the event history.

This facility is particularly useful to those receiving these emails when they do not have access to their axis diplomat system. For example, those who receive emails on their smartphone can now view the details of the call whilst they are out of the office.



Section E – Telephony

E1 CRM Telephony Events

When you make an outbound call from the call buttons on a Call Enquiry, an event is now created on the call, showing that the call has been made. This helps build a detailed record on the call of all activity, not just where operators have typed in notes on an event.

E2 Voice Recording Library (VRL) Interface

The Voice Recording Library is an optional add-on for the Avaya IP Office phone system. When used in conjunction with this add-on to the **axis diplomat telephony interface** module it provides access to call recordings via the Events tab in Customer or Supplier Enquiry.

Subject to the operator having appropriate permissions, they are able to simply double-click on a phone call entry in the Events list and click the Play button.

Access to call recordings not only provides a useful training tool but can also aid dispute resolution since managers can actually hear for themselves what was said.

E3 Other Telephony Enhancements

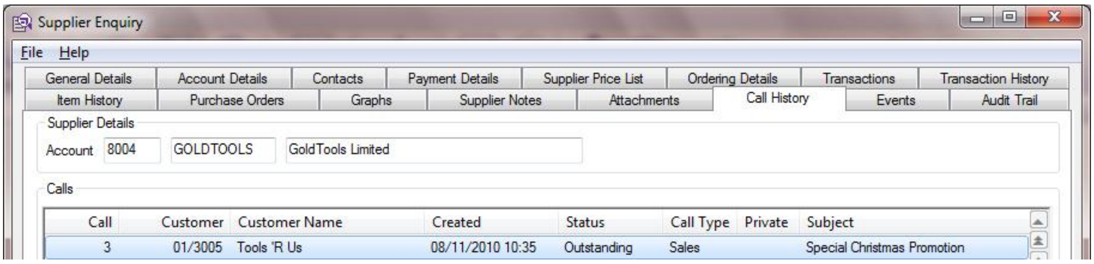
On contacts that have a mobile phone number recorded against them, in addition to being able to call their DDI number by right-clicking on the contact, you can also right-click and select Call Mobile.

Section F – Purchase Ledger

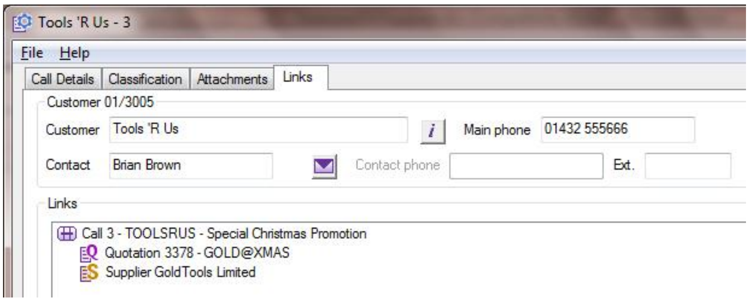
F1 Supplier Relationship Management

Calls raised against Customers can now be linked to Suppliers.

The Supplier Enquiry now includes a Call History tab, just like the Customer Enquiry, and shows all customer calls linked to that supplier.

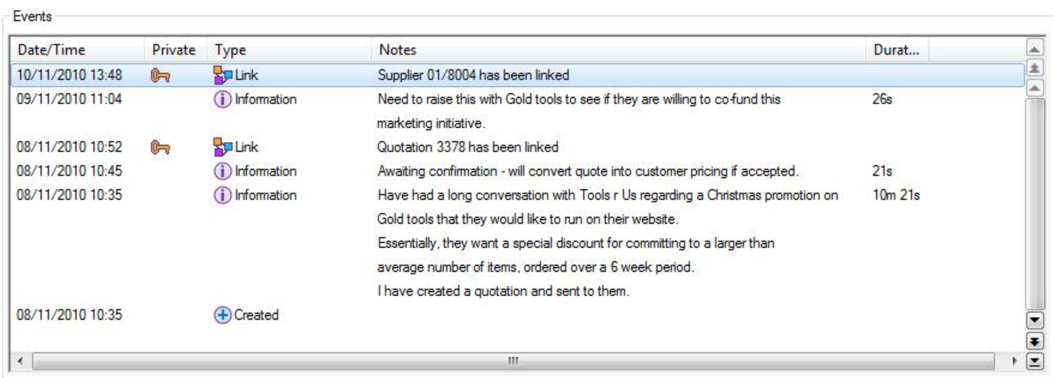


When a call is linked to a supplier, you have the option of specifying the contact at the supplier and a supplier incident reference.



The screenshot above shows a Customer Call that has also been linked to a Quotation as well as a Supplier – thus this call can be accessed from the "Links" tab when looking at either the Customer, the Quotation or the Supplier.

