axis® diplomat 2018

BUSINESS SOFTWARE

New features overview

01.10.18

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Foreword

Welcome to **axis diplomat 2018**!

This release is the culmination of the past two years' development work since the launch of **axis diplomat 2016**.

We are pleased to be able to say that this document describes in excess of one hundred separate enhancements that are featured in **axis diplomat 2018**. Significantly, we have also pre-released more of those new developments to our Software Assurance customers than ever before; some of the new features outlined in this document have been available to those subscribing to Software Assurance for as long as 18 months. 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.

There are many challenges facing businesses today, now or just around the corner - Brexit, Making Tax Digital (MTD), GDPR and PCI DSS to name but a few. Some are understood, but may still be liable to change and some, such as Brexit, are still unclear. Brexit won't just affect our UK customers; axis diplomat users elsewhere in Europe are likely to see some changes too if they trade with the UK. GDPR and PCI DSS requirements affect everyone too.

This means that there has never been a time when it has been so important that the software that you use to run your business is always kept up to date. We strongly recommend our customers to upgrade their axis diplomat software and to make sure that it is kept up to date by subscribing to Software Assurance. This is one way to ensure that you are ready for whatever challenges are waiting.

Regards
The axis diplomat Development Team

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Introduction

This document outlines the major new features and benefits that you can expect to see by upgrading to **axis diplomat 2018** from the previous edition of software, **axis diplomat 2016**.

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 https://www.axisfirst.co.uk/software/recent/ for information on the latest updates. Level updates within the **axis diplomat 2018** release will be free to all **axis diplomat 2018** licensees with current support contracts.

Similarly, **axis diplomat 2016** continued to be enhanced and improved during its life and so, if you are upgrading from an early level of **axis diplomat 2016**, 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 2018**, 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 2020.

Details of Software Assurance, how it works and the benefits, can be found on the axisfirst web site at www.axisfirst.co.uk/software/assurance.

To make sure that you are kept up to date with the latest news and developments, please make sure you are subscribed to our newsletters; we also recommend that you follow us on Twitter at https://twitter.com/axisfirst.

axis payroll

Based on feedback from the launch of previous versions of our software, we have incorporated details of the enhancements to **axis payroll 2018** within this single document rather than in a separate New Feature Guide.

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

1. Supplier Relationship Management
2. Custom Data (Customers, Suppliers, Stock and Nominal Accounts)
3. Standing Order Accruals and Prepayments
4. Import data directly from Microsoft Excel™ Spreadsheets
5. Add Custom Monitors to Favourites
6. A number of new or re-written functions including Bank Transfers and Cash Account Enquiry
7. Improved Posting Performance
8. Credit/Discount Lines on Purchase Orders
9. Modules that are now standard for all customers, including Agent's Commission, Multi-Location Stock and Back-to-Back Orders
10. Transfer Customer Payments

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.

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Upgrading to axis diplomat 2018

Customers with Software Assurance are entitled to an upgrade to their software licence to **axis diplomat 2018** under the terms of their agreement.

To request an update to **axis diplomat 2018**, 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.

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Details of Enhancements

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

A standard facility within **axis diplomat 2018,** available to all

A facility within **axis diplomat 2018** that has already been pre-released to those axis diplomat 2016 customers with Software Assurance

A new facility within **axis diplomat 2018** that requires one or more existing optional modules

An optional extra, available as an add-on to **axis diplomat 2018** but not available at previous versions

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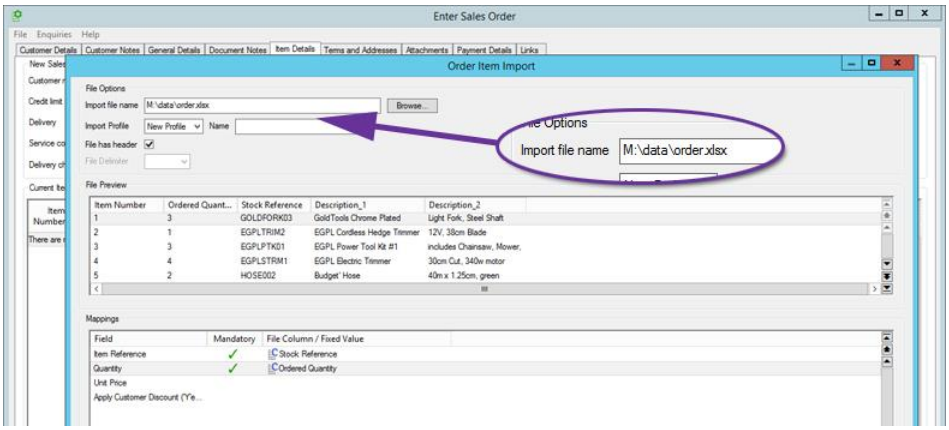
Section 1 Kernel (Core) Software

1.1. Import from Excel

Available to all customers with axis diplomat 2018

A number of the import functions within axis diplomat have been extended to support import from native Microsoft Excel ™.xlsx files as an alternative to comma-separated (CSV) text files.

Importing from Excel-format files is not only more convenient, as it eliminates the need to save the file as a CSV file first, but also helps avoid some of the issues caused when Excel applies its own formatting rules to data when saving as a CSV text file.



The functions that now support direct import from native .xlsx files include:

- Date & Time Specific Pricing
- Supplier Price Lists
- Nominal Budgets
- Custom Data
- Sales Order Items
- Purchase Delivery Advice (for those with the Purchase Delivery Advice module)
- Assembly Details (for those with the Bill of Materials module)
- Customer Assets & Customer Asset Warranty Packs (for those with the Customer Assets module)

It is planned that, during the life of axis diplomat 2018, further imports will be up-rated to add support for imports from Excel so this list is subject to change.

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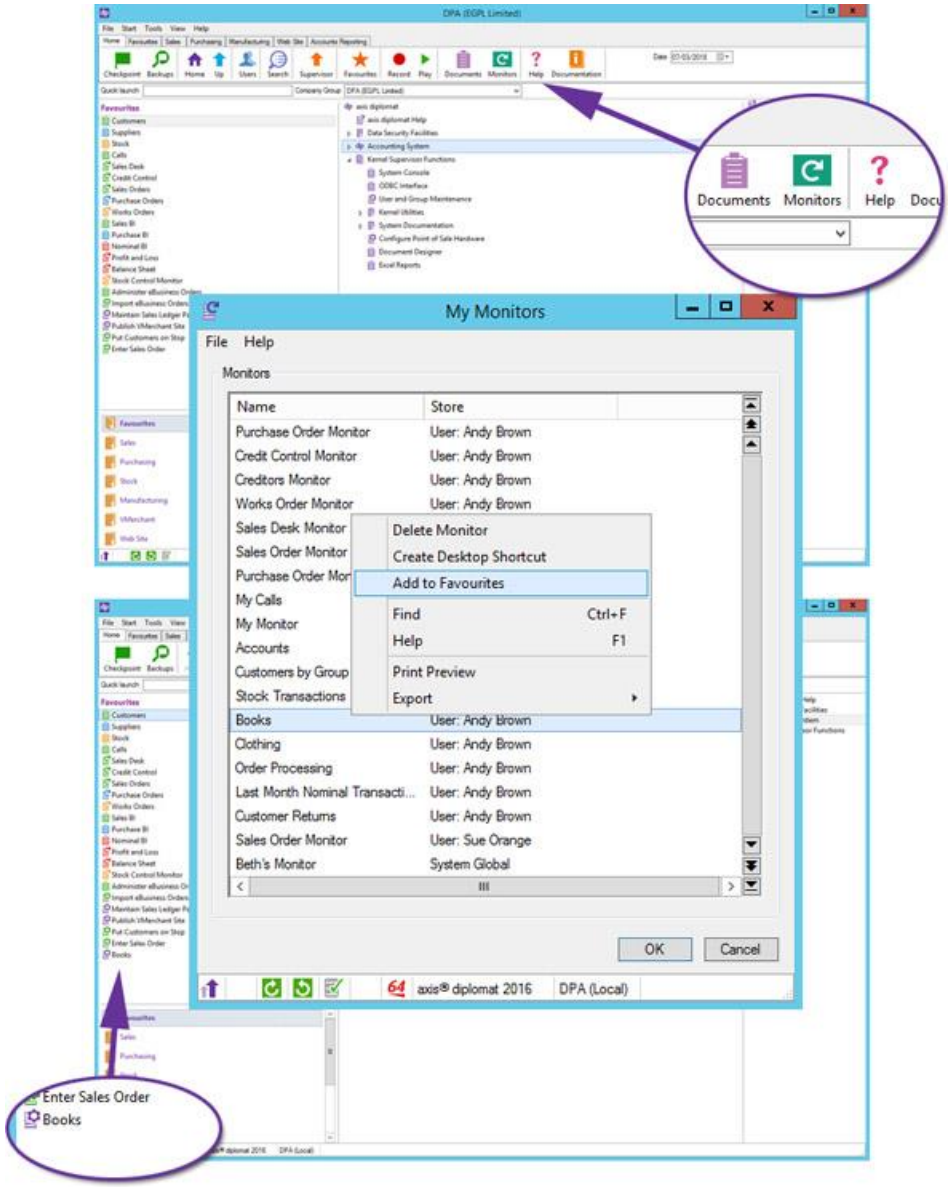
1.2. Add Custom Monitors to Favourites

Available to Software Assurance customers with axis diplomat 2016 or above

The ability to create custom monitors is a powerful feature of axis diplomat, providing you with your own unique view of the data that is important to you. We have now enhanced axis diplomat to allow you to add individual custom monitors directly to your Favourites, giving you instant access to the monitor. Simply right-click on any monitor in the "My Monitors" list and select "Add to Favourites".



In this example, we have created a custom monitor called "Books", which lists all of the book-related stock items, any outstanding sales orders that include books and any outstanding quotes for books. By adding the "Books" monitor to our Favourites, we now have direct access to that information.

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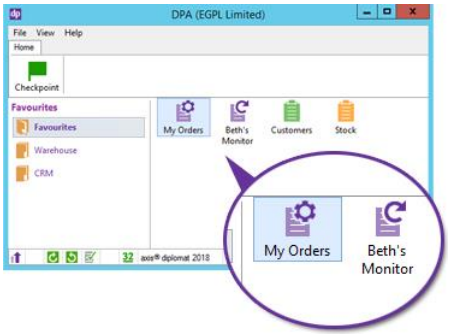
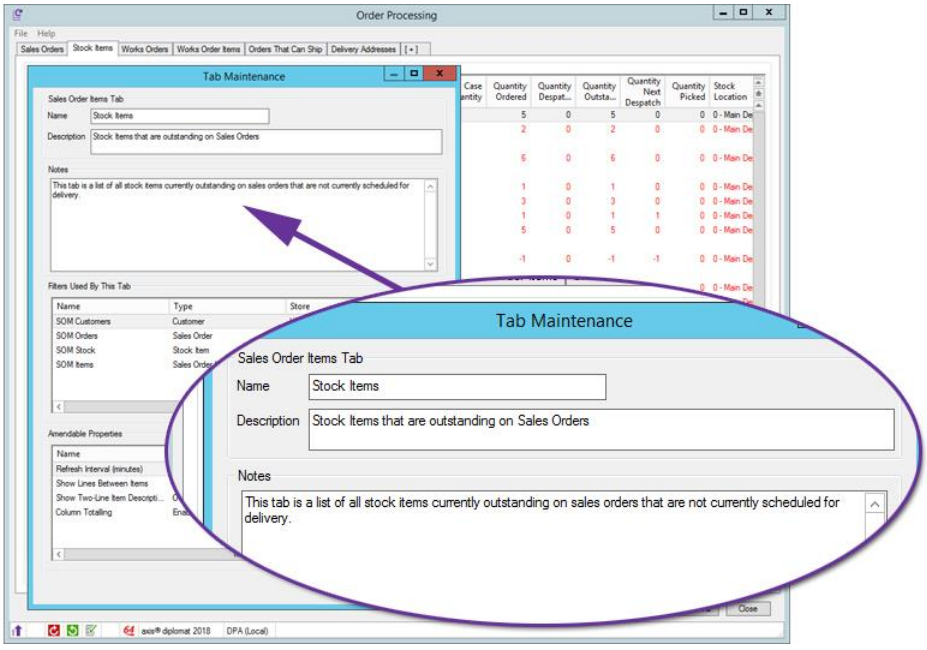
A further benefit is that those users who are configured to see Favourites only may now have custom monitors added for their use.



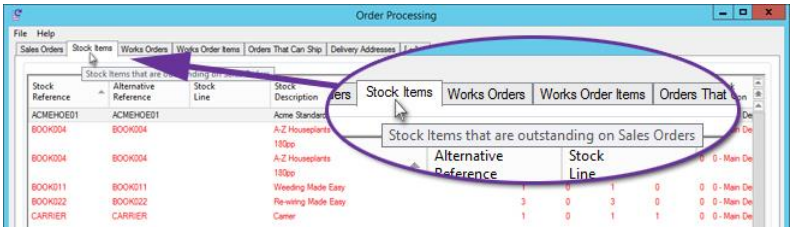
1.3. Monitor Tab Notes

Available to all customers with axis diplomat 2018

You can now add your own notes and descriptions to individual tabs within monitors.



This can be useful as a reminder of the information that the tab is showing. When F1 Prompt Help! is enabled, the description also appears as a tooltip when hovering over the monitor tab.



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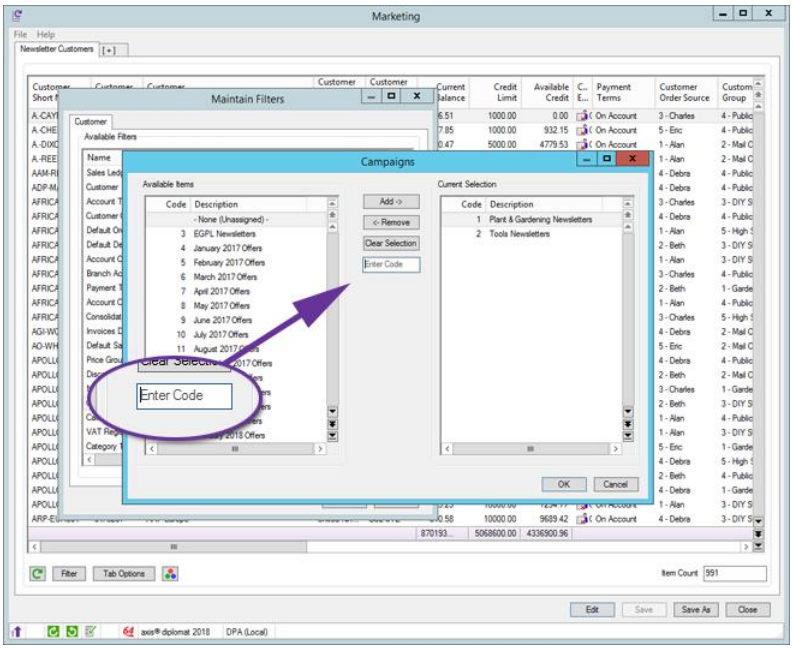
1.4. Text Entry in Monitor Filters

Available to all customers with axis diplomat 2018

When amending Monitor filters, for items that typically include long lists of items to choose from (such as Nominal Accounts, Calls and Campaigns), you can now enter the code of the item that you wish to add to the filter list directly.

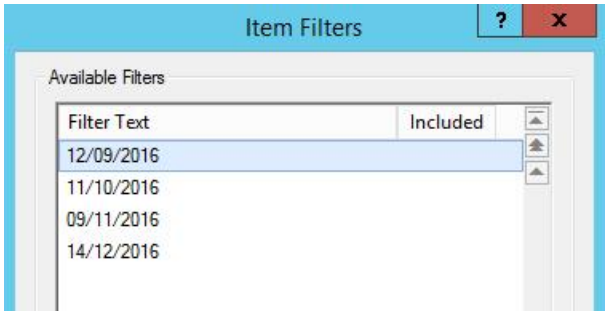
If you know the codes of the items that you wish to filter by, this can be much quicker and easier than locating them in a long list.



1.5. Date Filtering in Scrolling Data Lists

Available to Software Assurance customers with axis diplomat 2016 or above

Setting filters on Scrolling Data Lists is now aware of when a column contains dates and sorts the list of dates into chronological order instead of alphabetical order.



Previously. all column filter lists were treated as text and sorted accordingly - meaning that the list above would have started with 09/11/2016 and ended with 14/12/2016.

