www.axisfirst.co.uk/software



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.

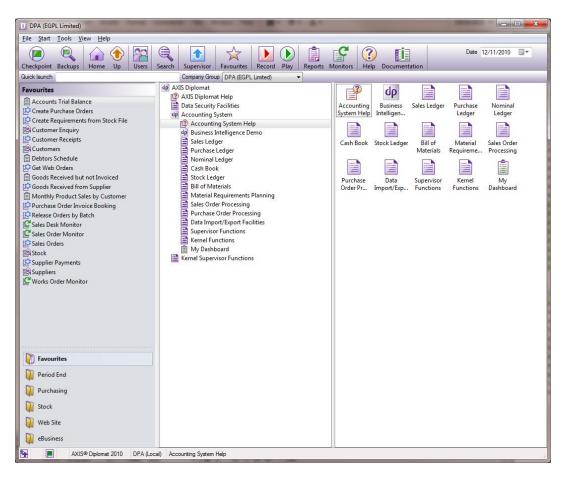
This document is by no means exhaustive and further enhancements will continue to be added after the initial release in the form of on-going level updates; please check on the **axis first** web site for the latest product information.

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

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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 prereleased 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:

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

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SALE	GOLDFORK03		GoldTools Chrome Plated	99	18.05	1786.95	312.72	2099.67
			Light Fork, Steel Shaft					-
SALE	EGPLTRIM2		EGPL Cordeas Hedge Trimmer	35	30.77	1107.72	193.85	1301.57
			12V, 38cm Blade					
SALE	EGPLSEEAR		EGPL Ear Defenders	135	7.23	976.05	0.00	976.05
SALE	EGPL0G24		EGPL Gardening Gloves	9	5.78	52.02	0.00	52.02
			Mens, XI,					
SALE	EGPLGG248		EGPL Gardening Gloves	180	5.78	1040.40	0.00	1040.40
			Mens, XL					
SALE	EGPLGG23		EGPL Gardening Gloves	117	5.78	676.26	0.00	676.26
			Mens, Large					
SALE	EGPLG87		Deluxe Gardening Boots	36	14.45	520.56	0.00	520.56
			Size 11					
SALE	EGPLG87		Deluxe Gardening Boots	90	14.46	1301.40	0.00	1301.40
			Size 11					
SALE	EGPLG83		Deluxe Gardening Boots	108	14.45	1561.68	0.00	1561.68
			Size 7					
SALE	ACMERAKE01		Acme Standard Rake	54	13.01	702.54	122.94	825.48
SALE	EGPLW88		Traditional Welly	43	6.50	312.00	0.00	312.00
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This is the same function on a typical 19" monitor running 1280x1024:

Total Invoice 2098 67 9706 1301 57 9706 976 05 9706 52 02 9706 1040 40 9705 676 25 9706	3182	Customer Order R6854 R6854	Audt Trail Product Gre
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1301.40 9706	3182	R5854	
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728.00 9606	3082	Y7549	
254.40 9606		Y7649	
572.40 9606		Y7549	
520.80 9606		Y7649	
231.04 9505		Y7649	
785.08 9606	3082	Y7649	
832.32 9606	3082	Y7649	
878.56 9606	3082	Y7649	
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This is the same function running on a widescreen monitor at 1920x1080:

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Туре	Ref.	Alt Ref.	Description	Quantity	Unit Price	Net	VAT	Total	Invoice	Sales Order	Customer Order	Product Group (archive)	Description	Product Group (current)	Description	
SALE	GOLDFORK03		GoldTools Oxome Plated Light Fork, Steel Shaft	99	18.05	1786.95	312.72	2099.67	9706	3182	R6854	2	Prof' Tools	2	Prof Toole	
SALE	EGPLTRIM2		EGPL Corders Hedge Trimmer	36	30.77	1107.72	193.85	1301.57	0.7350	3182	R6854	21	Hedge Transers	20	HedgeTrimmers	
SALE	EGPLININZ		12V, 38cm Biede	-35	30.77	1107.72	193.60	1001.57	3/06	3162	P/6604	20	Heage criminers	20	Peoge Inniners	
SALE	EGPLSEEAR		EGPL Ear Defenders	135	7.23	976.05	0.00	975.05	9706	3182	R6854	4	Macelaneous	4	Macelaneous	
SALE	EGPLGG24		EGPL Gardening Gloves	9	5.78	52.02	0.00	52.02		3182	R6854		Macellaneous		Macelaneous	
			Mens, XI,													
SALE	EGPLGG24B		EGPL Gardening Gloves	180	5.78	1040.40	0.00	1040.40	9706	3182	R6854	4	Macellaneous	4	Macelaneous	
			Mens, XL													
SALE	EGPLOG23		EGPL Gardening Gloves	117	5.78	676.26	0.00	\$76,26	9706	3182	R6854	4	Macellaneous	4	Macellaneous	
			Mena, Large													
SALE	EGPLG87		Deluxe Gardening Boots	36	14.46	520.56	0.00	520.56	9706	3182	R5854	4	Miscellaneous	4	Miscellaneous	
			Size 11													
SALE	EGPLG87		Deluxe Gardening Boots	90	14.45	1301,40	0.00	1301.40	9706	3182	R/5854	.4	Macellaneous	4	Macelaneous	
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SALE	EGPLG83		Deluxe Gardening Boots Size 7	108	14.45	1561.68	0.00	1561.68	9706	3182	R5854	4	Mscellaneous	4	Miscellaneous	
SALE	ACMERAKE01		Acree Standard Rake	54	13.01	702 54	122.94	825.48		3182	R6854		Budget Tools	22	Budget Tools	
SALE	EGPLW88		Traditional Welly	48	6.50	312.00	0.00	312.00		3182	Y7649		Miscellaneous		Miscellaneous	
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SALE	EGPLWB2		Traditional Welly	32	6.50	208.00	0.00	208.00	9606	3082	Y7649	4	Macelaneous	4	Macelaneous	
			Size 6													
SALE	EGPLSEVIS		Safety Visor	112	6.50	728.00	0.00	728.00	9606	3082	Y7649	4	Miscellaneous	4	Macelaneous	
SALE	EGPLSERCD		RCD	32	7.95	254.40	0.00	254.40	9606	3082	Y7649	4	Macellaneous	4	Macellaneous	
SALE	EGPLSERCD		RCD	72	7.95	572.40	0.00	572.40	9606	3082	Y7649	4	Miscellaneous	4	Miscellaneous	
SALE	EGPLSEBAG		Nel Beg	48	10.85	520.80	0.00	520.80		3082	Y7649		Mscellaneous	4		
SALE	EGPLRG2		EGPL Rigger Gloves	64	3.61	231.04	0.00	231.04	9606	3082	Y7649	4	Macellaneous	4	Macelaneous	
			Large													
SALE	EGPLGG24A		EGPL Gardening Gloves	136	5.78	796.08	0.00	786.08	9606	3082	Y7649	4	Mscellaneous	4	Mscellaneous	
			Mens, XI,		02255						Press Control of Contr					
SALE	EGPL65238		EGIPL Gardening Gloves	144	5.78	832.32	0.00	832.32	9606	3082	Y7649	4	Macellaneoua	4	Macelaneous	
SALE	EGPLGG138		Mens, Large EGPL Gardening Gloves	152	5.78	878.56	0.00	878.56	9606	3082	Y7649		Macelaneous	4	Macelaneous	
SALE	607100138		Lades, Large	152	5.7e	0.70.09	0.00	8/8.90	360.0	3052	1/043	<u>ೆ</u>	Priscellaneous	1	HISCHIGHEOUT	
SALE	EGPLQG13A		EGPL Gardening Gloves	80	5.78	452.40	0.00	462.40	1010	3082	¥7649		Mscellaneous	1	Macelaneous	
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Туре	Ref.	Alt Ref.	Description		Quantity	Unit Price	Net	VAT	Total	Invoice	0
SALE	GOLDFDRK03		GoldTools Chron	e Plated	99	18.05	1785.95	312.72	2099.67		-6
			Light Fork, Steel								1
SALE	EGPLTRIM2		EGPL Cordees H	Hedge Trimmer	35	30.77	1107.72	193.85	1301.57	9705	
			12V, 38cm Black								
SALE	EGPLSEEAR		EGPL Ear Defen		135	7.23	976.05	0.00		9706	
SALE	EGPLGG24		EGPL Gardening	Gloves	9	5.78	52.02	0.00	52.02	9706	
			Mens, XL								
SALE	EGPLGG248		EGPL Gardening	Gloves	180	5.78	1040.40	0.00	1040.40	9706	
SALE			Mena, XL	~			474.00	0.00	100.00		
SALE	EGPLGG23		EGPL Gardening	Gioves	117	5.78	676.26	0.00	676.26	9706	
SALE	EGPLGB7		Mens, Large Deluxe Gardenin	n Doots	35	14.45	520.56	0.00	520.56	9705	
- Andrew	sun 6307		Size 11	A reces	36	(4.40	-w0.20	0.00	369.30	3190	
SALE	EGPLGE7		Dekse Gardenin	n Boots	90	14.45	1301.40	0.00	1301.40	9706	
			Size 11		10			0.00			
SALE	EGPLGB3		Deluxe Gardenin	g Boots	108	14.46	1561.68	0.00	1561.68	9706	
			Size 7								
SALE	ACMERAKE01		Acres Standard	Rake	54	13.01	702.54	122.94	825.48	9706	
SALE	EGPLW88		Traditional Welly		48	6.50	312.00	0.00	312.00	9606	
			Size 12								
SALE	EGPLW82		Traditional Welly		32	6.50	208.00	0.00	208.00	9606	
			Size 6								
SALE	EGPLSEVIS		Sefety Visor		112	6.50	728.00	0.00	728.00	9606	
SALE	EGPLSERCO		RCD		32	7.95	254.40	0.00	254.40	9606	
SALE	EGPLSERCO EGPLSEBAG		ACD Nel Beo		72	7.95	572.40 520.80	0.00	572.40 520.80	9606 9606	
SALE	EGPLSEEAG EGPLRG2		EGPL Rigger Git		43	10.85	231.04	0.00	520.80	9606	
SALE	BGPDHG2		Large	2003	54	2.61	231.04	0.00	231.04	3606	
SALE	EGPLGG24A		EGPL Gardening	Clause	136	5.78	705.08	0.00	785.08	9606	
0.000			Mens XL		5542	0000					
SALE	EGPLGG218		EGPL Gardening	Gloves	144	5.78	\$32.32	0.00	\$32.32	9606	
			Mena, Large								
SALE	EGPLGG138		EGPL Gardening	Gioves	152	5.78	878.56	0.00	878.56	9606	
			Ladies, Large								
SALE	EGPLGG13A		EGPL Gardening	Gioves	80	5.78	462.40	0.00	462.40	9606	
			Ladies, Large								
SALE	EGPLGB3		Deluxe Gardenin	g Boots	40)	14.46	578.40	0.00	578.40	9606	
SALE	800K023		Size 7		120	5.05	607.20	0.00	607.20		
SALE	BOOK023 BOOK012		Plumbing Made I Roses Made Ea		120	5.06	607.20	0.00	607.20 323.84	9606	
SALE	ACMEFORK02		Acre Light Fork		112	5.06	1052.80	184.24	1237.04	9606	
SALE	GOLDSPD03		GoldTools Chron	e Pated	190	18.05	2888.00	505.40	3393.40		
			Light Spade, Ste					and de			
SALE	GOLDSAW01		Gold Log Saw		70	10.81	756.70	132.42	889.12	9506	
			24"								
SALE	GOLDSAW01		Gold Log Sew		180	10.81	1945.80	340.52	2286.32	9506	18
			24"								- 6
*			н								• 5
lacara est-	Include sector	theme (17) both of	o credits 🕑 🛛 As								
Service order	E Storage buodoo	ana (6) 1000	A lake	avanced Etter							

