axis® **diplomat 2016**

Accounting and Business Information Systems

New features overview

04.10.2016

Foreword

Welcome to **axis diplomat 2016**!

This release is the culmination of the past two years' development work since the launch of **axis diplomat 2014**.

We are pleased to be able to say that **axis diplomat 2016** incorporates more enhancements than any previous release - approximately 50% more than were introduced with axis diplomat 2014, which in itself included more enhancements than ever before.

We have also pre-released more of these new developments to our Software Assurance customers than ever before; many of the new features outlined in this document have been available to those subscribing to Software Assurance for 18 months in some cases. This means that not only have those customers been able to take advantage of those enhancements sooner but they have been available in smaller "bite-sized" upgrades, making them easier to assimilate.

A specific design brief for **axis diplomat 2016** was to focus on functionality rather than changing the user interface; we wanted our users to be immediately comfortable with the new release and to be able to concentrate on the job in hand. Feedback from users of other software packages (such as Microsoft Office) is that following an upgrade it sometimes takes a while to find the new ways of doing familiar tasks. We hope that you do not find this to be the case with **axis diplomat 2016** but can, instead, find completely new things to do with the system.

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

Regards
The axis diplomat Development Team

Introduction

This document outlines the major new features and benefits that you can expect to see by upgrading to **axis diplomat 2016** from the previous edition of software, **axis diplomat 2014**.

This list is by no means exhaustive and further enhancements will continue to be added after the initial release in the form of on-going level updates; please check the axisfirst web site at http://www.axisfirst.co.uk/axisdiplomat for the latest product information. Level updates within the **axis diplomat 2016** release will be free to all **axis diplomat 2016** licensees with current support contracts.

Similarly, **axis diplomat 2014** continued to be enhanced and improved during its life and so, if you are upgrading from an early level of **axis diplomat 2014**, there will be further modifications to be seen over and above those documented here.

In addition to the normal on-going level updates for **axis diplomat 2016**, 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 2018.

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

axis payroll

With previous releases, new features introduced for axis payroll have been included in the same New Features guide.

With the release of **axis payroll 2016**, to aid readability, we have moved details of the axis payroll enhancements to a separate document. If you use both **axis diplomat 2016** and **axis payroll 2016**, please also refer to the **axis payroll 2016 New Features Guide**.

The following list highlights our **Top Ten Favourite New Features** of **axis diplomat 2016**:

1. Send Shortcuts

   Send a link to another user of your axis diplomat system direct to a specific customer, supplier, stock item, sales order or purchase order.

2. Document Scanning

   Scan documents, using a TWAIN-compatible scanner, directly into any attachments area of axis diplomat.

3. New Monitor Tabs

   Add to your custom monitors with a host of new Monitor Tabs including Stock Items, Stock Transactions and Nominal Transactions.

4. Sales Order & Quotation Attachment Templates

   Create attachments from Word Document Templates from within the attachments area of a Sales Order or Quotation.

5. Customer Returns

   Manage your customer's returns more effectively and analyse the nature of your returns more accurately.

6. Schedule of Stock Availability

   See when stock will become available at the click of a button from within Sales Order maintenance functions.

7. Purchase Order Document Delivery

   Configure suppliers to receive purchase orders by email and have them sent automatically by Print Purchase Orders.

8. Import Sales Order

   Load your customer's spreadsheet of order details directly into the Sales Order maintenance function.

9. Reprice Sales Orders & Quotations

   Update your Quotation (or Sales Order) to the latest pricing at the click of a button.

10. VAT Inclusive Retail Pricing with VAT Exclusive Trade Pricing

   Specify your Stock item's Retail Prices as a VAT Inclusive amount whilst still specifying the Trade Prices as a VAT Exclusive amount.

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

Upgrading to axis diplomat 2016

Customers with Software Assurance are entitled to an upgrade to their software licence to **axis diplomat 2016** under the terms of their agreement. To request an update to **axis diplomat 2016**, Software Assurance customers should visit our web site at http://www.axisfirst.co.uk/software/assurance/ and follow the link to request their upgrade. The online request form also allows training to be ordered at the same time.

Details of Enhancements

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

A standard facility within **axis diplomat 2016,** available to all

A facility within **axis diplomat 2016** that has already been pre-released to those axis diplomat 2014 customers with Software Assurance

A new facility within **axis diplomat 2016** that requires one or more existing optional modules

An optional extra, available as an add-on to **axis diplomat 2016** but not available at previous versions

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Section 1 Kernel (Core) Enhancements

1.1. Send Shortcuts

Anyone who has used the CRM functionality within earlier releases of axis diplomat will be familiar with the concept of sending shortcuts to calls. This functionality has now been extended to allow you to email shortcuts to a variety of objects, including

- Customers
- Suppliers
- Sales Orders and Quotations
- Service Contracts and Contract Requests (for users of the Service Contract Maintenance module)
- Purchase Orders
- Stock Items

Any of the enquiry or maintenance functions associated with the items above now feature an additional button in the lower right corner labelled "Send Shortcut". Clicking this button will create an empty email message with an .axs file attached. When the recipient of that email opens the attached file, it launches an axis diplomat enquiry for that item.
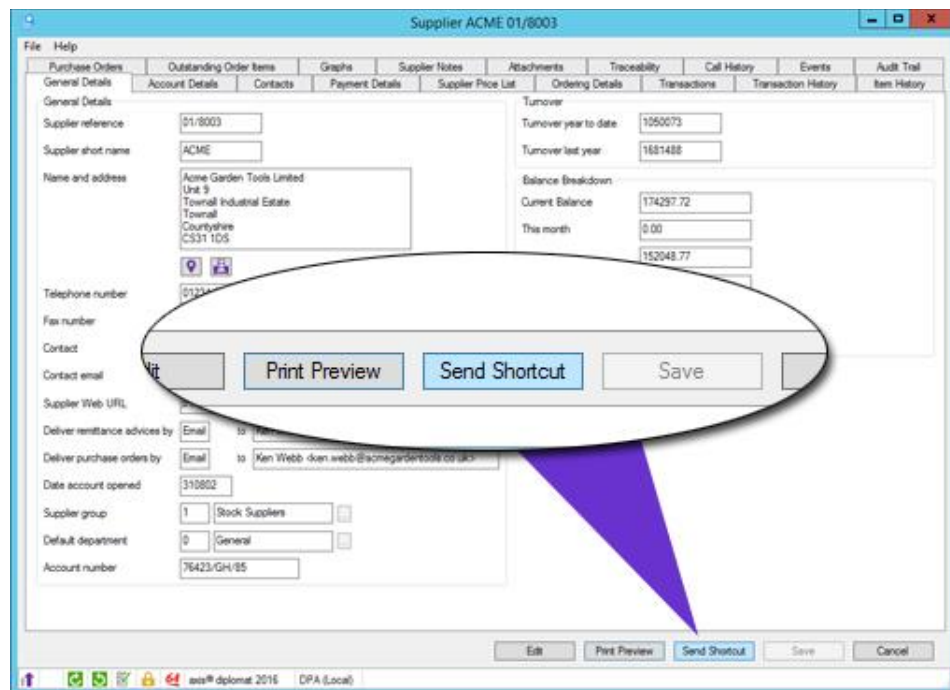
Example: within Supplier Enquiry, there is now a "Send Shortcut" button.

Clicking this opens an email dialog

When Bernard receives this email, he double-clicks on the attached file and he is taken straight into Customer Enquiry for the Tools 'r' Us Account

Note that the attachment is a link to the item; it does not in itself contain information about the item so the recipient must be an axis diplomat user and connected to your system at the time they open the email. They must also have the appropriate permissions within axis diplomat to view the item to which they have been sent a shortcut.

1.2.   Document Designer Email Variants

It is now possible to define a number of different sets of email parameters (known as Email Variants) for each Document Designer-based document. These parameters include:

- the sender's email address
- the sender's name
- subject
- content text
- any additional BCC recipients

Scripting allows switching of Email Variant based on a range of parameters, such as the department code, customer group or order source code (in the case of a Sales Ledger document), supplier group (for a Purchase Ledger document) or location.

This allows different styles of emails to be sent in differing circumstances - for example, retail customers could receive their invoices from sales@egpl.co.uk whilst trade customers could receive their invoices from accounts@egpl.co.uk.

1.3.   Faster Backup & Restore via Compressed Attachments

All attachments within the system are now automatically archived into a single compressed file after a period of time. This is entirely transparent to the user since archived attachments remain visible within the appropriate Attachments tabs of the system. The benefit is a substantial reduction in backup and restore times since it is much quicker to backup a single large file than thousands of small ones.

On a typical large system the backup time is reduced by 25% although this may vary depending on how extensively attachments are used. In particular, those systems using EDI with suppliers or other electronic links to third party systems, will see the greatest benefit as those systems automatically accumulate large numbers of attached files.

1.4.   Saving axis diplomat Documents

The axis diplomat document viewer has been extended so that, when saving or emailing a document (such as an invoice), the default filename is more relevant: it will now default to a short indicator (INV for Invoice, QUO for quotation, etc.) followed by the document number. This saves time renaming documents and ensures that each one is unique.
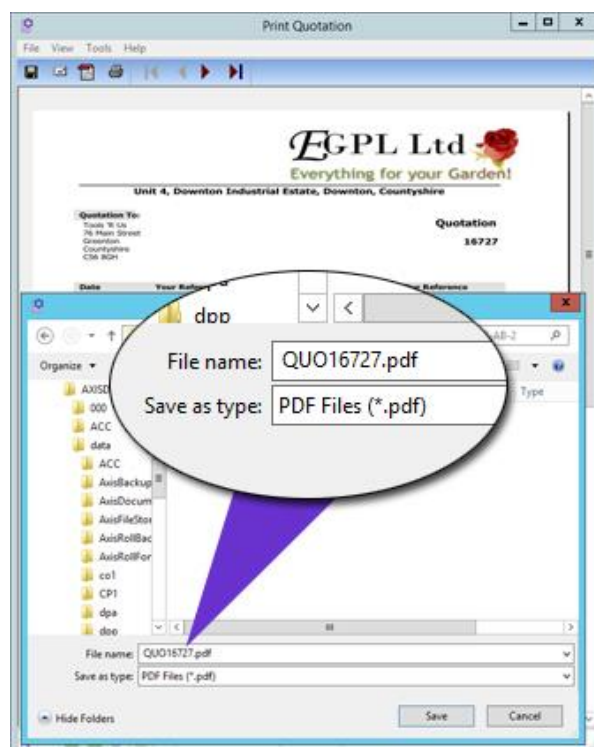
Saving a quotation automatically defaults to a filename of "QUO" followed by the quotation number

1.5.   Create Word and Excel Document Attachments

It is now possible to create new blank Microsoft Word and Microsoft Excel documents directly within the Attachments tab of any item that offers attachments (such as customers, suppliers, sales orders, etc.).

This offers greater convenience and time-saving when compared with creating the document elsewhere (such as on your desktop) and then copying the document into the attachments area. It also eliminates the chance of leaving a spurious duplicate file behind wherever that original file had been created (with the possible future confusion as to which is the master document - the one attached to axis diplomat or the one on the desktop).
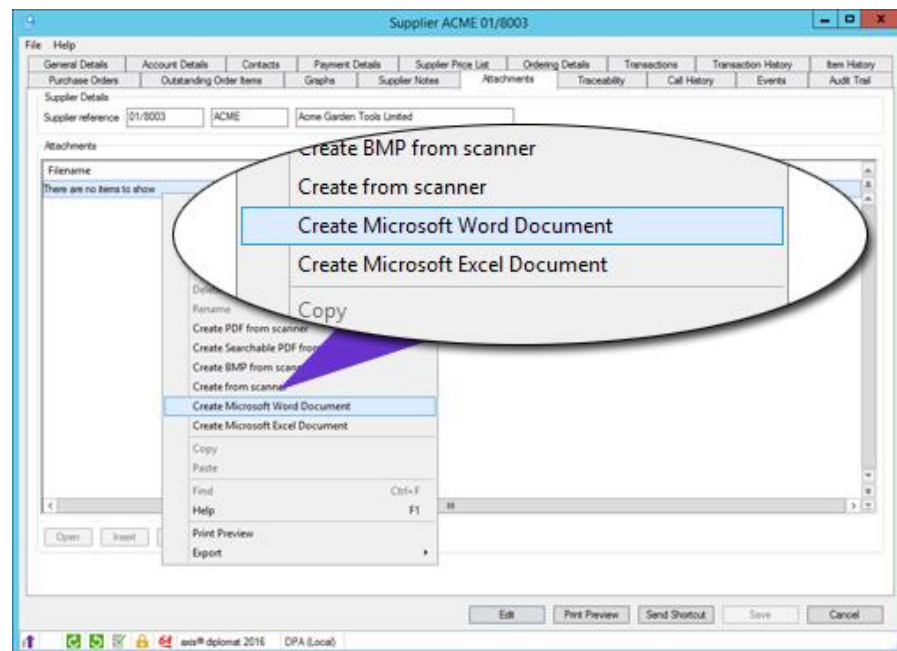
Supplier Enquiry's Attachments tab with right-click options to create new blank Microsoft Word or Excel documents

1.6.   Scroll Wheel Support in Report Viewer

When using a mouse with a scroll wheel, the wheel can now be used to scroll up and down through the pages of a previewed axis report.

1.7.   Document Scanning

For anyone with a scanner available with a Twain-compatible driver, it is now possible to scan documents directly into the Attachments area for any item that offers attachments.

As with the direct creation of Word/Excel documents (see above), this saves time by replacing what would have previously been a two-part process (i.e. scan the document to the desktop using a third party scanning solution and then copy the scanned document into the Attachments tab afterwards).
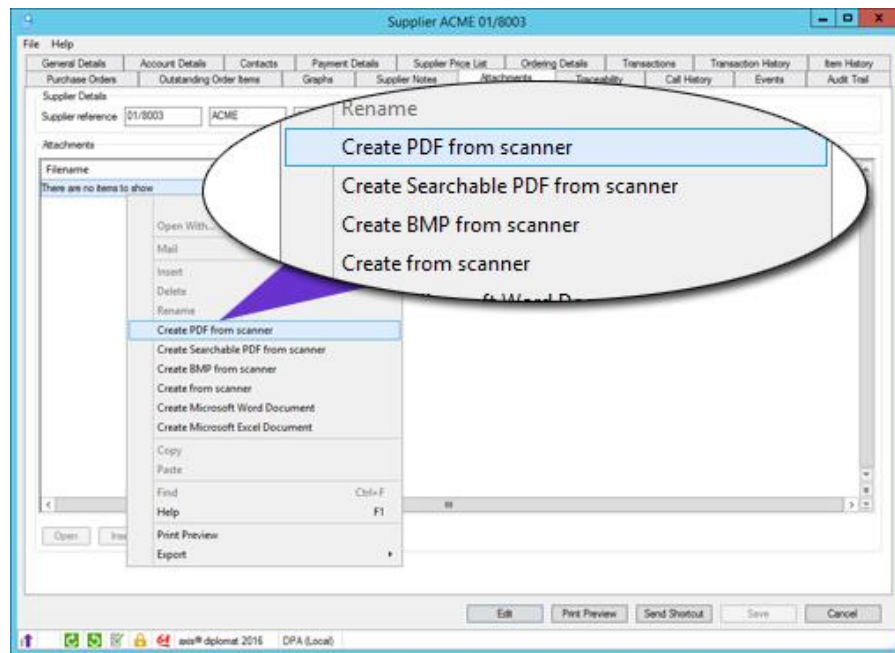
Supplier Enquiry's Attachments tab with right-click options to scan a document directly from a Twain-compatible scanner, as a PDF, a Bitmap (BMP format) or to accept the file format provided by the scanner (such as JPG)

Section 2   Nominal Ledger & General Accounts

2.1.   VAT Number Validation

Customer Enquiry and Supplier Enquiry now allow you to quickly validate your customer's and supplier's VAT numbers. The validation is performed using the VAT Information Exchange System (VIES) provided via the European Commission.
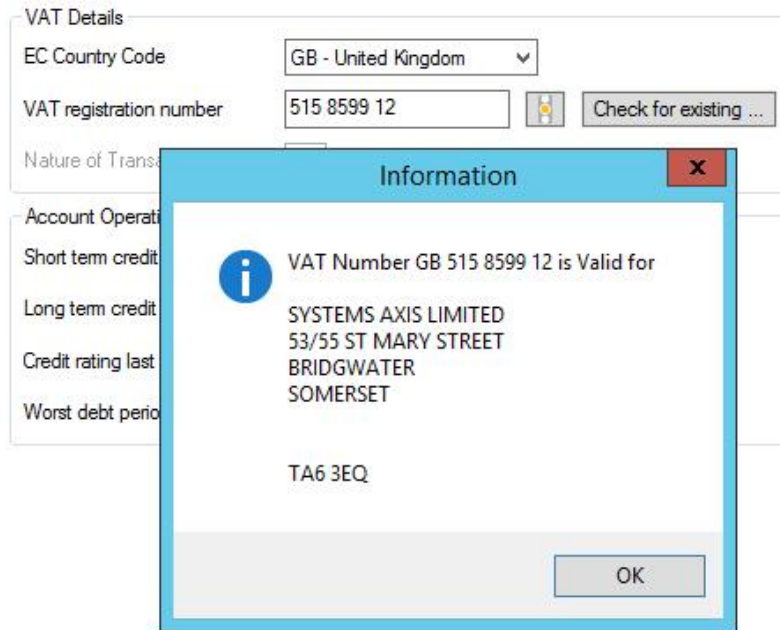
Monitor tabs listing Customers or Suppliers have been extended to include the VAT Registration Number along with a "traffic light" indicating valid (green), invalid (red) or not checked (amber).

2.2.   VAT Status by Delivery Address

axis diplomat 2016 changes the way in which the VAT status is determined when making sales to consumers.

The application of VAT is now determined by; (a) the delivery address (country) and (b) the presence or absence of a VAT registration number held on the customer account. Previous versions also referenced the 'Account Classification' to determine VAT status of the customer account.

For example, if you deal with a UK-based **consumer** and normally ship to their home, for example, in London but on occasion they ask you to ship directly to their holiday home in Jersey, those particular orders are classified as Non-EC Exports; previously you would have needed to amend the account classification or used a separate customer account for those sales.

As these rules only apply to consumers, the system determines whether to identify the VAT status by the delivery address by checking the presence of a VAT number on the customer account**. It is, therefore, vital that you hold the VAT number for any UK-based businesses for whom you ship overseas to ensure correct VAT reporting.**

2.3.   Current Period VAT Transactions

With previous releases of axis diplomat, VAT transactions were filed in separate VAT accounts and only posted to the Nominal Ledger VAT Control Account at Period End.

With the release of **axis diplomat 2016**, VAT transactions are now posted to the Nominal Ledger as well as the corresponding sales or purchase transactions being posted to the trading accounts.

A system parameter determines whether there is a single transaction accounting for all of the VAT for a given document (for example invoice or credit note) or whether there is a separate transaction for each item from that document.
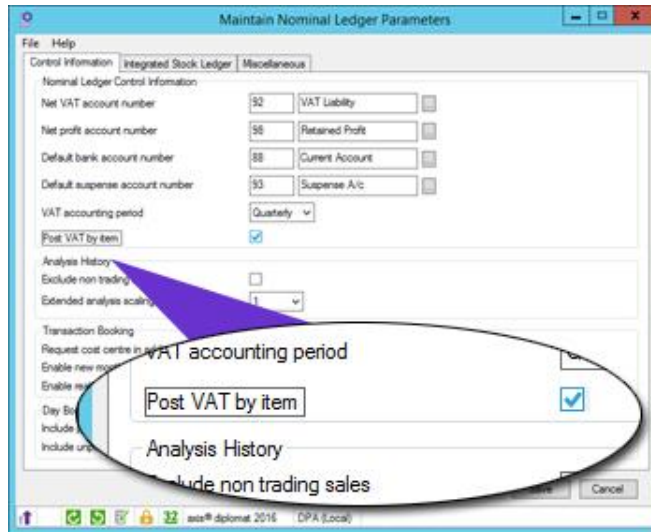
Maintain Nominal Ledger Parameters showing option to create separate VAT transactions for each item on a document

2.4.   Suppressing Consolidated Transactions from Nominal Ledger Report

At the Nominal Period End, all transactions for the period being closed are accumulated into Consolidated Transactions. The Nominal Ledger Report has been extended to optionally suppress these transactions when reporting on previous periods. The options now offered are for Consolidated Transactions Only, Detail Transactions Only or Detail and Consolidated Transactions. Choosing the appropriate option can significantly help improve the readability of the Nominal Ledger Report.
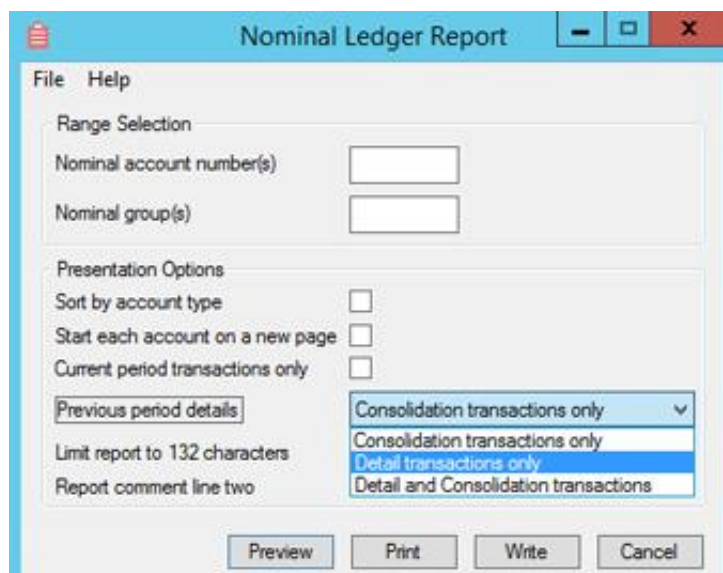
2.5.   Integrated Stock Ledger

A new module, available as an optional addition to **axis diplomat 2016** systems, changes the way in which the value of stock movements are reflected in the Nominal Ledger.

With the new Integrated Stock Ledger module, transactions are posted to the Nominal Ledger whenever a stock movement occurs in place of making periodic adjustments (typically at period end) based on a valuation of the stock on hand.

Stock movement transactions are posted to the Nominal Ledger, in real time once the nominal period end for the previous period has been run, so that receipts increase and issues decrease the value of the Balance Sheet Stock Ledger Control Account (Stock on Hand), whilst the double-entry for each transaction is posted to the appropriate nominal account for the type of movement. For example:

- The cost value of receipts of goods from purchase orders will increase the liability on the Goods Received not Invoiced account: the liability is reduced when the purchase invoice is booked to that account.
- The cost value (from the receipt being issued) on a sales issue transaction will increase the Cost of Sale account specified for that stock item.
- For users of the Compact MRP module, the Work-in-Progress account will be increased by the cost value of components issued to works and when the Works Order is completed the Finished Goods account will be increased by the cost value of the finished item received from works, while the cost value of the components used will be transferred from the Work-in-Progress account to the Finished Goods account, reducing the value of both the Work-in-Progress account and the Finished Goods account.
- Stock transfer transactions are not posted to the Nominal Ledger as they do not affect the stock valuation.
- Other non-specific stock movement transactions will be posted to designated stock adjustment accounts for investigation and write-off if appropriate.

For more information, please refer to our website at:

http://www.axisfirst.co.uk/software/axisdiplomat/modules/Integrated-Stock-Ledger/15326

2.6.   Multiple VAT Registrations   ➕

Businesses selling goods to consumers into individual EC countries where the value of those sales exceed those countries' thresholds for VAT registration must be registered for VAT in those countries.

With the increase in cross-border retail sales (sometimes referred to as Distance Sales), typically driven by successful eCommerce websites, many businesses now find that they must be registered for VAT in a number of European countries.