This means that if you are referring a customer services issue raised by a customer back to your supplier, you can link the call to that supplier and record their reference against it as well. An event will be shown on the customer call showing that a supplier has been linked:



This facility will also be of interest to those customers involved in project-orientated work where a customer sales call exists for a tender or proposal and that entails in turn getting quotes from suppliers.

Also, in line with the Customer Enquiry, Supplier Enquiry features an Events tab. This shows a summary of events on calls linked to the supplier. In addition, if you have the GFi MailArchiver interface, it lists all emails to/from that supplier and, if you have the Telephony Interface, it also lists all phone calls to/from that supplier.

F2 Purchase Invoice Register

With axis diplomat 2010, the system now automatically keeps track of all supplier invoices entered onto the system (regardless of whether or not they have been posted) and will not allow two invoices with the same number from the same supplier to be entered.

This helps prevent potentially costly human error when the same invoice is booked on twice, or the supplier sends you the same invoice twice.

F3 Archived Unposted Transactions

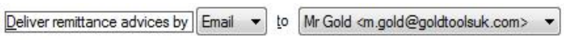
As with sales, Purchase Ledger transactions are now archived as soon as they are filed and not when they are posted. This means that Unposted transactions will now automatically appear in the Transaction History and Item History tabs within Supplier Enquiry, for example.

This has the benefit of allowing you to see and analyse on forward-dated transactions that typically will not be posted to the ledgers until next month. This is particularly relevant to the Purchase Ledger, where the accounting period is often kept open for a week or more into the next month to capture all of the supplier invoices.

F4 Document Designer Remittance Advice & Document Delivery

You can now create your own Remittance Advice document layout using the Document Designer.

More importantly, you can use the Document Delivery technology introduced with AXIS Diplomat 2008 to allow bulk sending of your Remittance Advices via email. Not only does this reduce the printing and postage costs but, for those with large numbers of suppliers in particular, it can represent a significant time-saving in this regular activity.



F5 Other Purchase Ledger Enhancements

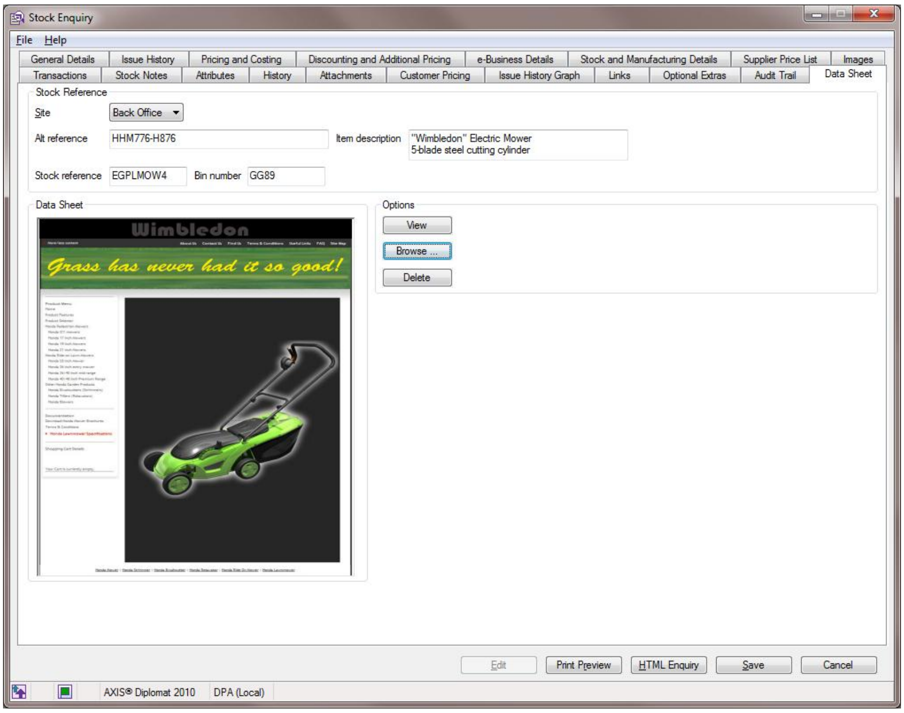
Customers using Purchase Requirements will find additional tabs within the maintenance function which show the history and sales history of the stock item in question. This provides easy access to the information which would otherwise necessitate drilling down into a Stock Enquiry and allows the purchaser to make a more informed decision about whether additional stock should be purchased (by looking at, for example, seasonal fluctuations).

Section G - Stock Ledger, Bill of Materials & MRP

G1 Stock Data Sheets

You are now able to attach a single PDF document to stock records as a Data Sheet, separate from other stock attachments.

When generating quotations from the system using Document Designer, these data sheets are automatically appended to the quotation.



If you have a number of stock items that all require the same data sheet, you can instead attach the data sheet to the product group, simplifying maintenance and avoiding repetition.