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:

Call Details Classification Attachments Links Customer 01/3005								
Customer 01/3005	all Details	Classification	Attachments	Links				
	Customer	01/3005						
Customer Tools 'R Us i Main phone 01432 555666	Customer	Tools 'R Us			i	Main phone	01432 555666	

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:

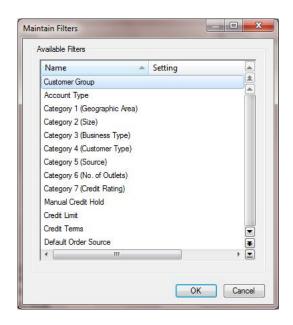
	U	
c	add	C

-

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:

Name	Туре	-
All Customers	Fixed	*
Garden Centres	User	-
Colin's Customers	User	
Local Customers	User	
Derek's Customers	User	
Abigail's Customers	User	
		• • •
4 [•	1
Open New	Delete	T

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:

Available Ite	ems			Current Sele	ection	
Code	Description		Add ->	Code	Description	
0	Miscellaneous		<- Remove	1	Garden Centres	
4	Public Sector			2	Mail Order	ÿ,
6	Buying Group		Select All	3	DIY Stores	
			Clear Selection	5	High St Retail	
				7	Mutiple Retail	
		+		•		,

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.

1	View	Filter	All Customers	• 🔶
			All Customers Garden Centres Colin's Customers Derek's Customers	
4		AXIS®	Abigail's Customers Retailing Customers	cal)

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 <u>File</u> menu within any function that has multiple tabs:

File	Help	
	Show/Hide Tabs	
	Save Current Tab Responses	
	Save Default Tab	
	Clear Saved Responses and Tab	
	Exit	

This allows you to go from this, for example:

e <u>H</u> elp											
Customer/Stock Pri	ces	Attachments	Call History	Events	Quotations	Sales Orders	Statement	Transaction His	tory Item History	Graphs	Audt Tra
General Details	Cu	stom Categories	Contacts	s Delivery	Details	Customer Notes	Account Det	ails Pricing	eBusiness / EDI	Docur	ment Options
Customer					Tumove	ar					
Account	01/	3005 9	ort name	OOLSRUS	Tumove	r vear to date	150602	Last year	131641		

to this:

ile <u>H</u> elp						
General Details	Contacts Delivery [Details Item Histo	ay			
Customer				Tumover		

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.

earch Details				_
earch text TO			Start Search	Advance
earch Results - 25 n	natches			
Match Type	Match Text	Customer Number	Customer Name	Type
Short Name	TOOLSRUS	01/3005	Tools 'R Us 76 Main Street	Standar
Short Name	TOOLSDIREC	01/3007	Tools Direct Unit 65X	Standar
Contact Name	Tom Gilberts	01/3026	ERP Software Ltd Unit 5	Standar
Contact Name	Tom Newland	01/3062	EBF Transport Limited 1 Mews	Standar
Contact Name	Tom Atkinson	01/3068	HUV Transport Co. 5 Mews	Standar
Contact Name	Tom Waddington	01/3082	NWQ Agency Company Unit 1b	Standar
Contact Name	Tom Matthews	01/3093	BJC Services Ltd Unit 1	Standar
•				+
<u>V</u> iew <u>Filt</u>	All 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 reengineered 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:

e Help						
ie Tielb						
Customers	Quotations	Sales Orders	Calls	Campaign Calls	Call Events	[+1

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 reengineered standard monitor functions.

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

<u>H</u> elp											
stomers Sales Orders Pure	chase Orders Ca	lls [+]									
									-		7
Customer Name	Account Number	Customer Post Code	Customer Short Name	Current Balance	Credit Limit		Customer Order Source	Customer Group	Turnover (1-12 months)	Margin(%) (1-12 months)	
ACB Distributors Ltd	3158	CS20 7YW	ACBDISTRIB	0.00	1000.00	1000.00	3 - C Clark	2 - Mail Order	50572.00	39.91%	Ē
ADN Systems Company	3123	CS15 3MH	ADNSYSTEMS	0.00	1000.00	1000.00	2 - B Brown	3 - DIY Stores	92284.00	39.47%	
AEK Transport Ltd	3371	CS34 6DY	AEKTRANSPO	0.00	1000.00	1000.00	1 - A Allen	5 - High St R	0.00		
AFN Holdings Limited	3131	CS53 6UA	AFNHOLDING	0.00	1000.00	1000.00	2 - B Brown	4 - Public Sec	31293.00	39.88%	
AFQ Supplies Company	3341	CS47 7XN	AFQSUPPLIE	0.00	1000.00	1000.00	3 - C Clark	1 - Garden Ce	0.00		
AIE Storage Limited	3335	CS93 4MW	AIESTORAGE	0.00	1000.00	1000.00	3 - C Clark	5 - High St R	0.00		
AKF Computing Ltd	3392	CS41 8QD	AKECOMPUTI	0.00	1000.00	1000.00	1 - A Allen	1 - Garden Ce	0.00		
A1253 T	0150	0000 10V	AVOTOANCOO	0.00	1000.00	1000 00	0.00	a DIVO	40050 00	40.000-	

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.