This new optional module available for **axis diplomat 2016** provides the functionality to handle those multiple VAT registrations across multiple countries.
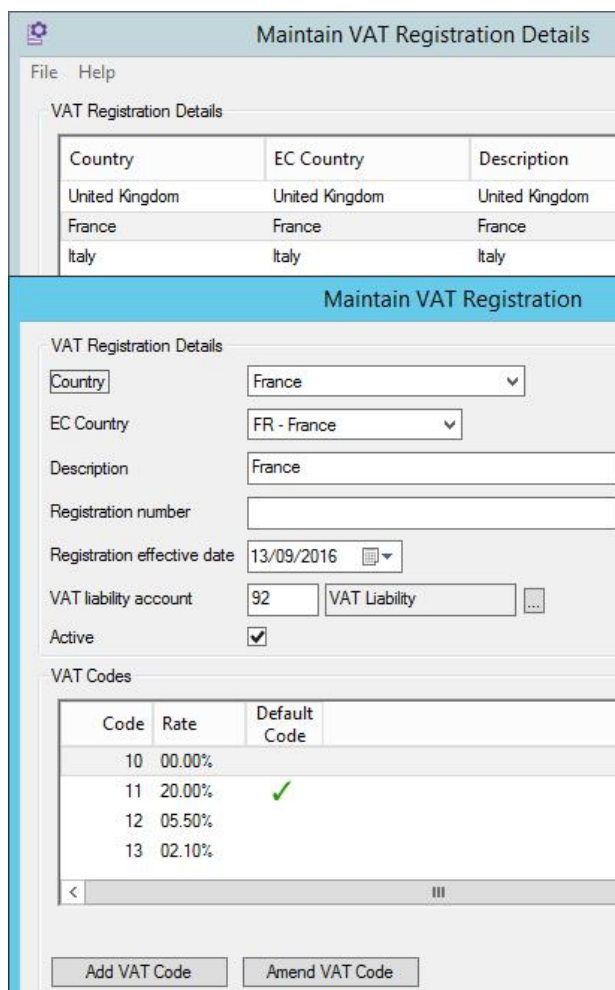
System for a company that is registered for VAT in the UK, France and Italy, showing the maintenance of each registration's unique VAT rates

It introduces the concept of VAT Groups to handle products that have different VAT status in different countries - for example, books are zero-rated in the UK but may be standard-rated in other countries.
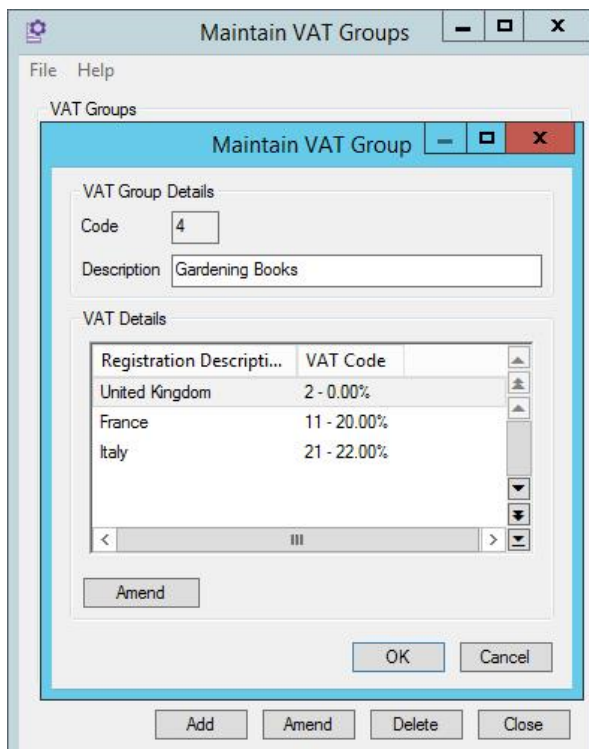
Configuring the VAT rate in different countries for the VAT Group "Gardening Books"

Where a consumer's delivery is to a country which matches an active VAT registration, the VAT rates applied to those goods will be those that relate to that registration rather than the default rate.

For more information, please refer to our website at:

http://www.axisfirst.co.uk/software/axisdiplomat/modules/Multiple-VAT-Registrations/15325

2.7.   Drilldown from Bank Reconciliation

The Bank Reconciliation function now includes additional columns for the contra account - for example, a customer payment will show the account reference, short name and full name of the customer in question.

Right-click context menu options now allow you to drilldown to the customer, supplier, nominal or journal as appropriate (depending on the payment type).
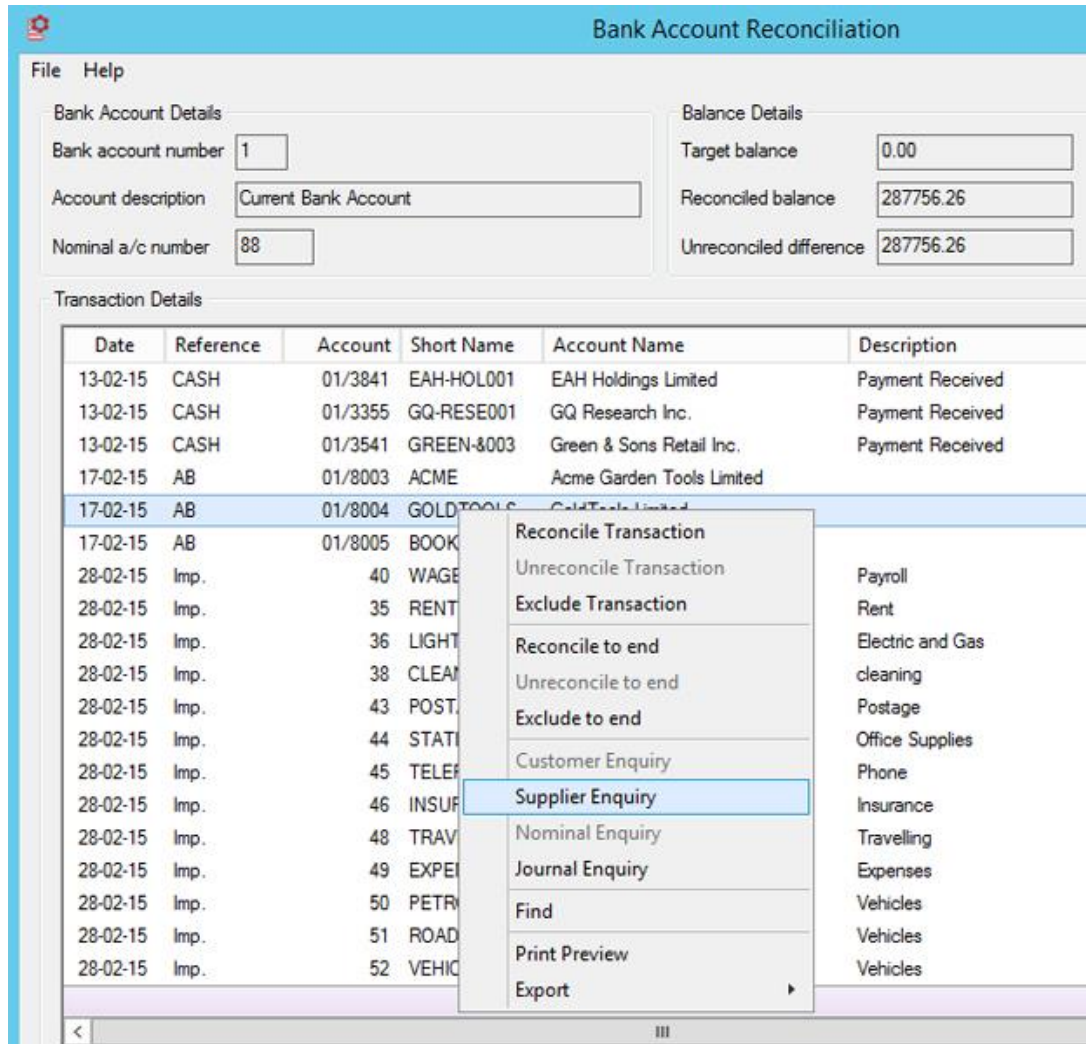
2.8. Nominal Account Attachments ✅⭐

It is now possible to add attachments to Nominal Accounts. As with other document attachments found throughout axis diplomat, these can be any type of additional file (such as a spreadsheet or a PDF). In the context of Nominal Accounts, this might include spreadsheets containing projections that form the basis of your budgeting for this account or a Standard Operating Procedure document describing how regular updates to the account should be done:
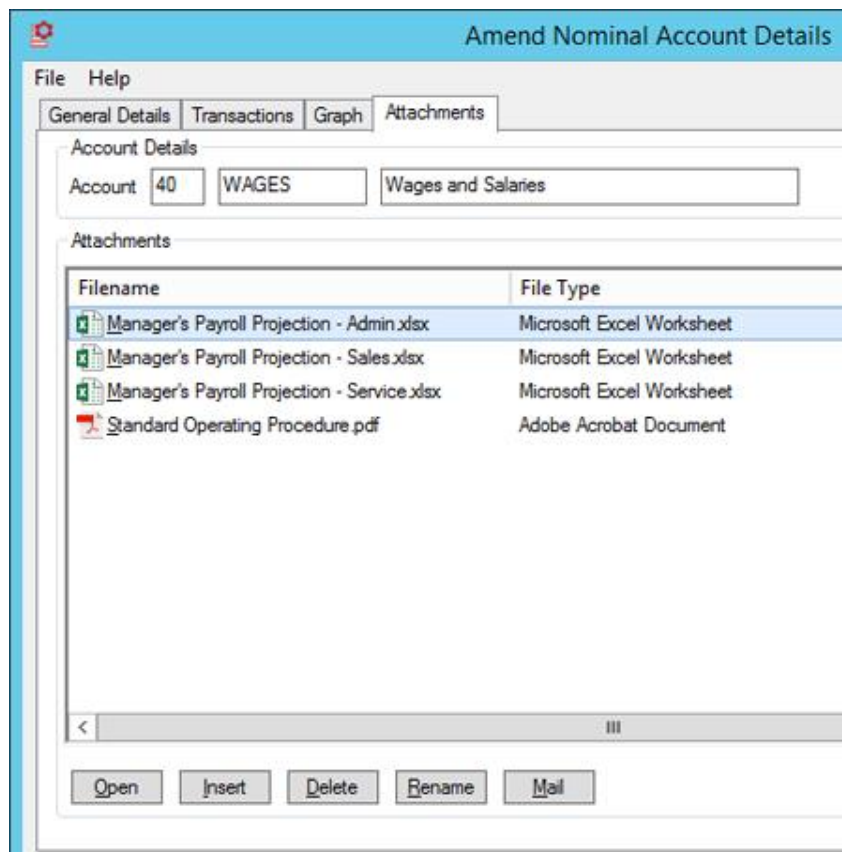
The attachments may of course come from an external source that you simply insert (or drag-and-drop/copy-and-paste) that are purely for archiving purposes, allowing the Nominal Account to become the repository for all such documents. For example, for a Nominal Bank Account, this might include all of the bank statements.

2.9.   Import Nominal Ledger Budget Figures

A new function has been provided to allow Nominal Ledger Budget figures to be imported from a CSV file (typically created from a spreadsheet).

The function allows historical, current and future budgets to be imported so is ideal both for moving to the built-in budgeting facilities within axis diplomat from a different system (such as anyone using spreadsheets for their budgets) but also those that like to use spreadsheets to manipulate their planned budgets before recording them in the system.
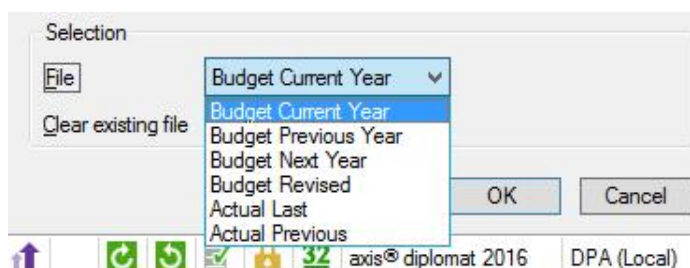
2.10. Nominal Transactions Monitor Tab

You are now able to add tabs to your custom Monitors showing Nominal Transactions. These may be mixed in with other monitor tab types or you can create a separate monitor just for Nominal Transactions. You can have multiple tabs, each filtered to show a different set of transactions.
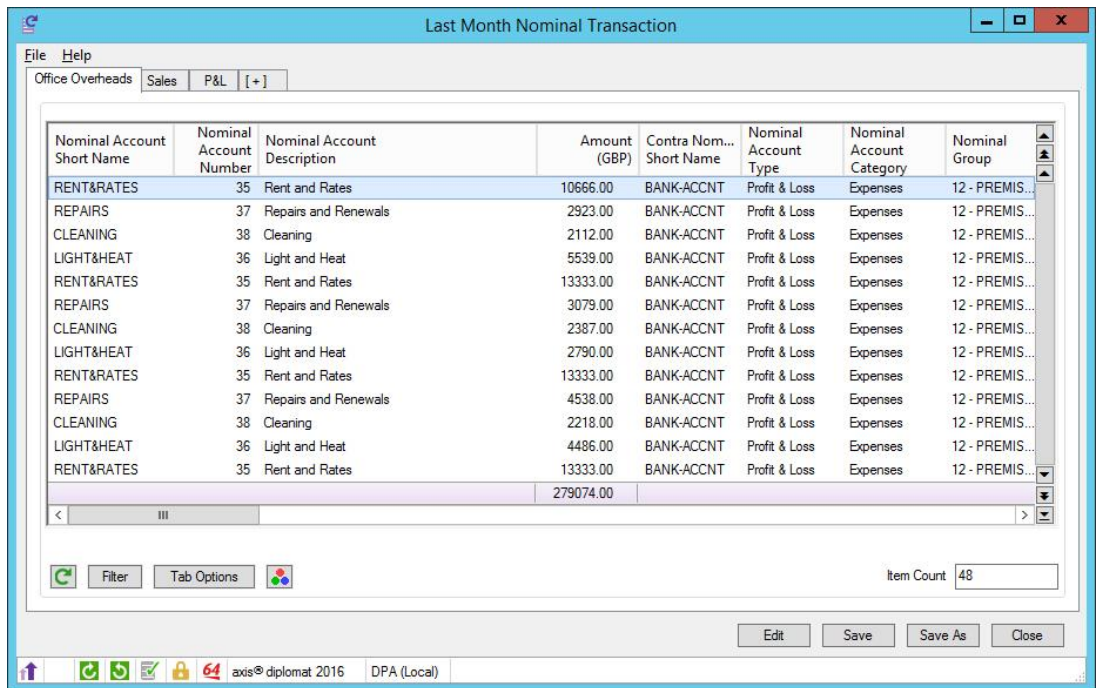
Right-click options are available to drill-down into individual transactions, with options being context sensitive:
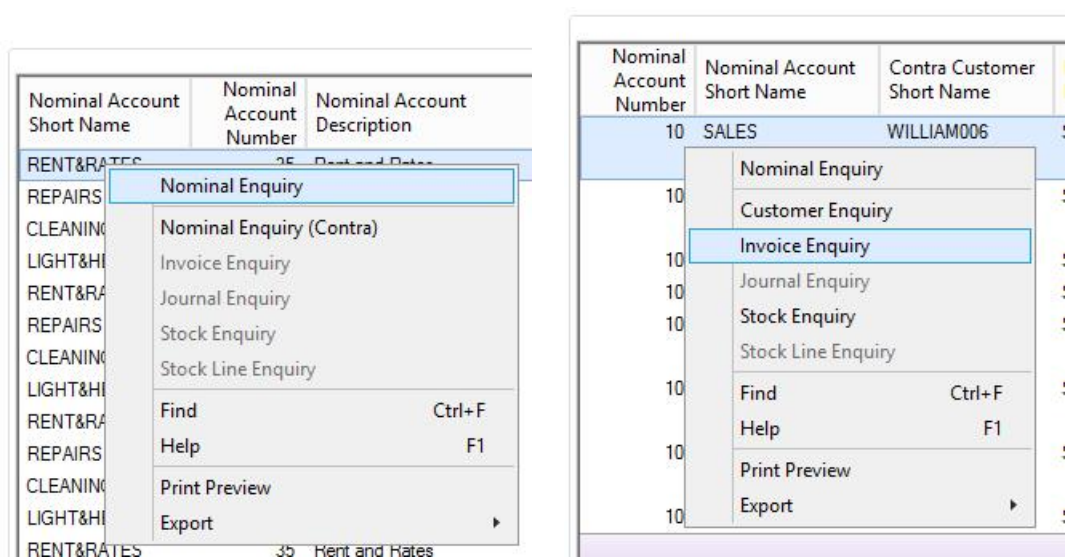
Context-sensitive menu offers different drilldown options depending on the type of the transaction
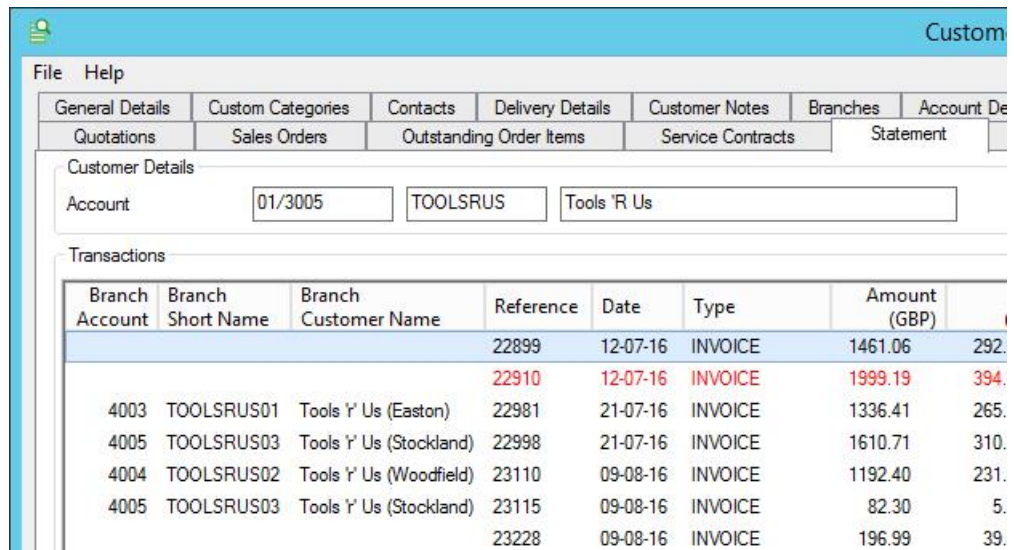
Filter options allow you to pre-set the filters on your monitor tabs by both Nominal Account parameters and by the nature of the transaction. For example, a particular tab could be configured to show transactions for only accounts in a particular Nominal Group and just for the previous period:
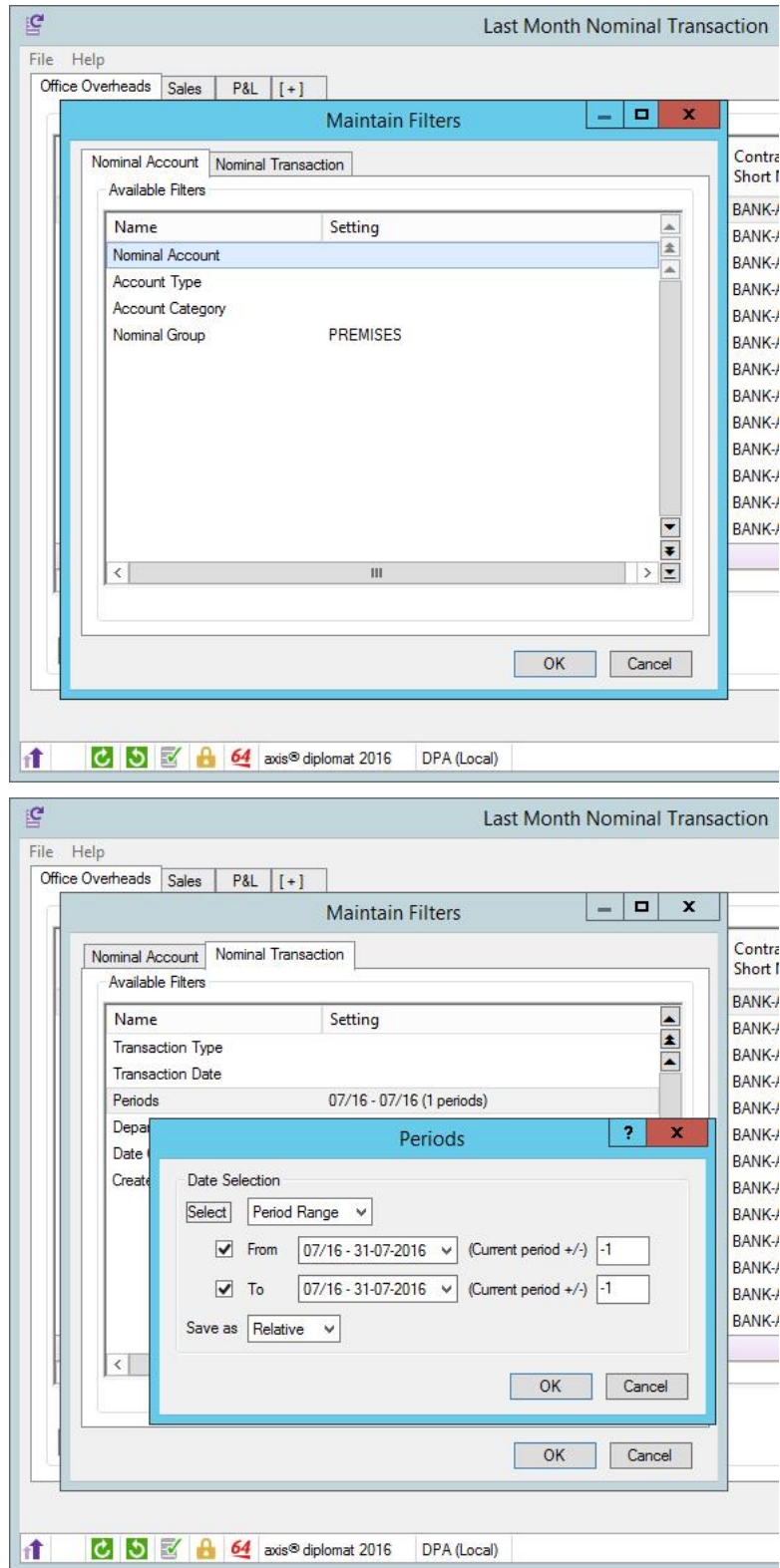
Section 3 Sales Ledger, CRM & Sales Order Processing

3.1. Branch Details in Customer Enquiry Statement tab ✅

The Statement tab for a head office account now includes columns for the Branch Account, Branch Short Name and Branch Name against any transactions originating from a branch.

3.2. Enter Payments ✅

The function to enter a payment via the Statement tab in Customer Enquiry has been extended to allow selection of the required payment method - the operator is now able to select from a list of all payment methods marked as "MOTO" (Mail Order Telephone Order).

The dialog showing the list of outstanding transactions now indicates any settlement discount, and the cut-off date for such discounts.