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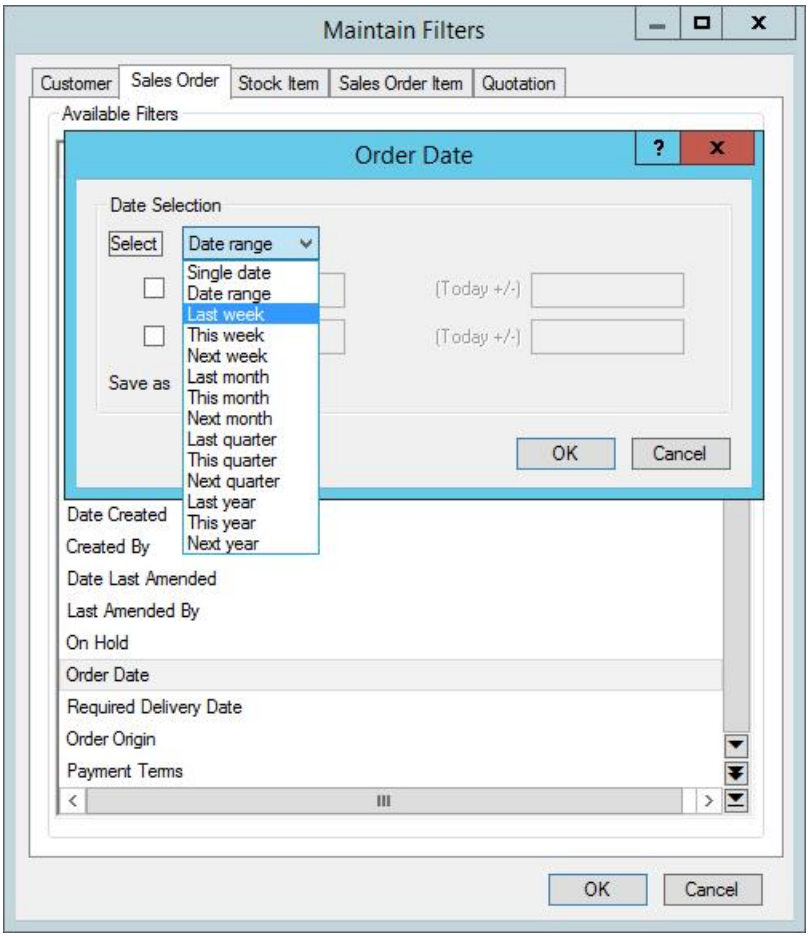
1.6. Date Selection Filters

Available to Software Assurance customers with axis diplomat 2016 or above

The list of data selections available when filtering a monitor tab by date has been extended from Single Date and Date Range to include a host of pre-defined selections, including last week, last month, this year and last year.



1.7. Filters for Current User and Current Group

Available to Software Assurance customers with axis diplomat 2016 or above

On monitor tabs that allow filtering by axis diplomat user and/or group (such as CRM Calls and User Activity), it is now possible to specify "Current User" and "Current Group" as selections. When monitors are shared, these filters will then use the ID or Group of the user viewing the monitor at the time.

This enhancement makes it easier to create shared monitors with, for example, a "My Calls" tab. Previously you would have needed to create separate tabs for each user (or each user would have needed their own custom monitor).

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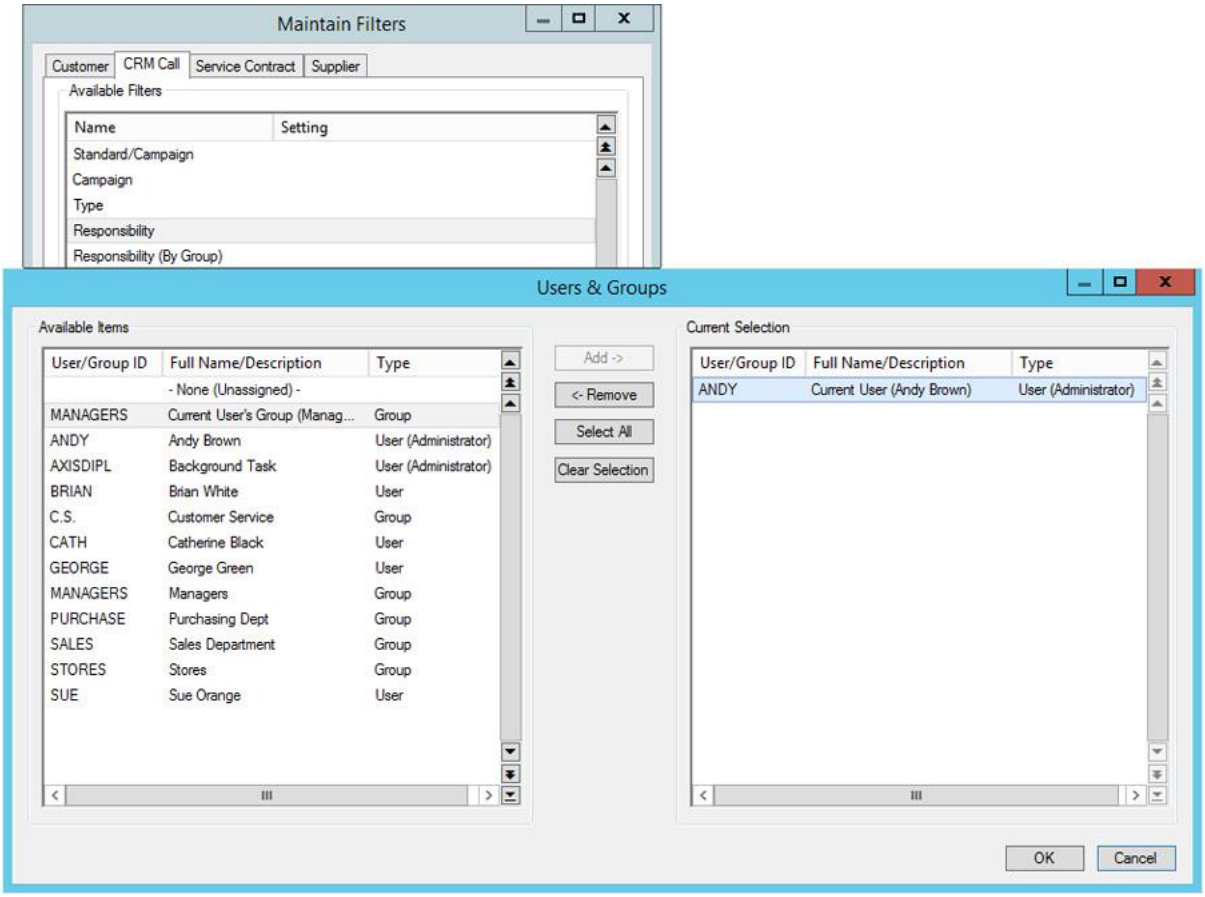
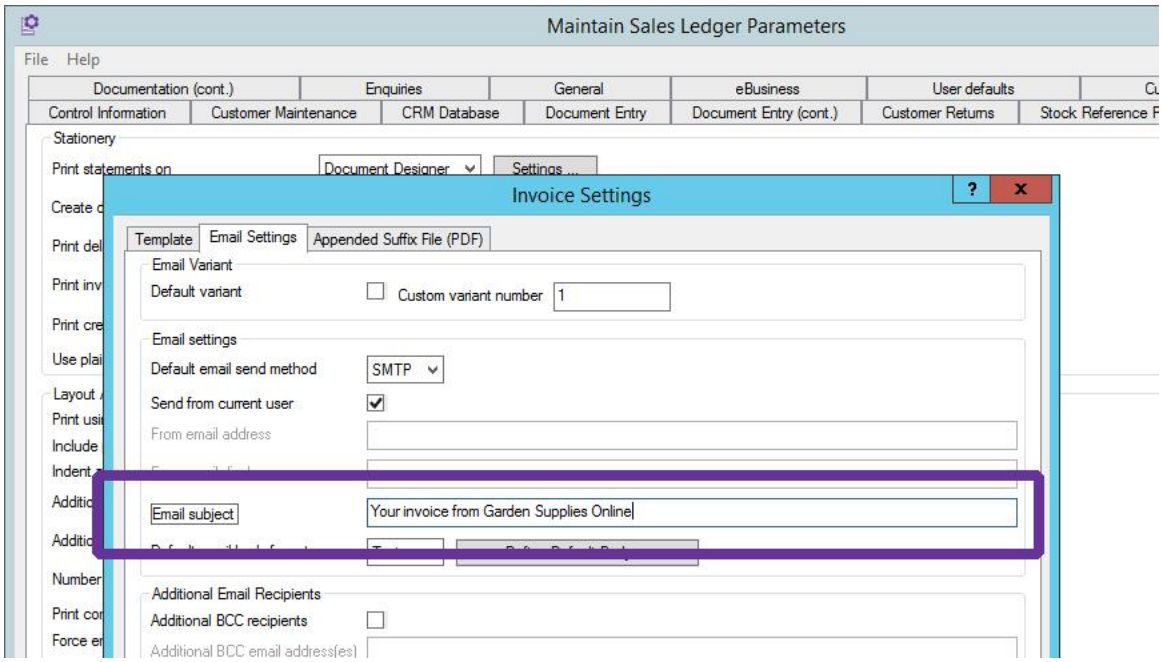


1.8. Configurable Email Subject by Variant

Available to Software Assurance customers with axis diplomat 2016 or above

For those using document variants, such as on systems with the Trading Identities module, it is now possible to configure different email subjects for each variant.



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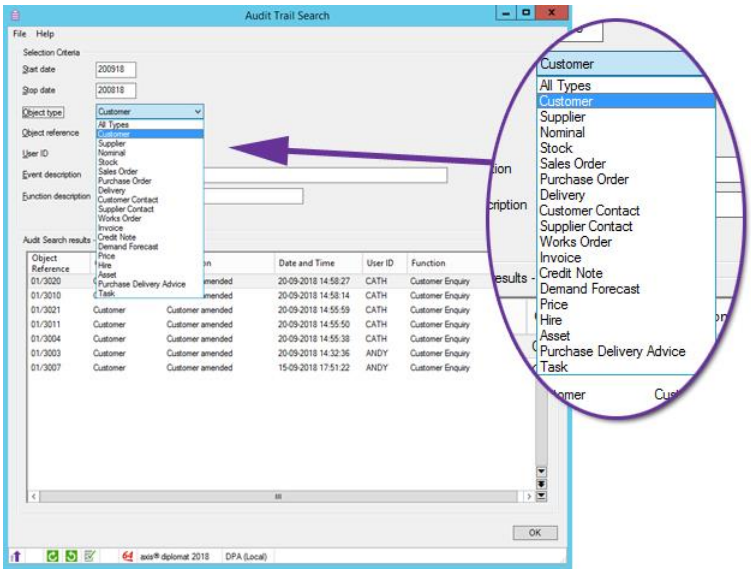
1.9. Audit Trail Search

Available to all customers with axis diplomat 2018

A new function has been added to allow you to search the Audit Trail database. You can search between selected dates, for specific types of update (for example, all changes to customer accounts) and/or filter to updates by a specific user.



As well as being of benefit in general administration, the function can also be useful for GDPR or ISO27001 compliance, in determining who has updated what parts of the system, and when.

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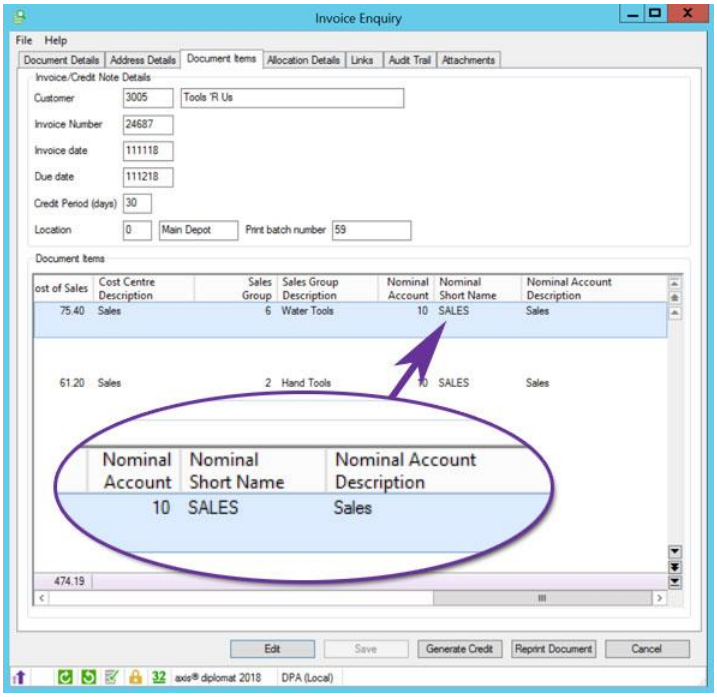
Section 2 Nominal Ledger & General Accounts

2.1. Nominal Account Details added to Sales Invoice Enquiry

Available to Software Assurance customers with axis diplomat 2016 or above

The Document Lines tab of Sales Invoice Enquiry has been extended to include details of the Nominal Account (columns include account number, short name and description) for each item.



2.2. Custom Nominal Account Data

Available to all customers with axis diplomat 2018

You can now define any number of additional data fields that you wish against your Nominal Accounts. These fields may be used to store whatever additional information that you need and may be of a variety of data types, including simple text fields, longer notes, boolean (yes/no), numeric, dates or URLs (web addresses).

As with Custom Data in other areas of the system (such as Customers, Suppliers and Stock), you can assign groups of data fields to "Schemas" and assign a specific Schema to different Nominal Accounts.

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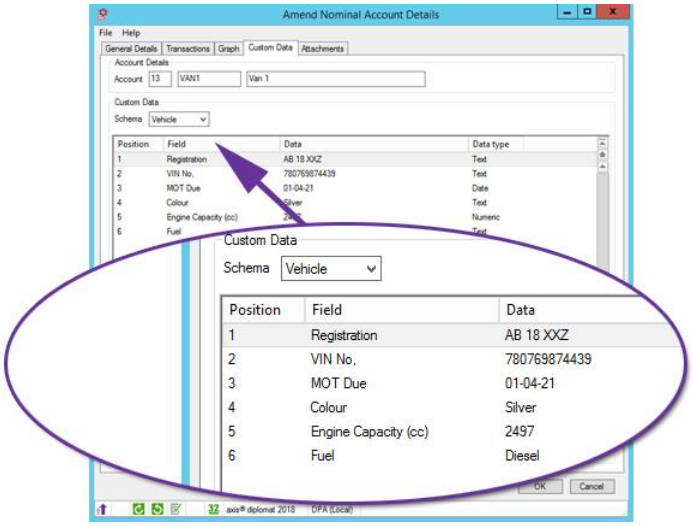

For example, if you maintain a separate Nominal Liability Account for each vehicle in your fleet, then you may choose to create a Schema specifically to hold additional vehicle-related information so that it is always at hand when looking at those Nominal Accounts.

2.3. Standing Order Accruals and Prepayments

Available to all customers with axis diplomat 2018

New functions have been added to allow you to configure accruals and prepayments that are scheduled over a number of months. You specify the frequency (normally Monthly) and a total number of releases; the appropriate journals are then made for you at each release.

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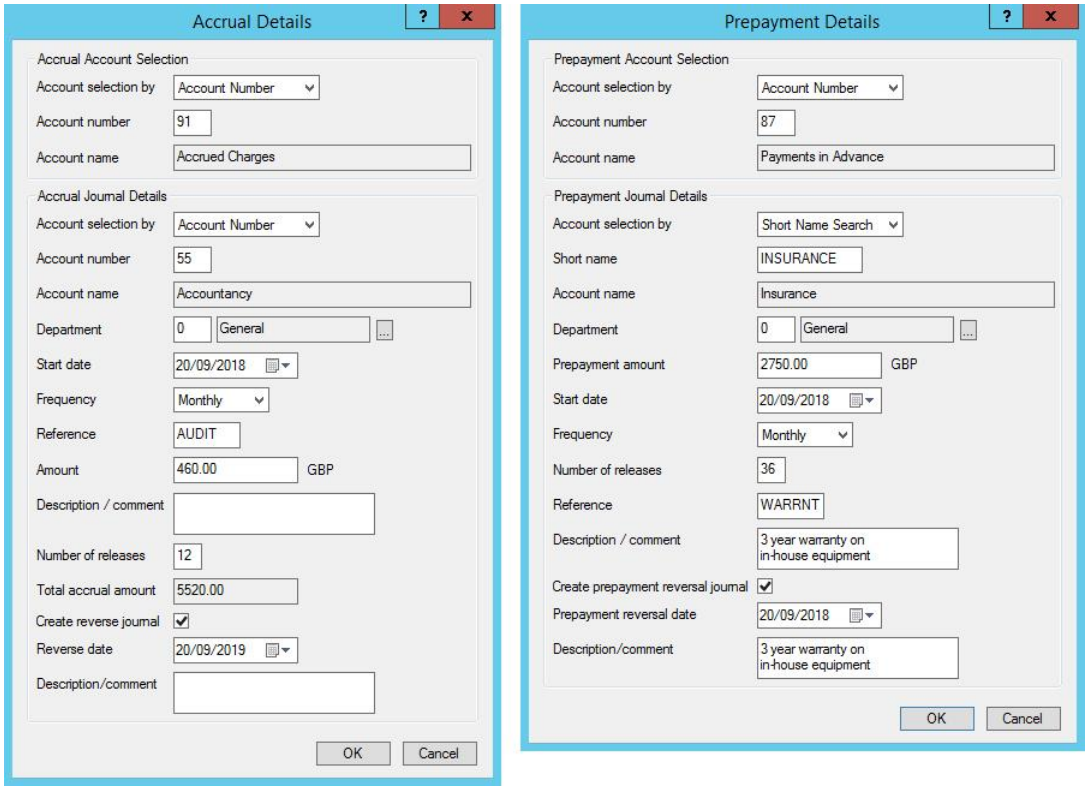

This greatly reduces the time spent each month in managing your accruals and prepayments since, once configured, everything is taken care of by the Release Standing Orders function at the same time that it is creating other recurring transactions (such as bank account payments and simple journals).