Balance 6901.20 0.00 4058.33 19165.48 0.00 0.00 14457.74 0.00 0.00	30-59 Days 0.00 2323.68 31874.85 0.00 0.00 0.00 7615.18 0.00	60-89 Days 0.00 4268.57 0.00 0.00 7238.66 0.00 0.00	90+ Days 404.80 0.00 0.00 0.00 0.00 35003.04	Credit 0.00 0.00 0.00 0.00 0.00 0.00	Cash 0.00 0.00 0.00 0.00 0.00	*
0.00 4058.33 19165.48 0.00 0.00 14457.74 0.00	2323.68 31874.85 0.00 0.00 0.00 7615.18	4268.57 0.00 0.00 7238.66 0.00	0.00 0.00 0.00 0.00 35003.04	0.00 0.00 0.00 0.00	0.00 0.00 0.00	
4058.33 19165.48 0.00 0.00 14457.74 0.00	31874.85 0.00 0.00 0.00 7615.18	0.00 0.00 7238.66 0.00	0.00 0.00 0.00 35003.04	0.00 0.00 0.00	0.00 0.00	
19165.48 0.00 0.00 14457.74 0.00	0.00 0.00 0.00 7615.18	0.00 7238.66 0.00	0.00 0.00 35003.04	0.00	0.00	
0.00 0.00 14457.74 0.00	0.00 0.00 7615.18	7238.66 0.00	0.00 35003.04	0.00		
0.00 14457.74 0.00	0.00 7615.18	0.00	35003.04			
14457.74 0.00	7615.18				0.00	
0.00			0.00	0.00	0.00	
		0.00	776.60	0.00	0.00	
	2598.16	0.00	0.00	0.00	0.00	
0.00	80033.54	0.00	0.00	0.00	0.00	
15943.65	6235.32	0.00	0.00	0.00	0.00	
0.00	2082.33	0.00	0.00	0.00	0.00	
26944.79	0.00	0.00	0.00	0.00	0.00	
0.00	2388.09	4601.73	0.00	0.00	0.00	
0.00	5693.31	0.00	0.00	0.00	0.00	
0.00	23434.62	16963.59	0.00	0.00	0.00	
0.00	0.00	7506.16	0.00	0.00	0.00	
0.00	22384.95	26935.46	0.00	0.00	0.00	
12733.57	4391.09	0.00	0.00	0.00	0.00	
20532.95	0.00	0.00	0.00	0.00	0.00	
0.00	14426.86	0.00	12651.42	0.00	0.00	
0.00	785.40	0.00	0.00	0.00	0.00	
435596.68	1176336.36	543959.31	176611.14	0.00	0.00	Ŧ
III						
	26944.79 0.00 0.00 0.00 0.00 12733.57 20532.95 0.00 0.00 435596.68	26944.79 0.00 0.00 2388.09 0.00 5593.31 0.00 23434.62 0.00 0.00 0.00 22384.95 12733.57 4391.09 20532.95 0.00 0.00 14426.86 0.00 785.40 435596.68 1176336.36	26944.79 0.00 0.00 0.00 2388.09 4601.73 0.00 5693.31 0.00 0.00 23434.62 16963.59 0.00 0.00 7506.16 0.00 22384.95 26935.46 12733.57 4391.09 0.00 20532.95 0.00 0.00 0.00 7854.0 0.00 0.00 7854.0 0.00 0.00 78540 0.00 435596.68 1176336.36 543559.3	26944.79 0.00 0.00 0.00 0.00 2388.09 4601.73 0.00 0.00 5593.31 0.00 0.00 0.00 23434.62 16963.59 0.00 0.00 0.00 7506.16 0.00 0.00 22384.95 26935.46 0.00 0.00 22384.95 26935.46 0.00 12733.57 4391.09 0.00 0.00 20532.95 0.00 0.00 0.00 0.00 785.40 0.00 0.00 435596.68 1176336.36 543359.31 176611.14	26944.79 0.00 0.00 0.00 0.00 0.00 2388.09 4601.73 0.00 0.00 0.00 5693.31 0.00 0.00 0.00 0.00 2384.42 16963.59 0.00 0.00 0.00 0.00 756.16 0.00 0.00 0.00 22384.95 26935.46 0.00 0.00 12733.57 4391.09 0.00 0.00 0.00 20532.95 0.00 0.00 0.00 0.00 0.00 12654.62 0.00 0.00 0.00 0.00 785.40 0.00 0.00 0.00 0.00 785.40 0.00 0.00 0.00 435596.68 1176336.36 543359.31 176611.14 0.00	26844.79 0.00 0.00 0.00 0.00 0.00 0.00 2388.09 4601.73 0.00 0.00 0.00 0.00 5593.31 0.00 0.00 0.00 0.00 0.00 2343.42 16963.59 0.00 0.00 0.00 0.00 0.00 7506.16 0.00 0.00 0.00 0.00 22384.95 26935.46 0.00 0.00 0.00 1273.57 4391.09 0.00 0.00 0.00 0.00 20532.95 0.00 0.00 0.00 0.00 0.00 0.00 14428.86 0.00 12651.42 0.00 0.00 0.00 785.40 0.00 0.00 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.

e <u>H</u> elp		
Customer 01/3402		Account Name
<u>C</u> ontact name	Mr John Smythe-Jones Eull Name	Account name Tools4U
E-mail address	i.smythjones@tools4u.co.uk E-mail	Address Label
lob title	Buyer	Address label John Smythe-Jones Tools4U
<u>[</u> elephone	01234 787786	34 The Ridgeway Hillside Business Park
Contact Details		Upton-upon-Slade Countyshire
Contact name	John Smythe-Jones	CS7 4YT
Address Details		Label conversion info
Address type	Business 🔻	
<u>Organisation</u>	Tools4U	Custom Address
Additional address lines	34 The Ridgeway Hillside Business Park	Use custom address
<u>⊇</u> ity/Town	Upton-upon-Slade	
County/State	Countyshire	
ostal/Zip code	CS7 4YT Lookup	
Country	United Kingdom 🔻 Display Map	
		ОК Са

C4 Quotation Order Forms

A new development in the area of documentation is the introduction of an allnew 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.