Data sheets are ideal for general product information, COSSH data, installation instructions – in fact, any information that you may wish to automatically include in your quotations.

G2 Automatic Price Feeds

The ability to collect Price Feed files from distributors, especially those in the Electronic Office Supplies (EOS) arena, has been available for some time and has proven invaluable to many of our users.

In previous versions, this worked via a scheduled task that ran once a day, typically in the middle of the night.

With the release of axis diplomat 2010, this facility has been enhanced to constantly monitor the distributor's websites and to download the files as soon as they become available. Typically, this will mean that your system is updated within a few minutes of a distributor releasing a new price file.

With a number of distributor producing several updates a day, and with those files including stock on hand information, this makes sure that the supplier stock availability figures within axis diplomat are as up-to-date as possible.

By ensuring that you always have the latest pricing and stock availability figures in the system, you can make more accurate buying decisions whilst maintaining margins through more accurate costing data.

G3 Spicers Price Feed Support

Spicers have recently joined the ranks of EOS distributors in producing daily price feed files which also include stock availability information.

The automatic price feed mechanism will collect these price feed files as and when they are made available by Spicers.

This helps to ensure that Spicers' dealers always have the latest stock on hand and pricing information.

G4 Unit Weight on Stock

The facility to record the weight of an item against its stock record has been an option for quite some time but has now been made standard.

As well as being available for general information, holding the weight of a stock item allows the system to approximate the weight of a consignment when used in conjunction with any of the delivery-related modules.

Customers with **axis vmerchant**-driven web sites are also able to scale their delivery charges calculated at the checkout by the weight of the items in the shopping basket. For example, you could charge delivery on the web site at £10.99 for the first 10Kg and £0.50 per Kg thereafter.

G5 Custom Build Assemblies

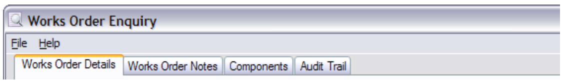
A completely new module is due for release in December 2010 called Custom Build Assemblies. This represents a major addition to the Bill of Materials module and allows you to configure complex kits based on optional extras and to configure sales orders to match precise customer requirements.

For more information, watch for the newsletter email in December and visit www.axisfirst.co.uk/software or speak to your Account Manager.

G6 Works Order Enquiry Enhancements

For customers with the Compact MRP module, the Works Order Enquiry has been modified to include a Components tab, showing all of the components for that Works Order, the quantity required, the quantity issued so far and the quantity remaining to be issued.

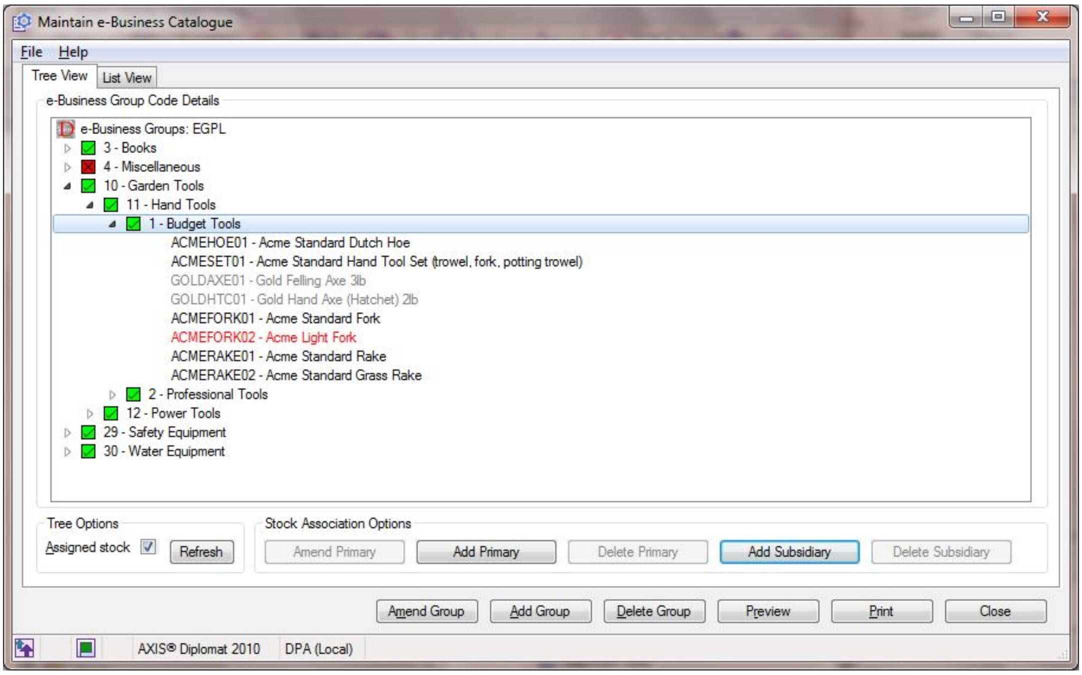
The Works Order Enquiry also now shows an Audit Trail tab, listing significant events that have occurred with that Works Order, such as issuing components.