2.4. Bank Transfer Function

Available to Software Assurance customers with axis diplomat 2016 or above

A new function, Bank Transfer, has been added to allow simple recording of movements between bank accounts.

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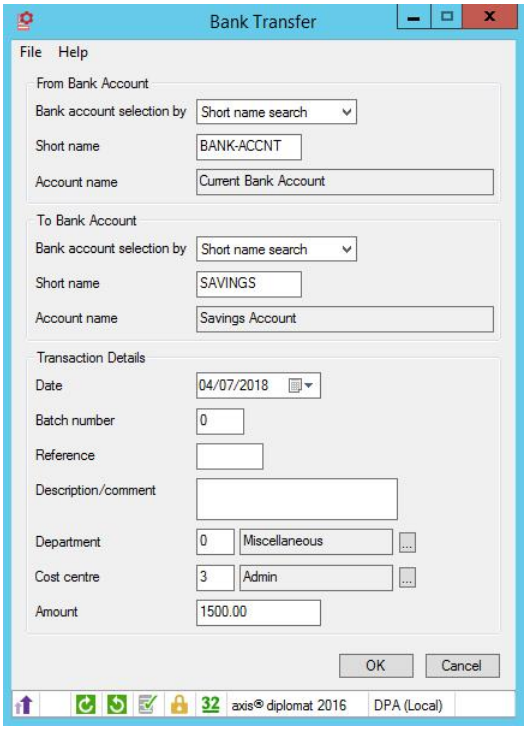
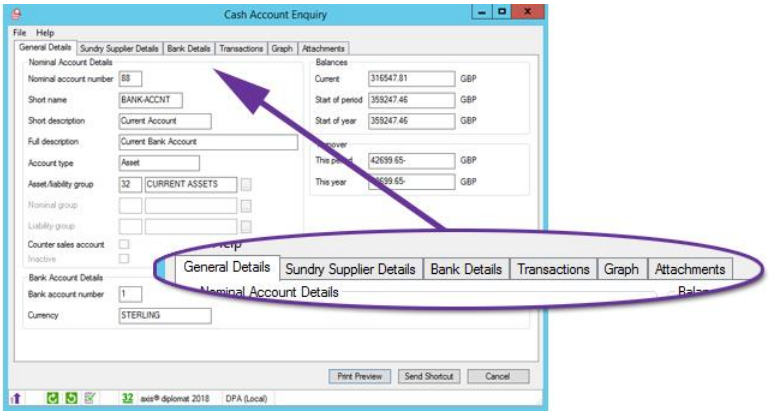


This new function makes it much easier and quicker to record transfers between your bank accounts, eliminating the need to use traditional journal booking functions.

2.5. New Cash Account Enquiry Function

Available to Software Assurance customers with axis diplomat 2016 or above

The previous Cash Account Enquiry has been replaced with a new interactive enquiry, providing access to all of the information relating to the Cash Account across a number of tabs. This includes access to Attachments, Graphs and the ability to drill-down into transactions. As with other similar functions within the system, it also provides the ability to export transaction data to a CSV text file or to a Microsoft Excel™ spreadsheet.



For those who still want to produce the report-style enquiry offered by the previous function, this is provided via the Print Preview button.

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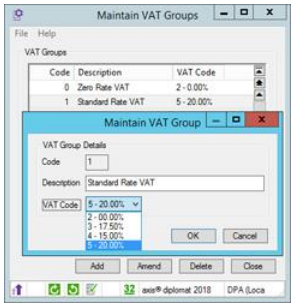
2.6. VAT Groups

Available to all customers with axis diplomat 2018

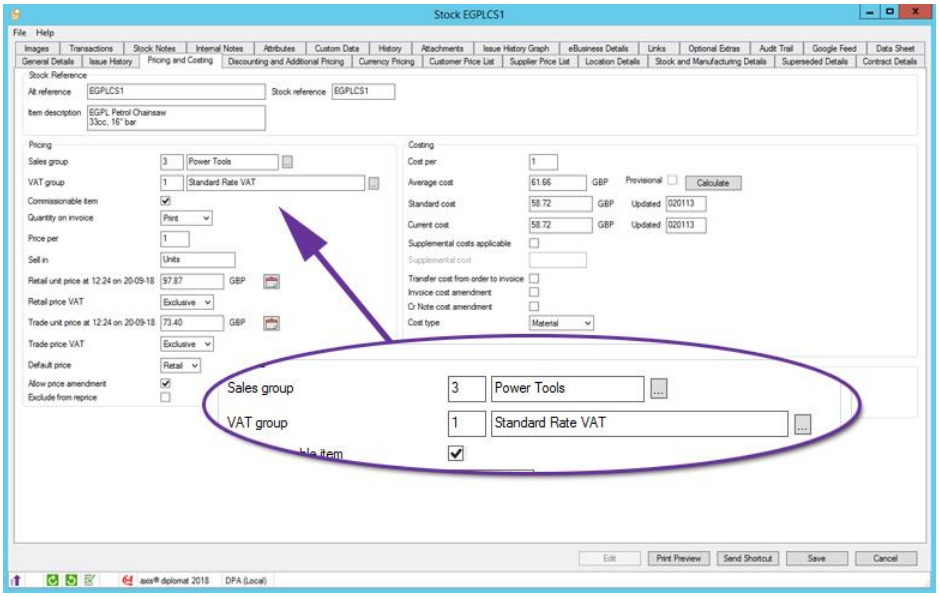
With the release of axis diplomat 2018, VAT Groups have been made standard; these were previously only available to those with Multiple VAT Registrations.

VAT Groups are used to control the VAT rates applied to individual stock items instead of taking the VAT rate from the Sales Group.



Not only does this make it easier to manage the varying VAT rates associated with different products and services but also allows you greater freedom in how you use Sales Groups since they can now be used purely for sales analysis purposes. For example, you can now have a single Sales Group for "Clothing", which can encompass both Adult and Children's clothing, despite the fact that their VAT rates differ.

A stock item's VAT Group is configured within Maintain Stock Details but is also supported by Stock Record Block Amendment and Import Stock Details.



For those with the Service Contract Management module, a second VAT Group is recorded against the stock item for use when a contract includes that item.

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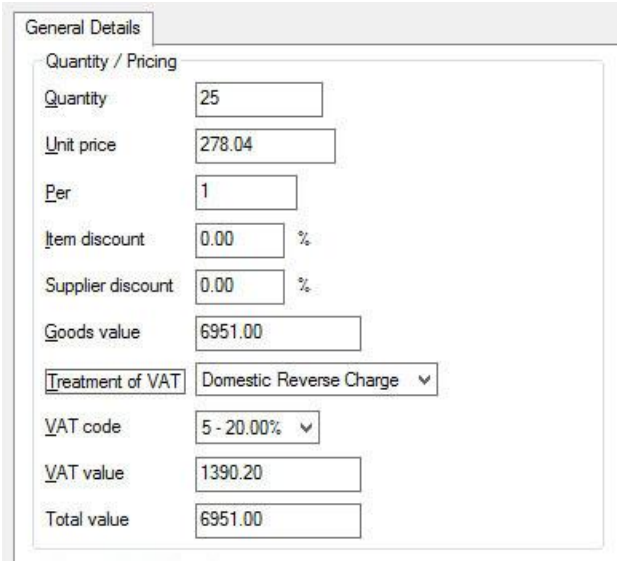
2.7. Domestic Reverse Charge VAT on Purchases

Available to Software Assurance customers with axis diplomat 2016 or above

For those axis diplomat users who purchase goods or services that fall under the rules of Domestic Reverse Charge VAT (including, for example, mobile phones, subject to certain de minimis limits), Purchase Order Invoice Booking has now been extended to support this.

When booking a supplier's invoice via Purchase Order Invoice Booking, you now have the option to specify (for Standard UK suppliers) VAT treatment as "Domestic Reverse Charge".

In these cases, the VAT is not added to the invoice value but is recorded; axis diplomat then reports the VAT amount as both Output Tax and Input Tax. The goods value is reported in Total Inputs but not Total Outputs.



2.8. Multi-User Previous Period Adjustments

Available to Software Assurance customers with axis diplomat 2016 or above

The Nominal Ledger function "Previous Period Adjustments" has been reworked to allow operation in multi-user mode.

The function allows adjustment journals to be entered for any completed accounting period within the current year or either of the two preceding years.

The function has also been extended to allow adjustments to be posted to previously unused years. This is particularly useful when correcting errors brought forward from legacy accounting systems when implementing a new axis diplomat system.

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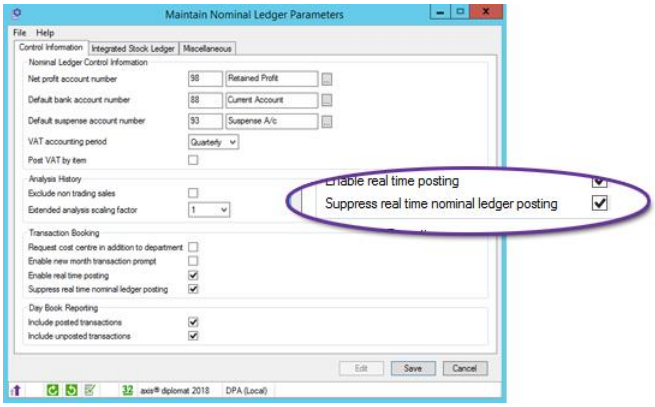
2.9. Improved Performance when Posting Transactions

Available to all customers with axis diplomat 2018

A new Nominal Ledger parameter has been added to suppress real time posting of Nominal Ledger transactions. This has a significant impact on the general performance of the system, particularly when filing sales and purchase transactions.

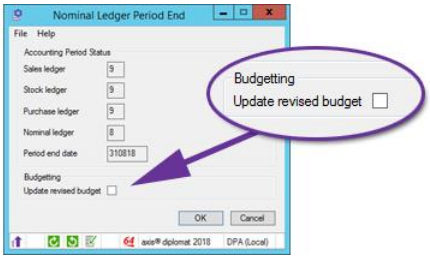
This improvement is particularly noticeable when running with "split periods", when the Sales Ledger (and possibly Purchase Ledger) periods have been closed but the previous Nominal Ledger period remains open. For many businesses, this may account for as much as half of every month.



2.10. Automatically Update Revised Budget during Period End

Available to all customers with axis diplomat 2018

The Nominal Period End now offers the option to update your Revised Budget with actual figures. This updates the figures for all completed periods in the current year and so includes any previous period adjustments that may have been made since the previous period end.



This removes the need to manually run the Update Revised Budget with Actual function.

A new function, Clear Revised Budget, has also been added which allows you to clear out the revised budget figures at the start of the year.

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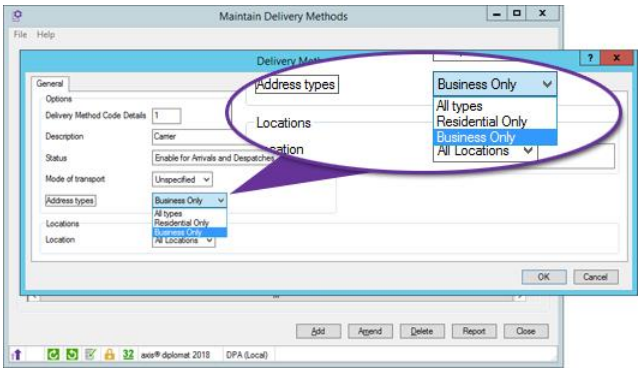
Section 3 Sales Ledger, CRM & Sales Order Processing

3.1. Restrict Delivery Methods by Delivery Address Type

Available to Software Assurance customers with axis diplomat 2016 or above and the Delivery Methods & Charges module

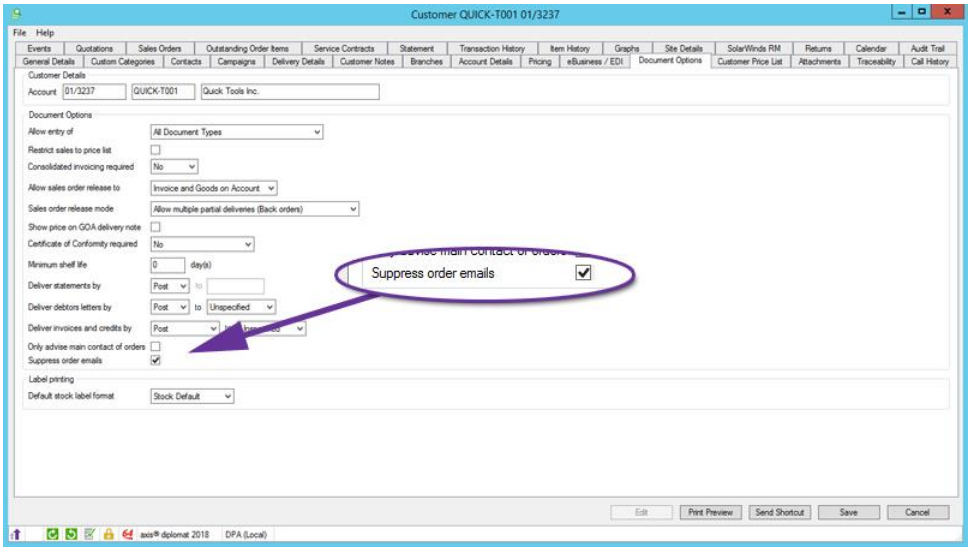
Certain Delivery Service Providers (carriers) will only deliver to business addresses or, conversely, only to residential addresses. For these situations, you are now able to restrict specific delivery methods by address type:



3.2. Option to Suppress Order Emails

Available to all customers with axis diplomat 2018

If a customer does not wish to receive any order emails from axis diplomat, such as order acknowledgements and despatch notifications, a new parameter on customer accounts allows these to be suppressed.



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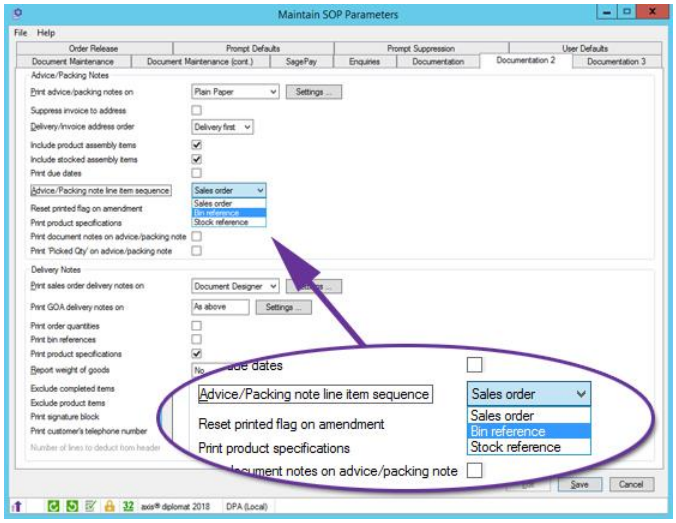
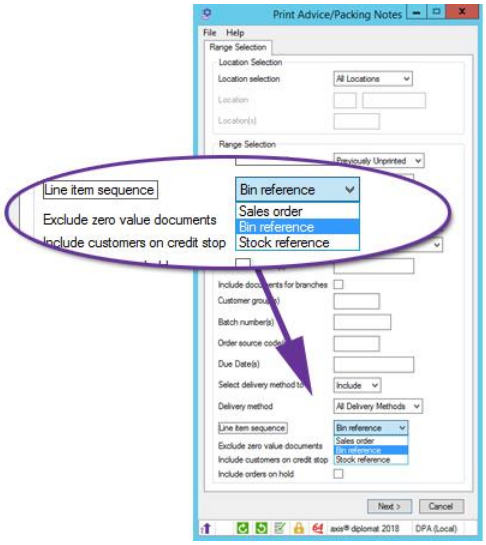
3.3. Configurable Advice/Packing Note Sequence

Available to all customers with axis diplomat 2018

A new system parameter allows you to control the sequence of items listed on an Advice/Packing Note. This allows Advice/Packing Notes to be printed with the items listed in the sequence that they were entered onto the order, in Stock Reference order or in Bin Reference order. The Bin Reference sequence is particularly useful for those using the Advice/Packing Note for paper-based picking in a warehouse.