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	25.52	EACH	0			90		
	for cordless hedge trimmer								
EGPLCS1	EGPL Petrol Chainsaw	97.87	EACH	0			15		
	33cc, 16" bar								
EGPLGB1	Deluxe Gardening Boots	17.01	PAIR	0	12		140		
	Size 5								
EGPLGB2	Deluxe Gardening Boots	17.01	PAIR	0				108	
	Size 6								
EGPLGB3	Deluxe Gardening Boots	17.01	PAIR	0			130	186	
	Size 7								
EGPLGB7	Deluxe Gardening Boots	17.01	PAIR	0				186	
	Size 11								
1									•
tions Amend Quant	ity Stock Enquiry								

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.

Stock Reference	Description	Unit Price	UOM	Free Stock	Size	Colour	Brand .	Rating	Bin Numbe
EGPLGG11	EGPL Gardening Gloves	5.78	PAIR	1511	Ladies Small	Green	EGPL	Amateur	C107
	Ladies, Small								
EGPLGG12	EGPL Gardening Gloves	5.78	PAIR	542	Ladies Medium	Green	EGPL	Amateur	D644
	Ladies, Medium								
EGPLGG13	EGPL Gardening Gloves	5.78	PAIR	906	Ladies Large	Green	EGPL	Amateur	D540
	Ladies, Large								
GPLGG21	EGPL Gardening Gloves	5.78	PAIR	637	Mens Small	Green	EGPL	Amateur	D667
	Mens, Small								
EGPLGG22	EGPL Gardening Gloves	5.78	PAIR	1098	Mens Medium	Green	EGPL	Amateur	D715
	Mens, Medium								
EGPLGG23	EGPL Gardening Gloves	5.78	PAIR	814	Mens Large	Green	EGPL	Amateur	D279
	Mens, Large								
EGPLGG24	EGPL Gardening Gloves	5.78	PAIR	819	Mens Extra Large	Green	EGPL	Amateur	D588
	Mens, XL								

(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.

Item Position		
Operation	Insert at End	
Item number	1	
Item Selection		
Entry type	Stock Item -	
Select by	Product Group	•
Assembly type	Ignore 👻	
Product group	Books -	
Selected Item	Books Budget Tools Chainsaws	
Reference source	Garden Tools Hand Tools Hedge Trimmers Miscellaneous]
Description	MiscPower Mowers PowerTools Prof' Tools	
Additional Description	WaterEqpt	
Description		
		OK Cancel

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.

References	
Batch number	0
Customer order number	G4680
Our reference	3209
Status code	0 Outstanding
Document Dates	
Order Date	Status code 🔹 👔 🔀
Order received date	Code Description
Required delivery date	1 <u>A</u> waiting Deposit
Analysis Details	2 <u>A</u> waiting Finance 3 In Stores
Department code	4 In QC
Order source code	5 Despatch

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:

Customer Contact	Tools 'R U Brian Brow	F / .	▼ New		phone 01432 555666 Ed.	
Call 3						
Open for	11m		Time spent	10m 42s	Call type Sales -	
<u>S</u> ubject	Special Ch	iristmas Promotio	n		Private call	
Events						
Date/Tir	ne	User	Private	Туре	Notes	Durat
08/11/20	10 10:52	ANDY	0	See Link	Quotation 3378 has been linked	
08/11/20	10 10:45	ANDY		(i) Information	Awaiting confirmation - will convert quote into customer pricing if accepted.	21s
					Gold tools that they would like to run on their website. Essentially, they want a special discount for committing to a larger than average number of items, ordered over a 6 week period. I have created a quotation and sent to them.	
08/11/20	10 10:35	ANDY		(+) Created		
•					m	•
New Ev	ent	Amend Event	Delete E	Event Defer Call	Information events only 📄 My events only 📄 Show deleted events 📄 Exclusion	de private [
Call Status		anding 👻 <u>R</u> e:	sponsibility A	ndy Brown 👻	Watch Call Create Linked Call	

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

all Details	Classification Attachments Links			
Customer	01/3005			
Customer	Tools 'R Us	i Main phor	ne 01432 555666	
Contact	Brian Brown	Contact phone	Ext.	
Links				

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

Customer Detai	Is Customer Noter	General Details	Document Notes	Item Details	Terms ar	nd Addresses	Attachments	Links	Audit Trail		
Viewing Quo	tation 3378			I management of the second	Values				Enconcernation of the		
Customer	3005 T	ools 'R Us			Goods	149.66	Cost	119.72		Margin	20.01% (29.94)
Credit limit 10000	10000 Ci	urrent balance 0.0	0		VAT	22.46	Weig	ht 0.00	00	1	
					Total	172.12	Supp	ress tota	ls 🔳		
Links											

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.