Section H – eBusiness

H1 eBusiness Catalogue Maintenance and eBusiness Groups by Site

The previous "Maintain eBusiness Groups" function has been replaced with a new "Maintain eBusiness Catalogue" function. In addition to allowing you to change the structure of your eBusiness groups, this function also allows you to manage which stock items sit within each eBusiness group, and to modify the eBusiness settings of those stock items, all from one place.



As can be seen from the screenshot above, the stock items that have the selected group as its primary eBusiness Group are shown in black (unless they are unpublished, in which case they are shown in red). Items that are in this group by virtue of the fact that they have this as an additional eBusiness group (now referred to as a Subsidiary) are shown in grey (or orange if they are unpublished).

The most significant development here, in addition to the ease of maintaining everything to do with your online catalogue in one place, is that this information can now be site specific.

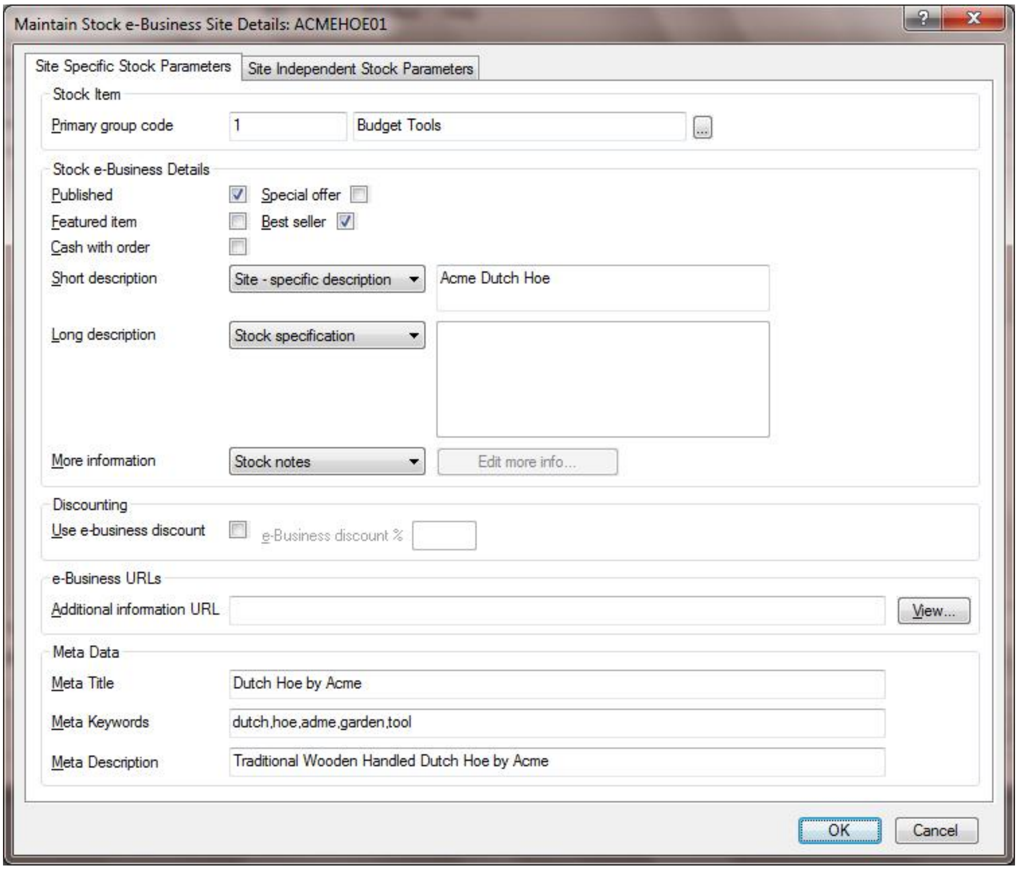
Many customers have a number of web sites driven by one **axis diplomat** system. This is now much easier to manage since each site can have its own eBusiness catalogue structure. In other words, each site can have different eBusiness groups and the same items can appear in different places on different sites. Moreover, an item that is flagged as a "Best Seller" on one site, for example, need not be a best seller on a different site, but it might be a "Special Offer" on that other site.

When you create a new web site, you can specify whether it uses the eBusiness catalogue of an existing site or if it has its own. This means that there is no additional work involved if you do not wish to have different structures across different sites.

H2 Stock Descriptions by Site

In addition to the ability to have entirely different eBusiness catalogue structures across different sites, your products can now have completely different descriptions as well.

For each product, for each site, you can specify whether the item uses the standard stock description, specification and stock notes (for the short description, long description and more information respectively) or has its own descriptions specifically for this one web site.