3.3. Turnover by Product Group Graph ✅

The Graphs tab within Customer Enquiry now features the option to display a Pie Chart showing the customer's turnover by Product Group, for either the current rolling 12 months or the previous rolling 12 months.
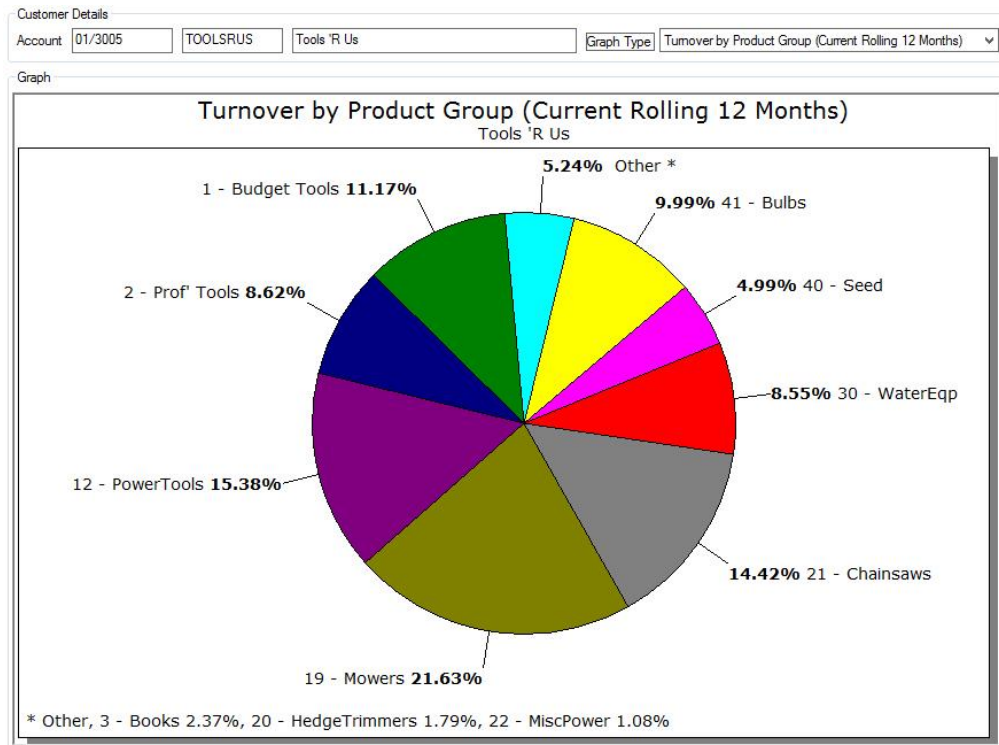
As can be seen from the example above, when turnover extends across a large number of product groups, those with the smallest turnover are automatically collected into an "Other" section to aid legibility.
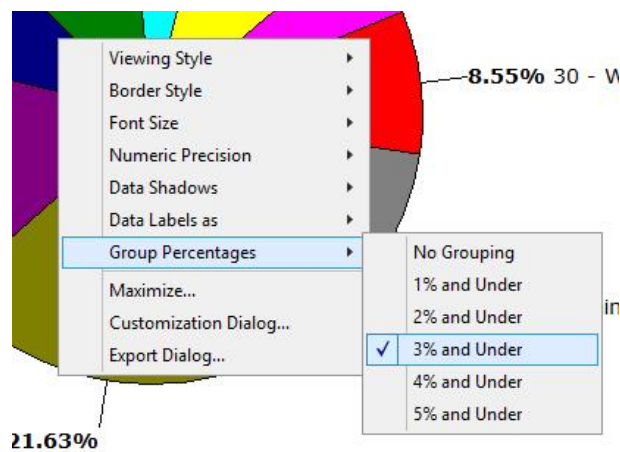
A right-click option allows configuration of the turnover percentage threshold below which groups are merged into the "Other" section.

3.4.   Turnover by Department Graph

For users of the Department/Cost Centre by Line feature, the Graphs tab within Customer Enquiry now also features two additional graphs showing Turnover by Department for the Current Rolling 12 Months and Previous Rolling 12 Months.

3.5.   Contacts List Enhancements

The list of Contacts shown in Customer Enquiry has been extended to show both the Joined Date and the Left Date. A tick box has also been added to select whether contacts that have left are shown - by default, only active contacts are now shown. A further column has been added for Status (Active or Left).
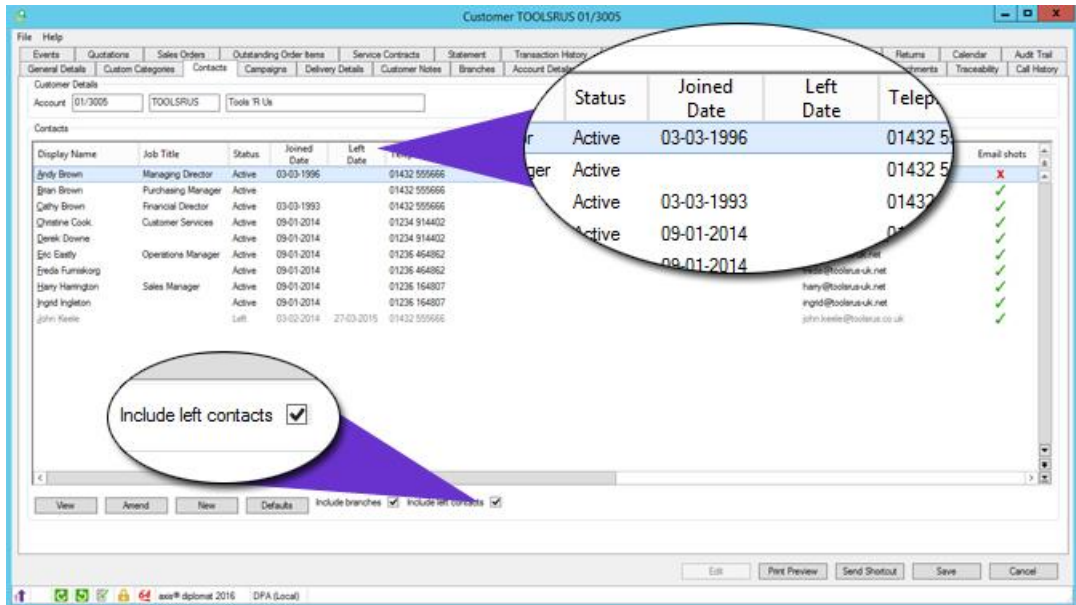
3.6.   Enhancements to Customer Maintenance

Selecting a head office account for a branch has been made easier by including a search button (with a [icon] icon) which offers full searching capability in the same way as the general Customers function.

3.7.   Longer Credit Terms

The maximum number of days credit (for both the default credit days and the maximum credit period) has been increased from 99 to 250 days allowing, for example, customers with six months credit terms.

3.8.   Outstanding Order Items Tab Enhancements

The Outstanding Order Items tab within Customer Enquiry has been extended to include additional columns showing the Order Age (in days) and the Item Due (in days), being the number of days from now before the order item is due; overdue items are shown as negative numbers.

3.9.   Suspected Duplicate Customer Checking ✅

When creating new customer accounts, the system will now check whether the email address or telephone number already exist on other accounts. If any matches are found, a warning dialog is displayed, giving the operator an opportunity to review the other account(s) - if the correct course of action is to still create the new account, the operator can continue.

3.10. Warning on Blank Email Addresses

Functions that allow creation of new contacts against existing accounts or new customer accounts (not only the Customer and Customer Enquiry functions but also others such as Enter Sales Order and Enter Hire) can now generate a warning if attempting to add a new customer and contact with no email address:
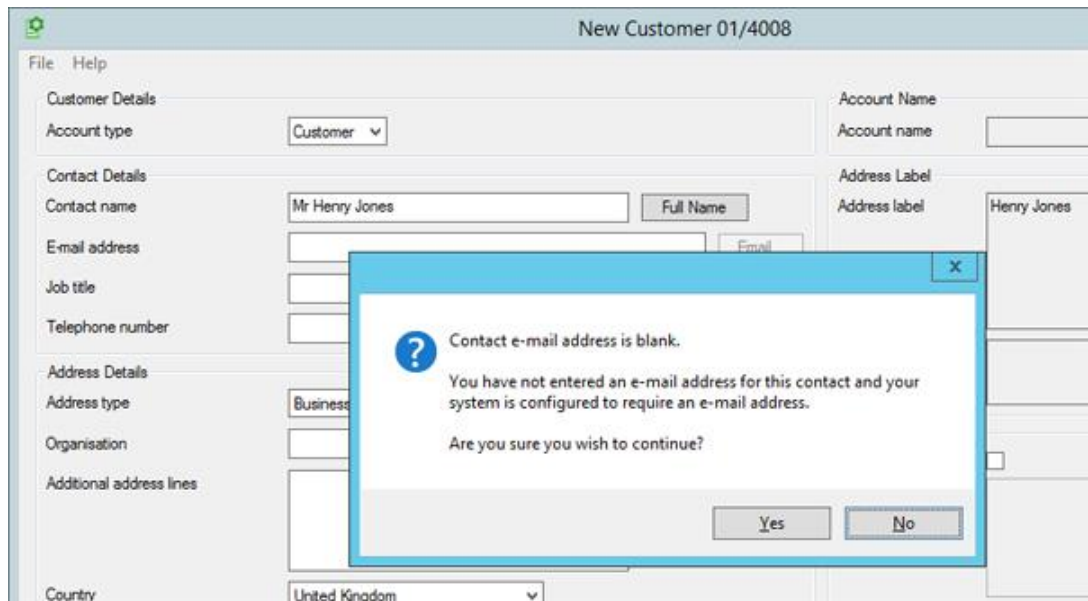
This action is enabled by setting a system parameter via the Amend Sales Ledger Parameters function:
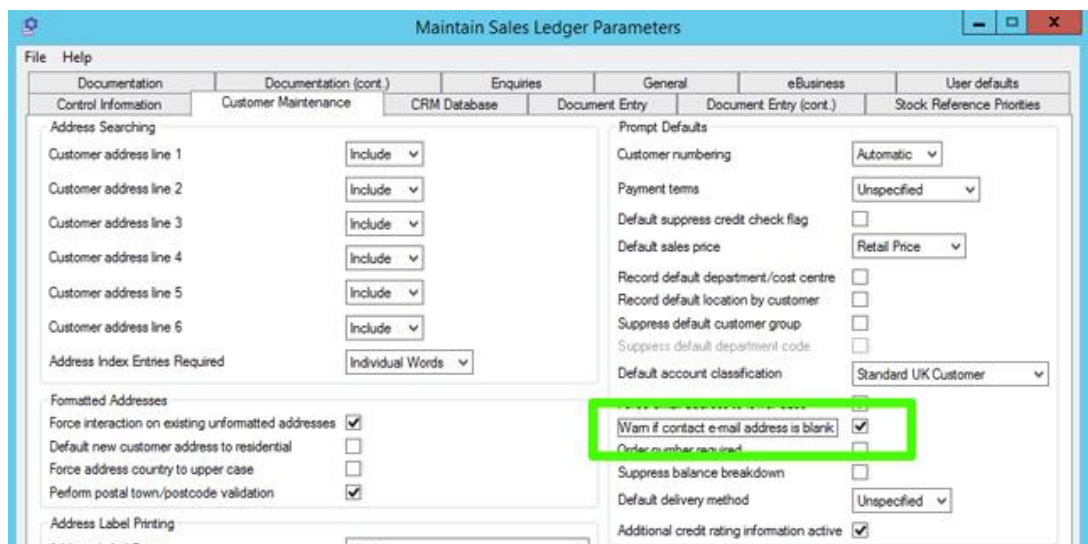
3.11. Campaign Management

The Campaign Management module, previously an optional extra, is now standard on all systems.

The module extends the integrated CRM facilities to provide facilities for both managing a rotating sales cycle and for ad-hoc telesales or marketing campaigns.

It is ideal for any company that has a pro-active telesales team, either calling existing customers on a regular basis (for example, weekly or monthly), or following up specific mailings.

Campaigns are created for specific marketing exercises, such as an individual mailer or catalogue, and also for repeat calls, with a specified frequency. Customers and prospects can then be assigned to a number of campaigns, either manually or via Gap Analysis.

Once customers and/or prospects have been added to a campaign, a range of facilities are available to manage contact with those customers or prospects:

- emailshots may be sent from within axis diplomat to all members of a campaign (optionally excluding those that have declined emailshots)
- a mailing file may be extracted to allow a mailmerge Word document to be used to create a printed mailshot (or simply address labels)
- CRM Calls can be created for use by a telesales team

3.12. Default CRM Call Event Privacy

A new user specific parameter allows call events created by that user to default to being either 'Public' or ' 'Private'. Depending on an individual's job role, it may be generally inappropriate to include their updates on call information made available to clients - those users may now be set to default to creating private events.

Since this is only a default setting, the user may still change a specific event's privacy setting but this parameter reduces the number of occasions where this becomes necessary and, hopefully, the chance of error (for example, accidentally publishing intellectual property or commercially sensitive information).
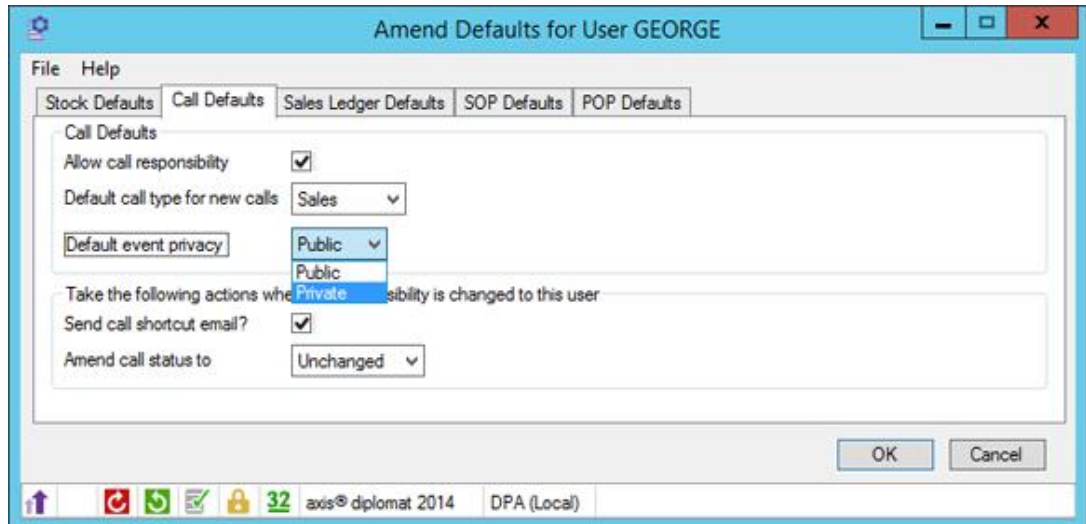
3.13. All-New Customer Record Block Amendment Function ✓★

A number of different supervisor functions, each designed to perform specific updates to ranges of customer accounts, have been replaced with a single new Customer Record Block Amendment function. This new function is easier to use and allows a range of amendments to be made at once.

This is an extremely powerful function and can, in many cases, make a much easier solution to bulk updates than importing spreadsheets. To illustrate the power of this new function, we have published a short video which can be seen by going to the following web page:

http://www.axisfirst.co.uk/software/axisdiplomat/video/

3.14. Default Delivery Method by Delivery Address ✓★

When adding additional delivery addresses to a customer account, it is now possible to specify a default delivery method for that specific address, over-riding the default delivery method for the customer.

In addition, the default delivery method can be set from a CSV file when importing additional delivery addresses using "Import Customer Records".
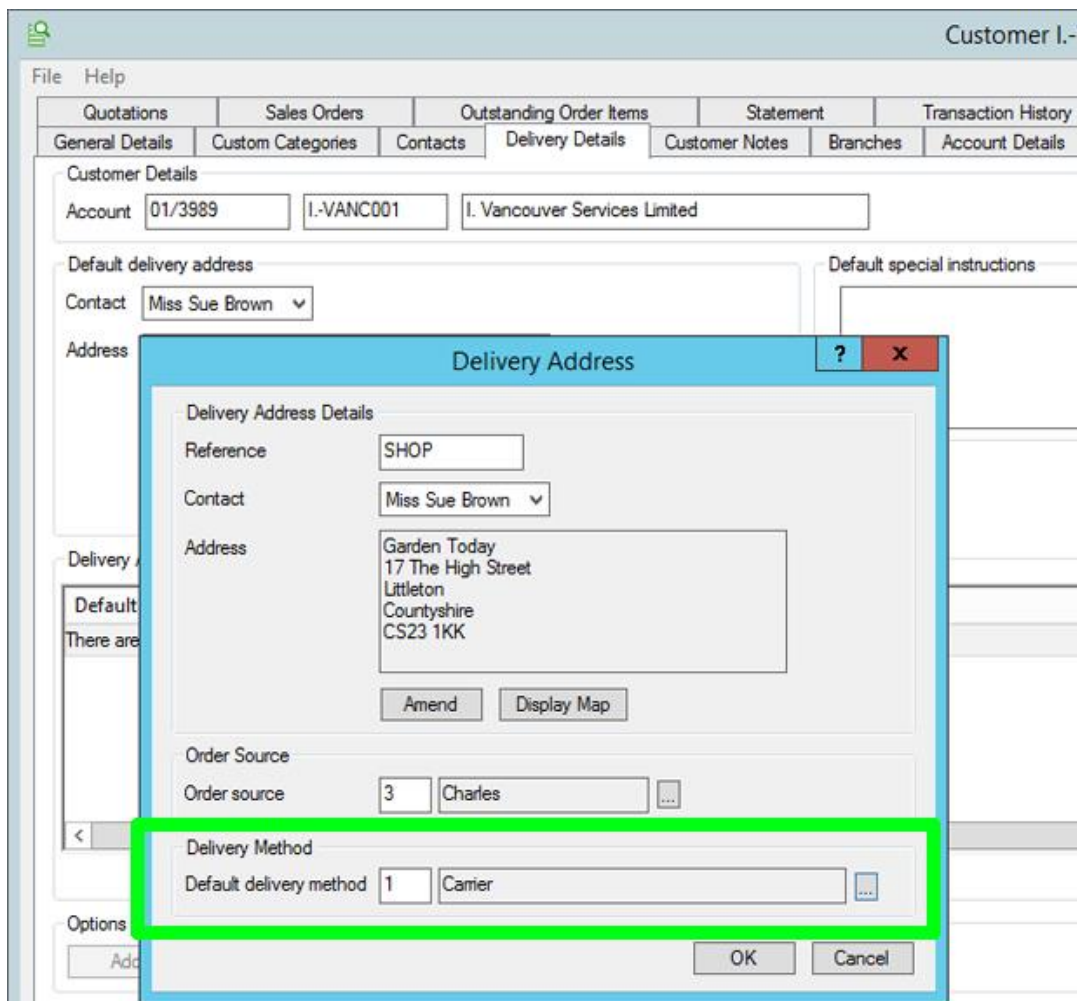
3.15. Ability to Lock Customer's Delivery Method

For those with the Despatch & Delivery Management module that are using the Best Delivery Method option, there is now the ability to 'lock' the default delivery method for a specific customer, thereby disabling the best delivery method calculation for that customer's orders. This is ideal where, for example, you have an agreement with a customer to always use a specific method for their deliveries.
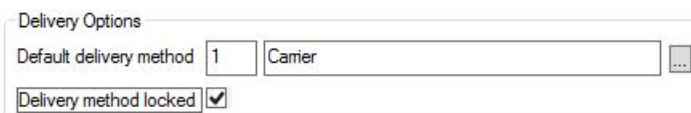
3.16. Customer Notes List

This report, which lists all of the customer notes on selected accounts, has been extended to allow selection by Account Type - Open, Closed and/or Prospect.

3.17. Export Customer Delivery Addresses ✓ ★

A new function has been added to allow customer's additional delivery addresses to be exported to a CSV file.

3.18. Export Customer Details Enhancements ✓ ★

The Export Customer Details function has been extended to optionally include a column in the CSV file for the date of the first transaction for each customer.

The function has also been extended to optionally include a column for the date of the most recent quotation. This can be useful, for example, in filtering or sorting the data within a spreadsheet to identify those customers with recent activity.

3.19. Customer Pricelist Entries by Trade or Retail ✓ ★

It is now possible to create pricelist entries for a customer that use a discount off of the current trade or retail price, irrespective of whether the account in question defaults to trade or retail pricing.

3.20. New Sales Business Intelligence Tab ✓ ★

Sales Business Intelligence now shows two separate Order Source tabs - the original one ("Order Sources") shows the transactions grouped by the Order Source codes associated with the actual sales transactions whilst the new one ("Customer Order Sources") shows the same transactions but grouped according to the default Order Source codes on each Customer Account.
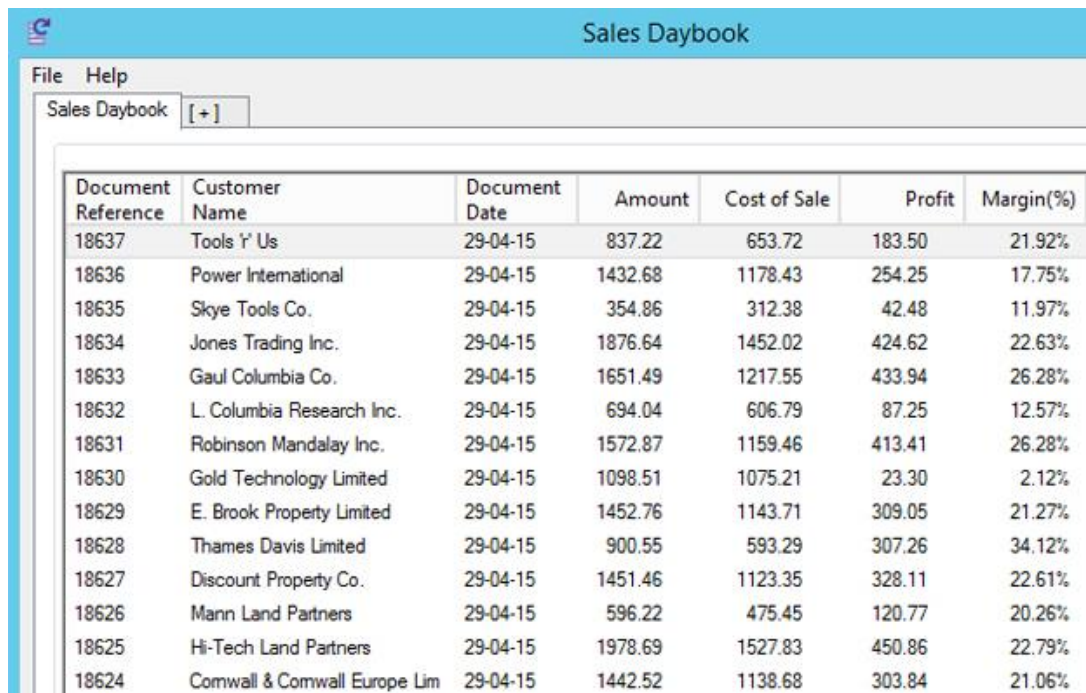
3.21. Amend Due Date on Sales Invoices ✓★

It is now possible to amend the due date on an invoice from Sales Invoice Enquiry (reached, for example, via the right-click "Open" option on an Invoice on the Statement tab of Customer Enquiry) and selecting Edit.

This can be very useful for credit control - for example, when a staged or delayed payment has been agreed with a customer after the invoice has been raised. In these situations, by ensuring that the invoice has been updated to reflect the revised due date, reports and documents (such as debtor letters) continue to show only invoices that are genuinely overdue.

3.22. Profitability Details on Sales Daybook Transactions Monitor ✓★

A monitor featuring a Sales Daybook Transactions tab now includes additional columns for the transaction's profitability (amount and percentage).

Document Reference	Customer Name	Document Date	Amount	Cost of Sale	Profit	Margin(%)
18637	Tools 'r' Us	29-04-15	837.22	653.72	183.50	21.92%
18636	Power International	29-04-15	1432.68	1178.43	254.25	17.75%
18635	Skye Tools Co.	29-04-15	354.86	312.38	42.48	11.97%
18634	Jones Trading Inc.	29-04-15	1876.64	1452.02	424.62	22.63%
18633	Gaul Columbia Co.	29-04-15	1651.49	1217.55	433.94	26.28%
18632	L. Columbia Research Inc.	29-04-15	694.04	606.79	87.25	12.57%
18631	Robinson Mandalay Inc.	29-04-15	1572.87	1159.46	413.41	26.28%
18630	Gold Technology Limited	29-04-15	1098.51	1075.21	23.30	2.12%
18629	E. Brook Property Limited	29-04-15	1452.76	1143.71	309.05	21.27%
18628	Thames Davis Limited	29-04-15	900.55	593.29	307.26	34.12%
18627	Discount Property Co.	29-04-15	1451.46	1123.35	328.11	22.61%
18626	Mann Land Partners	29-04-15	596.22	475.45	120.77	20.26%
18625	Hi-Tech Land Partners	29-04-15	1978.69	1527.83	450.86	22.79%
18624	Cornwall & Cornwall Europe Lim	29-04-15	1442.52	1138.68	303.84	21.06%

3.23. Profit shown in Sales Invoice Enquiry ✓★

The Document Details tab of a Sales Invoice Enquiry (for example when drilling down from a Customer Enquiry or a Sales Daybook Transactions monitor tab) now includes the Profit as a monetary amount as well as the margin percentage previously shown.

Security Permissions within **axis diplomat** allow selected users to be prevented from seeing this information.

### 3.24. Sales Order & Quotation Attachment Templates

We have now added the ability to create attachments to both Sales Orders and Quotations from Word Document Templates (.dot or .dotx files).

This mechanism will be familiar to anyone who uses the same technique to create attachments to CRM calls within **axis diplomat** or on Employee records within **axis payroll**. It allows you to create standard documents ranging from proposal and project plan documents to production and conformity documents.

The attachment template is simply a standard Microsoft Word document template but with fields added, enclosed by braces {...}, that are replaced with the actual data from the Sales Order or Quotation when the attachment is created.