Help										
ayment Methods										
Description	Туре	Currency	Point of Sale	Till Number	мото	Web	Payment Service Provider	Authorisation Method	Nominal A/C Number	Nominal A/C Descrip
Cheque	Cheque	GBP			🗸 Yes				88	Current Bank
BGC	Cash	GBP								
SagePay - EGPL	Credit / Debit Card	GBP			🗸 Yes	Yes	SagePay	Payment	12	SagePay Pay
SagePay - toolsonlineno	Credit / Debit Card	GBP			1	/ Yes	SagePay	Payment	12	SagePay Pay

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:

etomor Dotnilo	Customer Notes	General Details	Document Notes	Itom Dotnile	Terms and A	ddraeaaa	Attachmente	Payme	ent Details	Linka	Audit Trail
Amending Sale		Certeral Details	Document Notes	Item Details	Values		Audenmenus		in Dotailo	LING	
Customer	3005	Tools 'R Us				90.40		Cost 6	9.80	_	Margin 29.42% (26.60)
Credit limit	10000	Current balance	0.00		VAT	13.56		Matalat	0.0000	_	
	132335	current balance	0.00			137626200		weight	0.0000		
Payment terms	Cash with Order				Total	103.96					
Payment Event	s										
Event	Method	l	Requested	Availa	ole In	voiced	Refunde	d	Balance	Trans	saction ID
Payment	Cheque		90.40	90.4	0	0.00	0.0	0	90.40	12353	12
					New Payme	ent					?
					Payment	Details				Che	eque Details
				<u>P</u> ayment	type	SagePay -	EGPL	•	Nur	mber	
				Outstand	ling amoun	t 13.56		GBP	Che	eque clearance 📃 👻	
							13.56				
					<u>P</u> ayment	amount	13.06		GBP		
					Card Det	ails				Billin	ng Address
					Card type	• (Visa	•]		ools 'R Us 5 Main Street
					Card nun	nber	4929				reenton ountyshire
					Valid fron	n date					S6 8GH
					Expiry da	te					
					Issue nur		-				very Address
					-					76	ools 'R Us 5 Main Street
•					Cardhold	ername				Co	reenton ountyshire
Options					<u>V</u> erification	on code				C	S6 8GH
Add Deposit	Add Payme	Amend	Payment Ref	und Payment							
, and proposit				and ruymonic							OK Cancel

AXIS® Diplomat 2010 DPA (Local)

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 timesaver, 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.

Maintain Delivery Methods	
<u>F</u> ile <u>H</u> elp	
Delivery Method Code Details	
Delivery Method Code Detail	s ? 🗾 🏹
General	
Delivery Method Code Deta	ails
Delivery Method Code	1
Description	Canter
Delivery Stock Record Det	ails
Associated stock record	
Select by	Product Reference
Product reference	CARRIER
Description	Delivery by Carrier
	J
	OK Cancel
Amend Add	Delete Preview Print Close
AXIS® Diplo	mat 2010 DPA (Local)

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.

le <u>E</u> nquiries	<u>H</u> elp				
Customer Details	Customer Notes	General Details	Document Notes	Item Details	Ter
New Sales Ord	er				
Customer	3005	Tools 'R Us			
Credit limit	10000	Current balance	0.00		

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:

No. of Outle	ts	Credit Rating					
oups Order Sources	By Month By Year	Geographic Area Size	e Business Type	Custome	г Туре		
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.

Item Number	Stock Reference	Desc	ription	Ordered Quantity	Quantity	Outstanding Quantity	Uni Price
		24"					
8	EGPLWB1	Trac ^{ia} Size	Insert Item	130	0	130	6.89
9	BOOK001	A-Z 214	Amend Item Close Item	130	0	130	3.83
10	EGPLCS2	EGF 240	Delete Item View Item	40	0	40	72.77
11	GOLDAXE01	Gold 3lb	Move Item Up Move Item Down	130	0	130	22.94
12	ACMEFORK	Acm	Stock Enguiry	170	0	170	11.48
13	EGPLSEEAR	EGF	Purchase Order Enguiry	190	0	190	7.65
14	BOOK011	Wee-		160	0	160	5.36
15	EGPLWB3	Trac	Add to Favourites	110	0	110	6.89
		Size	Find				
16	EGPLGG23B	EGF Mer	Print Preview CSV Export	20	0	20	6.12

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.

ategory Detail	s				
ategory code		Q			
escription		Outcome			
umber of elem	ents	10			
elevance to s	ales calls	Irrelevant 👻			
elevance to te	lesales calls	Optional Irrelevant			
elevance to c	ustomer services calls	Mandatory on call completion Mandatory on call creation			
Relevance to R <u>D</u> calls Relevance to accounts calls		Irrelevant 👻			
		Irrelevant 💌			
elect Element					
Number	Description				
1	Software fix		*		
2	Hardware repair		-		
3	Documntion fix				
4	Advice given				
5	Config change				
6	User error				
			_		
			-		
_					

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:

-		_	
ile <u>H</u> elp			
My Customer Sales Calls	My Customer Account Calls	My Calls	[+]

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.

Refresh Threads Include email 🖉 Email filter	Domains Include phone V Include call events V Call filter All Calls	÷
	Outstanding Calls My Calls	
		ancel

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.

Ē	Send Emailshot		
E	le <u>H</u> elp		
	- Email Details		
	From address	andy.black@egpl.co.uk	
	Display name	Andy Black	
	Subject	Summer Price List	
	Attach file to email		
	Attachment file	C:\PriceList.pdf Browse	J
	Attachment display name	PriceList.pdf	
	Format	HTML 💌	

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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.

cipients					
To Sue Orange					
Cc Brian White					
<u>B</u> cc					
ail Details					
ject Call 3 - Tools 'R Us	- Special Chris	tmas Promotio	n		
ched: Call 3.axs					
🤞 🖪 👗 🖺 ≣	≣ ≣ B	IUS	🗱 🗱 🖏	🌾 🗠 📽 📓 🎬 🗄 🖷	
Customer	Contra Numb		Call Reference	Call Subject	Total Time Spent
Tools 'R Us			3	Special Christmas Promotion	10m 42s
Date	User	Private	Туре	Notes	Duration
10/11/2010 13: <mark>4</mark> 8	ANDY	*	Link	Supplier 01/8004 has been linked	
09/11/2010 11:04	ANDY		Information	Need to raise this with Gold tools to see if they are willing to co-fund this marketing initiative.	26s
08/11/2010 10:52	ANDY	*	Link	Quotation 3378 has been linked	
08/11/2010 10:45	ANDY		Information	Awaiting confirmation - will convert quote into customer	21s
				m	