In addition to maintaining these site-specific descriptions on a case-by-case basis via Maintain eBusiness Catalogue, they can also be imported en masse from a CSV file.

Furthermore, for customers with the Foreign Language Stock Descriptions module, this information can also be language-specific. For example, you could have different French descriptions of the same product on two different web sites.

H3 eBusiness Voucher Enhancements

The optional module eBusiness Vouchers allows you to generate voucher codes that customers can enter at the checkout to receive a discount. This discount can either be a percentage discount or a fixed financial amount – allowing either a 5% discount or a £5 discount, for example.

This module has been enhanced with axis diplomat 2010 to also allow a Free Gift to be defined – a stock item is associated with the voucher and, when the voucher is redeemed at the checkout, that stock item is added free of charge to the shopping basket.

Vouchers have always been able to be restricted to a time period to allow, for example, "this weekend only" type promotions.

Vouchers can now also be restricted to limited use so, for example, each customer can only redeem the same voucher once.

H4 Order Satisfaction Emails

It is common practice amongst larger eRetailers to send an email to customers several days after their order has been completed, inviting them to complete an online customer satisfaction survey. Not only does this give valuable feedback but research shows that it is also positively received by the vast majority of customers as a sign of good customer care.

A new facility within **axis diplomat 2010** allows an overnight scheduled task to automatically generate these emails for orders completed a set number of days before.

For customers with the optional **axis vmerchant** Surveys module, this facility is provided free of charge. For customers using third party survey sites (such as surveymonkey), this is available as a chargeable optional extra.

H5 Other eBusiness Enhancements

Stock items can now be flagged as Best Sellers and/or Featured Items, in addition to Special Offers. How these are treated on the web site is down to the web designer when the site is built – they can, for example, incorporate a "Best Sellers" panel on the home page, a "Feature Items" list on the right-hand side of every page or simply highlight such items in normal search results and product listings with a unique graphic.

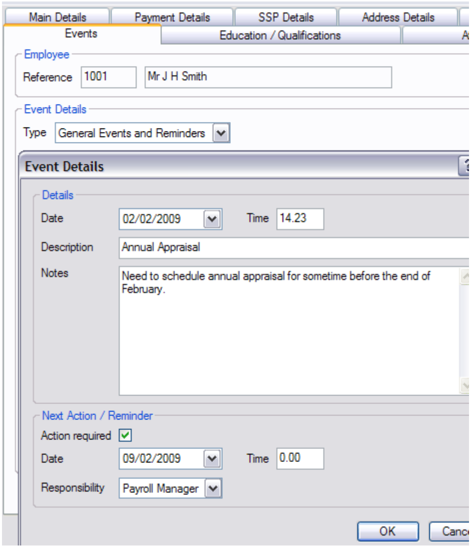
Your web site can also be configured to always put Best Sellers or Featured Items to the top of any product listings on the web site (and again, your designer can choose to show these differently).

Section I - Payroll

I1 Employee Events

A new tab within Employee details allows you to record events of various types against each employee. Events may include appraisals, training records, name changes and other general events. Events may also have a next action date associated with them.

A new Events Monitor allows payroll staff to be reminded on actions due against employee events, allowing the mechanism to be used for reminders of when staff are next due, for example, for review, working time directive assessment or refresher training.

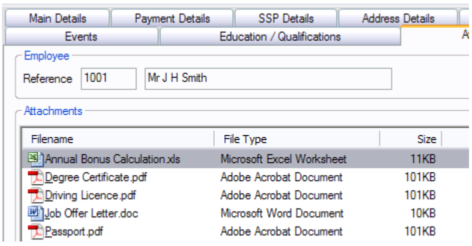


I2 Attachments

Those familiar with the AXIS Diplomat Accounts software will be aware of the Attachments tab present on various records, such as Customers, Suppliers and Stock.

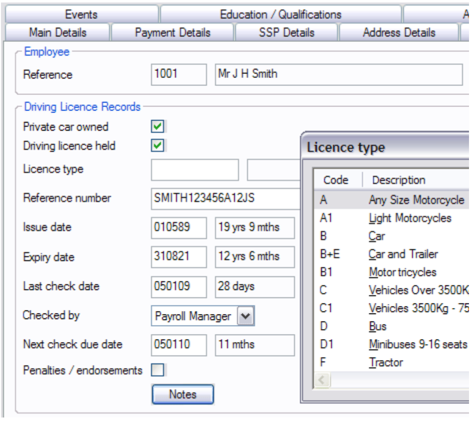
Attachments on Employee records work in the same way - you can drag and drop external files onto the Employee record for future reference.

This is an ideal way of keeping track of scanned documents (perhaps copies of driving licenses or passports), letters to and from employees, and other correspondence relating to that member of staff.