For example, here is a template for a document that perhaps needs to be sent to the customer with the goods:
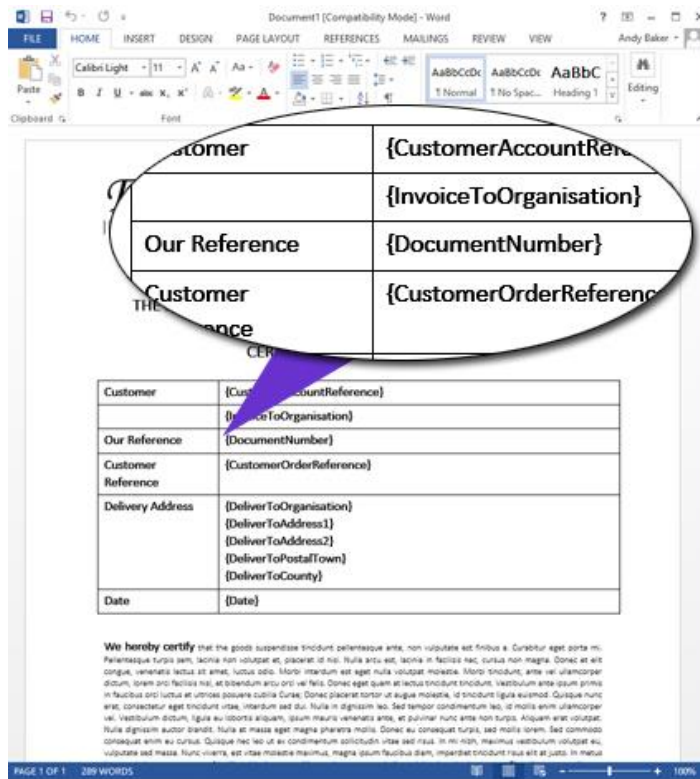
From within the Maintain Sales Order function's Attachment tab, you simply click the "Create from template" button and select the required template:
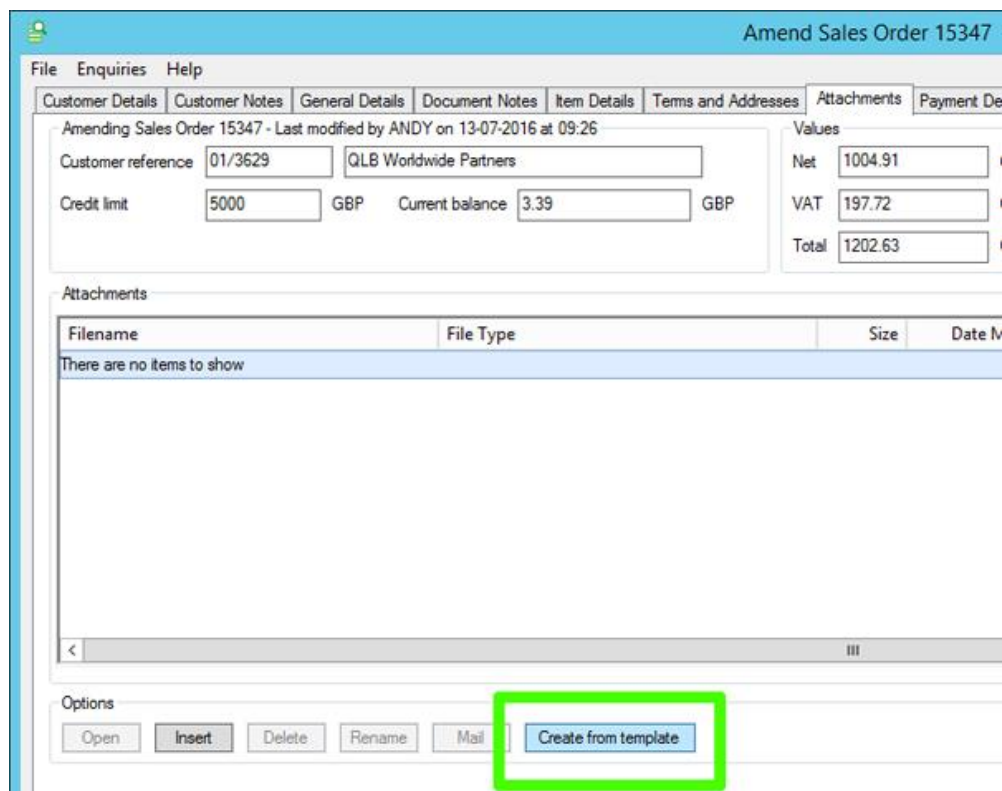
A document is then created from the template with the various fields replaced with the actual information for this order:
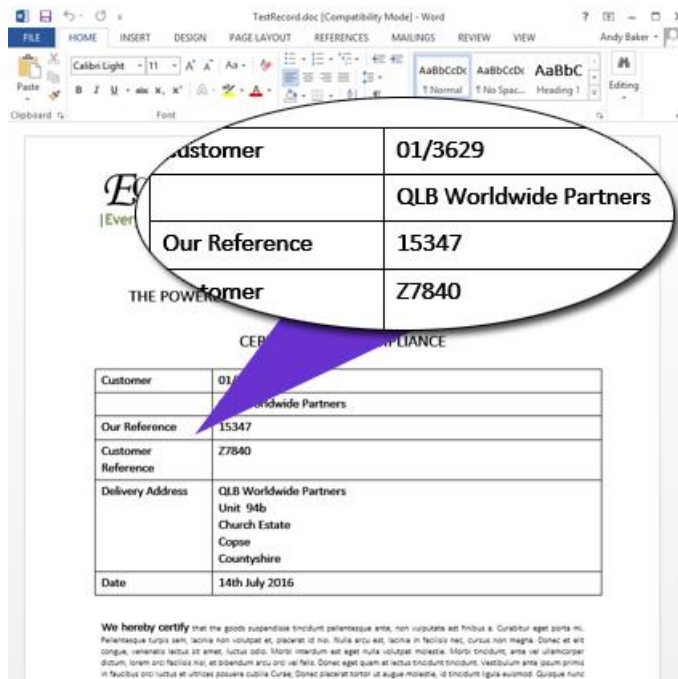
In addition to general information from the sales order or quotation, as shown above, the individual items from the document can also be included as a table:
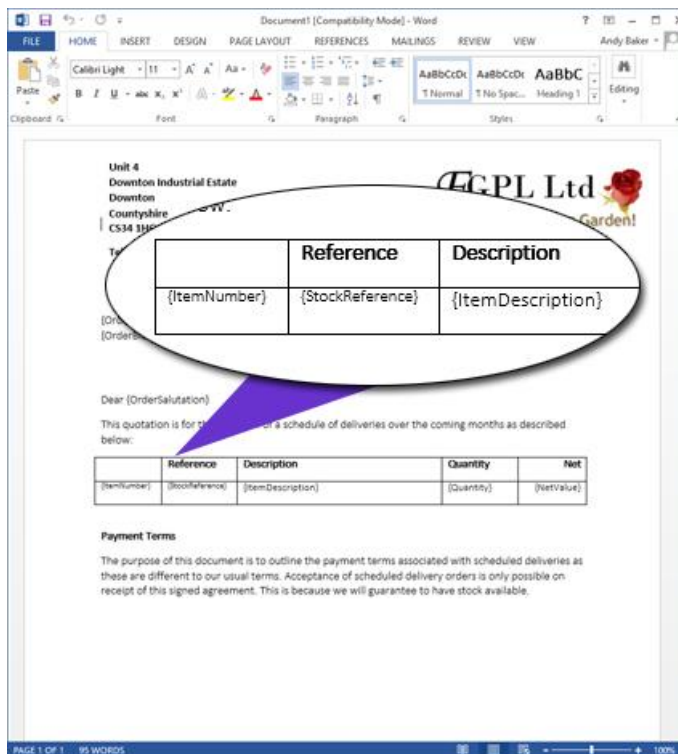
When the attachment is actually generated, the table row will be repeated for each of the items on the Sales Order or Quotation.

3.25. Schedule of Stock Availability in Sales Order Maintenance

When adding or amending a sales order or quotation line for a stock item, a new Schedule button (next to the On Order quantity) opens a dialog showing a breakdown of future projected stock availability, as purchase orders are due to be received and other sales orders are due to be released.
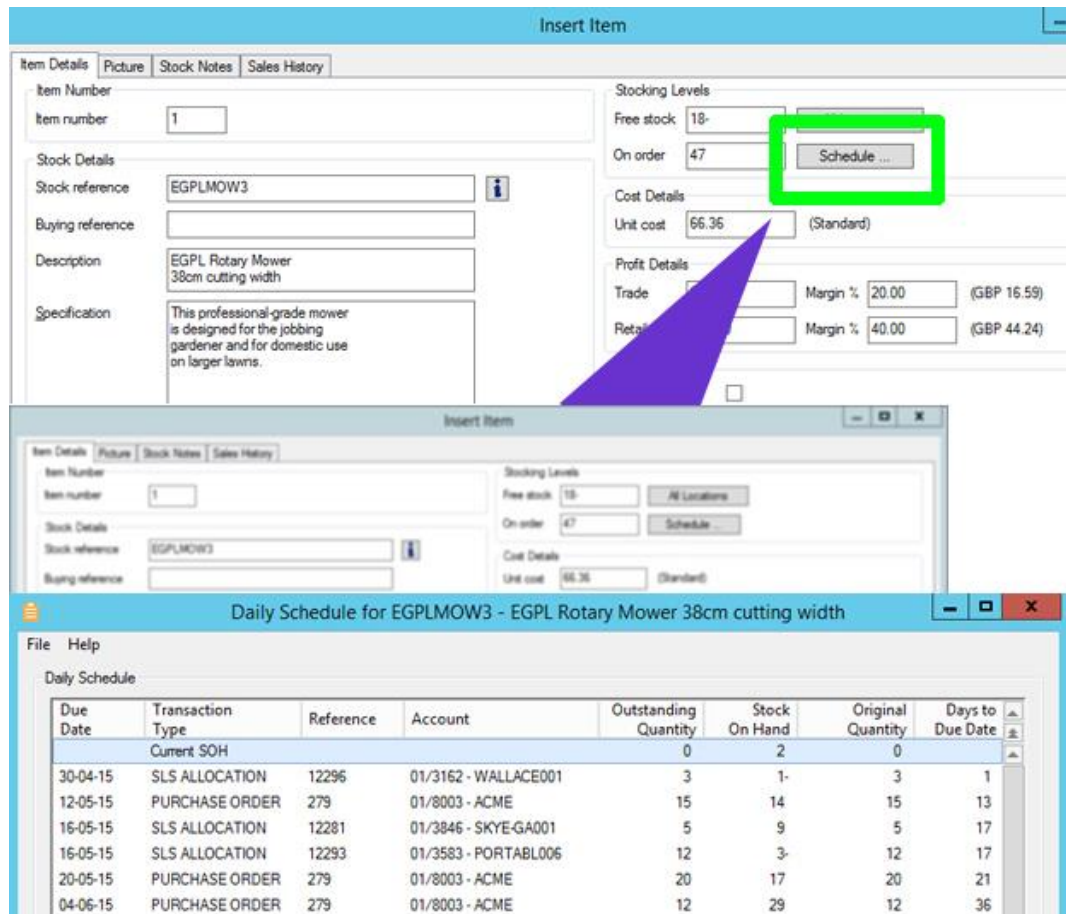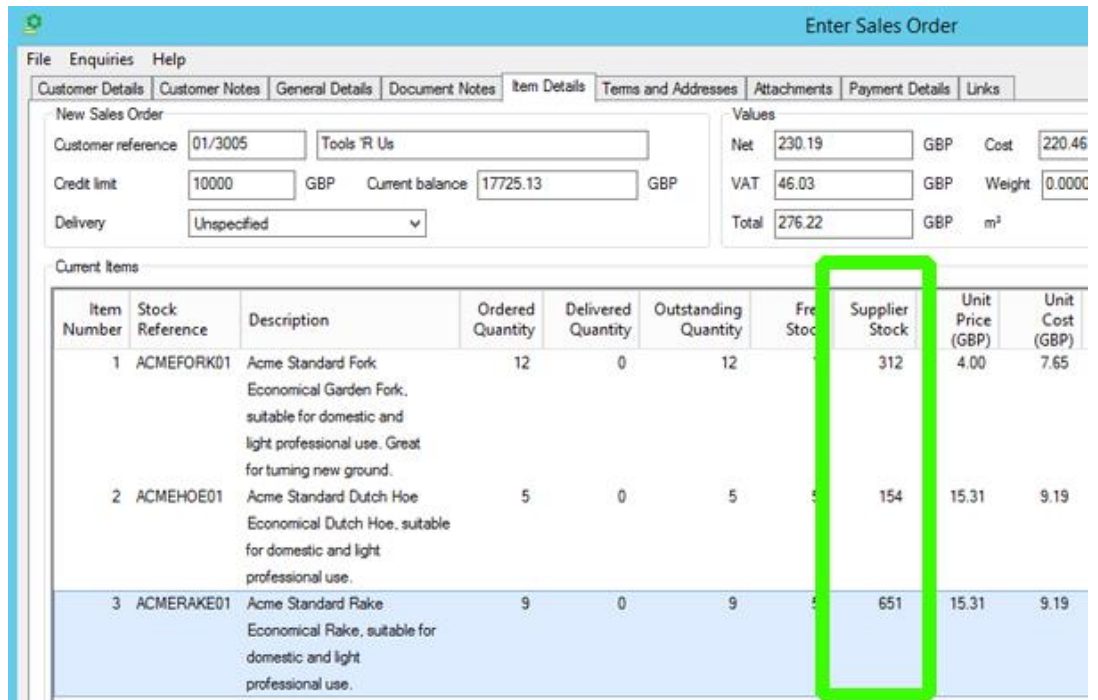
3.26. Value of Next Despatch in Sales Order Maintenance

For users of the Despatch Quantity Recording module, additional columns on the Item Details tab in Sales Order Maintenance now show the net, VAT, total and weight of each line's next despatch quantity. These columns are also totalled, giving an immediate view of the next shipment's value and weight.
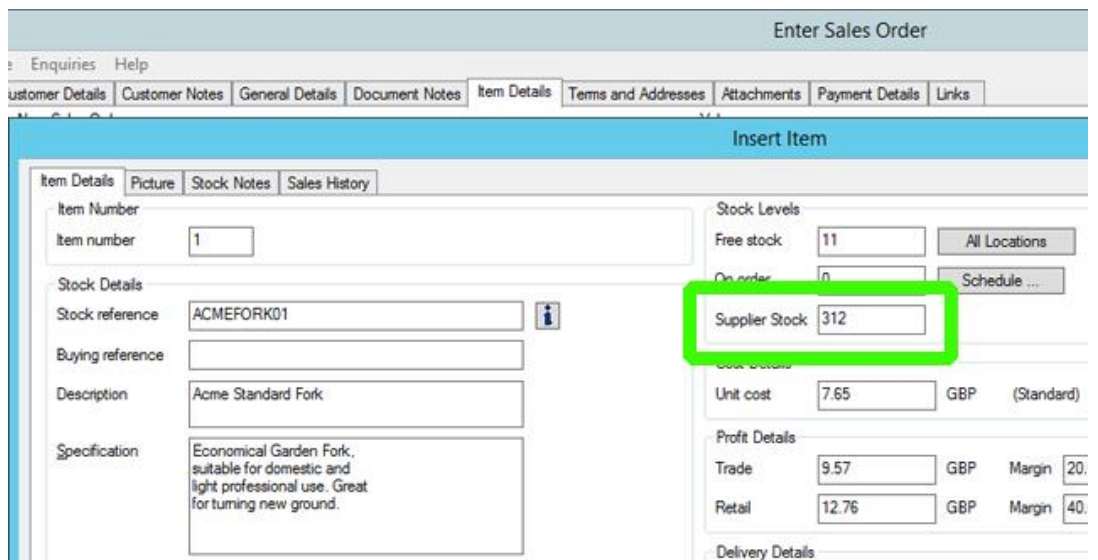
3.27. Supplier Stock in Sales Order & Quotation Maintenance

When entering a stock item onto a Sales Order or Quotation, on systems with the Supplier Price Feeds module, the Supplier Stock is now shown as an additional field. It also appears as a column within the scrolling list of order/quotation lines. Only supplier stock figures from price feeds that fall within the expiry period (i.e. the maximum feed age from the Supplier Account) are included.

3.28. Additional Columns in Search Results for Sales Order Maintenance ✅ ⭐

The scrolling data list of search results when adding an item to a Sales Order (such as Stock Reference Search or Keyword Search) has been extended to include additional columns for the retail price, trade price, sales group code and sales group description.

Sales Group Code	Sales Group	Product Group	Alternative Reference	Description	Unit Price	UOM	Margin	Trade Price	Retail Price	Stock on Hand
2	Hand Tools	1 - Budget Tools	ACMEFORK01	Acme Standard Fork	4.00	EACH	91.25%	9.57	12.76	293
2	Hand Tools	1 - Budget Tools	ACMEFORK02	Acme Light Fork	9.40	EACH	29.47%	8.29	11.06	264
2	Hand Tools	1 - Budget Tools	ACMEHOE01	Acme Standard Dutch Hoe	13.01	EACH	29.36%	11.48	15.31	254
2	Hand Tools	1 - Budget Tools	ACMERAKE01	Acme Standard Rake	13.01	EACH	29.36%	11.48	15.31	240
2	Hand Tools	1 - Budget Tools	ACMERAKE02	Acme Standard Grass Rake	14.46	EACH	29.39%	12.76	17.01	230
2	Hand Tools	1 - Budget Tools	ACMESET01	Acme Standard Hand Tool Set (trowel, fork, potting trowel)	18.08	EACH	29.42%	15.95	21.27	270
2	Hand Tools	1 - Budget Tools	ACMESPDE01	Acme Standard Spade	10.85	EACH	29.49%	9.57	12.76	282
4	Gardenin...	3 - Books	BOOK001	A-Z Weeds 214pp	3.61	EACH	29.36%	3.19	4.25	274
4	Gardenin...	3 - Books	BOOK002	A-Z Roses 196pp	3.61	EACH	29.36%	3.19	4.25	301
4	Gardenin...	3 - Books	BOOK003	A-Z Fruit Trees 270pp	3.61	EACH	29.36%	3.19	4.25	272
4	Gardenin...	3 - Books	BOOK004	A-Z Houseplants 180pp	3.61	EACH	29.36%	3.19	4.25	236
4	Gardenin...	3 - Books	BOOK011	Weeding Made Easy	5.06	EACH	29.45%	4.46	5.95	261
4	Gardenin...	3 - Books	BOOK012	Roses Made Easy	5.06	EACH	29.45%	4.46	5.95	280
4	Gardenin...	3 - Books	BOOK013	Fruit Trees Made Easy	5.06	EACH	29.45%	4.46	5.95	253
4	Gardenin...	3 - Books	BOOK021	Decorating Made Easy	5.06	EACH	29.45%	4.46	5.95	325
4	Gardenin...	3 - Books	BOOK022	Re-wiring Made Easy	5.06	EACH	29.45%	4.46	5.95	277
4	Gardenin...	3 - Books	BOOK023	Plumbing Made Easy	5.06	EACH	29.45%	4.46	5.95	279
1	MISC @2...	4 - Miscellaneous	CARRIER	Delivery by Carrier	7.65	EACH	21.57%	9.00	9.00	
1	MISC @2...	4 - Miscellaneous	DELIVER-SA	Delivery (Saturday)	7.61	EACH	39.95%	5.71	7.61	
1	MISC @2...	4 - Miscellaneous	EGPLACC1	Replacement Battery for cordless hedge trimmer	21.69	EACH	29.41%	19.14	25.52	41
1	MISC @2...	4 - Miscellaneous	EGPLACC2	25m Extension Lead for garden use	18.08	EACH	29.42%	15.95	21.27	5
1	MISC @2...	4 - Miscellaneous	EGPLACC3	Trimmer Cord replacement	3.61	EACH	29.36%	3.19	4.25	653
3	Power To...	21 - Chainsaws	EGPLCS1	EGPL Petrol Chainsaw 33cc, 16" bar	83.19	EACH	29.41%	73.40	97.87	284
3	Power To...	21 - Chainsaws	EGPLCS2	EGPL Electric Chainsaw 240v, 35cm bar	68.72	EACH	29.41%	60.64	80.85	258
3	Power To...	21 - Chainsaws	EGPLCS3	EGPL Electric Chainsaw 240v, 30cm bar	61.49	EACH	29.42%	54.26	72.34	236

Not only does this allow you to sort the results (to make finding the right item even easier) but also allows you to see, at a glance, the buying price for the customer and how it compares to the standard Retail and Trade prices.

> **Tip**
>
> Searching without entering any particular search term will list all items on the stock ledger so this is a quick and easy way of producing a full pricelist for a specific customer on an ad hoc basis. In conjunction with the export to Excel capability common to all scrolling data lists, this is a simple way to produce a pricing spreadsheet to send to a customer. You could even reduce the columns shown to just the information required and save that as a View Profile to minimise the amount of work in Excel prior to sending to the customer.

3.29. New Delivery Addresses via Sales Order Maintenance ✅

It is now possible to add new delivery addresses to the customer account from the Terms and Addresses tab within Sales Order Maintenance.

This is ideal when a new delivery address is not only for this sales order but is likely to be used again in the future. In addition, the two existing buttons for Amend Address and Display Map have been replaced with icons:
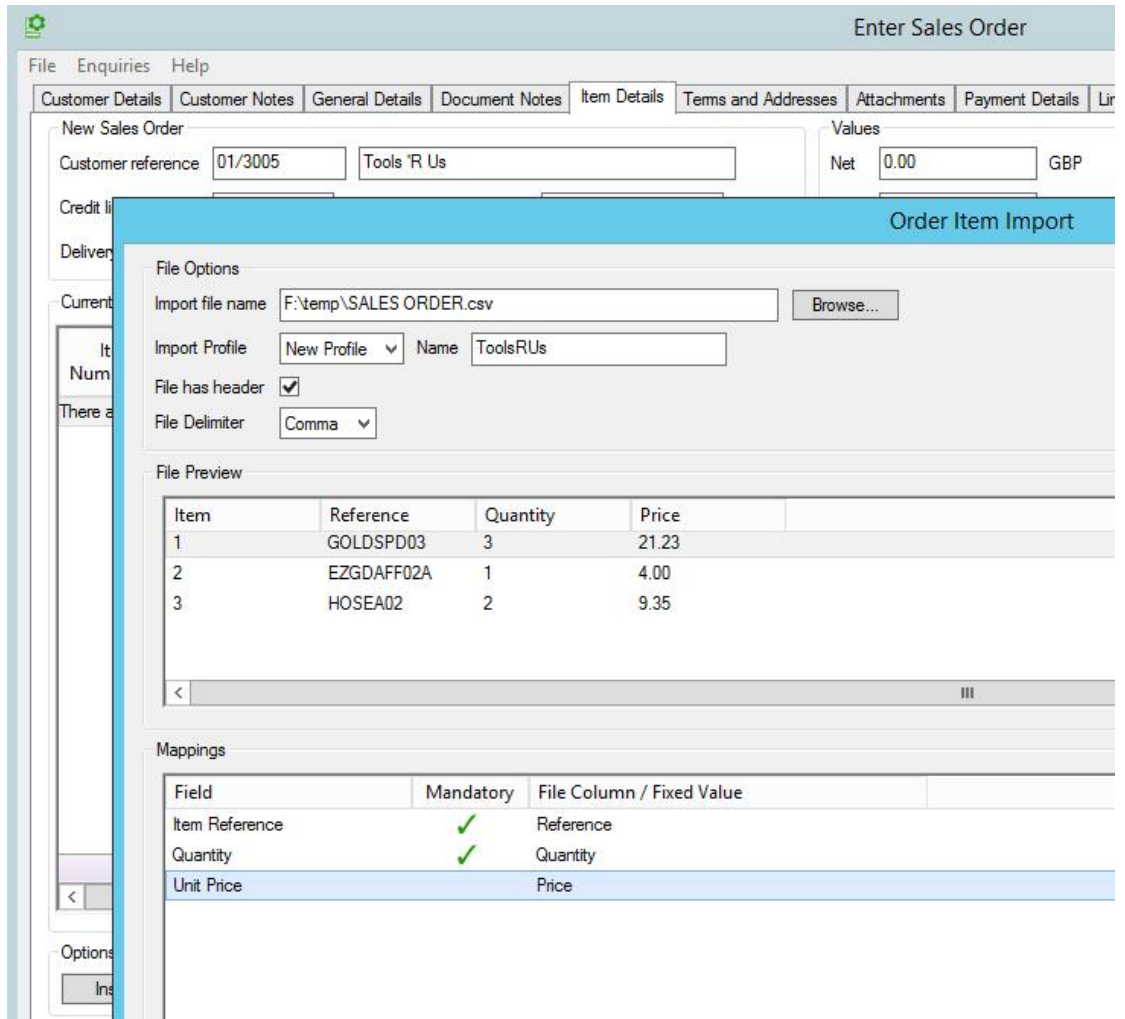

3.30.   Import Sales Order   ✅

It is now possible to import details of a sales order from a file from within Sales Order Maintenance. The file may be comma-separated (CSV), tab-separated (TSV) or Pipe ("|") separated.