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.

e <u>H</u> elp									
General [)etails	Account Details	Contacts	Payment Details	Supplier Price List	Ordering Det	ails Tra	nsactions	Transaction History
Item His	story	Purchase Order	rs Graph	s Supplier No	otes Attachme	ents Ca	all History	Events	Audit Trail
Account	8004	GOLDTOOLS	GoldTools Limited	i					
Calls									
-	all	Customer Custo	mer Name	Created	Status	Call Type Pr	ivate Subje	ct	

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

Call Details Classification Attachments Links	
Customer 01/3005	
Customer Tools 'R Us Main phone 01	432 555666
Contact Brian Brown Contact phone	Ext
Links	

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:

Date/Time	Private	Туре	Notes	Durat	
10/11/2010 13:48	0-7	Enk Link	Supplier 01/8004 has been linked		
09/11/2010 11:04		(i) Information	Need to raise this with Gold tools to see if they are willing to co-fund this marketing initiative.	26s	
08/11/2010 10:52	0-7	Ep Link	Quotation 3378 has been linked		
08/11/2010 10:45		(i) Information	Awaiting confirmation - will convert quote into customer pricing if accepted.	21s	
08/11/2010 10:35		(i) Information	Have had a long conversation with Tools r Us regarding a Christmas promotion on	10m 21s	
			Gold tools that they would like to run on their website.		
			Essentially, they want a special discount for committing to a larger than		
			average number of items, ordered over a 6 week period.		
			I have created a quotation and sent to them.		
08/11/2010 10:35		Created			
4			III		•

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

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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.

```
Deliver remittance advices by Email 🔹 to Mr Gold <m.gold@goldtoolsuk.com> 🔹
```

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.

	Issue History	Pricing and	Costing	Discounting and	Additional Pricing	e-Business Details	Stock and Man	facturing Details	Supplier Price List	Image
General Details Transactions	Stock Notes	Attributes	History	Attachments	Customer Pricing	Issue History Grap		Optional Extras	Audit Trail	Data She
Stock Reference	,									
Site	Back Office 💌									
Alt reference	HHM776-H876			Item descr	iption "Wimbledon" E 5-blade steel cu					
Stock reference	EGPLMOW4	Bin number	GG89							
Data Sheet					Options					
	Wimt	oledon			View					
Next fait setter			Teres & Tandelson Raffd	and the second	Browse					
grass	has neve	n had c	it so g	ood!	Delete					
Particul Very			_							
Name Restard Party of Restard Indexes										
Hande Et Anno 1971 Hande ET Anno 1971 Hande ET Anno 1971 Hande ET Inst-Anno 1971 Hande ET Inst-Anno 1971			-							
Harris II and America Harris Eliteration America America March America										
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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.

File Help Tree Wew List Mew e-Business Group: EGPL P P 3 - Books P 4 - Macellaneous III - Hand Tools III - Hand Tools III - Budget Tools ACMEHOED1 - Acme Standard Dutch Hoe ACMEHOED1 - Acme Standard Hand Tool Set (trowel, fork, potting trowel) GOLDAXC01 - Gdd Feling Ave 30 GOLDAXC01 - Gdd Feling Ave 30 GOLDHTC01 - Gdd Hand Ave (Hatchet) 2b ACMEFORK01 - Acme Standard Fork ACMEFORK01 - Acme Standard Fork ACMEFORK01 - Acme Standard Fork ACMEFORK02 - Acme Standard Grass Rake P 2 - Professional Tools P P 2 - Safety Equipment P P 30 - Water Equipment And Primary Ageing dtock: P Refresh Amend Primary Add Primary Delete Primary Add Subsidiary Delete Subsidiary Agend Group Add Group Pierview End AtXIS® Diplomat 2010 DPA (Loca) P	😰 Maintain e-Business Catalogue
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AXIS® Diplomat 2010 DPA (Local)	Amend Group Add Group Delete Group Preview Print Close
	AXIS® Diplomat 2010 DPA (Local)

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.

e Specific Stock Paramete Stock Item	rs Site Independent	t Stock Par	rameters		
Primary group code	1	Budget To	pols)	
Stock e-Business Details					
Published	Special offer				
<u>F</u> eatured item	📄 <u>B</u> est seller 🔽				
<u>C</u> ash with order					
Short description	Site - specific desc	ription 🔻	Acme Dutch Hoe		
Long description	Stock specification	•			
More information	Stock notes	•	Edit more info		
Discounting		S 15			
<u>U</u> se e-business discount	🖾 😐 e-Business dis	count %			
e-Business URLs					
<u>A</u> dditional information URL	s[<u>V</u> iew
Meta Data					
<u>M</u> eta Title	Dutch Hoe by Acm	e			
Meta Keywords	dutch,hoe,adme,ga	irden,tool			
Meta Description	Traditional Wooder	Handled [Dutch Hoe by Acme		

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.

Main Details	Payment Details	SSP Details	Address Details
Events	Ec	ducation / Qualification	s A
- Employee			
Reference 1001	Mr J H Smith		
Event Details			
Type General Eve	ents and Reminders 🔽		
Event Details			(re
- Details			
Date	02/02/2009	Time 14.23	
Description	Annual Appraisal		
Notes	Need to schedule annu February.	ual appraisal for sometin	ne before the end of
Next Action / F			
Action required			
Date	09/02/2009	Time 0.00	
Responsibility	Payroll Manager 💌		
			OK Cance

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.