I3 Driving Licence Details

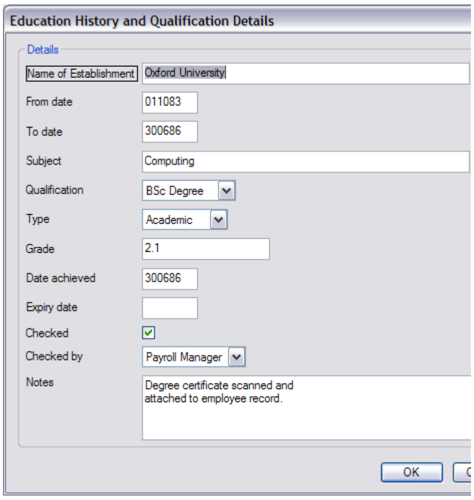
A new tab has been added to the Employee record allowing full details of each employees driving licence to be recorded. A supervisor function also allows you to define a list of driving licence types (PSV, HGV, etc.) so that you can see at a glance which type of licence is held by an employee.



I4 Education / Qualifications

A further tab on the Employee record allows you to record all of the relevant qualifications held by each employee.

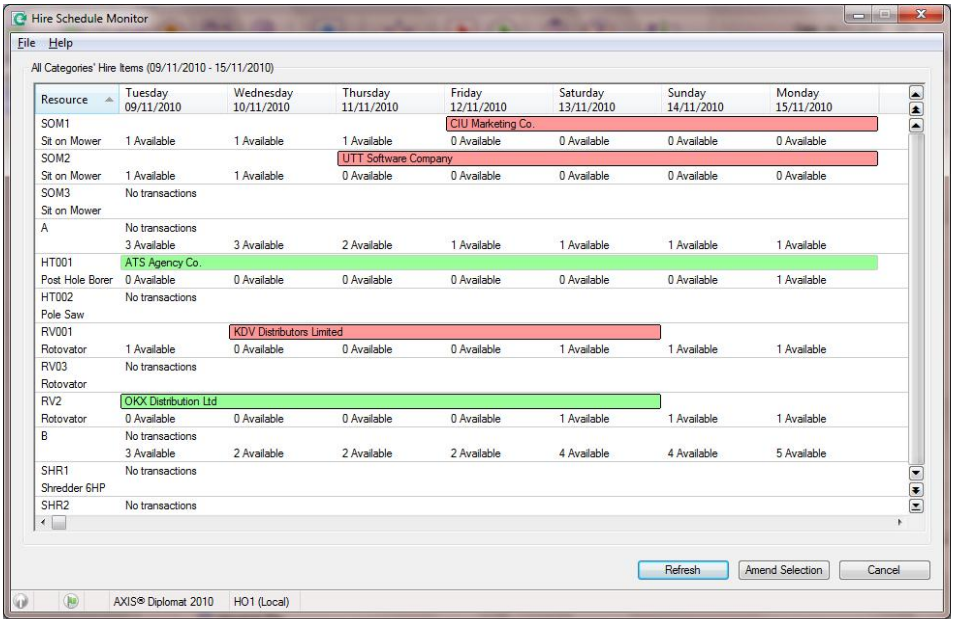
A list of all of the commonly held educational qualifications (GCSE, A Level, B.Sc, etc.) is created as standard, but further qualifications, such as professional qualifications specific to your industry, can be added via a Supervisor function.