This is ideal for those dealing with trade customers who regularly supply orders via spreadsheet (perhaps by email). This is made even easier by allowing the column mappings for a particular import to be saved as a profile for future use - thus, if a given customer always supplies spreadsheets in the same format, you only need to define the mappings once.
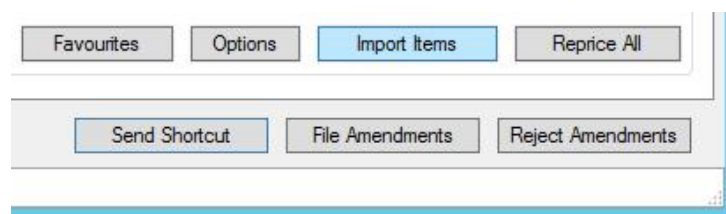
You are presented with a dialog allowing you to browse to the file and map the columns - you can import the prices from the file or allow the system to define the pricing as if you were manually entering the items onto the order.

Having named the profile, then in future, whenever files are received in the same format, it is only necessary to choose the file and select the profile in order to import the items into the Sales Order.
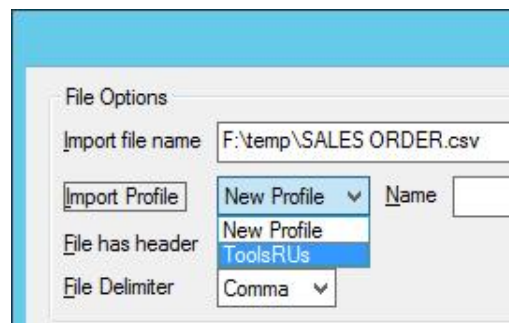
3.31. Reprice Sales Orders & Quotations

It is now much easier to ensure that pricing within a sales order or, more commonly, quotation is brought up to date. This can help to protect your margins by ensuring that, for example, you do not accidentally re-issue an old quote when the pricing has changed.

Within Sales Order or Quotation Maintenance, additional columns can now show the recalculated net, VAT, total and variance for each line - in other words, the values for each line if they were re-entered now compared with the values on the quote.
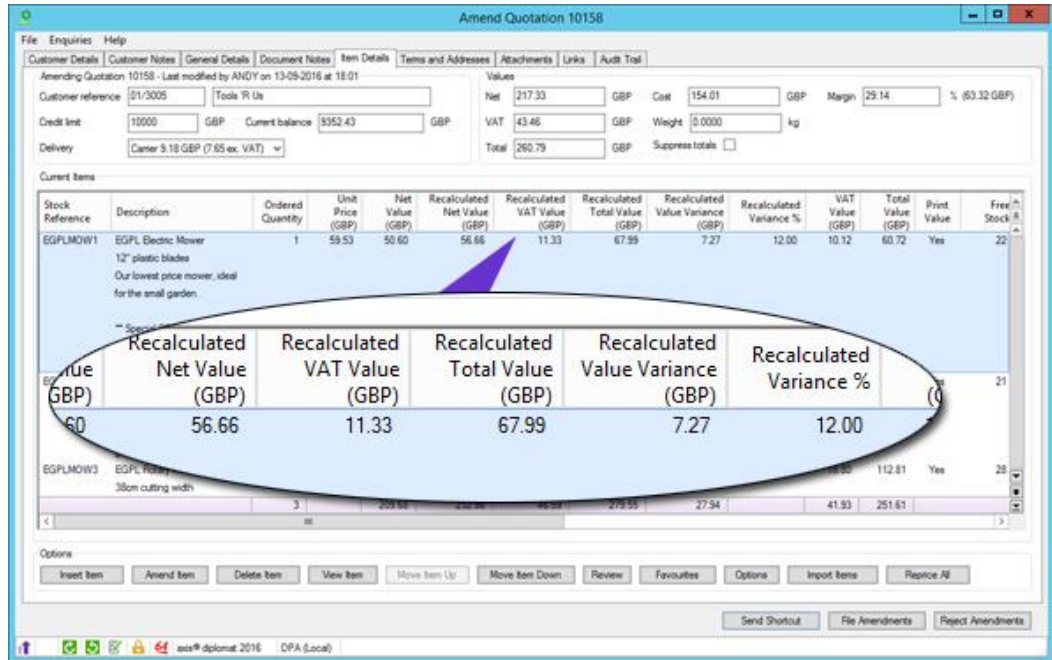
This example shows a quotation where the first line is £7.27 (including VAT) less than it ought to be at current pricing
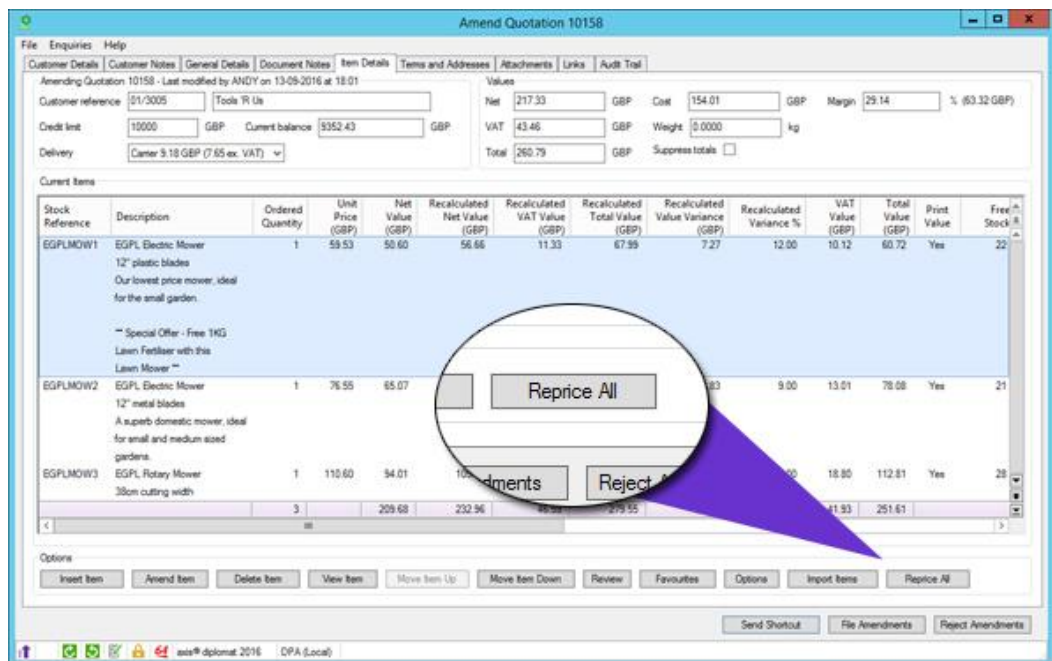
In addition, a new Reprice All button allows you to update, with a single click, all of the prices on your Sales Order or Quote to current pricing.

3.32.   Colour-Coding within Quotation Maintenance

The colour coding within Quotation Maintenance has been updated to bring it into line with Sales Order Maintenance. Closed or Completed lines are now shown in grey. This includes, for users of the optional Custom Build Assemblies, option lists.

3.33.   Reschedule Quotation

A new function has been added to reschedule the due dates on a quotation, optionally including all of the line items. This function can be accessed via a right-click option within Quotation monitor tabs and the Quotations tab within Customer Enquiry. It can also be run as a separate function via the main Quotations menu,

3.34.   Quotation Reporting

This development enhances the ability to analyse the successful conversion of quotations. It changes the behaviour of "Convert Quote to Order" so that, instead of the quote being changed into a Sales Order, the quotation is automatically closed and a new sales order created with the same document reference. This ensures that there is always a quotation to compare with, regardless of whether the original quotation was copied to a sales order or converted into a sales order.

Sales Order Monitor tabs can be filtered based on the existence of linked quotations so it is now possible to compile a monitor with separate tabs showing

- Sales orders that have not been converted from a quotation
- Sales orders that have been converted from a quotation
- Sales orders irrespective of whether or not they have been converted from a quotation

3.35.   Sales Order Monitor Enhancements

A number of fields have been added to the Delivery Addresses tab:

- Currency[1]
- Order Value (Currency)[1]
- Order Value (Base ledger currency)
- Outstanding Value (Currency)[1]
- Outstanding Value (Base ledger urrency)
- Order(s) on Hold
- Order(s) Weight

[1] - only applicable to systems with the optional Foreign Currency module

3.36. Stock Traceability Details in Sales Order Monitor

For systems with the optional Stock Transaction Traceability module, Sales Order monitor tabs now include an additional column to indicate sales orders that contain at least one traceable item.

3.37. Despatch Quantity Details in Sales Order Monitor

For users of the optional Despatch Quantity Recording module, a number of additional columns have been added to the Sales Orders tab:

- Next Despatch Value (Original Currency)[1]
- Next Despatch Value (Base Currency)
- Next Despatch Weight
- Available Stock Weight

Whilst further fields have also been added to the Delivery Addresses tab:

- Next Despatch Value (Original Currency) [1]
- Next Despatch Value (Base Currency)
- Available Stock Value (Original Currency) [1]
- Available Stock Value (Base Currency)
- Available Stock Weight
- Next Despatch Weight

[1] - only applicable to systems with the optional Foreign Currency module

3.38. Customer Email Notifications

The system is now capable of automatically sending an email notification to a customer whenever a sales order is changed to particular status codes.

Specific status codes are marked as triggering an email and each status code can be associated with a specific email variant. A PDF of the Order Acknowledgement is automatically attached to the order.

Emails can also be sent on change of status code for quotations and, for users of the Service Contract Management module, Service Contracts and Requests for Service Contract.

3.39.   Additional Description Lines from Goods on Account

The function Maintain Goods on Account Bookings has been modified to allow additional description lines to be amended or removed.

3.40.   Allow/Disallow Consolidated Order Picking

Until now, the axis diplomat Warehouse Management module would automatically suggest combining multiple orders for the same customer with the same delivery address. This can now be controlled, on a customer-by-customer basis and is designed for use when supplying customers who insist on a separate delivery note and/or invoice per order (or part order). The default setting of this flag is determined by a system parameter but can be over-ridden for individual customers, either using Customer Account Maintenance or in bulk from CSV (using Import Customer Records) or the Sales Ledger Supervisor Function "Set Customer Flags".

3.41.   Picking by Original Stock Receipt Date

On systems with the optional multi-location, multi-bin stock module, sales order picking can now draw from stock transactions based on the oldest original receipt

date. Traditionally, the 'oldest' stock (other than traceable items on systems with the Stock Traceability module) would be based on the transaction's receipt date - which might be the date it was transferred into that stock location rather than the date it was originally received by the business.

The original stock receipt date is now preserved and, by setting the appropriate system parameter, picking can be based on choosing the oldest stock received into the company rather than the oldest stock transfer into this location or bin.

3.42. Enhancements for Replenishment Orders

For customers with the Replenishment Orders module, Sales Order monitor tabs can now be filtered by replenishment order location whilst the Location Details tab within Stock Enquiry has been extended to show the incoming replenishment quantity for each location.
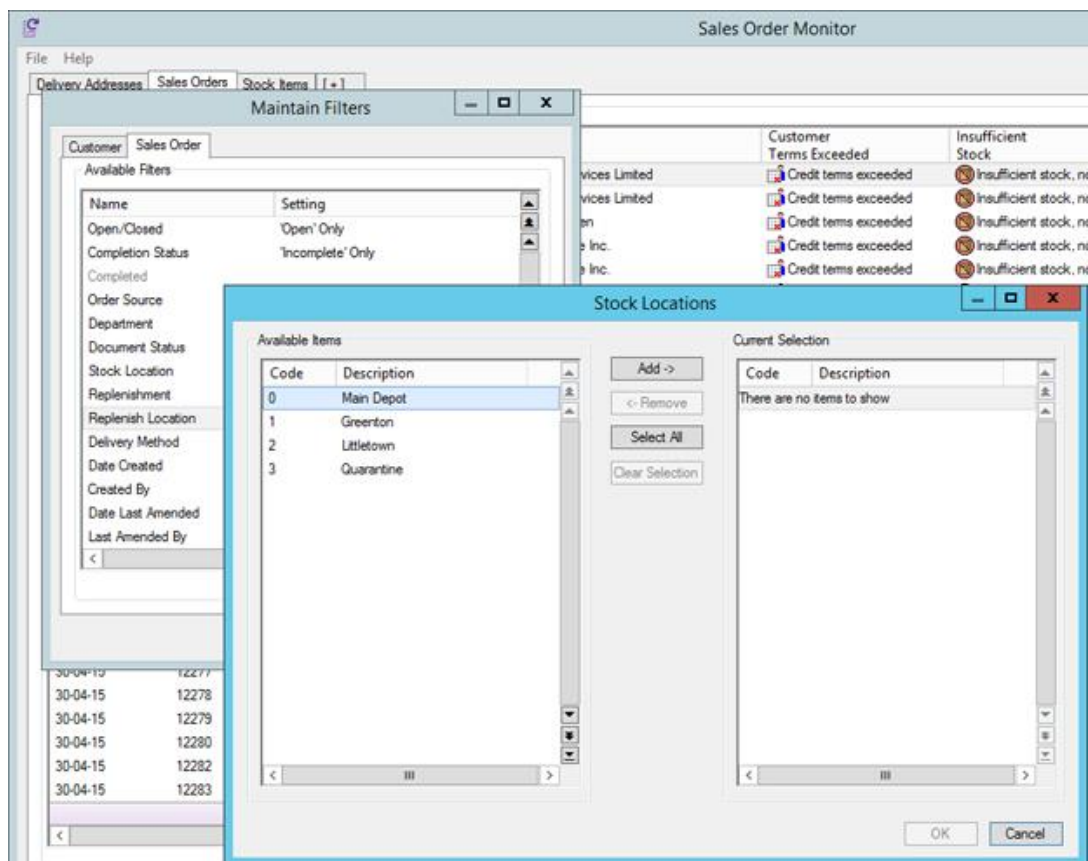
3.43. Set Despatch Quantities by Batch

For customers using the optional module Despatch Quantity Recording, the Set Despatch Quantities by Batch function now allows selection by Order Origin:
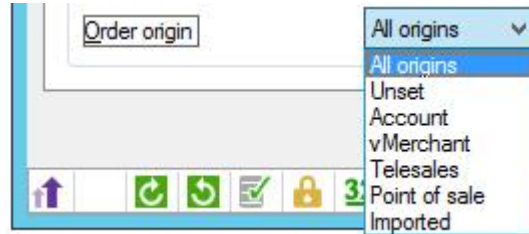
The function has also been made significantly faster, particularly on larger systems.

3.44. Set/Clear All Despatch Quantities from Order List

A further development for users of the option Despatch Quantity Recording module is the ability to clear all despatch quantities for a single order, or to set the despatch quantities for all outstanding items to the maximum available by a right-click within a list of sales orders. This can be done from within Sales Order Monitor (or a Sales Order monitor tab within a custom monitor) or from the Sales Orders tab of Customer Enquiry.
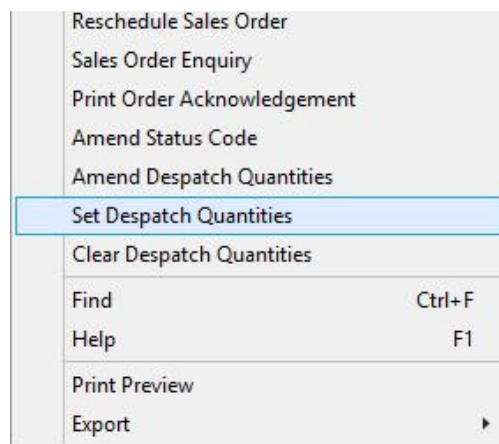
3.45. Set Despatch Quantities for Scheduled Deliveries

For those using the optional Scheduled Deliveries facility, there is now the ability to set despatch quantities for a specific delivery via a right-click option within the Deliveries Monitor.

3.46. Despatch Quantity Defaults by Location

For users of both the Multi-Location Stock and Despatch Quantity Recording modules, the behaviour of the default next despatch quantity used by Sales Order maintenance functions can now be overridden on a location-by-location basis. Within Maintain Stock Locations, the Next Despatch Quantity setting may be left as "System", in which case it will follow the system-wide default behaviour, or it may be set to Zero, Order Quantity or Maximum Available.

3.47. Import Cash Receipts by Customer Short Name

The optional function Import Cash Receipts (part of the Sales Transaction Import Functions module) has been extended to allow customer accounts to be specified in the import file by Short Name rather than Account Number.

3.48. Tolerance to Rounding Discrepancies when Releasing Sales Orders

When part-shipping sales orders, valid discrepancies can occur between the sum of the individual invoices and the original expected order total - due to either VAT rounding or discount rounding. When invoicing to credit account customers, this does not cause an issue but when dealing with cash with order customers (typically those paying by credit card) it is possible that the sum of the invoices may exceed the original payment taken (typically by a penny or two) which could prevent the final invoice being released as there are insufficient funds available.

A new Sales Order Processing parameter has been introduced ("Maximum under payment") which allows you to specify a value (for example £0.05) to still allow these final deliveries and invoices to be processed.

3.49.   Delivery Enquiry

Whilst, for users of the Despatch & Delivery Management module, it has been possible to view the details of a Delivery via the Deliveries Monitor or from the Deliveries tab of Customer Enquiry there is now also a separate function called Delivery Enquiry. This simply allows you to enter a Delivery number in order to find the information on that specific delivery. This is ideal, for example, in situations where you do not know the specific customer to which the delivery relates.
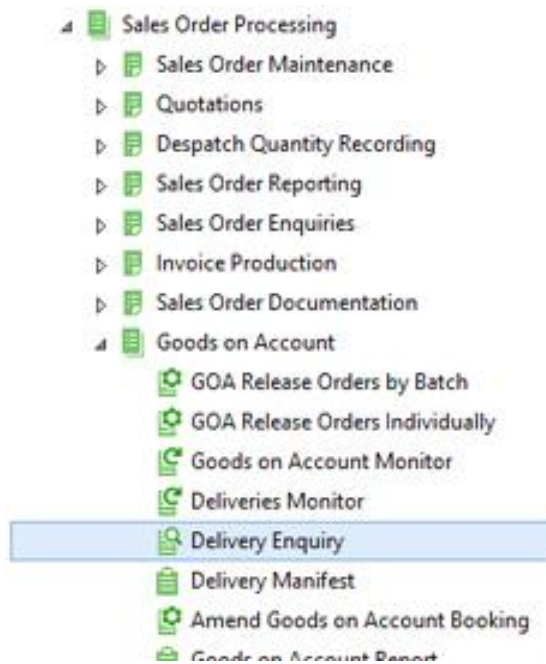
The Delivery Enquiry itself has also been extended to include additional tabs listing the pick details and, for customers with the additional Shipping Containers module, container information.

3.50. Delivery Number Searches in Customers function

Also for users of the Despatch & Delivery Management module, the Customers function has been extended to additionally search for customers by Delivery Number.
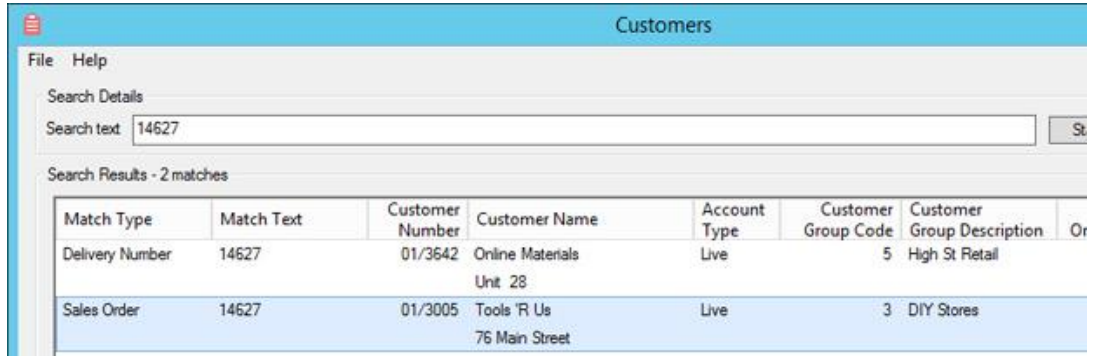
This screenshot illustrates how a search of "14627" has identified two possible customers - one with a Sales Order numbered 14627 and one with a Delivery numbered 14627
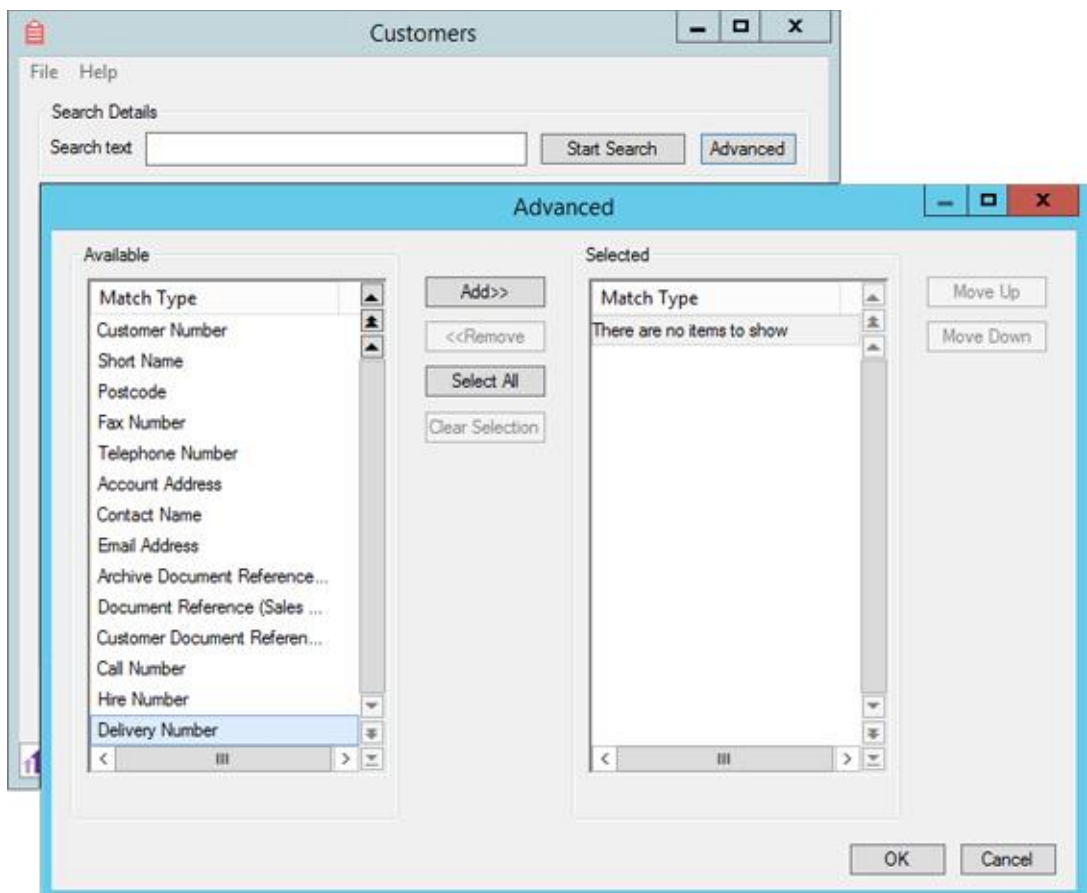
Delivery Numbers may be included or excluded from searches via the Advanced button

3.51. Handheld Picking by Location

For users of the Warehouse Management Module, it is now possible to indicate against each location whether picking is used. Orders for non-picking locations may be released using the traditional Release Sales Orders by Batch function.