When printing a single Advice/Packing Note, such as on filing as Sales Order or from a right-click option in a Sales Order Monitor, the system will automatically use this sequence. When printing via the dedicated Print Advice/Packing Notes function, the system will default to the System Parameter's current setting but this can be changed if required:



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3.4. Automatically Lock Calls when adding Attachments

Available to all customers with axis diplomat 2018

Many users choose to open CRM and SRM Calls in an unlocked state by default and only lock them as and when they wish to make an update. In such situations, adding events or links to a call will automatically lock the call first.

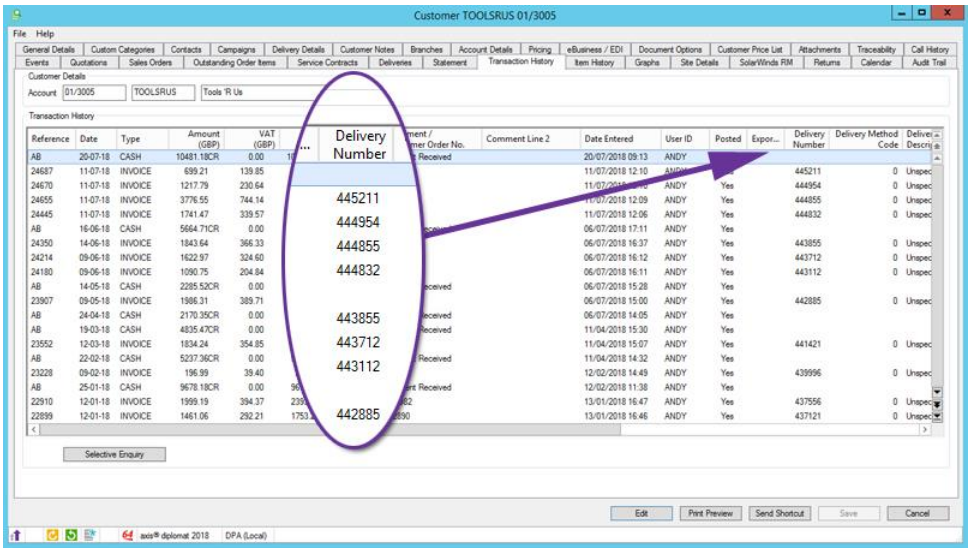
The system has now been extended to also attempt to lock the call when dragging a file onto the Attachments tab of an unlocked call.

3.5. Delivery Number column added to Transaction History

Available to Software Assurance customers with axis diplomat 2016 or above and the Despatch & Delivery Management module

The Customer Enquiry function's Transaction History tab has been extended to include an additional column for the Delivery Number.

This reference will be present when the invoice appearing on the Transaction History tab relates to a single delivery (the column will be blank for consolidated invoices).



3.6. Colour Coding added to Customers Function

Available to all customers with axis diplomat 2018

The Customers function has been enhanced to use colour coding within the search results to identify the account type.

Normal accounts are shown in black whilst prospects are listed in orange and closed accounts in grey.

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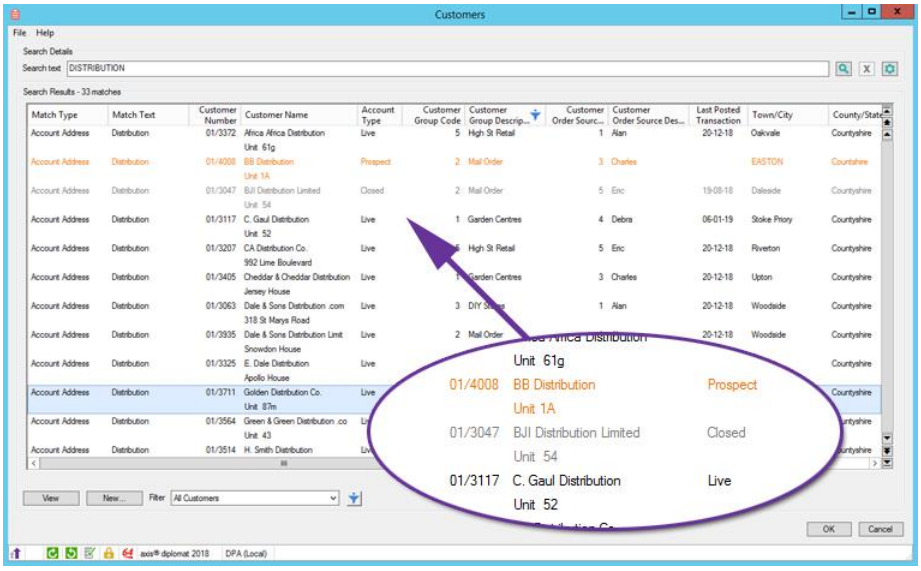
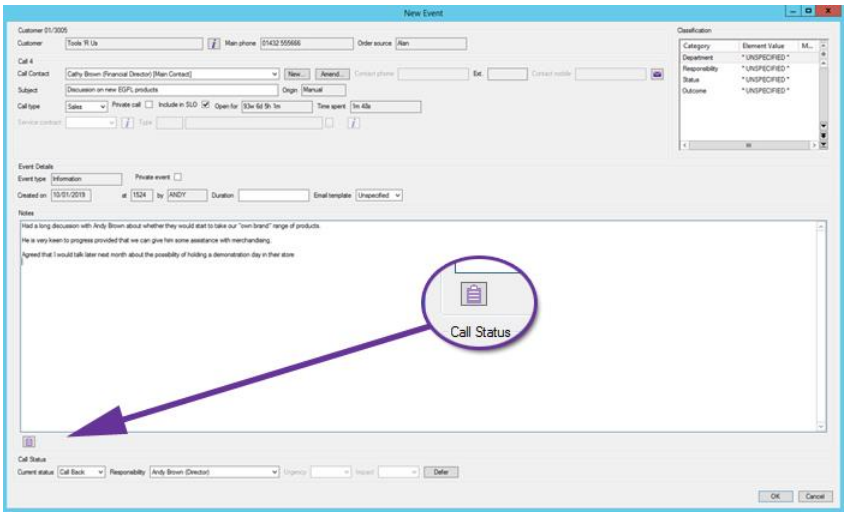


3.7. Copy to Clipboard icon added to Events dialog

Available to all customers with axis diplomat 2018

An additional icon has been added to the Event dialog within CRM to copy the whole of the event text to the clipboard.

This makes it quicker and easier to copy text from an event into, for example, an email than the alternative of highlighting all of the text manually and then using the right-click Copy option.



3.8. Supplier Stock added to Sales Order Item monitor tabs

Available to all customers with axis diplomat 2018 and the Supplier Price Feed Foundation module

An additional column has been made available within Sales Order Items monitor tabs to show the Total Supplier Stock On Hand. This uses the same logic as is applied to the

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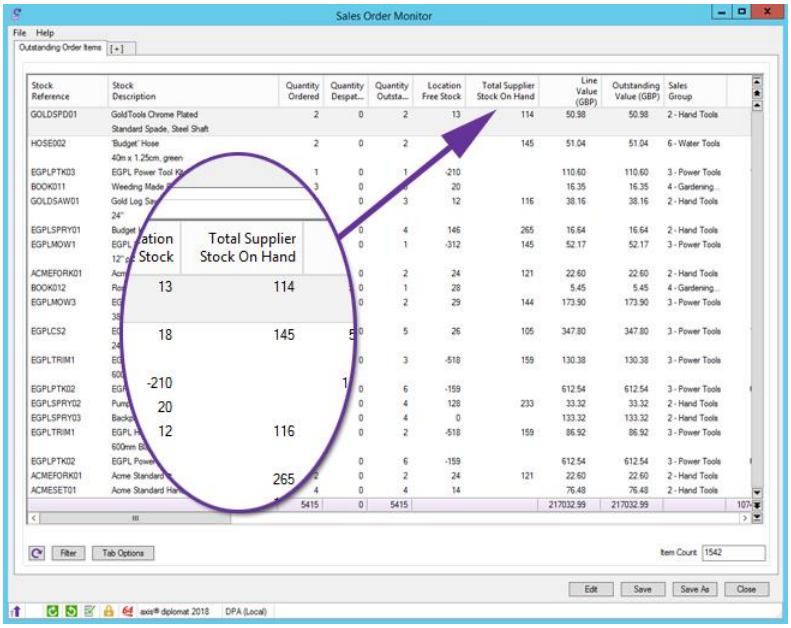
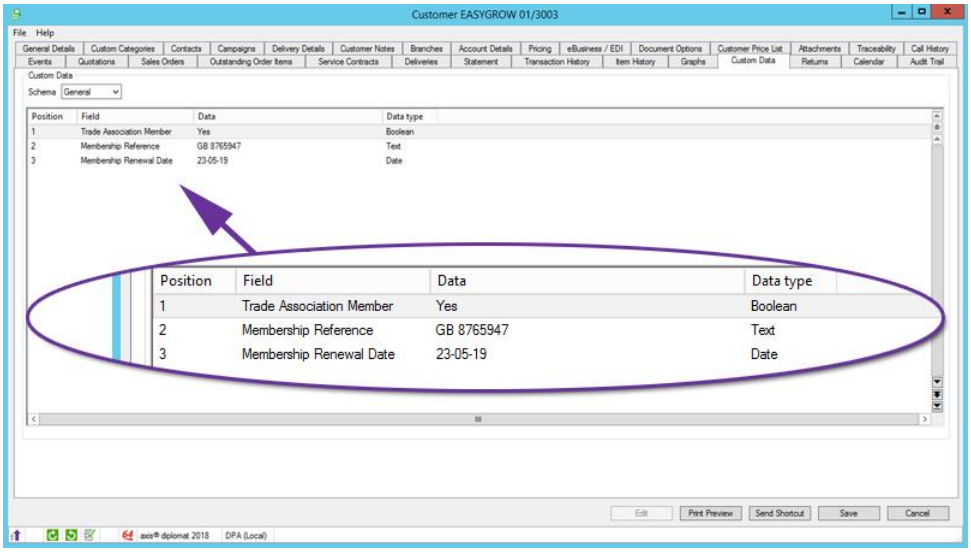
figure shown within Sales Order Maintenance (ignoring supplier's stock figures that have not been recently updated).



3.9. Custom Customer Data

Available to all customers with axis diplomat 2018

You can now define any number of additional data fields that you wish against your customer accounts. These fields may be used to store whatever additional information that you need and may be of a variety of data types, including simple text fields, longer notes, boolean (yes/no), numeric, dates or URLs (web addresses).



For example, if you grant an additional discount to customers who are members of a trade association, you may wish to record the fact, along with their membership number and the date when that membership is due for renewal.

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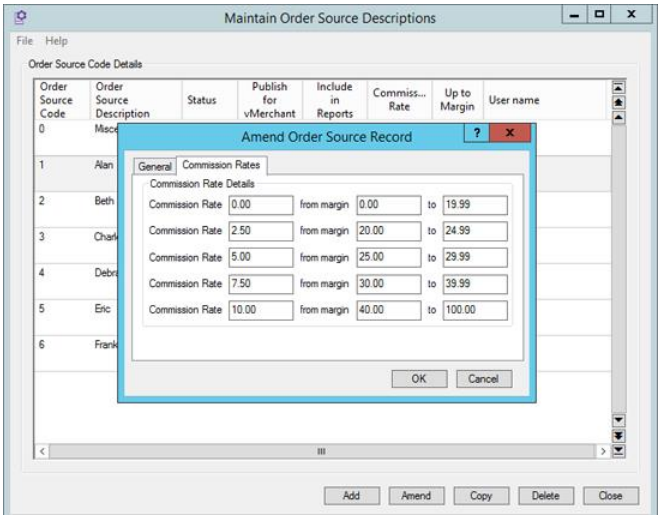
3.10. Agent's Commission Module now standard

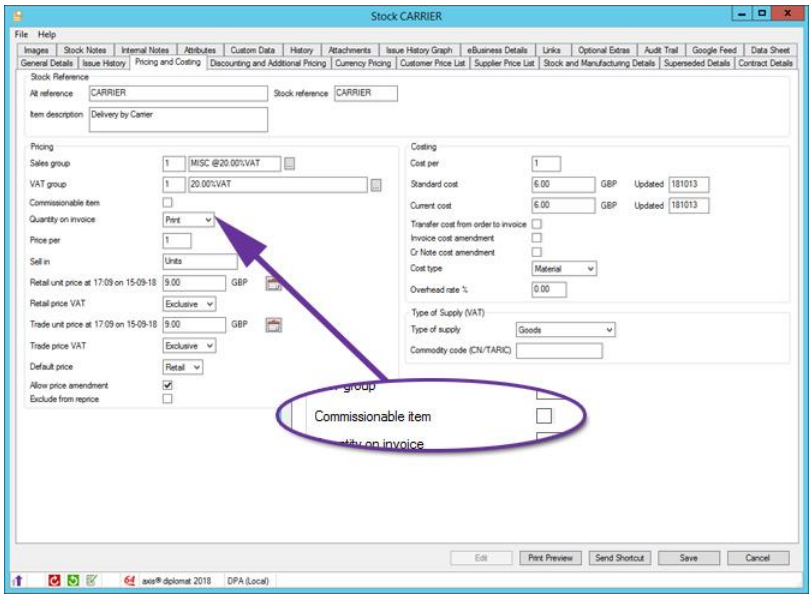
Available to all customers with axis diplomat 2018

The Agent's Commission module, which was previously an optional addition, is now standard on all axis diplomat 2018 systems.

This module calculates and reports commission payments to agents or sales reps based on sales by order source.



Each order source code can hold up to 5 commission rates depending on the profit margin.



Specific stock items can be excluded from commission calculation (typical examples include delivery or handling charges).

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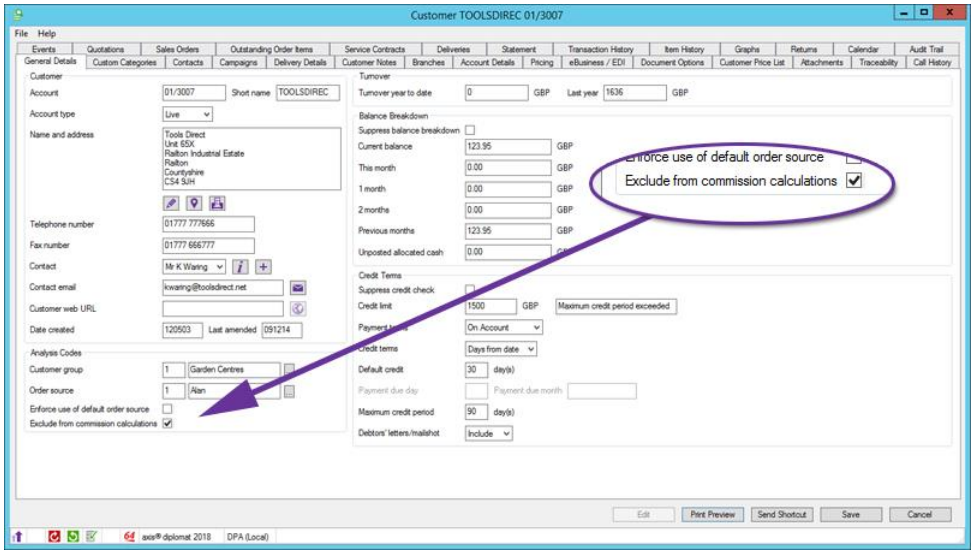

Specific customers may also be excluded from commission calculation.

3.11. Back-to-Back Ordering now standard

Available to all customers with axis diplomat 2018

This module, previously available as an extra-cost option, is now provided as standard.

It enables purchase orders to be created as items are added to a sales order, with the option of delivery direct to the customer.

Sales Order document templates may include a column showing the linked purchase order number and as goods are received into stock, the operator is notified that there is a linked sales order waiting for the stock.

For those using Despatch Quantity Recording, the process to allocate stock is aware of the receipts for back-to-back orders and will ensure that stock is assigned to the correct sales orders.