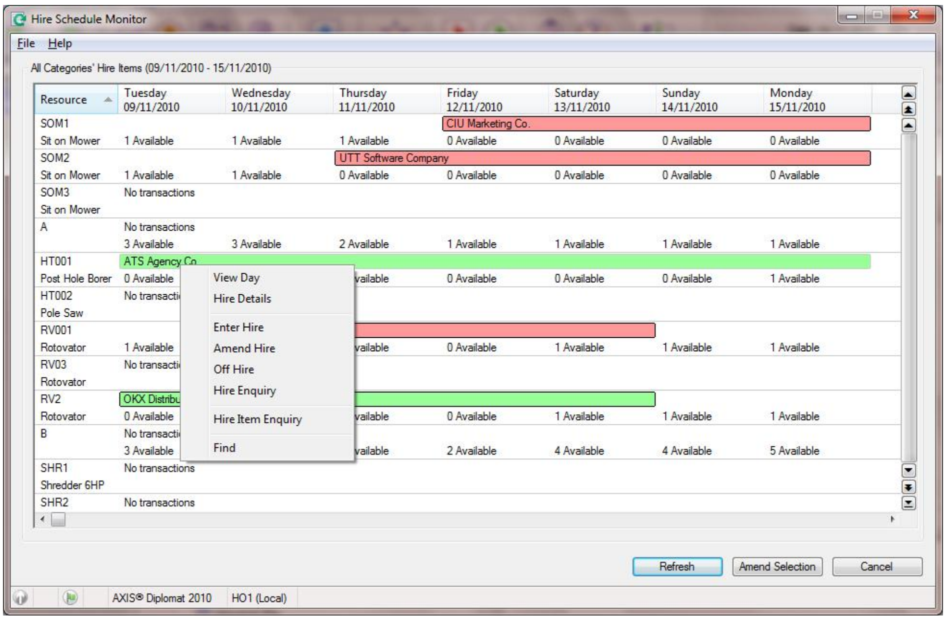
Section J - Hire

J1 Hire Schedule Monitor

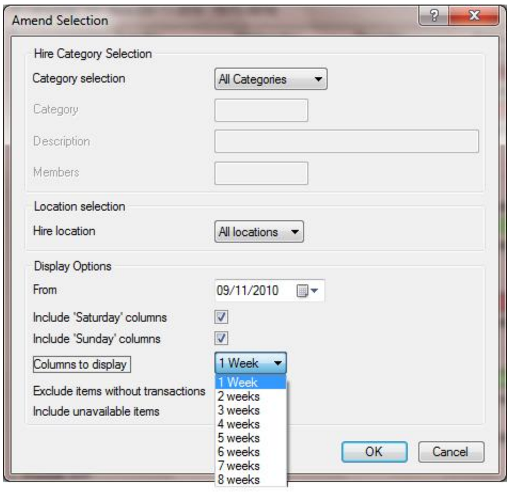
For those entering forward-dated hires using the Hire module, the Hire Schedule Monitor provides a graphical calendar view of the availability of hire items. It also provides a simple way of accessing hires, to on-hire or off-hire items, enter new hires and enquire on hire items.



In the example above, for instance, it can be seen at a glance how the availability of Sit-on Mowers fluctuates between 3 and 1 during the week. By right-clicking on any hire, a range of operations can be carried out:



The selection parameters for the function allows filtering to specific categories of hire items or, as in the examples above, all categories. The schedule can also be shown for various periods of time, from 1 week to 8 weeks.



Section K – Kernel (Core) Enhancements

K1 Links to Windows User Accounts

When logging in to axis diplomat, the software checks the Windows User Account of the current user to see if the account matches.

At previous versions, this would simply check the first 8 characters of the Windows account against the axis diplomat user accounts. This could lead to confusion where multiple Windows user accounts exist with the same first 8 characters.

When creating a new axis diplomat user account, the system now records an explicit link to the correct Windows user account, eliminating this potential confusion.

Furthermore, additional information such as that user's email address, are now synchronised with the Windows user account. This means that if, for example, a user's email address is changed within the Windows Active Directory then axis diplomat's email address for that user will be updated as well.

K2 Disable User Account

It is now possible to disable axis diplomat user accounts without deleting them.

This means that when a member of staff leaves, for example, their account can be disable to prevent future log-ins but calls, quotes, etc. remain associated with that user account for historical record and analysis.

This would enable, for example, a sales manager to use the Sales Desk Monitor to look at the outstanding activity for a member of the sales team that has just left, allowing them to delegate or re-allocate those on-going projects.

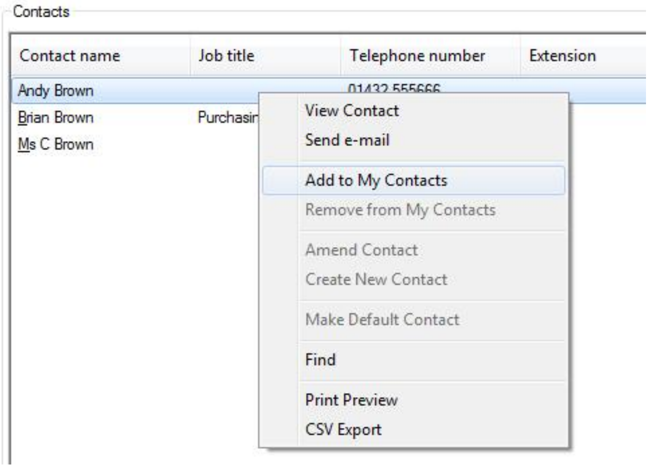
K3 Contact Synchronisation with Outlook / Exchange

With **axis diplomat 2010**, you have the ability to synchronise customer and supplier contacts with your Outlook/Exchange Server Contacts.

The system does not import or export those contacts but establishes a link so that, in the future, any changes made are synchronised.

Each operator has a “My Contacts” list which identifies which customer and supplier contacts are to be synchronised with their Outlook/Exchange Server contacts.

Adding a new contact to this list is simplicity itself – right-click on the particular contact in either Customer Enquiry or Supplier Enquiry and choose Add to My Contacts:



That contact will then appear, virtually immediately, within your Contacts list in Outlook. If you are using a SmartPhone that receives push email with contact synchronisation, that contact will also appear on your phone within seconds.