Applications for this will include those users that have a local warehouse, where orders are picked via handheld or paper, but also use direct shipment from their suppliers (where orders need to be released conventionally).

3.52. Automatic Export of Invoices to Freeway EDI

On systems featuring an interface to the OpenText Freeway EDI software, invoices can now be automatically exported to Freeway as part of the normal invoice delivery process. This simplifies sending invoices to Freeway since they can now be handled without needing a separate operation.

To use this facility, the customer's Document Delivery options are changed to deliver invoices and credit notes via EDI Freeway using Customer Account Maintenance / Customer Enquiry:

Clicking the Deliver All Documents option within the Print Invoices function, for example, will then email invoices for customers configured to receive invoices by email, export any invoices to Freeway for those customers and print the balance for sending by post:

3.53.   Customer Returns   ✅

A new Customer Returns module has been added as standard to **axis diplomat 2016**.

In previous releases of axis diplomat, the recommended method for dealing with customer returns was using negative lines on sales orders. The new Customer Returns module provides a number of benefits, including

- the provision of RMA numbers
- formalising the location used for returns (for users of the Multi-Location Stock module)
- the introduction of user-maintained reason codes to allow more detailed analysis of the nature of returns

A customer return may be created by either selecting a complete or partially-complete sales order (from the list of sales orders within Customer Enquiry) or, for users of the Despatch & Delivery Management Module, by selecting a Delivery.
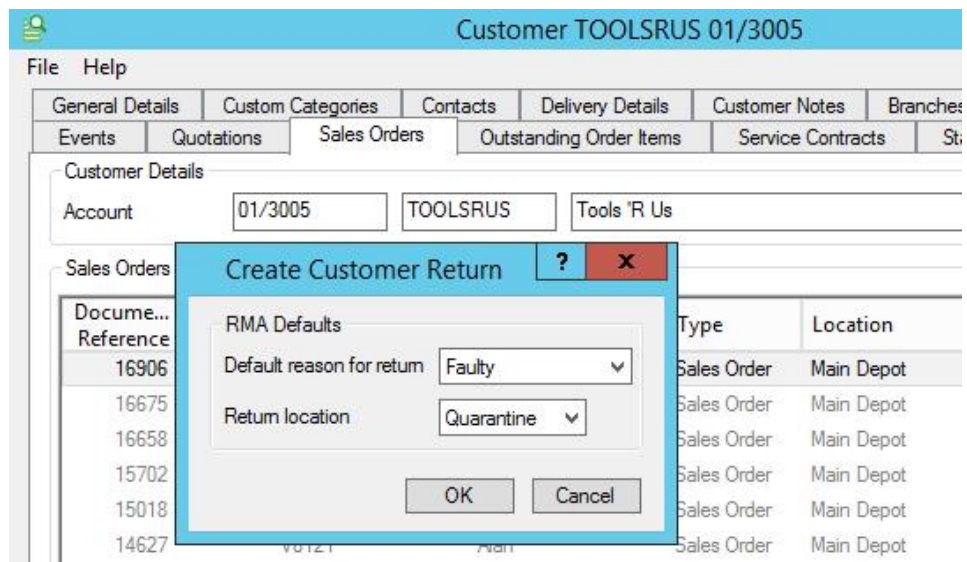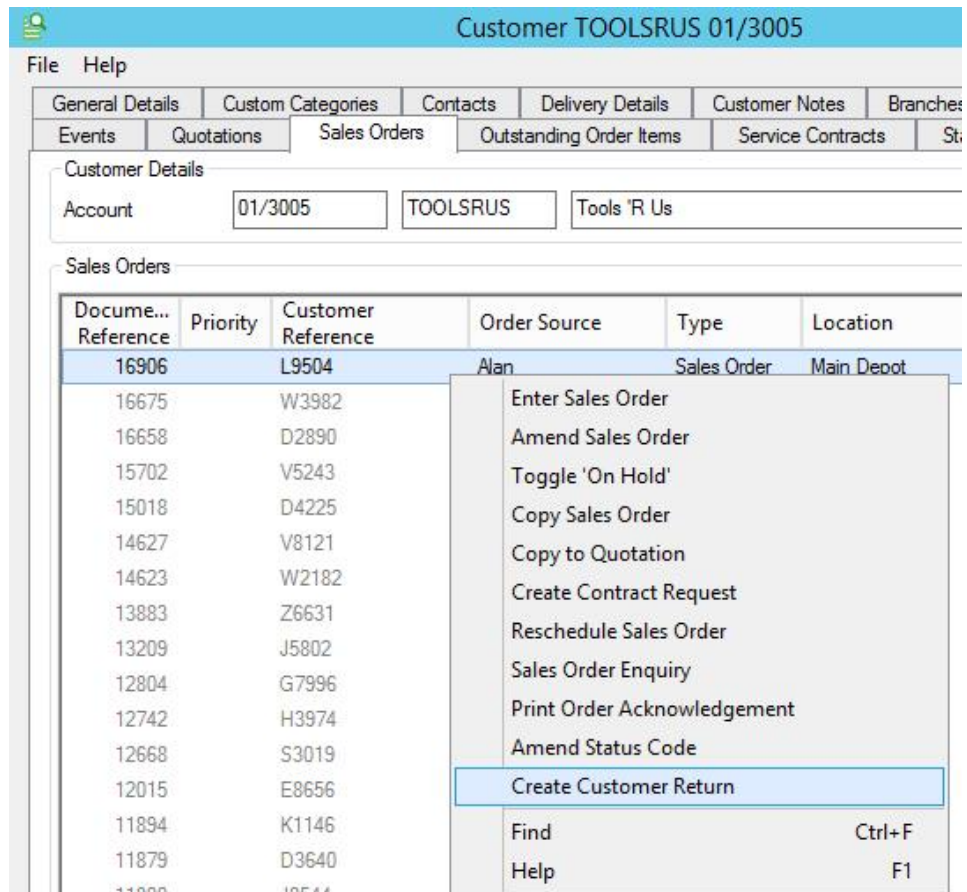
The system offers a list of the supplied items on the original order (or delivery) for the operator to select those being returned. They are able to amend the quantities being returned (for example, four were supplied but only one is faulty) and to amend the reason codes for individual lines (for example one item was faulty whilst another was incorrectly supplied).

As with other sales documents such as sales orders and quotations, Customer Returns can have their own unique Document Status codes.

Using the new facilities described above for generating email notifications on change of document status, it would also be possible, for example, to automatically trigger an email when changing the status from Awaiting Return to Awaiting Inspection.

Once satisfied that the customer has correctly returned the goods, a new "Release Customer Return" function completes the process by receiving the goods into the return location and generating the associated credit note. For customers with the optional link to Channel Advisor (for links to Amazon and eBay, for example), the updated status is also passed back through that system so the relevant marketplace is also updated.

Customer Enquiry features a new Returns tab listing current and previous Customer Returns whilst a monitor tab can be added showing Customer Returns or Customer Returns Items.

Since these monitor tabs can be filtered to just outstanding or completed returns and/or specific document status codes (and because the Document Value column is totalled), it is very easy to create monitors listing, for example:

- value of expected returns
- value of returned goods currently awaiting inspection
- value of customer returns due to faulty goods in the last 90 days

3.54. Customer Asset Database

A new optional module available to axis diplomat 2016 users, the Customer Asset Database is ideal for anyone needing to track, or provide services on, equipment belonging to customers (irrespective of whether you have supplied that equipment).

Assets may be maintained manually or can be imported from various external sources.

The Customer Asset Database module is scheduled for general release in January 2017.

Section 4　　Purchase Ledger & Purchase Order Processing

4.1.　　Create New Suppliers from Suppliers function

The Suppliers function now allows you to create new supplier accounts at the click of a button:
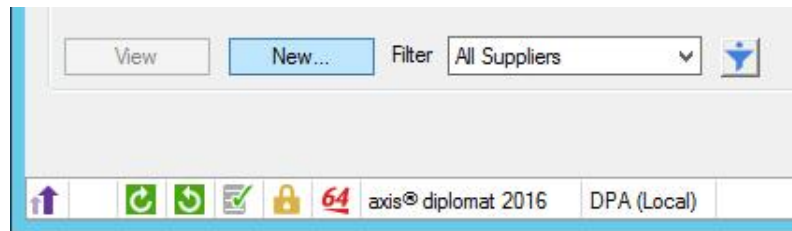
4.2.　　Supplier Enquiry Enhancements

The Supplier Price List tab has had a number of enhancements, to provide additional information and to aid clarity:

- a new column has been added to show the Supplier's Description
- the existing Description column has been renamed to Stock Description to make it clear that this relates to the description on the Stock Ledger as opposed to the Supplier's own description
- both the Stock Description and Supplier's Description columns now show the description in a single line rather than over two lines; as well as improving readability on-screen, this makes it much easier to handle data when exporting to Excel or CSV
- additional columns have been added for the Sales Group (number and description) and the Product Group (number and description) - these are particularly useful in conjunction with filtering or sorting when dealing with suppliers with many price list entries
- for systems with the optional Foreign Currency module, headings for columns with monetary amounts now indicate the currency and a further column shows the calculated equivalent price in the base currency

The Contacts tab within Supplier Enquiry has been extended (matching the equivalent Customer Enquiry) to show additional columns for the status (Active or Left) and, for contacts that have left the supplier, the date that they left.

An additional tick box below the list of suppliers allows contacts that have left to be included or excluded from the list.

4.3. Copy Purchase Order from Supplier Enquiry

It is now possible to copy an existing Purchase Order to a new Purchase Order via a right-click option from the list of Purchase Orders within Supplier Enquiry.
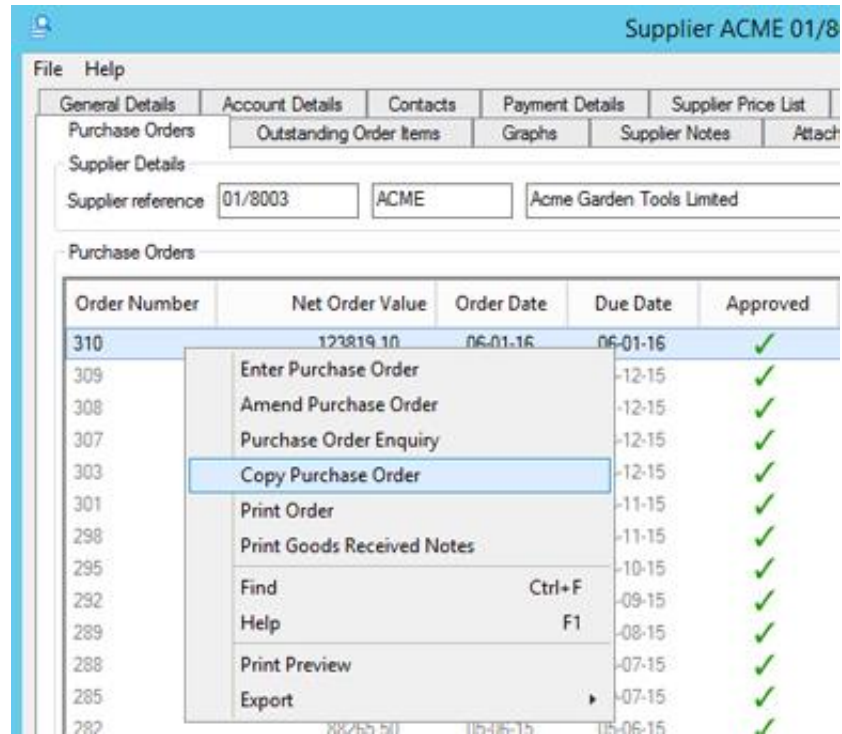
4.4.   Supplier Address Label Print from Supplier Enquiry   ✅★

It is now possible to print an address label from Supplier Enquiry via a button directly below the address on the General Details tab of Supplier Enquiry. This will use the same label format (designed for Zebra label printers) as is used by Customer Enquiry.
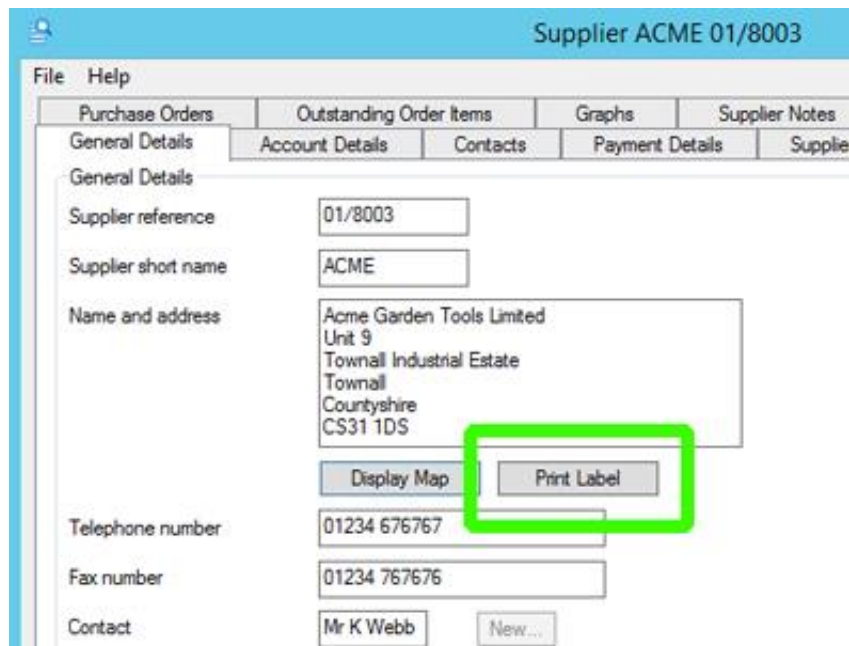
4.5.   Electronic Payments   ✅

The Electronic Payments module, which was previously available as an optional extra, is now standard.
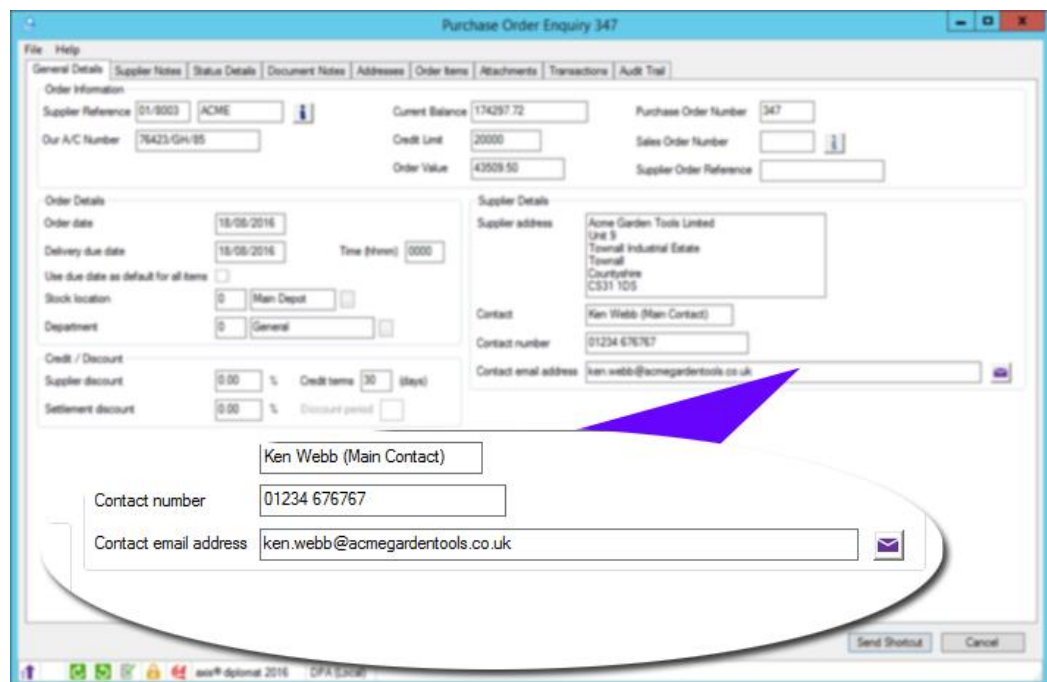
The module allows you to interface to a number of the leading banks' banking software to make payments to suppliers, as well as allowing payments via BACS.

Currently supported bank software includes packages from Lloyds Bank, Barclays, HSBC, Clydesdale and NatWest.

Suppliers (and, when using **axis payroll**, employees) are allocated to a preferred bank account. On running the Automatic Payments function, you select the bank account that you wish to pay from and the due dates for payments. The function then identifies those suppliers that are paid from that bank account that have approved payments due within the specified date(s). It then produces a payments file for uploading into the appropriate banking software.

4.6.   Supplier's Email Address Shown in Purchase Order Enquiry   ✅★

The General Details tab of Purchase Order Enquiry now includes the email address of the Supplier's Contact associated with the Purchase Order. A button alongside the email address allows an email to be sent to that contact. This is ideal, for example, where a query has arisen or an order needs to be chased as it ensures that the required information is to hand.
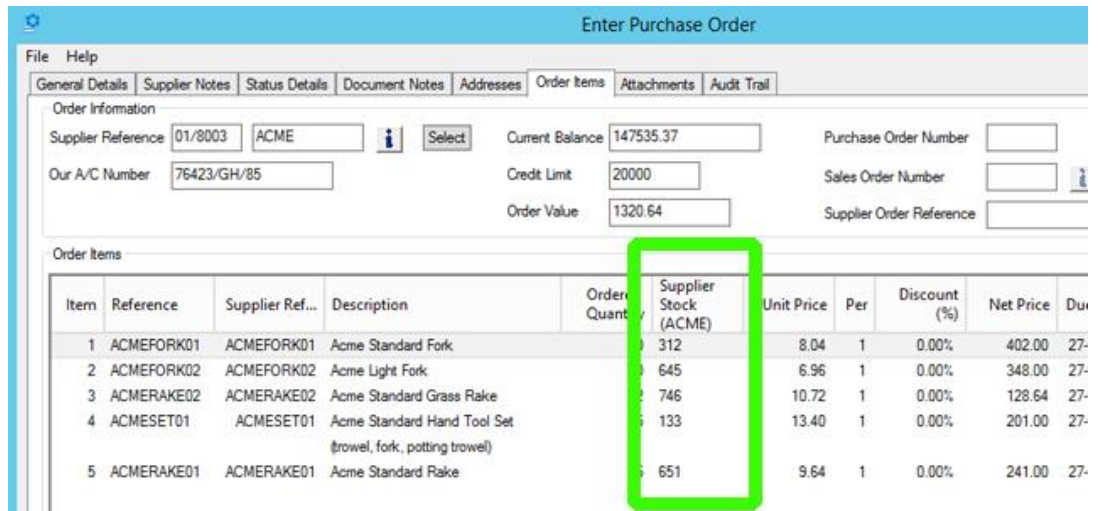
4.7.   Supplier Stock in Purchase Order Maintenance   ✔ ★

On systems with the Supplier Price Feeds module, the Order Items tab in both Purchase Order Maintenance and Purchase Order Enquiry now shows the stock available at the supplier to which the purchase order relates. The supplier's stock figures are only included if they are from price feeds that fall within the expiry period (i.e. the maximum feed age from the Supplier Account).

4.8.   Purchase Requirements   ✔

The Purchase Requirements module, previously optional, is now standard.

The module is able to create a list of suggested purchase orders, and to suggest with whom those purchase orders should be placed. The suggestions may come from the Stock Ledger (based on the stock under minimum information) or from shortages identified by the optional Compact MRP (Material Requirements Planning) module.

The resultant "shopping list" can be monitored and adjusted manually to allow managerial judgement to be used to take into account factors which the system cannot be aware of, for example, quantity related special offers or future rebates.

Once the purchasing manager is completely happy with the suggested ordering list, a simple function converts these into purchase orders (orders can be created with either an 'approved' or 'unapproved' status).

4.9. Minimum Order Quantity and Order Quantity Multiple on Supplier Price Lists ✅

If your supplier has a minimum order quantity and/or a pack quantity, it is now possible to record this on the Supplier Price List entry.

This information can then be used by the Purchase Requirements module when calculating suggested re-order quantities.

4.10. Purchase Order Document Delivery ✅

We have now introduced the ability to deliver purchase orders by email or by post, matching the existing mechanism available with, for example, sales invoices and remittance advices.

A new setting on the supplier account indicates whether purchase orders to this supplier should be delivered by post (i.e. printed) or by email:

The Print Purchase Orders function now features a "Deliver All Documents" button - this will email (as PDFs) those purchase orders for suppliers marked to receive orders by email and print the balance.

In order to take advantage of electronic delivery, your system will need to be using a Document Designer format for your purchase orders.

4.11. Inflate Re-Order Level in Purchase Requirements

Purchase Requirements has also been enhanced for **axis diplomat 2016** to allow the Create Requirements from Stock File function to artificially inflate each stock item's re-order levels before determining whether they need to be ordered.

This now allows you to generate Purchase Requirements for items that are approaching their minimum levels but are not actually below that level yet. This might be for everyday use or just used on an ad-hoc basis, for example, when it is known that there are longer delays than normal (such as around seasonal holidays or supplier's shutdown) and a larger-than-normal buffer stock is desirable or because you are looking to increase your order to reach a minimum economic shipment size/value from a given supplier.

4.12. Advanced Shipment Notice (ASN) processing via EDI

For customers using EDI with selected suppliers, the system is now capable of processing the supplier's Advanced Shipment Notices (ASNs) . This information can then be used to confirm expected arrival dates and provide tracking information.

For those also using the Stock Transaction Traceability module, this information includes, where appropriate and when made available by the supplier, serial number and/or batch details.

When processing an EDI Advanced Shipment Notice for a drop-ship order, in addition to creating the Purchase Delivery Advice, the system also (subject the relevant modules being in use):

- creates Goods Received transactions
- sets despatch quantities on the sales order
- creates Picking records to match the information
- creates a Delivery Record

This information is used to release the order using the normal release process (for example down-date stock, create delivery and/or invoice, email despatch advice with tracking information, collect payment etc.).

Suppliers currently providing ASNs include:

- Techdata
- Westcoast
- Ingram Micro

This list is subject to change, however, as additional suppliers make this information available and as the software is extended to support those additional suppliers. Please check the current list of supported suppliers by visiting our website at:

http://www.axisfirst.co.uk/software/axisdiplomat/supplierEDI/

4.13. Automatic EDI Purchasing

Also for customers using EDI with selected suppliers, **axis diplomat 2016** now offers the ability to run the Online Order Processing function as a background task. With this enabled (via a simple parameter), the system will regularly check for new purchase orders marked to be sent electronically and transmit them automatically; it will also look for and process, Order Acknowledgements, ASNs and invoiceswaiting to be imported from suppliers.
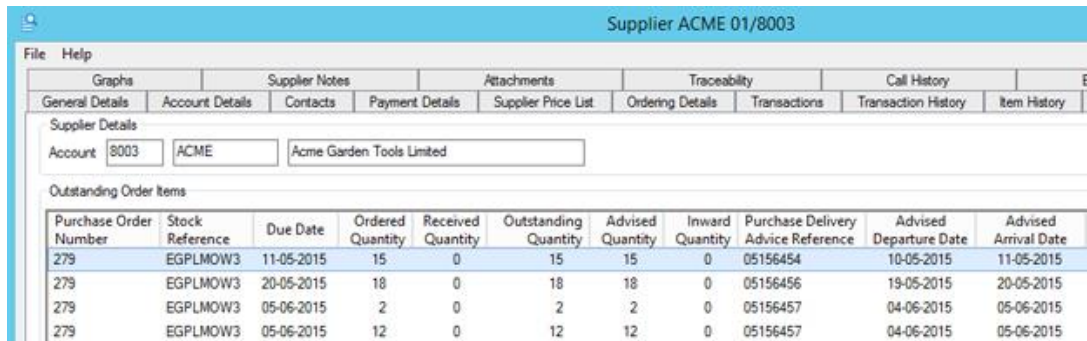
This development allows yet further levels of automation and, for many who rely heavily on direct shipments from their suppliers to their customers, potentially automates the entire day-to-day trading process, with orders being automatically imported from websites and generating direct shipment purchase orders on suppliers.

4.14. Purchase Delivery Advice information via Supplier Enquiry

For those with the Purchase Delivery Advice module, the Outstanding Order Items tab now also shows additional columns for

- Delivery Advice Reference
- the Advised Quantity
- the Inward Quantity

Right-click Context Menu options now allow Delivery Advice details to be added or amended.