Main Details	Payment Details	SSP Details	Address Details
Events		Education / Qualifications	
Employee			
Reference 1001	Mr J H Smith		
Attachments			
Attachments Filename		File Type	Size
	alculation xls	File Type Microsoft Excel Worksheet	Size 11KB
Filename			
Filename	e.pdf	Microsoft Excel Worksheet	11KB
Filename	:e.pdf pdf	Microsoft Excel Worksheet Adobe Acrobat Document	11KB 101KB

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.

Events		Educati	on / Qualific	ations		A
Main Details	Payment Detai	ls	SSP Detail	s	Address Details	- I
Employee Reference	1001	MrJHS	ìmith			
Driving Licence Rev Private car owned Driving licence held Licence type Beference number		3456A12JS		Code	type Description	aude
Issue date Expiry date	010589	19 yrs 9 12 yrs 6		A1 B B+E	Light Motorcycl Car Car and Trailer	
Last check date	050109	28 days		B1 C C1	Motor tricycles Vehicles Over 3 Vehicles 3500H	
Checked by Next check due dat		nager 💟 11 mths		D D1 F	— <u>B</u> us <u>M</u> inibuses 9-16 <u>T</u> ractor	seats
r chailes / chubisci	Notes			<		

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.

Education History and	d Qualification Details
C Details	
Name of Establishment	Oxford University
From date	011083
To date	300686
Subject	Computing
Qualification	BSc Degree
Туре	Academic
Grade	2.1
Date achieved	300686
Expiry date	
Checked	
Checked by	Payroll Manager 🖌
Notes	Degree certificate scanned and attached to employee record.
	ОК

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.

Help							
Categories' Hire	Items (09/11/2010 -	15/11/2010)					
Resource 🔺	Tuesday 09/11/2010	Wednesday 10/11/2010	Thursday 11/11/2010	Friday 12/11/2010	Saturday 13/11/2010	Sunday 14/11/2010	Monday 15/11/2010
SOM1				CIU Marketing Co			
Sit on Mower	1 Available	1 Available	1 Available	0 Available	0 Available	0 Available	0 Available
SOM2			UTT Software Co	mpany			
Sit on Mower	1 Available	1 Available	0 Available	0 Available	0 Available	0 Available	0 Available
SOM3 Sit on Mower	No transactions						
Ą	No transactions 3 Available	3 Available	2 Available	1 Available	1 Available	1 Available	1 Available
HT001	ATS Agency Co.						
Post Hole Borer	0 Available	0 Available	0 Available	0 Available	0 Available	0 Available	1 Available
HT002 Pole Saw	No transactions						
RV001		KDV Distributors L	imited				
Rotovator	1 Available	0 Available	0 Available	0 Available	1 Available	1 Available	1 Available
RVD3 Rotovator	No transactions						
RV2	OKX Distribution Ltd	ł					
Rotovator	0 Available	0 Available	0 Available	0 Available	1 Available	1 Available	1 Available
3	No transactions 3 Available	2 Available	2 Available	2 Available	4 Available	4 Available	5 Available
SHR1 Shredder 6HP	No transactions						
SHR2	No transactions						
•							
						Refresh	Amend Selection Canc

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:

Resource 🔺	Tuesday 09/11/2010	Wednesday 10/11/2010	Thursday 11/11/2010	Friday 12/11/2010	Saturday 13/11/2010	Sunday 14/11/2010	Monday 15/11/2010	
SOM1	09/11/2010	10/11/2010	11/11/2010	CIU Marketing Co		14/11/2010	13/11/2010	-
Sit on Mower	1 Available	1 Available	1 Available	0 Available	0 Available	0 Available	0 Available	-
SOM2	17 Handelo	1111000010	UTT Software Co		0111010010	o / It dilucito	o / It dilabito	
Sit on Mower	1 Available	1 Available	0 Available	0 Available	0 Available	0 Available	0 Available	
SOM3 Sit on Mower	No transactions							
A	No transactions 3 Available	3 Available	2 Available	1 Available	1 Available	1 Available	1 Available	
HT001	ATS Agency Co							
Post Hole Borer	0 Available	View Day	vailable	0 Available	0 Available	0 Available	1 Available	
HT002 Pole Saw	No transacti	Hire Details						
RV001		Enter Hire	1					
Rotovator	1 Available	Amend Hire	vailable	0 Available	1 Available	1 Available	1 Available	
RV03 Rotovator	No transaction	Off Hire						
RV2	OKX Distribu	Hire Enquiry						
Rotovator	0 Available	Hire Item Enquiry	vailable	0 Available	1 Available	1 Available	1 Available	
В	No transacti 3 Available	Find	vailable	2 Available	4 Available	4 Available	5 Available	
SHR1 Shredder 6HP	No transactions							
SHR2	No transactions							
•								•

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.

end Selection	? <mark>*</mark> *
Hire Category Selection	
Category selection	All Categories 👻
Category	
Description	
Members	
Location selection	
Hire location	All locations 🔻
Display Options	
From	09/11/2010
Include 'Saturday' columns	
Include 'Sunday' columns	
Columns to display	1 Week 🔻
Exclude items without transactions	1 Week 2 weeks
Include unavailable items	3 weeks
	4 weeks 5 weeks
	6 weeks OK Cancel
	7 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.

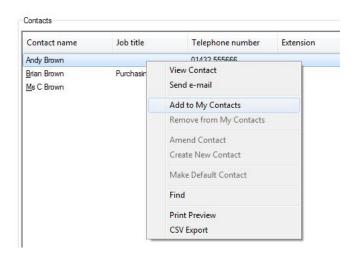
K3 Contact Synchronisation with Outlook / Exchange

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 rollforward 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.

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