The real strength of this facility, though, is that if you change the contact’s details (amend the email address or their mobile number for example) then the changes are synchronised – it does not matter whether you update the axis diplomat details or the details in Outlook or on your phone; the changes get synchronised back.

Not only is this a real productivity tool, saving people having to copy-and-paste contact details around, it offers much better opportunities for keeping everyone’s contact information up-to-date. This means, for example, a better delivery rate on marketing emails that you send and less difficulty for staff to keep in touch with customers and suppliers when on the road.

Note: this facility requires a Microsoft Exchange Server 2007 (or later) with Service Pack 1 (SP1). This facility uses an interface (API) into Exchange Server that is only available from this version. This facility is believed to operate with Hosted Exchange but at time of writing has not been tested – please contact axis first sales for the latest information.

K4 Folder Changes

With axis diplomat 2010, various subsets of its files can be located on different shares. By default, everything will reside within a single \AXISDiplomat$ folder but the following subsets can now be located elsewhere:

axisdocument$ can hold all user reports
axisfilestore$ can hold non-transactional files such as attachments, EDI files, etc.
axisrollforwardlog$** and **axisrollbacklog$ can hold data protection log files
axisbackups$ can hold all axis diplomat backups (AXBs)

These changes mean that you are better able to leverage your existing investment in hardware by, for example, storing all of your backup files in a separate (and possibly lower cost) storage device, such as an external NAS (network attached storage) box.

It also means that, in the future when you upgrade your network, it is possible to design more resilient network architectures by, for example, holding the roll-forward logs off-site.

K5 Real-Time SQL Updates

One of the most significant fundamental changes in architecture with axis diplomat 2010 is its new ability to synchronise data with a Microsoft SQL Server in real-time.

Many customers have taken advantage of the overnight export to SQL available in previous versions to analyse their data outside of the system – typically using Microsoft Excel. This analysis could potentially now be done in real-time.

Having the SQL data available in real-time also means that our own developers have been able to use that data instead of the native axis diplomat data where doing so would provide a performance improvement.

A current example of that is the latest developments with monitor functions, which will query the SQL data rather than the axis diplomat data. This provides better performance for two reasons; firstly, SQL is ideally suited to returning filtered sets of data and secondly, on busy systems the SQL Server is often running on a different server (or processor) and so any intensive operations by the SQL Server do not affect those other users putting transactions through on the live axis diplomat system.

Note: in line with the recommendations for axis diplomat 2008, axis diplomat 2010 only supports Microsoft SQL Server Express with axis diplomat 2010 express; please see www.axisfirst.co.uk/software/diplomat2010 for more information on support environments.

Section L : Upgrade Options and Pricing

L1 Pricing

	Upgrade from	
Product	**axis diplomat2006**	**axis diplomat2008**
axis diplomat 2010 Express Client	£495	£295
axis diplomat 2010 Small Business Edition Client	£995	£495

2. Client Transition Pricing

	Transition From	
Transition To	**axis diplomat 2010 Express**	**axis diplomat 2010 SBE**
axis diplomat 2010 Small Business Edition Client	£295	

3. Software Assurance

Product	**Per Client, Per Month**
axis diplomat 2010 Express	£12.50
axis diplomat 2010 Small Business Edition	£20.00

Note: Software Assurance must be taken out at the time of upgrading to **axis diplomat 2010** or at the time a new **axis diplomat 2010** system is supplied.

4. Additional Services

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

L2 Software Assurance

A number of the new developments within **axis diplomat 2010** 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 2010** 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 2010**, please go to our web site at http://www.axisfirst.co.uk/software/diplomat2010/upgrades and click on the link to request your upgrade.

Section M : Supported Environments

M1. Server

Microsoft Windows Server 2008 R2
Microsoft Windows Server 2008
Microsoft Windows Essential Business Server 2008
Microsoft Windows Small Business Server 2008
Microsoft Windows Server 2003 R2
Microsoft Windows Server 2003
Microsoft Windows Small Business Server 2003
Citrix Access Essentials 2 and above
Citrix XenApp 5
Citrix Presentation Server 4.5

M2. Workstations

Microsoft Windows 7 Professional
Microsoft Windows 7 Ultimate
Microsoft Windows Vista Business
Microsoft Windows Vista Ultimate
Microsoft Windows XP Professional

M3. Database Servers

Microsoft SQL Server 2008
Microsoft SQL Server 2005

M4. Contact Databases

Microsoft Exchange 2007 SP1
Microsoft Exchange 2010

M5. SMTP (email) Servers

Microsoft Exchange 2003 (or later)

For the latest information on axis diplomat 2010 Supported Environments, please consult Application Support Note 24275886, which can be found at the following address:

www.axisfirst.co.uk/documentation/Article.asp?P=24&C=4538&B=195&A=80886

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

E & OE.

Document Reference: Diplomat/2010/Upgrade/1.1