The tab also now shows both the Stock Description (from the Stock record) and the Supplier Stock Description (from the Supplier Price List).

Section 5   Stock Ledger, Bill of Materials & MRP

5.1.   VAT Inclusive/Exclusive Pricing for Retail & Trade

In previous releases of axis diplomat, there has been a single flag for both trade and retail prices to indicate whether the prices specified are inclusive or exclusive of VAT.
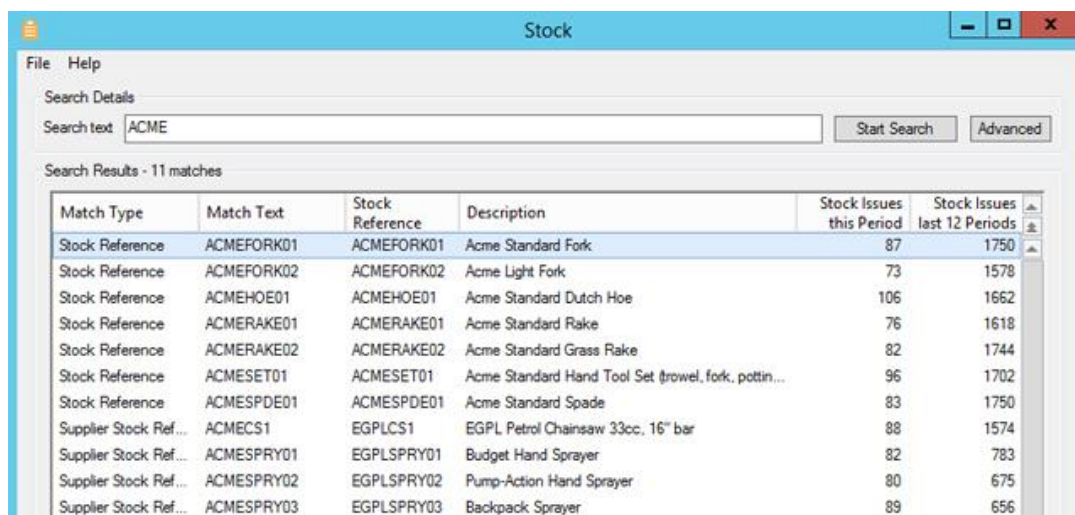
With the release of **axis diplomat 2016**, this can now be optionally separated into two different flags, one for retail and one for trade. This now makes it possible to specify your retail prices as VAT inclusive and your trade prices as VAT exclusive (or vice versa).

There is often a requirement to record trade prices as VAT exclusive to make it easier to quote prices to your trade customers but there are some VAT inclusive retail prices, such as £9.99, that cannot be expressed as a VAT exclusive amount - with a 20% VAT rate, £8.32+VAT gives £9.98 whilst £8.33+VAT gives £10.00.

This development now means that you can record a VAT inclusive retail price without needing to include VAT in all of your trade prices.

5.2.   Stock Search

The Stock function's results list has been extended to include columns for Issues This Period and Issues Last 12 Periods:

It is now possible to include the Product Specification in the keyword search results. This is enabled by setting the appropriate parameter in Maintain Stock Ledger Parameters:

The function also allows new stock records to be created by way of a New button or, via a right-click option, to be copied from an existing stock item.

5.3.   Picked Quantities in Stock Enquiry

For customers using the Warehouse Management Module, the Picked quantity is now shown within Stock Enquiry, alongside other stock quantities (such as Stock on Hand and Allocated).
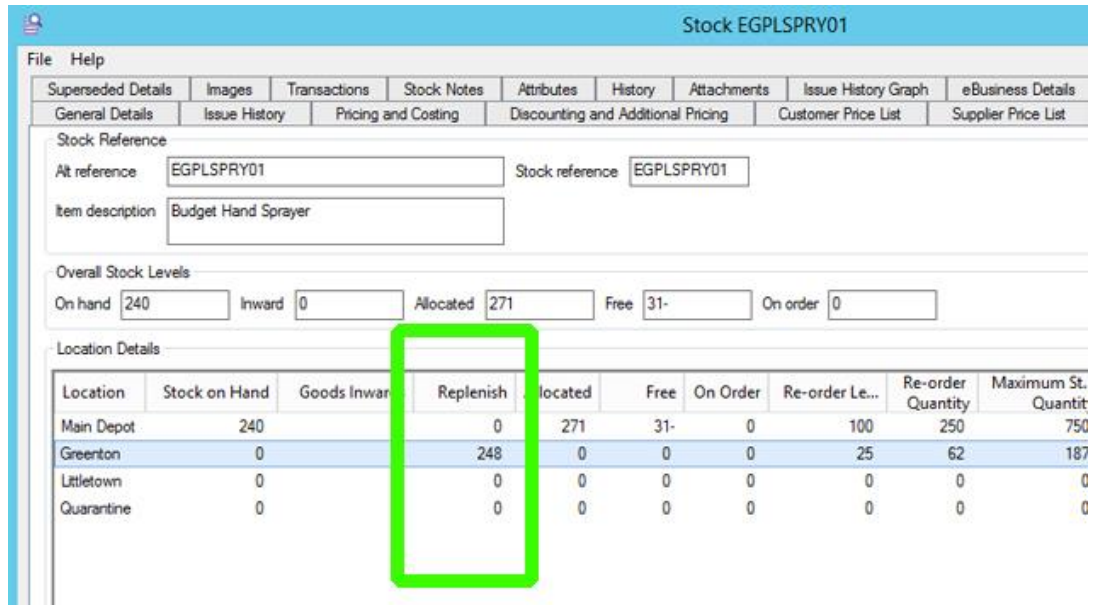

The information broken down by Location is also shown on the Location Details tab.

5.4.   Incoming Replenishment Stock figures in Stock Enquiry

For systems featuring the Stock Transfers module, the Location Details tab within Stock Enquiry has been enhanced to show the figure for expected replenishment receipts from other locations.

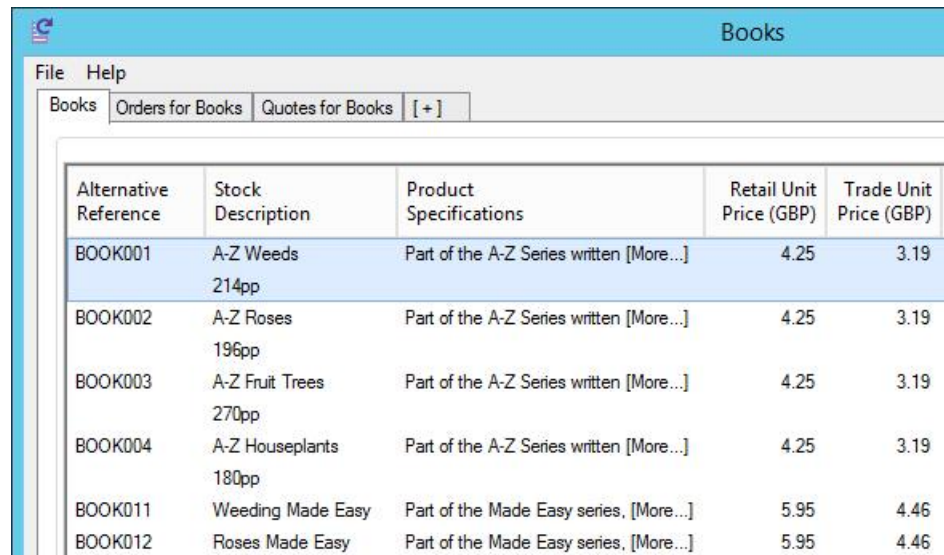## 5.5.   Stock Control Monitor Enhancements

Additional columns have been added to the Stock tab within the Stock Control Monitor including:

- Sales Group Code & Description
- Department Code & Description
- Cost Centre Code & Description
- Commodity Code
- Case Quantity
- AXIS Bar Code Reference
- Manufacturer's Reference
- GTIN-13 (EAN-13) Bar Code Reference
- GTIN-12 (UPC-12) Bar Code Reference
- Case Bar Code Reference

The various stock references are only shown if they have been enabled on the system (via Maintain Stock Ledger Parameters).These additional columns are particularly useful when used to sort or filter the items shown.

5.6. Stock Item Monitor Tab

It is now possible to create a monitor tab listing stock items. This is intended to supplement rather than replace the Stock Control Monitor (which collates an extensive set of data, for example relating to issue history) and provides a quick and easy method of listing stock items.

One advantage of adding Stock Items tabs to monitors is that they can be mixed with other types of monitor tabs - the illustration above, for example, shows a Stock Items tab alongside tabs listing Sales Orders and Quotations - all filtered to one set of products.

5.7. Stock Transaction Monitor Tab

It is now possible to create an additional monitor tab (or a new monitor from scratch) showing Stock Transactions.

This screenshot shows an excerpt of a Stock Transactions monitor tab, filtered to just those transactions that still have outstanding quantities, and sorted to show the oldest first.

5.8.   Export Stock Details   ✓★

The function to export stock details to CSV has been modified to include a column indicating whether settlement discount applies to each item.

For users of the optional Stock Transaction Traceability module, the function can now also include the traceability mode (None/Batch Number/Serial Number) in an additional column. It is also possible to restrict the stock items included in the export to just traceable items or to just non-traceable items.

5.9.   Selection by Stock Type in Stock Record Block Amendment   ✓★

Stock Record Block Amendment has been extended to allow selection to be filtered by Stock Record Type - i.e. stock items only or non-stocked/product items only.

5.10. Date of First Transaction by Location

For systems with the Multi-Location Stock module, the Location Details tab within Stock Enquiry will now show the date of the first transaction against each location. This allows you to see, at a glance, when that item was first used at that particular location.
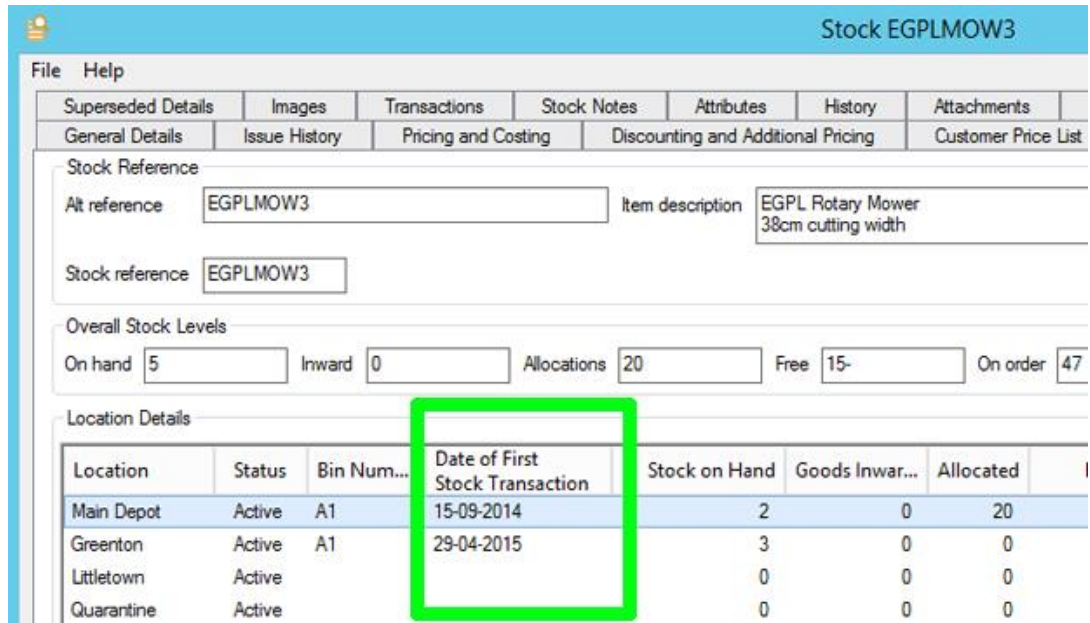
5.11. Image Management Enhancements

When viewing a list of images attached to a Stock item (or an eBusiness Group for users with axis vMerchant websites), additional options are now available when right-clicking on an image in the list. Options are now available to allow you to Open, Open With, Edit and Save As. These options are ideal if you are using your axis diplomat system as the master repository for your product images and users need to be able to access copies of the images (to send to a publisher or designer, for example).
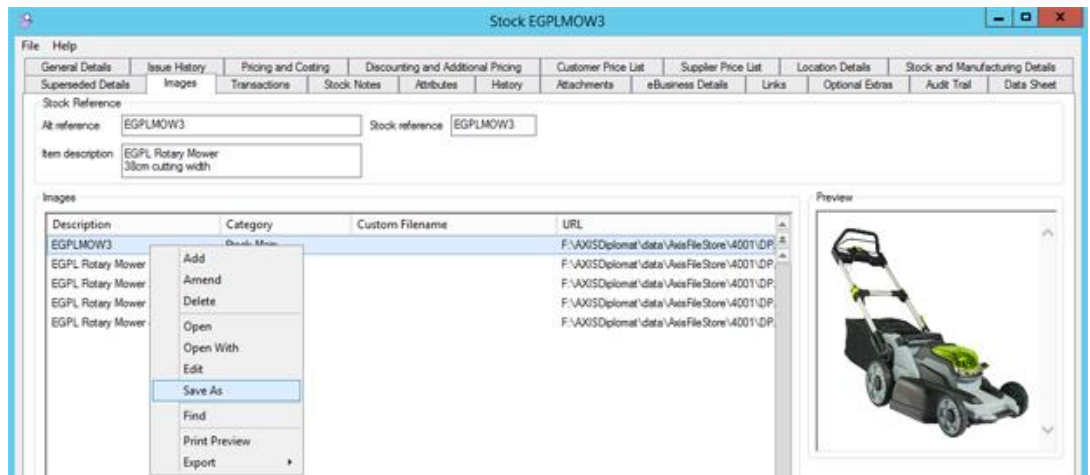
5.12. Stock Valuation using Most Recent Purchase Price ✔★

A new valuation option has been added to the Stock Valuation report allowing all stock to be valued at its most recent purchase price (i.e. the cost price from the most recent Goods Received from Supplier transaction). This could be considered as a 'replacement cost' valuation.
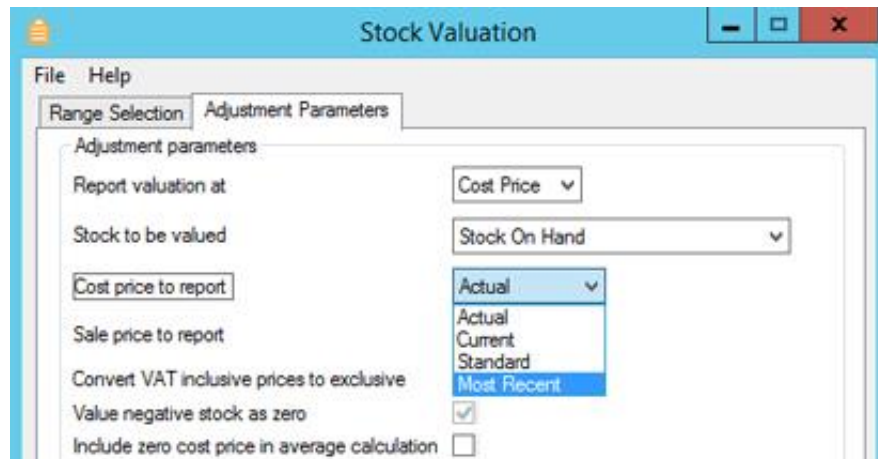
5.13. Aged Stock Valuation using Original Receipt Date ✔★

The Aged Stock Valuation Report has been enhanced to offer the option to base the age calculation on the Original Receipt date thereby ignoring the effects of internal receipts, such as movement between locations or bins.
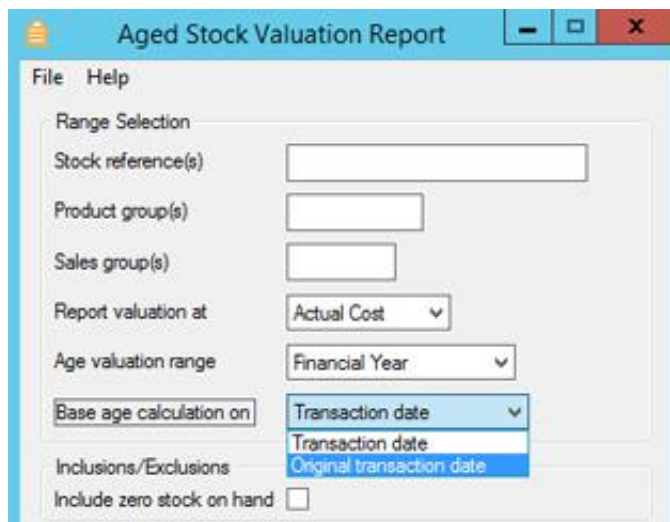
5.14.   Enhancements to Create Works Orders from Stock ✅ ★

For users of the Compact MRP module who create works orders for manufactured stock items that are below their minimum stock levels, it is now possible to exclude stock allocations for sales orders that are on hold. This matches the functionality already offered by Purchase Requirements and helps ensure that you do not manufacture items that are only required because of demands from sales orders that you would not currently aim to fulfil.

5.15.   Works Order Monitor ✅

For users of the Compact MRP module, it is now possible to add additional tabs to custom monitors for both Works Orders and Works Order Items. These provide all of the functionality offered by the previous stand-alone Works Order Monitor but with the added advantage that they can be mixed with other monitor tabs.
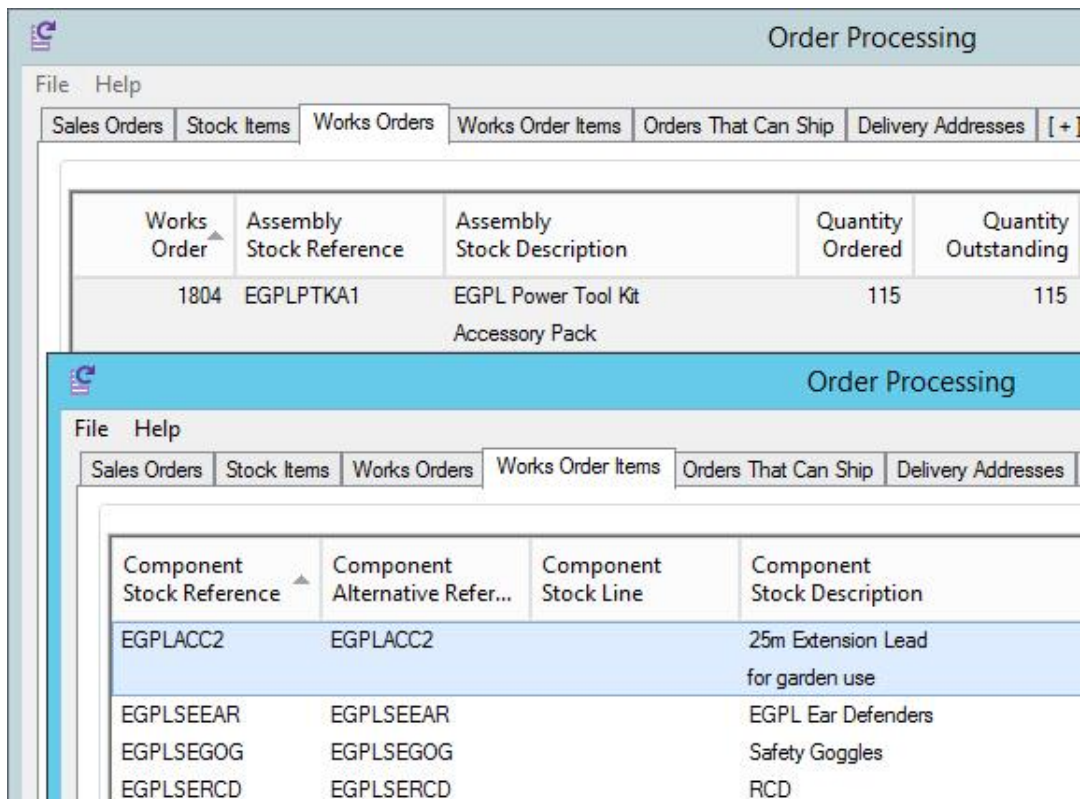
A custom monitor including Works Order and Works Order Items tabs alongside Sales Order and Stock tabs

5.16. Custom Stock Data

This new optional module extends the data held against stock and product records to include all of the specifications and attributes that you may wish to hold. This information is ideal for publishing to a website or other eCommerce applications, as well as providing your own staff with ready access to all of the information that they need on your products.

Unlike the standard Stock Attributes, in which the same set of attributes are used across the system (and are therefore ideally suited for generic information such as Brand or Colour), Custom Stock Data can vary for different types of product.

For example, a company selling IT products might have quite different requirements for the data to hold against an external hard drive and an inkjet printer:

External Hard Drive		Inkjet Printer	
Storage Capacity	3TB	Number of Cartridges	4
Interface	USB3	Print Speed	18ppm
Data Transfer Rate	5.0 GBps	Duplexing	Yes
Warranty	2 Years	Interface(s)	USB 2.0, LAN, Wi-Fi

This would apply equally to anyone selling products of a technical nature, from audio visual equipment to power tools, or even clothing, where the custom data might include information such as care instructions, for example "Dry Clean Only?".
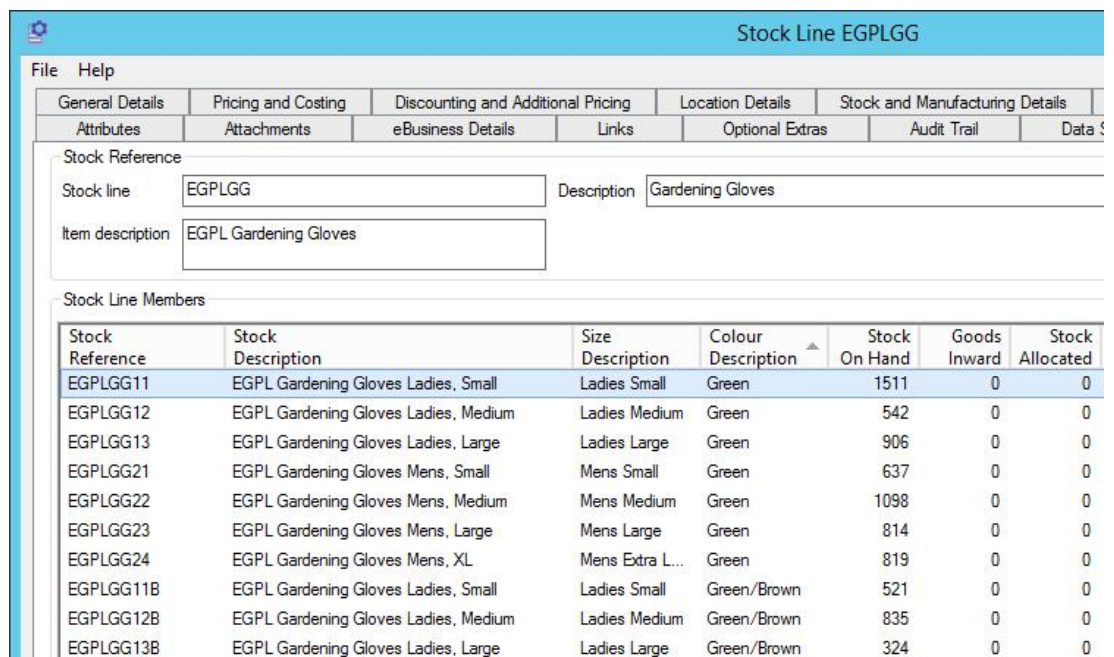
For further information, please visit our website at:

http://www.axisfirst.co.uk/software/axisdiplomat/modules/Custom-Stock-Data/15182

5.17. Stock Lines

This optional new module is designed to ease the management of product ranges sold in a number of different variations, for example clothing where essentially the same item is available in a number of different colours and sizes.

Each variant (or SKU) is a unique stock item and its unique properties (for example colour and size) are identified by stock attributes. These various stock records (SKUs) are then collected into a Stock Line.

Stock Line Maintenance, showing it's member stock items with their unique stock attributes and the individual stock availability figures

Changes to various properties of the Stock Line are then cascaded down to the individual stock records; editing those properties at the stock record level is then blocked.

Which properties are maintained within the Stock Line and which can be varied by stock record is configurable on a line-by-line basis. For example, the default behaviour could be for pricing to be maintained at the Stock Line level; it would then be impossible to affect the pricing of an individual stock record, ensuring that all variants are maintained with a consistent price.