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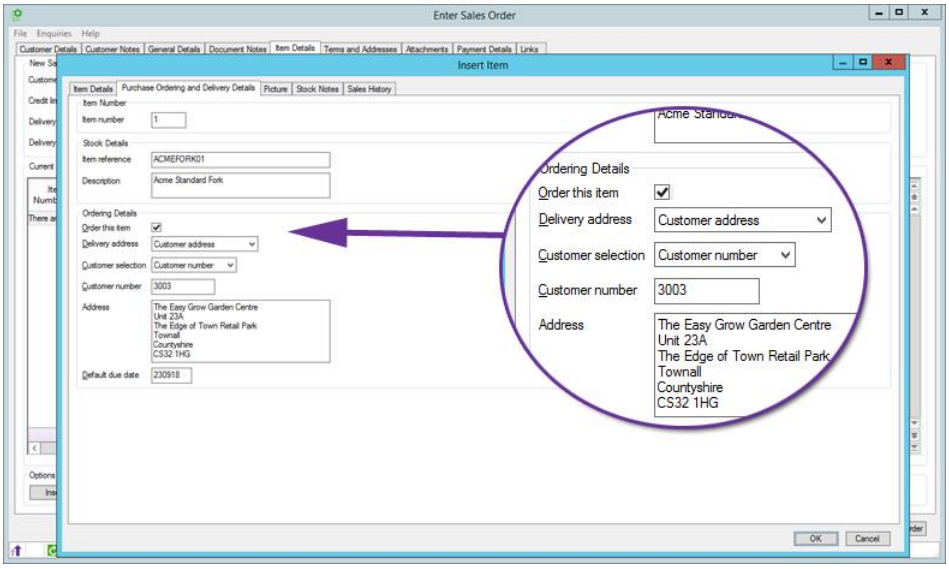
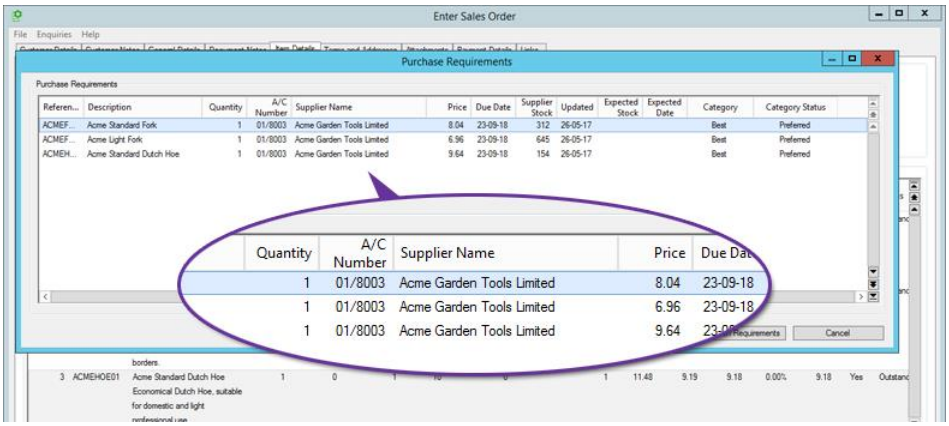


As individual items are added to the order, simply tick the "Order this item" box; you can also choose the delivery address - either direct to the customer, to your own address (typically for consolidation with items that you are supplying from stock) or to another location



Upon filing the order, the system identifies the preferred supplier for each back-to-back item (based on the supplier price list) and you may choose to change suppliers at this stage; purchase orders are then created

3.12. Customer Receipts and Allocations

Available to all customers with axis diplomat 2018

It is now possible to allocate credits (such as unallocated receipts and credit notes) on a customer account from the Statement tab of Customer Enquiry. The Enter Payment function has been extended to allow the allocation of existing credits without needing to enter a new payment at the same time.

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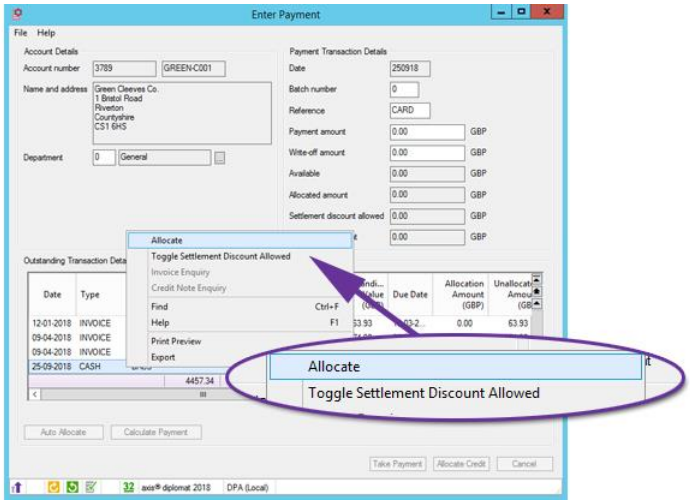
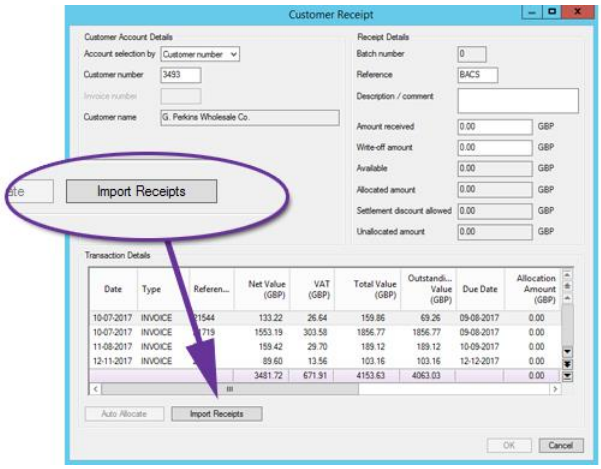


3.13. Import Customer Remittance Advice from Spreadsheet

Available to all customers with axis diplomat 2018

It is now possible to import a Customer's Remittance Advice from a spreadsheet. This is particularly useful where customers have a large number of invoices, such as when you are drop-shipping individual orders direct to their customers, as it both saves time and reduces human error in allocating payments to the correct invoices.



The Customer Receipt dialog now features an Import Receipts button

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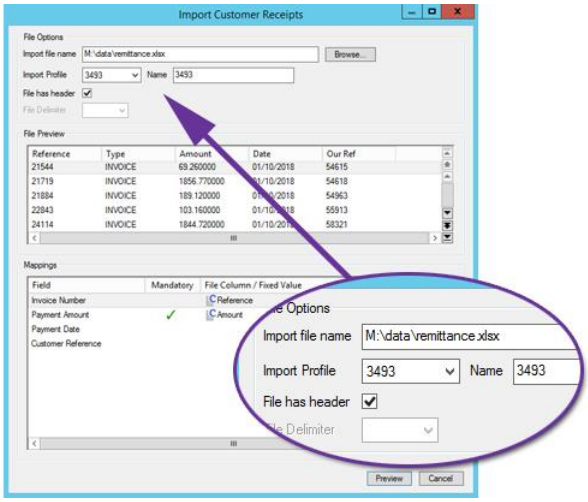
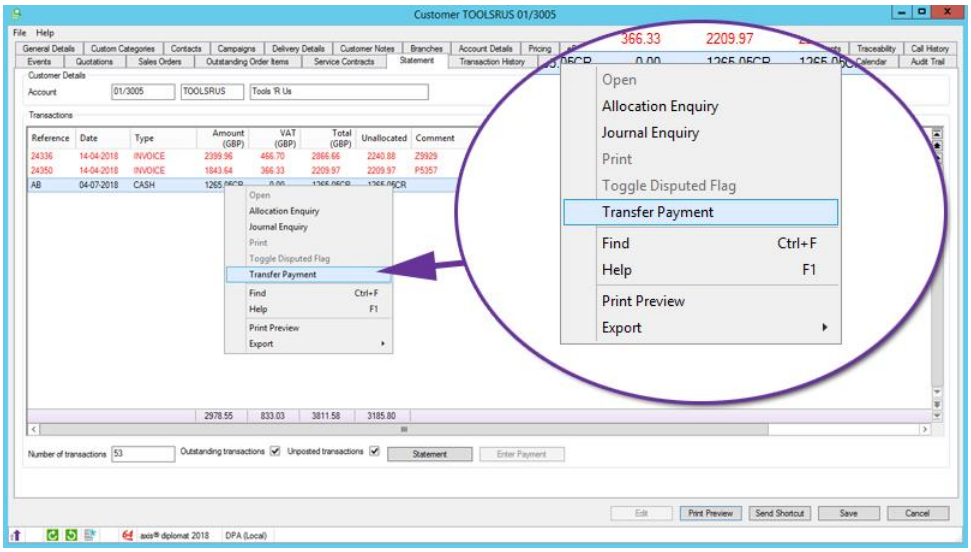


The function allows you to import a Remittance Advice from a CSV text file or from a native Microsoft Excel .xlsx file. The file can be in any format provided that it contains a column for the payment amount and, to allow automated allocation, a column for the Invoice Number. Once you have mapped the columns in the supplied file to the fields required by axis diplomat, you can save that mapping for future use. This is ideal in situations where regular customers supply their Remittance Advices in the same format every month, as it means that the mapping process only needs to be done once for a particular customer.

3.14. Transfer Customer Payments

Available to Software Assurance customers with axis diplomat 2016 or above

axis diplomat now has the ability to easily transfer unallocated cash payments from one customer account to another. The function can be accessed via a simple right-click option on the specific cash transaction within Customer Enquiry (when in Edit mode) and then specifying the destination customer account.



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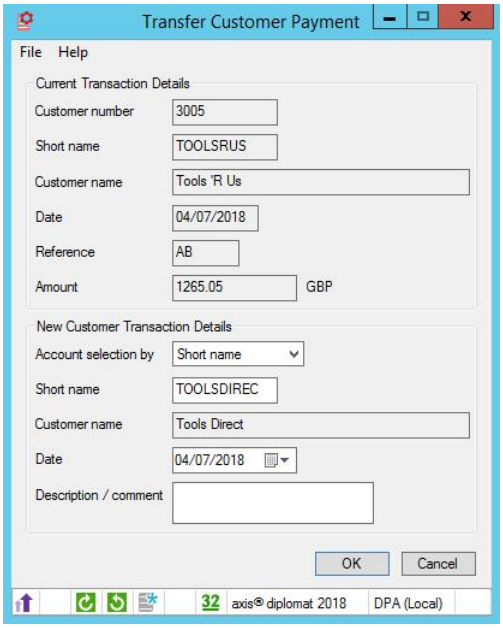

This is ideal for correcting operator errors where cash has been allocated to the wrong account, perhaps because the customer names are very similar or the cash was received with no remittance advice and the user assumed the wrong account.

3.15. Improved handling of Settlement Discount

Available to all customers with axis diplomat 2018

The Customer Receipts function within the Cash Book and the Enter Payment function (from the Statement tab in Customer Enquiry) have been modified to assist with the recording of settlement discount allowed when customers pay invoices in full (less the settlement discount) within the settlement terms.

In addition, the system will now also create the required credit notes to enable the VAT portion of the settlement discount to be reclaimed when payment is made within the settlement terms.

3.16. Improved Maintenance of Customer Price Lists

Available to all customers with axis diplomat 2018

It is now possible to add, amend and delete Customer Price List entries from within both Maintain Customer Details and Maintain Stock Details. This simplifies the maintenance of customer-specific pricing, regardless of whether you want to update pricing for a number of stock items for a single customer or pricing for a number of customers for a single stock item.

As a result, the function "Maintain Customer Price Lists" is no longer required.

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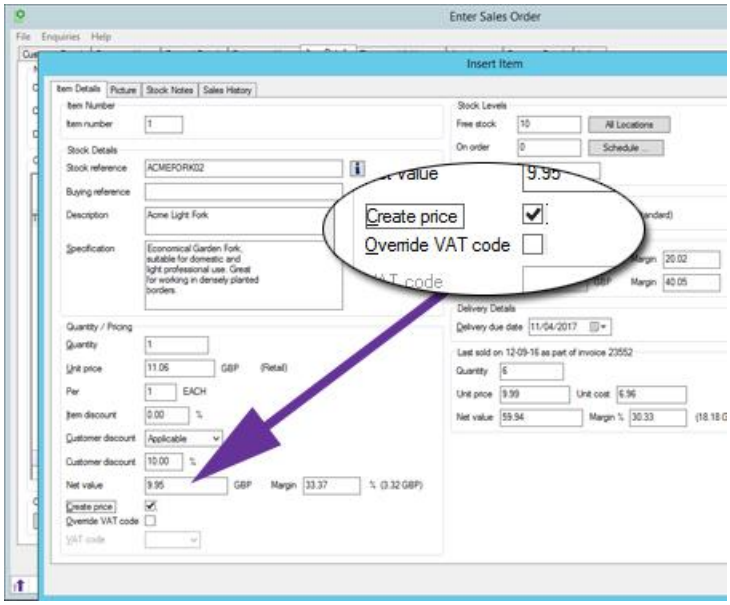
3.17. Customer Price List Updates

Available to Software Assurance customers with axis diplomat 2016 or above

It is now possible to create new customer price list entries for items being added to Sales Orders. Previously, it was only possible to update existing entries.



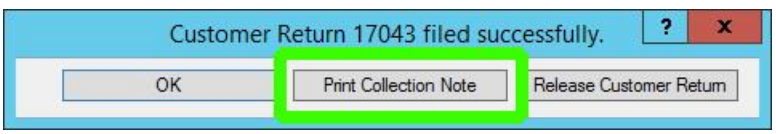
System parameters exist to enable or disable this functionality and to set the default value. These can be found on the Prompt Suppression and Prompt Defaults tabs of the Maintain SOP Parameters function respectively.

3.18. Collection Notes

Available to Software Assurance customers with axis diplomat 2016 or above

The Customer Returns module, introduced with axis diplomat 2016, now allows the production of a Collection Note.

This Document Designer-based document will be particularly useful to those using their own vans to collect items from customers. As well as documenting the items to be collected, the Collection Note can also be designed to incorporate a signature box to be left with the customer as a receipt for the collected goods.



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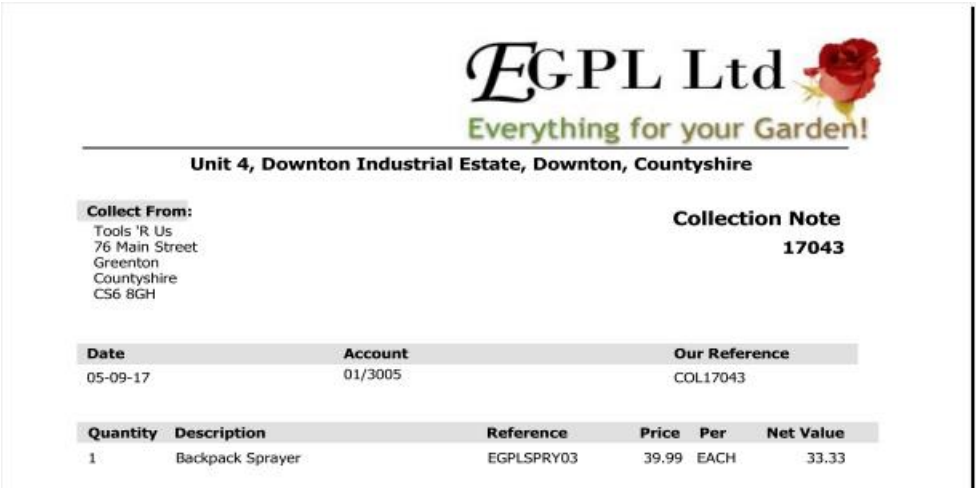


EGPL Ltd
Everything for your Garden!

Unit 4, Downton Industrial Estate, Downton, Countyshire

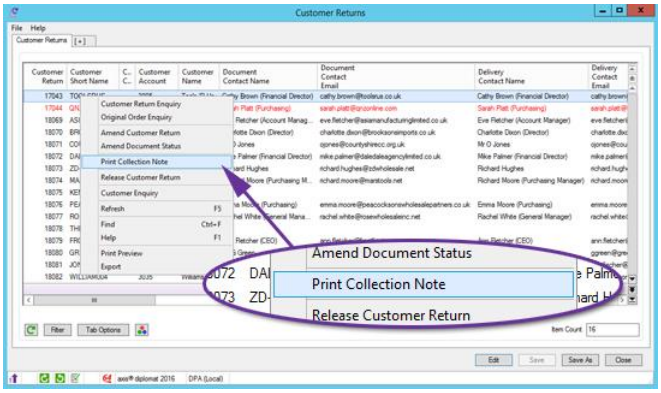
Collect From:
Tools 'R Us
76 Main Street
Greenton
Countyshire
CS6 8GH

Collection Note
17043

Date	Account	Our Reference
05-09-17	01/3005	COL17043

Quantity	Description	Reference	Price	Per	Net Value
1	Backpack Sprayer	EGPLSPRY03	39.99	EACH	33.33

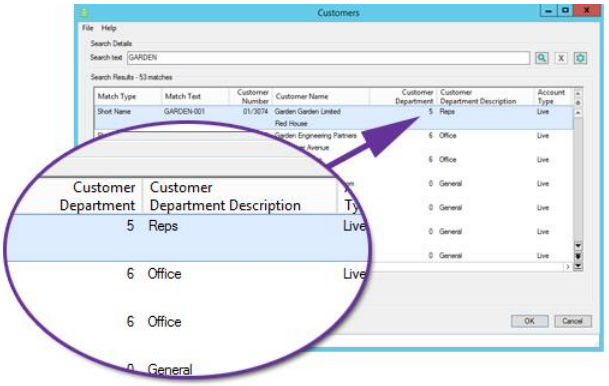
It is also possible to print Collection Notes from within a Customer Returns monitor:



3.19. Default Department in Customer Searches

Available to Software Assurance customers with axis diplomat 2016 or above

For those who use hold a default Department Code against customers, Customer search results now include columns for the default Department (code and description).