If, however, certain items within a particular line are sold at a different price (for example, sizes XXL and above are more expensive) then that line can be changed to allow the pricing to be controlled at the individual stock record level.
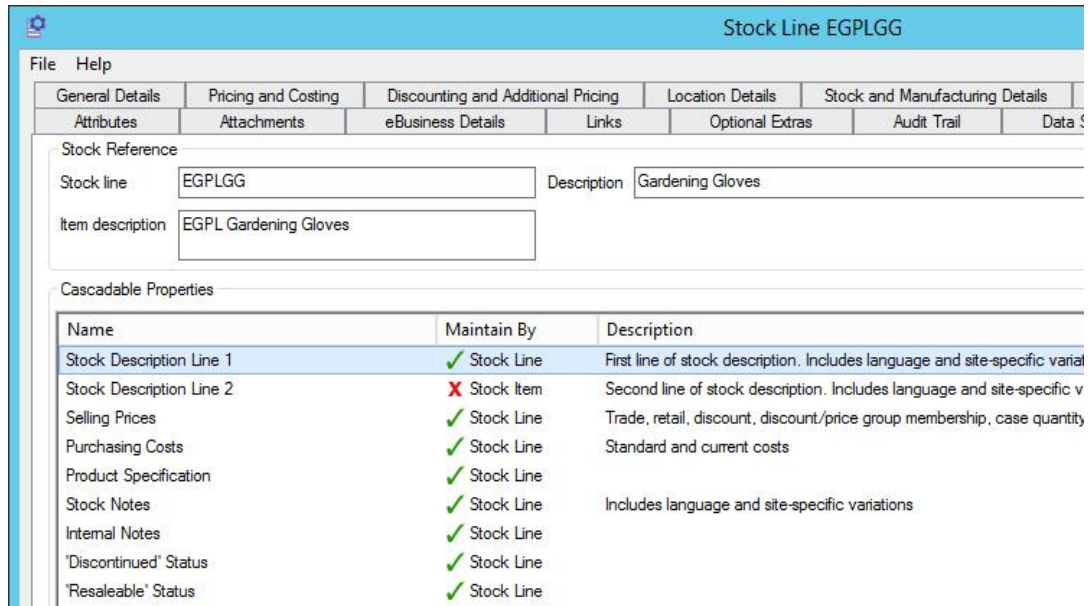
Stock Line Maintenance, showing the selection of which properties are cascaded down to all member stock records and which are maintained on the individual stock record

In addition to simplifying the maintenance of related products, adding a stock line to a sales order is also made easier by selecting the attributes rather than having to locate the specific stock record required.
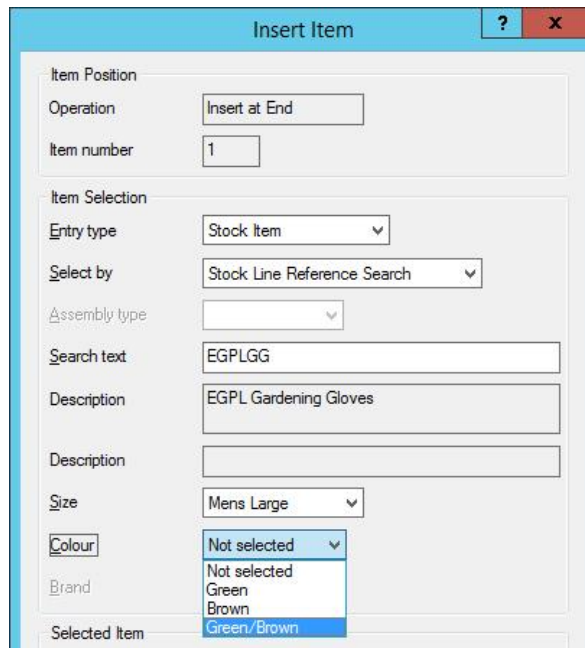
Sales Order Maintenance showing selection from a Stock Line by size and colour

For further information, please visit our website at:

http://www.axisfirst.co.uk/software/axisdiplomat/modules/Stock-Lines/15324

Section 6 axis vMerchant Interface

6.1. Google Price Feeds ✅

This module, previously available as an optional addition, is now standard for all users of axis diplomat 2016 with axis vMerchant websites. It allows you to generate a daily data feed, automatically, to Google Shopping.

Configuration and maintenance of the data feeds is managed entirely through axis diplomat so management is simplicity itself.

You can choose on a product-by-product basis whether an item is sent to Google and for customers with multiple axis vMerchant eCommerce web sites driven by one axis diplomat system, you can feed different data to Google for each web site.

Although managed via axis diplomat, the data feed is generated by your axis vMerchant web server, once every 24 hours.

6.2. Stock Availability ★

axis vMerchant websites are able to display an availability lead time for items that are out of stock (for example, "this item is available in 7 days"). Traditionally, this has been taken from the "Default Delivery to Customer" field on the relevant stock record. A new parameter (accessed via the Maintain Sites function) allows this to be changed to instead use either the "Delivery Lead Time" from the Stock Record, a combination of both or a fixed number of days.
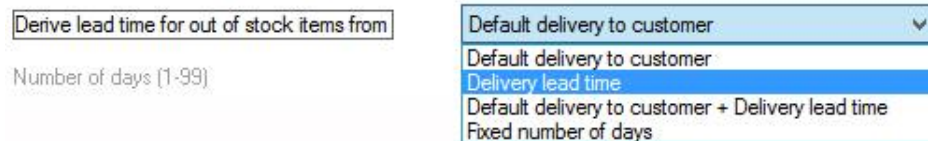
This allows the "Default Delivery to Customer" field to be used for other purposes (for example, when setting despatch quantities by batch).

6.3. Adding Watermarks to your Website Images ★

There is now the ability to add watermarks to your images for axis vMerchant-based websites. Watermarks can be applied to product and/or category (eBusiness Group) images and may, optionally, be applied at certain sizes only. You may choose, for example, to watermark larger images but leave small thumbnail-sized images without watermarks.
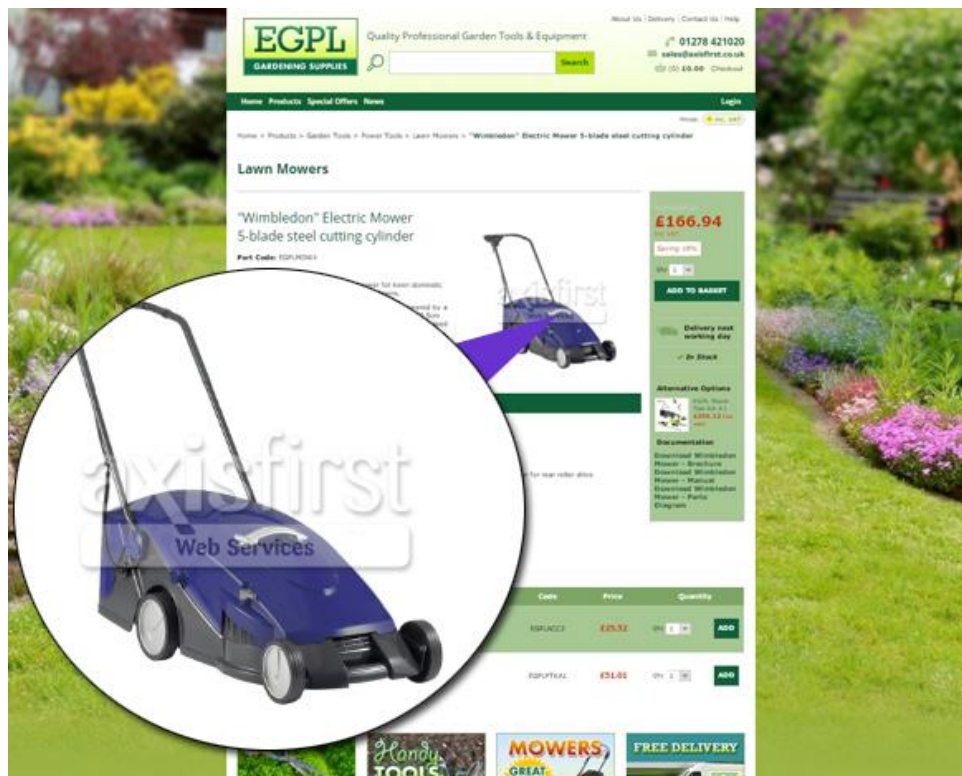
The watermark is applied when the image is uploaded to your website instead of watermarking the master copy of each image held within axis diplomat. This means you can change your watermark, or remove it, at any time without needing to re-import your images.

It also means that un-watermarked versions of the images do not exist online (unlike some mechanisms that use the web server itself to add a watermark on demand). Furthermore, the performance of the website is not affected by the need to process the image before delivery. It is also means that it is possible to apply different watermarks to the same images on different websites.

The watermark is taken from any PNG file with a transparency layer so you can create a watermark in your favourite graphics application. You might choose to have your watermark once, in the centre, or tiled across the whole image. You can also make the watermark as strong or as faint as you wish.

For example, a watermark could be any of the following:

We have provided full documentation on the steps required to watermark your website images in a support note that can be found on our website at:

http://www.axisfirst.co.uk/documentation/Adding-Watermarks-to-Product-Images/articles/12641

6.4.   Export eBusiness Group Notes ★

A new function has been added to export all of the notes associated with the eBusiness Groups for a given site. For customers with the Multi-Lingual Stock Ledger module, the exported file can be for a selected language.

This function exports the Notes in exactly the same format as expected by the Import Stock Notes function. This makes the export ideal for situations where you want to copy notes between systems or sites as well as for loading in a spreadsheet for amendment before importing back into the system (to allow, for example, a site-wide search-and-replace operation).

Section 7   Hire Management

7.1.   Hire Monitor   ✅ ⭐

A number of significant enhancements have been made to the Hire Monitor:

Filter options have been added to the "Hires" tab to allow filtering by hires starting and/or ending today, tomorrow, this week, this month or within a given number of days. The tab can optionally be restricted to showing only live hires, completed hires or forward dated hires.

The "Hire Items" tab, meanwhile, has been extended to show the projected availability for hire items for up to 8 weeks from a given starting point. The filter options have been extended to show only active Hire Items (i.e. those with forward dated hires that fall within the selected period) or only those where there are insufficient items available.
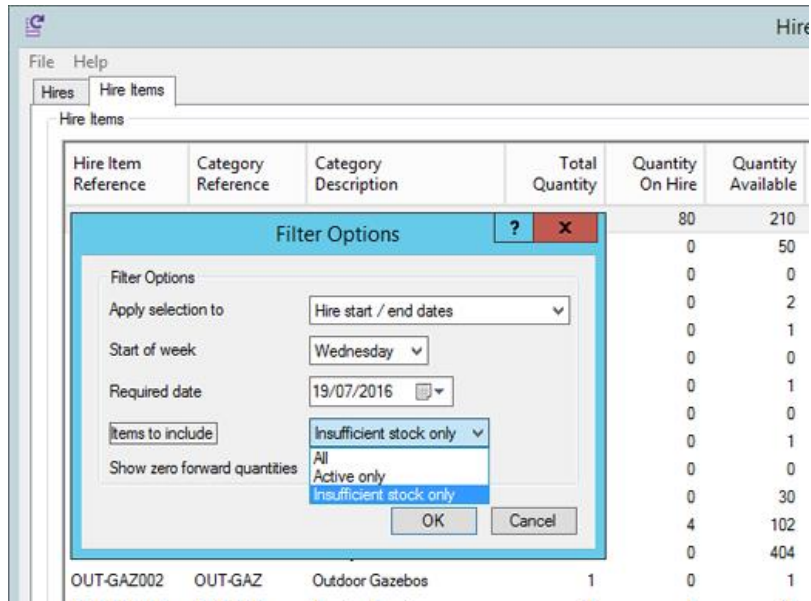
Collectively, these enhancements mean that the Hire Monitor now provides a very powerful tool for identifying potential shortfalls from upcoming hires:

7.2. Audit Trail Events

Audit trail events are now created for any of the following:

- Enter Hire
- Amend Hire
- Activate Hire
- Off Hire
- Invoice Hire

Section 8   Service Contract Management

8.1.   Service Contracts in Customer Enquiry

The Service Contracts tab within Customer Enquiry now shows additional columns for the Termination Date (if set), the Contract Contact, Invoice Contact and Delivery To Contact.

8.2.   Service Contract Items & Service Contract Request Items Monitor Tabs

Two new types of monitor tabs have been added:
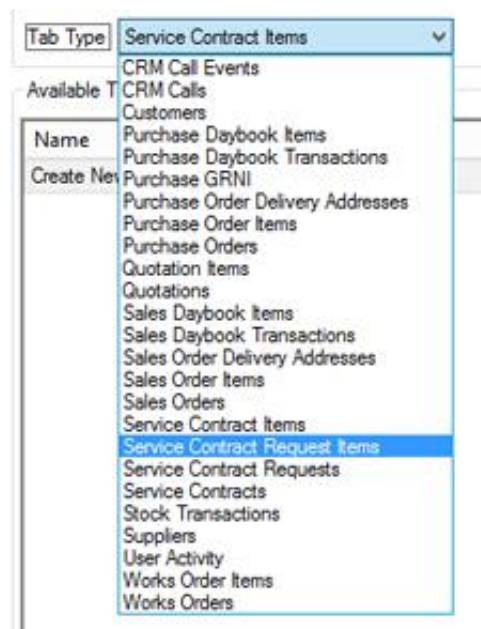
These monitor tabs allow you to view all of the line items from a range of Service Contracts (or Service Contract Requests). In addition to a similar range of columns to those you would expect to see on a Sales Order Items or Quotation Items monitor, additional columns are available specifically relating to contracts and contract requests, such as Contract Start Date and Billing Frequency:

Alternative Reference	Stock Description	Quantity	Frequency	Net Value	Equivalent Monthly Value	Equivalent Yearly Value	Service Contract	Customer Order Num...	Contract Start Date	Next Due Date
MAINTMOW01	Lawn Mower Maintenance Agreement (Small)	1	Monthly	12.00	12.00	144.00	16734	45748334	01/08/2016	01/08/201
MAINTMOW02	Lawn Mower Maintenance Agreement (Medium)	8	Yearly	2400.00	200.00	2400.00	16736	AG8765	01/09/2016	01/09/201
MAINTMOW03	Lawn Mower Maintenance Agreement (Large)	8	Quarterly	720.00	240.00	2880.00	16733	43652	01/08/2016	01/08/201
MAINTMOW03	Lawn Mower Maintenance Agreement (Large)	12	Monthly	360.00	360.00	4320.00	16735	431675442	01/08/2016	01/08/201
MAINTSHR01	Shredder Maintenance Agreement (Small)	1	Monthly	9.60	9.60	115.20	16734	45748334	01/08/2016	01/08/201
MAINTSHR01	Shredder Maintenance Agreement (Small)	2	Monthly	24.00	24.00	288.00	16735	431675442	01/08/2016	01/08/201
MAINTSHR02	Shredder Maintenance Agreement (Medium)	1	Monthly	18.00	18.00	216.00	16735	431675442	01/08/2016	01/08/201
MAINTTRC01	Tractor Maintenance Agreement (Small)	1	Monthly	20.00	20.00	240.00	16734	45748334	01/08/2016	01/08/201

Since Service Contracts can have a range of billing frequencies (for example, monthly, quarterly and annual), additional columns have been added for the equivalent monthly and annual values, thereby allowing comparison or analysis of contracts with different billing frequencies.

Alternative Reference	Stock Description	Quantity	Equivalent Monthly Value	Equivalent Yearly Value	Contract Request	Frequency	Customer Name	Product Group	Sales Group
MAINTMOW02	Lawn Mower Maintenance Agreement (Medium)	2	50.00	600.00	16728	Monthly	A. Cayman Engineering Co.	12 - PowerTo...	8 - Ma
MAINTMOW02	Lawn Mower Maintenance Agreement (Medium)	2	50.00	600.00	16731	Monthly	D. Reed Services .com	12 - PowerTo...	8 - Ma
MAINTMOW03	Lawn Mower Maintenance Agreement (Large)	4	120.00	1440.00	16730	Monthly	C. Green Online .com	12 - PowerTo...	8 - Ma
MAINTSHR01	Shredder Maintenance Agreement (Small)	1	12.00	144.00	16728	Monthly	A. Cayman Engineering Co.	12 - PowerTo...	8 - Ma
MAINTSHR01	Shredder Maintenance Agreement (Small)	3	36.00	432.00	16731	Monthly	D. Reed Services .com	12 - PowerTo...	8 - Ma
MAINTSHR03	Shredder Maintenance Agreement (Large)	1	24.00	288.00	16731	Monthly	D. Reed Services .com	12 - PowerTo...	8 - Ma
MAINTTRC02	Tractor Maintenance Agreement (Medium)	2	100.00	1200.00	16731	Monthly	D. Reed Services .com	12 - PowerTo...	8 - Ma
MAINTTRC02	Tractor Maintenance Agreement (Medium)	3	120.00	1440.00	16732	Monthly	E. White Holdings	12 - PowerTo...	8 - Ma
MAINTTRC03	Tractor Maintenance Agreement (Large)	2	150.00	1800.00	16729	Monthly	B. Green Agency Limited	12 - PowerTo...	8 - Ma

Right-click options have been added to allow drill-down or maintenance of the contracts relating to any item shown

8.3. Reschedule Service Contracts ✓★

It is now possible to reschedule a Service Contract via a right-click on the contract's entry on the Service Contracts tab of Customer Enquiry.

8.4. Ability to Restrict Authorised Calls ✓★

When using the Service Contract Management module, customer calls with a type of "Service" must be either associated with a valid contract or marked as "Authorised". New user permissions allow you to restrict which users are able to mark such calls as Authorised - allowing you to ensure that only appropriate members of staff authorise work that is not covered by a contract.
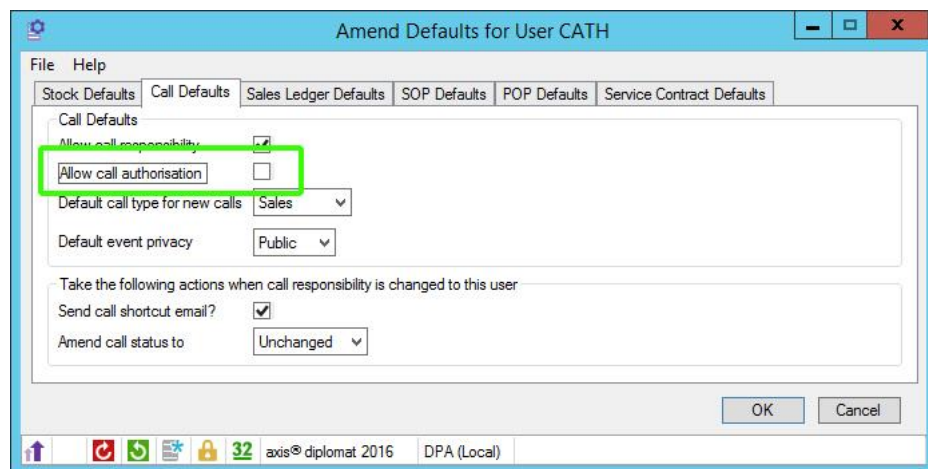
8.5.   Filter Call Monitor by Service Contract Properties

It is now possible to filter a monitor tab showing CRM Calls to show just those calls linked to Service Contracts that have specific parameters.
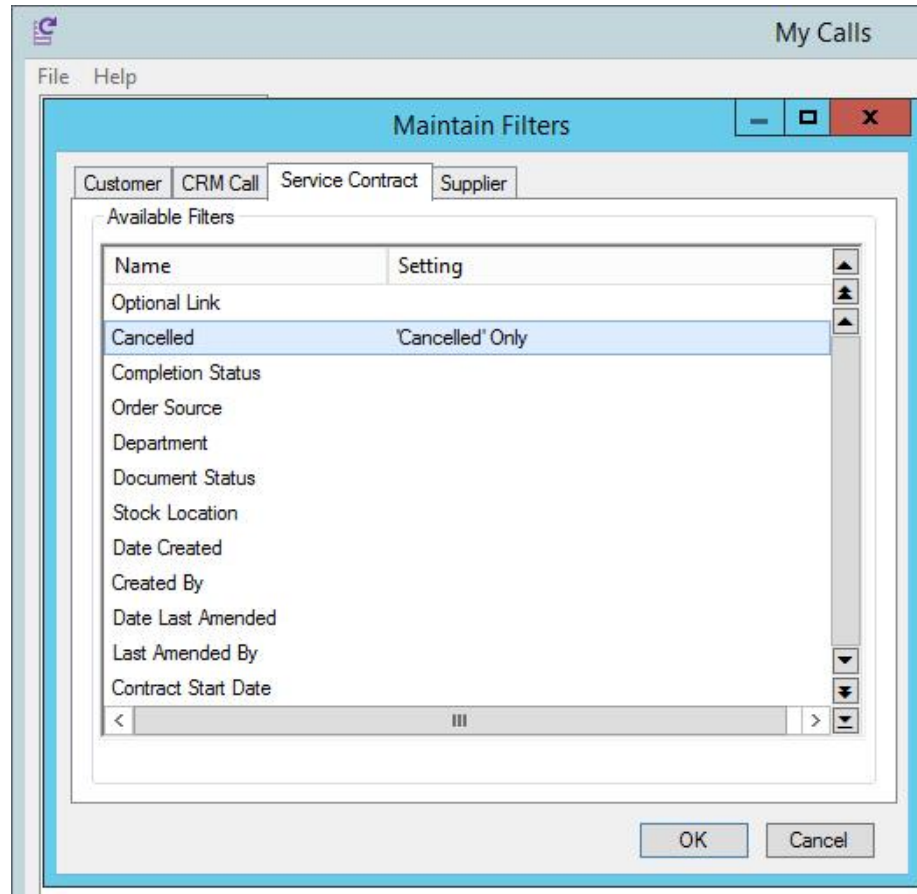
Call Monitor Filter showing calls filtered to just those linked to cancelled Service Contracts

Section 9   Upgrade Options and Pricing

9.1.   Upgrade Pricing

Product	axis diplomat 2012	axis diplomat 2014
axis diplomat 2016 Express Client	£745	£395
axis diplomat 2016 Small Business Edition Client	£1245	£695

9.2.   Transition Pricing

Transition To	Transition From
	axis diplomat 2016 Express
axis diplomat 2016 Small Business Edition Client	£345

9.3.   Software Assurance Pricing

Product	Per Client, Per Month
axis diplomat 2016 Express	£16.00
axis diplomat 2016 Small Business Edition	£27.00

Note: Software Assurance must be taken out at the time of upgrading to **axis diplomat 2016** or at the time a new **axis diplomat 2016** system is supplied.

9.4.   Additional Services

Product	
Time Unit Based Implementation Services (40x15 minutes)	£895
Time Unit Based Implementation Services (30x15 minutes)	£695
Time Unit Based Implementation Services (20x15 minutes)	£495
Time Unit Based Remote Upgrade Assistance (8x15 minutes)	£195

Time Unit Based Remote Upgrade Assistance provides for online remote upgrade of an axis diplomat system to axis diplomat 2016. It is not intended as a substitute for training – onsite training is strongly recommended for all upgrades to axis diplomat 2016 in order to maximize the return on investment.

9.5.   Software Assurance Upgrades

A number of the new developments within axis diplomat 2016 described above have already been released to those customers with Software Assurance.

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

Software Assurance customers will be entitled to software licence upgrades to the full release of axis diplomat 2016 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 2016, please go to our web site at

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

and click on the link to request your upgrade.

Section 10   Supported Environments

For the latest information on **axis diplomat 2016**'s supported environments, including additional information such as approved Thin Client software and Microsoft Office versions, please visit our website at:

http://www.axisfirst.co.uk/software/axisdiplomat/platforms/

Section 11   Withdrawn Facilities

11.1.   Dot Matrix Printers

Printing from axis diplomat using dot matrix printers is no longer supported. Printing may be possible but axisfirst will no longer be able to offer support or assistance in its configuration or use.

11.2.   Faxing via Zetafax

Due to the general demise of fax, the optional module available at previous versions to interface with Zetafax by Equisys has been withdrawn.

11.3.   A4 Barcode Labels

Support for printing labels on sheets of A4 has been superseded with support for dedicated label printers (primarily those produced by Zebra) which utilise rolls of label stationery.

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

E & OE.

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