In addition to searches using the Customers function, searches within other functions, such as Enter Sales Order, also include these columns:

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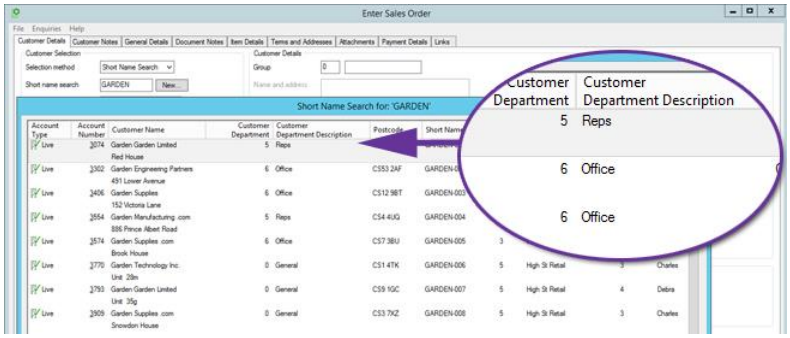
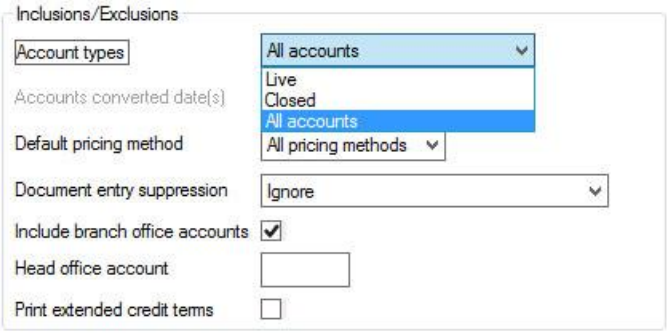


The ability to record a default Department against customers, is controlled via a system parameter (on the "Customer Maintenance" tab of "Maintain Sales Ledger Parameters").

3.20. Account Types in Customer List by Turnover

Available to Software Assurance customers with axis diplomat 2016 or above

The Customer List by Turnover report has been modified to allow reporting of just live accounts, just closed accounts or both.



3.21. Additional Information shown for Contacts in Customer Enquiry

Available to all customers with axis diplomat 2018

The Quotations and Sales Orders tabs and, for those with the Service Contracts Management module, the Service Contracts tab in Customer Enquiry now show, for each document contact, the Job Title in brackets. In addition, if the contact has been marked as Left, this is also shown in brackets.

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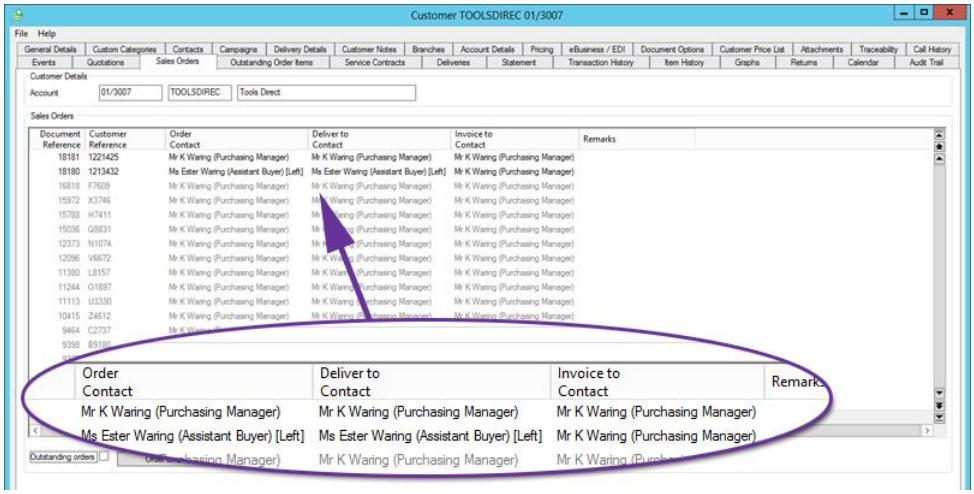
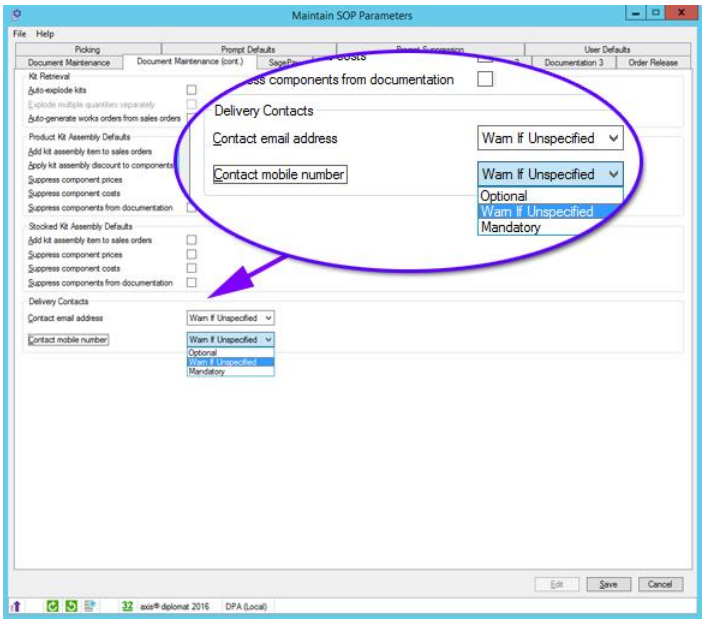


3.22. Enforce Delivery Contact's Email or Mobile Number

Available to Software Assurance customers with axis diplomat 2016 or above

It is now possible to configure your system to enforce email and/or mobile numbers for your delivery contacts. This is particularly useful where you are using carriers who need contact details to confirm delivery.

These may be optional, mandatory or you can choose to be warned if you attempt to file a sales order using a contact with a blank email or mobile number but still allowed to file the order.



When mandatory, you receive an error message if you attempt to file an order for a contact without this information:

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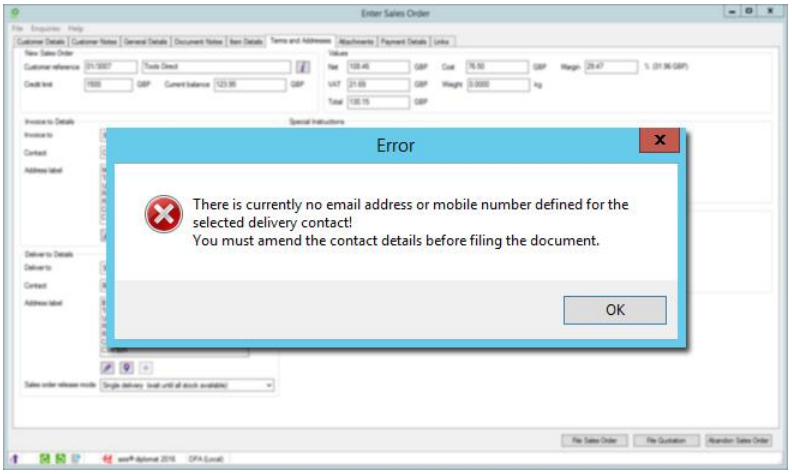
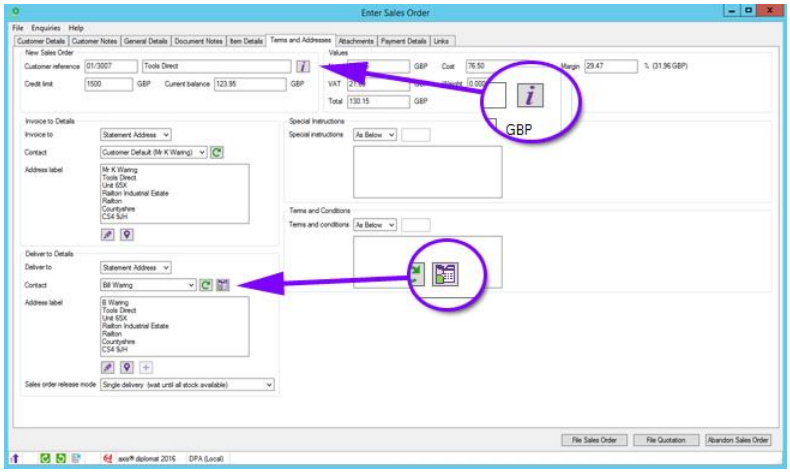


You may then choose to update the contact details for the customer (using the SmartLink icon at the top of the function) or update the delivery contact details just for this order using the Edit Contact icon:



3.23. Postcode column added to Customer List by Turnover

Available to Software Assurance customers with axis diplomat 2016 or above

The Customer List by Turnover Report has been modified to optionally include an additional column for each customer's postcode.

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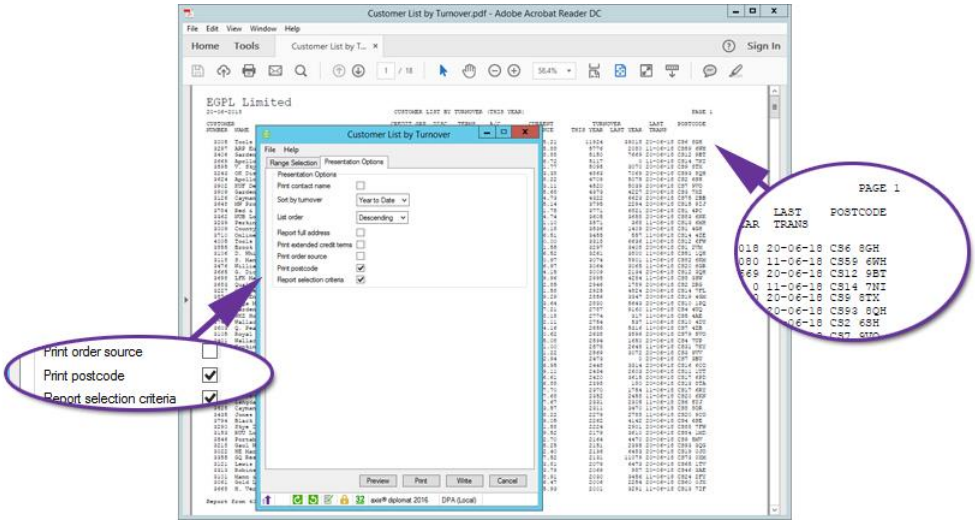
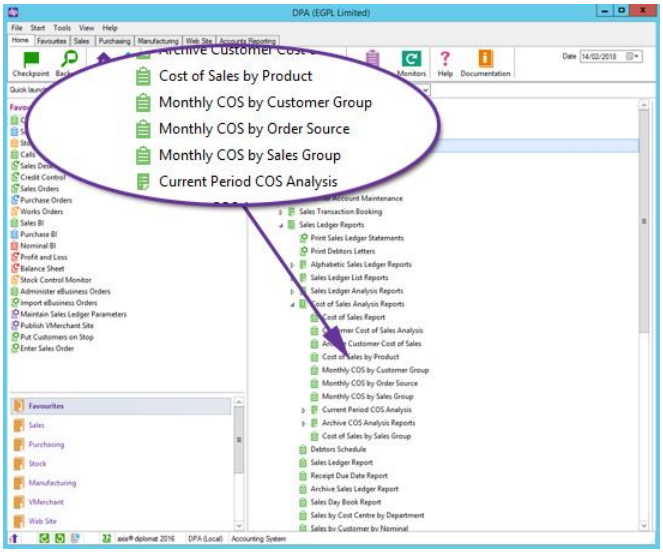


3.24. Monthly Cost of Sales Reports

Available to Software Assurance customers with axis diplomat 2016 or above

Three new Monthly Cost of Sales Reports have been added to the system, giving a simple breakdown by Customer Group, Order Source or Sales Group.

Each report shows the sales and cost of sales, along with the margin amount and percentage for the last complete nominal period, all of the preceding periods of the current year as well as the preceding twelve periods.



3.25. Customer Requested Delivery Date

Available to all customers with axis diplomat 2018

An additional date can now be recorded against individual sales order lines, to indicate the date that the customer has requested for delivery.

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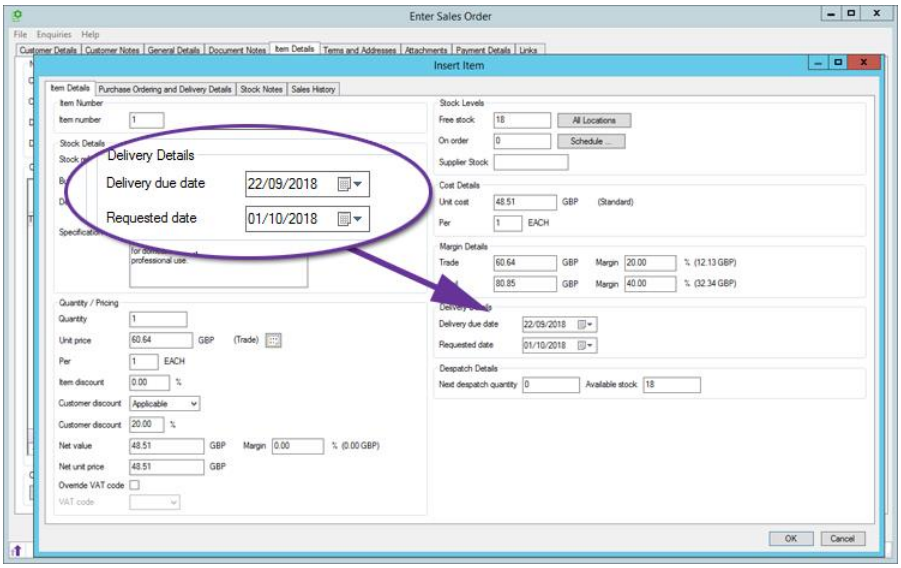
This is designed to allow you to compare the actual delivery date that you achieved with the original date requested by the customer and so analyse your achievement rates.

The function Reschedule Sales Order allows you to optionally update the Customer Requested Delivery Date (for situations where the customer has themselves asked for a date change).

The date appears as an additional column on Sales Order Items-type monitors and, on Sales Order-type monitors, the earliest date is shown.



3.26. Exclude Items from Repricing

Available to Software Assurance customers with axis diplomat 2016 or above

axis diplomat 2016 introduced the ability to reprice sales orders and quotations with a single click. It is now possible to mark specific stock and product items as being excluded from such repricing operations:

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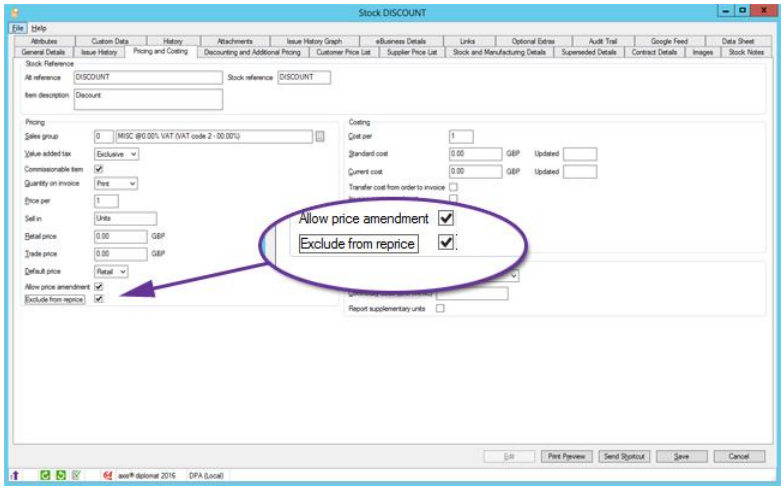


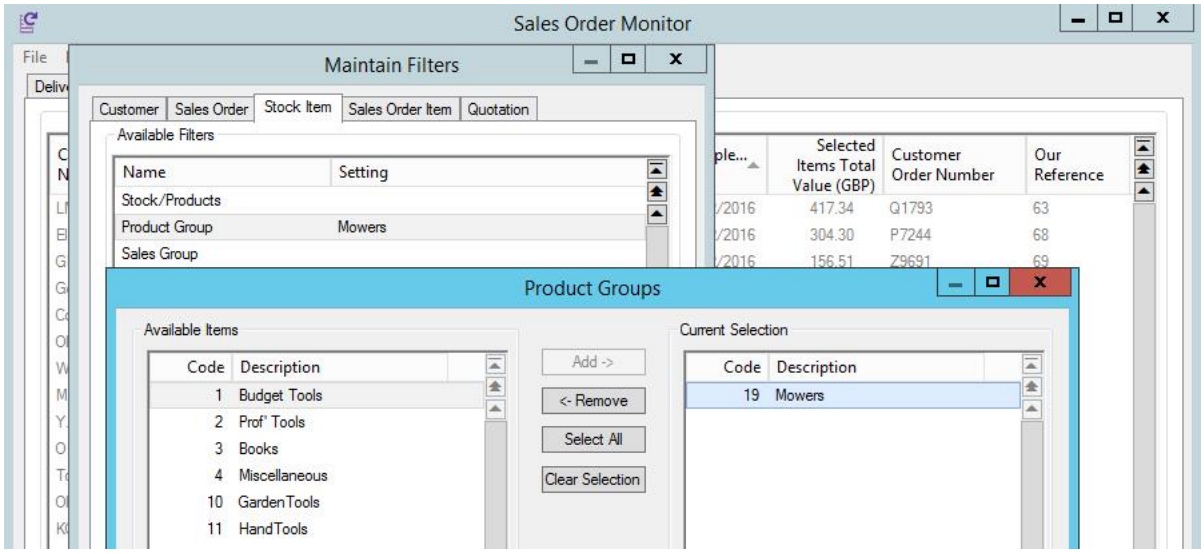
This is controlled via a simple tick box on the Pricing and Costing tab of Maintain Stock Details, as shown above. This is ideal, for example, when dealing with discount, surcharge or miscellaneous product codes that have no default value where these would otherwise be repriced to zero.

3.27. Selected Line Values in Sales Order Monitor

Available to Software Assurance customers with axis diplomat 2016 or above

It has previously been possible to filter Sales Order monitor tabs to show just those orders containing certain products but a new column, Selected Items Total Value, has now been added to show the order value of just those selected products.

For example, this Sales Order monitor tab has been filtered to only include Sales Orders including lawn mowers:



The monitor has also been filtered to show all orders from last year (including those that are complete). From this monitor, we can now see that the total value of orders

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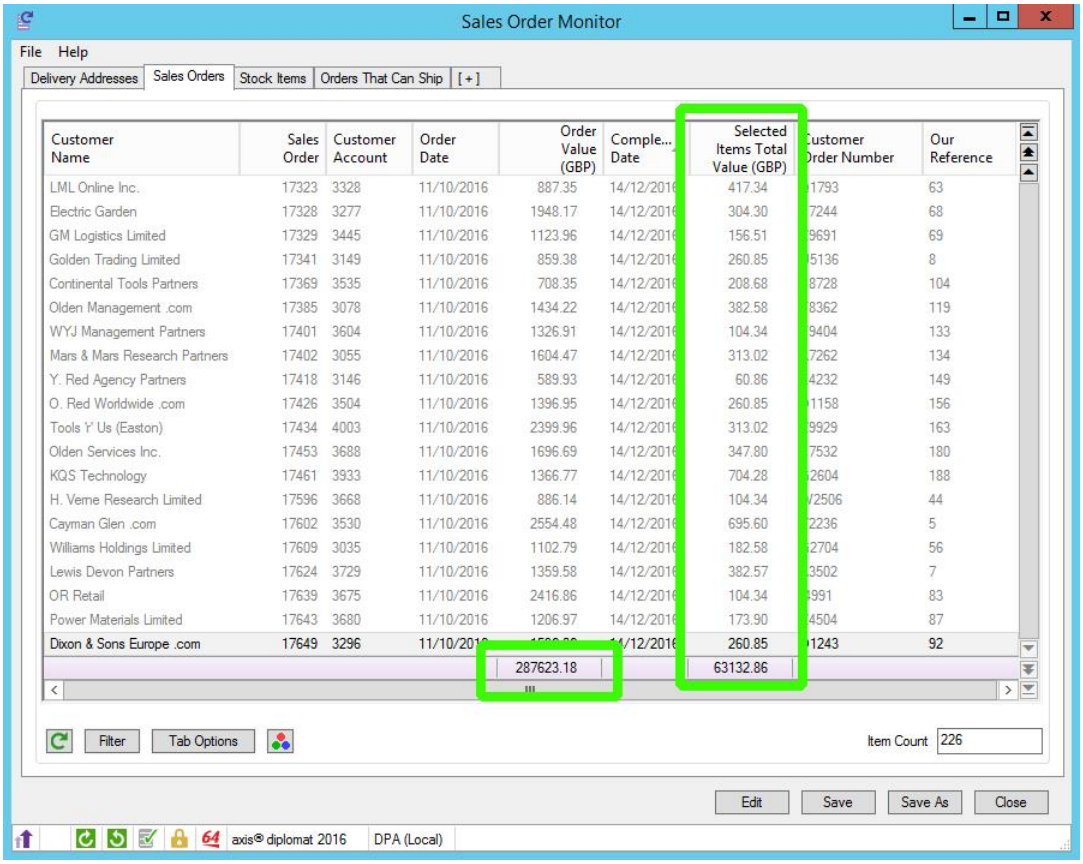
that included Lawn Mowers was £287,623, of which £63,132 was made up of the Lawn Mowers themselves:



3.28. Configure "Return Goods into Stock" Behaviour

Available to Software Assurance customers with axis diplomat 2016 or above

Additional parameters have been added to axis diplomat's "User and Group Maintenance" function to allow you to configure, on a user-by-user basis, the action for returning goods into stock when raising credits.

Normally, when raising Sales Ledger credits (either via a credit note or a negative line on a Sales Order), you can choose whether or not the item(s) being credited should be returned into stock. The default action is determined by a system-wide parameter.

Additional settings on each user account now allow you to vary that behaviour for an individual.

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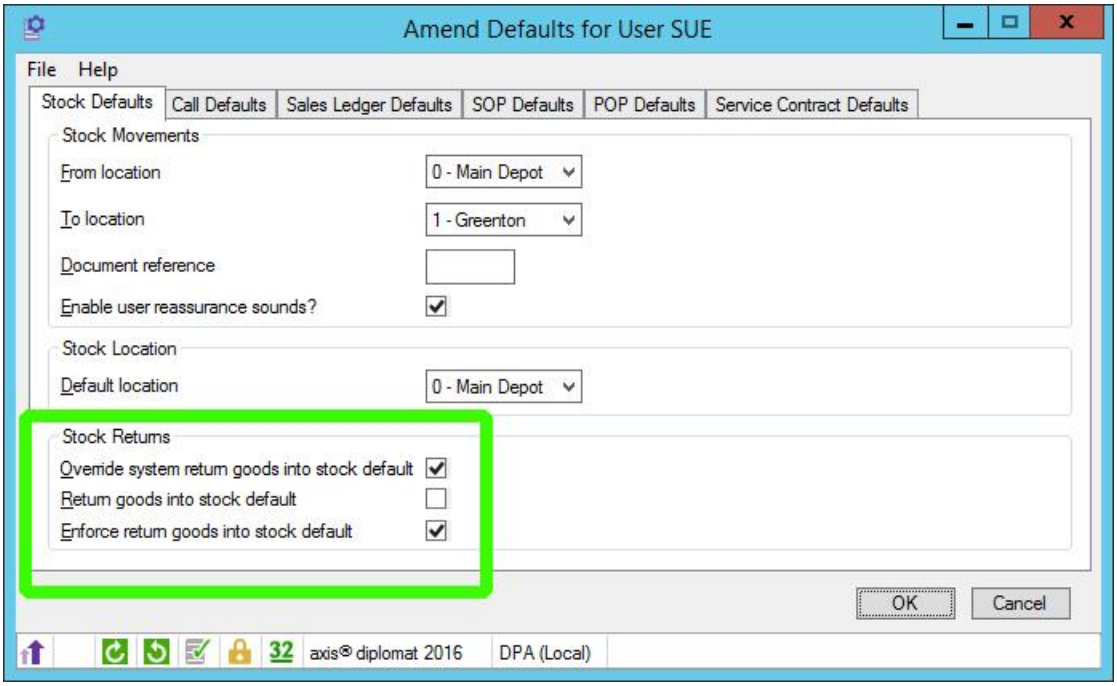

You are now able to indicate that the default action for a particular user differs to the overall system. Furthermore, you are also able to prevent the user from changing that behaviour. The user above, for example, will always return goods into stock when raising a credit note and will be unable to change that setting.

3.29. Campaign Calls

Available to Software Assurance customers with axis diplomat 2016 or above

When using Campaigns to manage regular outbound telesales and an order is entered on the system, you now have the option of leaving the call open. Calls would previously have been automatically completed when an order was placed.

3.30. Improved Performance when searching Calls

Available to all customers with axis diplomat 2018

The "Calls" function has been re-engineered to achieve a massive performance improvement when searching calls, particularly when searching within individual call events.

Previously, the function would quickly identify calls where the search term existed within the subject text but would take much longer to identify matches within events.

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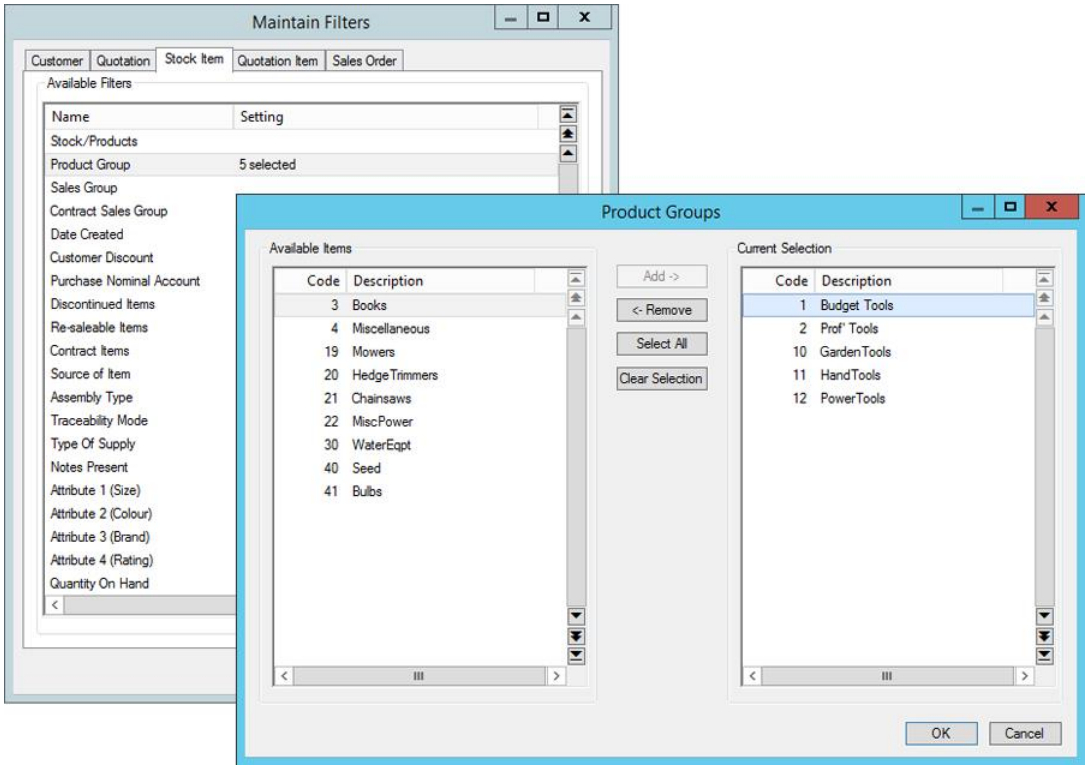
3.31. Filter Quotation Monitors by Stock

Available to Software Assurance customers with axis diplomat 2016 or above

It is now possible to filter Quotation monitor tabs to show just quotations that contains certain types of stock item.

The example below shows a Quotations monitor being filtered to just those quotes that contain any item from five different product groups:



It would be equally possible, for example, to produce a Quotations monitor showing just those outstanding quotes that include any item that has been discontinued.

3.32. Non-Resaleable Products in Keyword Search

Available to Software Assurance customers with axis diplomat 2016 or above

A new system parameter has been added to allow you to see non-resaleable items in keyword search results when adding items to sales orders. When set, non-resaleable items will appear within the search results and will be greyed out. They may not be added to the order but are shown for information only.

The parameter to enable this functionality can be found on the Prompt Defaults tab within the Maintain SOP Parameters function.

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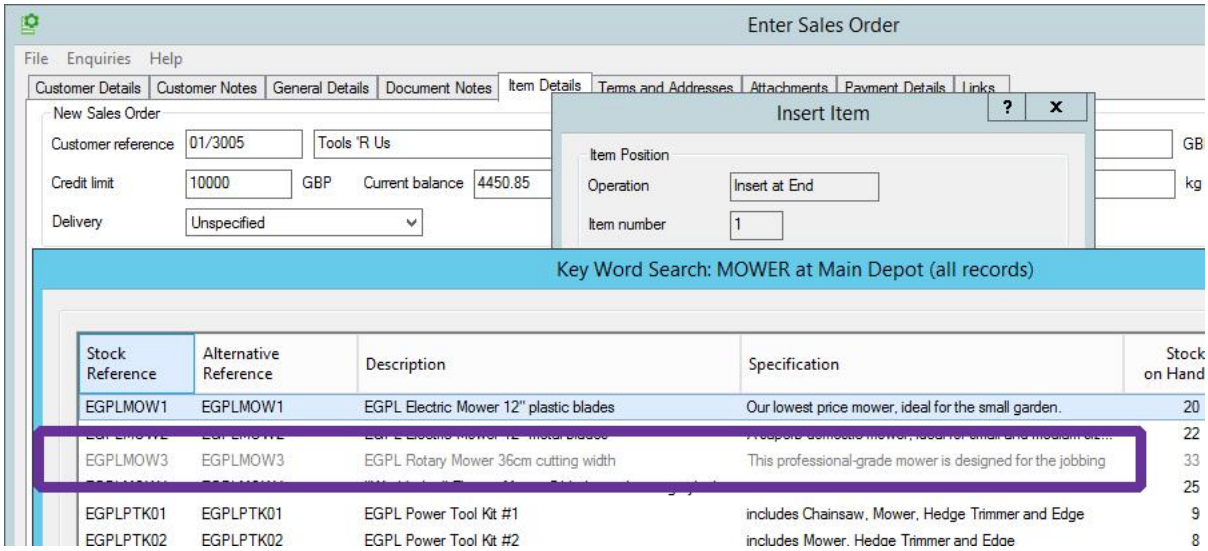

3.33. More Configuration Options over Sending Call Shortcuts

Available to Software Assurance customers with axis diplomat 2016 or above

Additional configurability has been added to control when Call Shortcuts are automatically emailed to users. Each user can now be configured with one of three options:

- Always - whenever a call is assigned to this user's responsibility, a call shortcut email will be automatically sent to them
- Optional - when a call is assigned to this user's responsibility, the operator us asked whether they want to send a call shortcut
- Never - the system does not send a call shortcut and does not ask; call shortcuts can still be manually sent using the "Send" button

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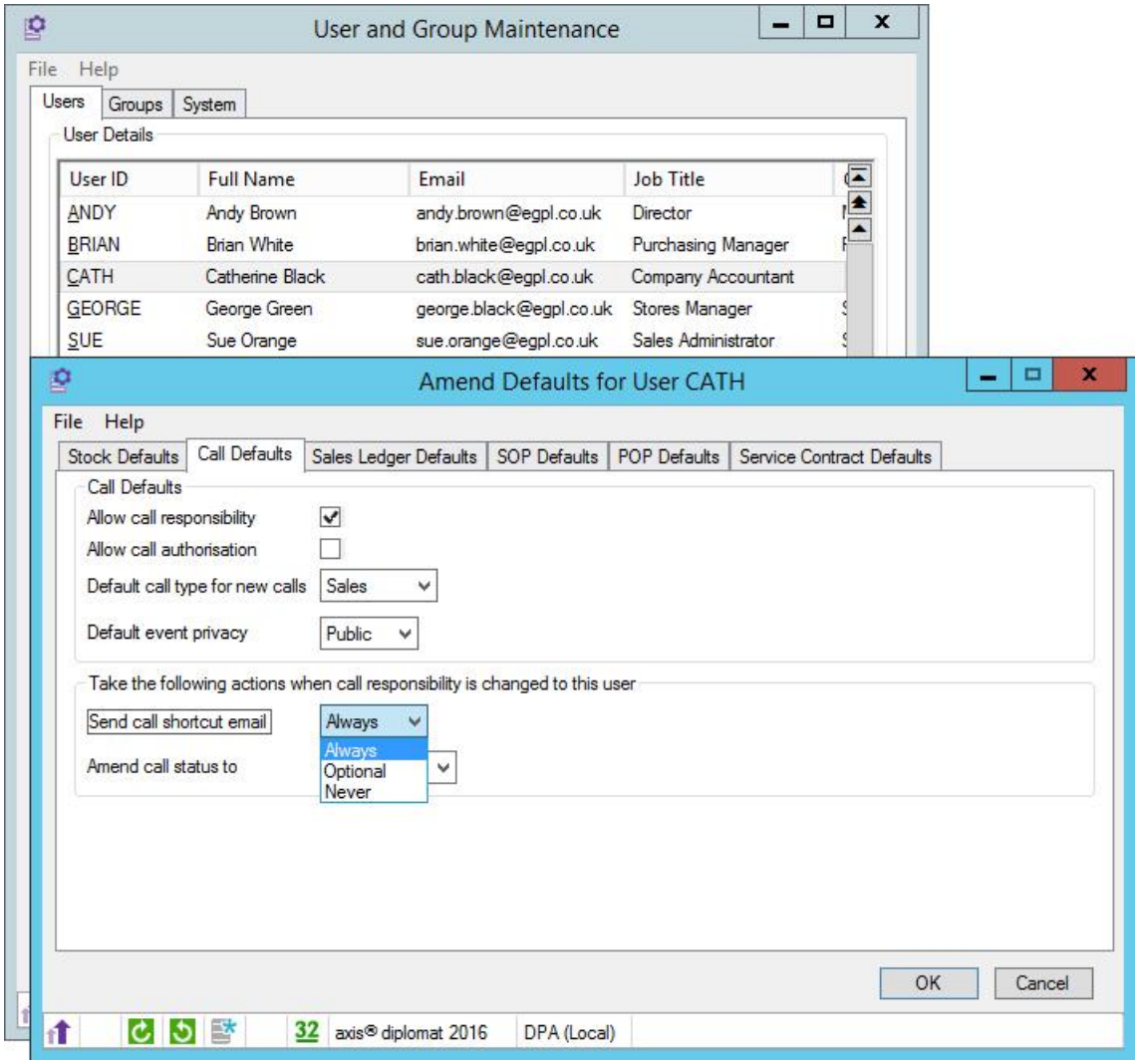

3.34. Filter Call and Call Event Monitors by Linked Call

Available to all customers with axis diplomat 2018

It is now possible to include linked calls within the list of calls shown in a monitor of Calls or Call Events.

When creating the filters for a call-related monitor, a new tab, "CRM Call (Linked)", allows you to specify that linked calls are to be included. You can further filter the type of linked calls that are included.

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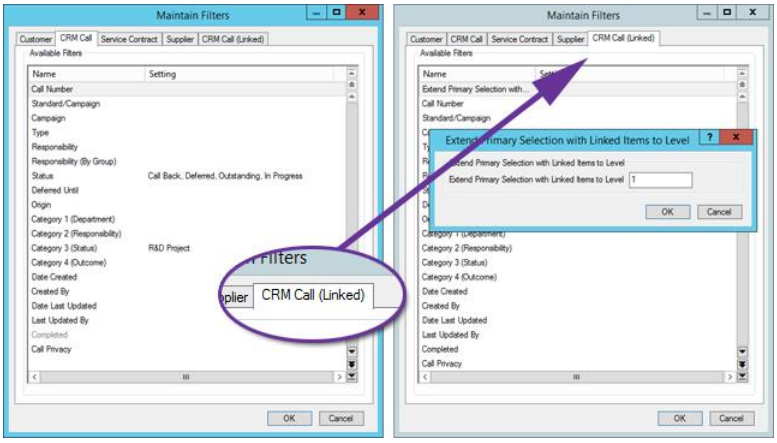


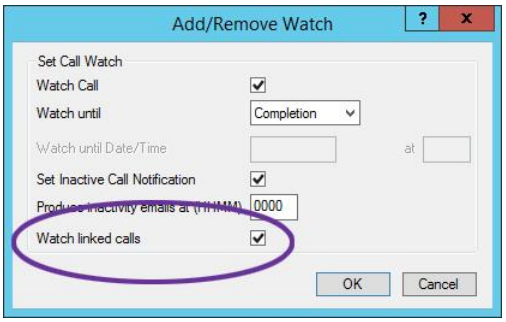
This example shows a monitor filtered to show just calls that have a status of "R&D Project" and any other calls that are directly linked to those calls (irrespective of whether they are R&D Project calls)

3.35. Watch Linked Calls

Available to all customers with axis diplomat 2018

Call watching is a powerful tool within the CRM facilities of axis diplomat in which you can elect to receive an email notification whenever a call has been updated (or if it has not been updated in a 24-hour period).

This has now been extended to allow you to watch not only a specific call but any calls that are linked to it as well.



This can be useful, for example, if a number of linked calls represent various invoice queries or perhaps a number of linked R&D calls collectively form a complete project.

3.36. Delivery Charges by Cost

Available to all customers with axis diplomat 2018 and the Delivery Service Provider Interfaces Foundation module

axis diplomat can now calculate the delivery charge to your customer based on your own estimated delivery costs. Once it has determined the delivery charge to you from your carrier's rate card, it can apply a pre-determined mark-up to derive the charge to your customer.

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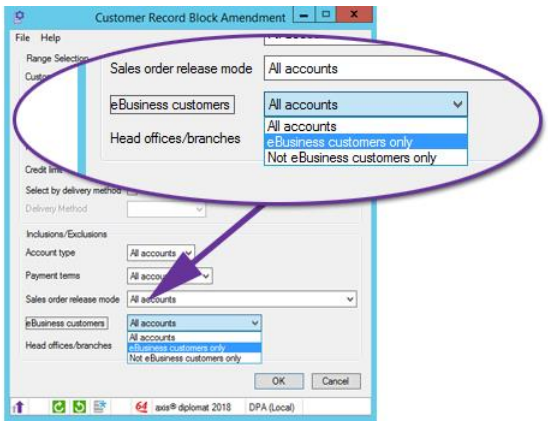
3.37. eBusiness Customer Selection in Customer Block Amendment

Available to Software Assurance customers with axis diplomat 2016 or above and the eBusiness module

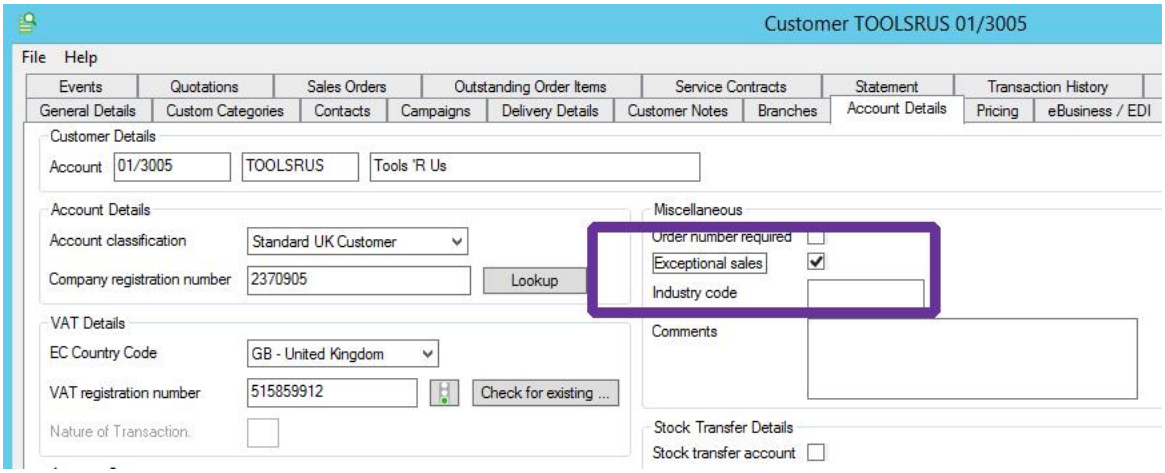
Customer Record Block Amendment has been extended to allow the range of customers to be amended to be filtered to just eBusiness customers or to only those accounts that are not flagged as eBusiness:



3.38. Exceptional Sales Customer Accounts

Available to Software Assurance customers with axis diplomat 2016 or above and the Demand Forecasting module

For users of the Demand Forecasting module, it is now possible to flag individual customer accounts as "Exceptional Sales". All sales for such customers will then be marked as exceptional sales and therefore excluded from the Demand Forecasting calculation.



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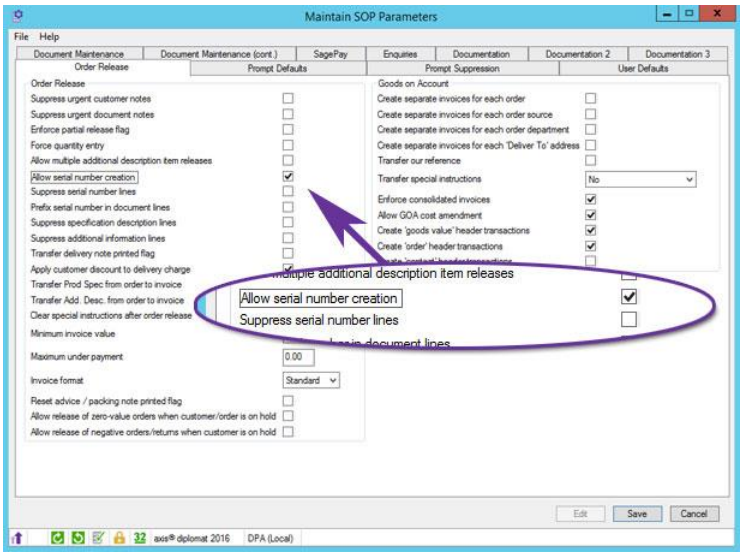
3.39. Create Serial Numbers during Sales Order Release

Available to Software Assurance customers with axis diplomat 2016 or above and the Stock Transaction Traceability module

A new parameter has been added to the system to allow serial number creation as part of the process of releasing a credit line on a sales order.

Normally, you can only return a serialised item into stock where that serial number has previously been issued. This new development, however, is ideal for situations where you have previously sold an item prior to marking it as serialised.



The parameter can be found on the Order Release tab within Maintain SOP Parameters.

3.40. Larger Email Addresses on Customer Contacts

Available to all customers with axis diplomat 2018

The length of email addresses held against customer contacts, including invoice to/deliver to contacts on sales documents, has been extended from 50 to 100 characters.

3.41. Valid Discount Groups by Customer

Available to all customers with axis diplomat 2018 and the Customer Group/Product Group Discount Matrix module

You are now able to restrict, on a customer-by-customer basis, which alternative discount groups may be used when entering a sales order.

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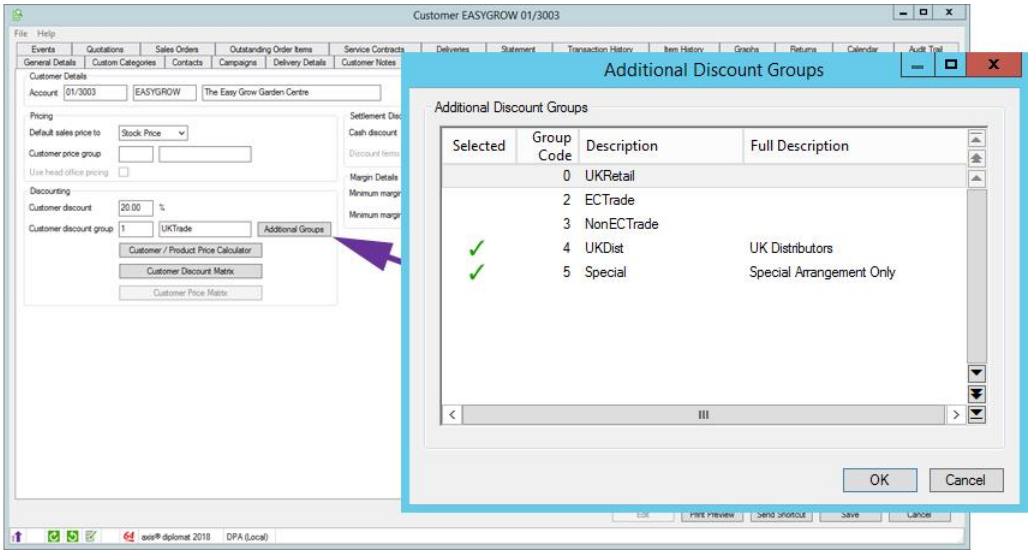
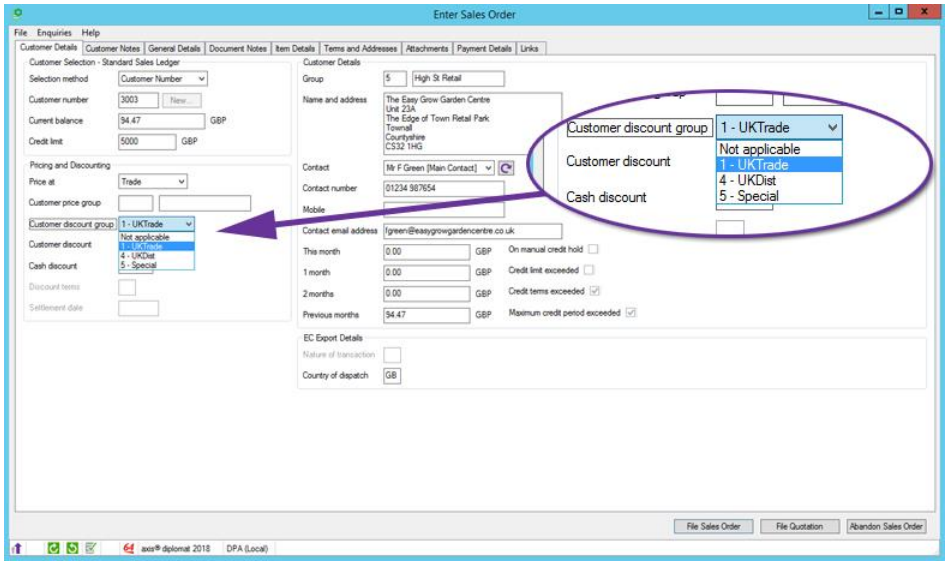


Once enabled, a user is only able to change the discount group when entering a sales order to one of that has been allowed for that particular customer.



The functionality is enabled via a Sales Ledger Parameter:

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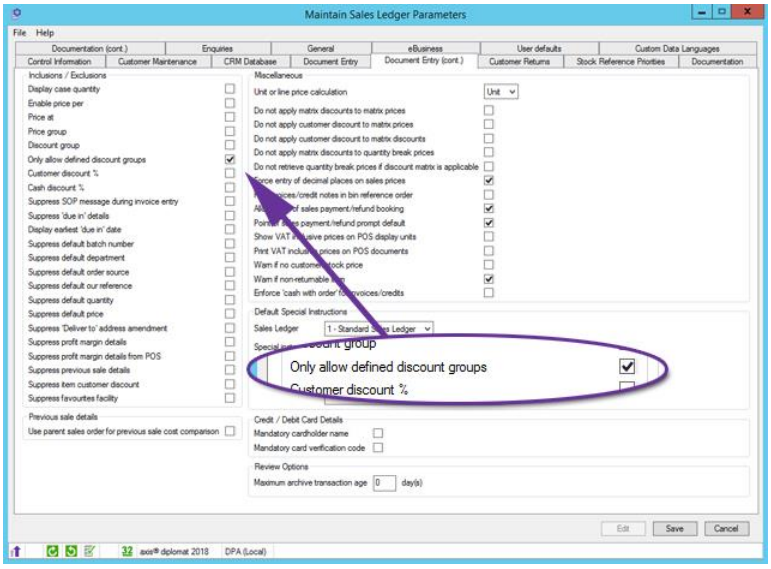

3.42. SagePay ePOS Payment Processing

Available to purchase for all customers with axis diplomat 2018

A new module is now available for axis diplomat 2018 to provide the ability to interface with SagePay Payment Terminals.

Designed for use in point-of-sale and trade counter applications, SagePay's payment terminals allow chip-and-pin transactions to be processed with the customer present. The transaction value is automatically passed to the terminal by axis diplomat whilst a unique transaction reference is returned to axis diplomat following a successful payment, simplifying statement reconciliation.

3.43. Amazon Seller Fulfilled Prime

Available to purchase for all customers with axis diplomat 2018

A new module is available for axis diplomat 2018 to support Seller Fulfilled Prime as a Delivery Service Provider (DSP).

Seller Fulfilled Prime is Amazon's fulfilment programme that allows merchants to make direct deliveries to Prime customers from their own warehouse.

By joining the Seller Fulfilled Prime programme, you are able to supply products directly from your own warehouse but still have the Prime badge on your product listings on Amazon. Shipments from your warehouse can be made using either Amazon shipping services (who arrange collection of the orders from your warehouse) or your own delivery services.

As with other Delivery Service Provider interfaces, axis diplomat uses information it has already obtained as a part of the sales order and picking processes to provide

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consignment information directly to Amazon's system making the despatch process quick, simple and less prone to error.

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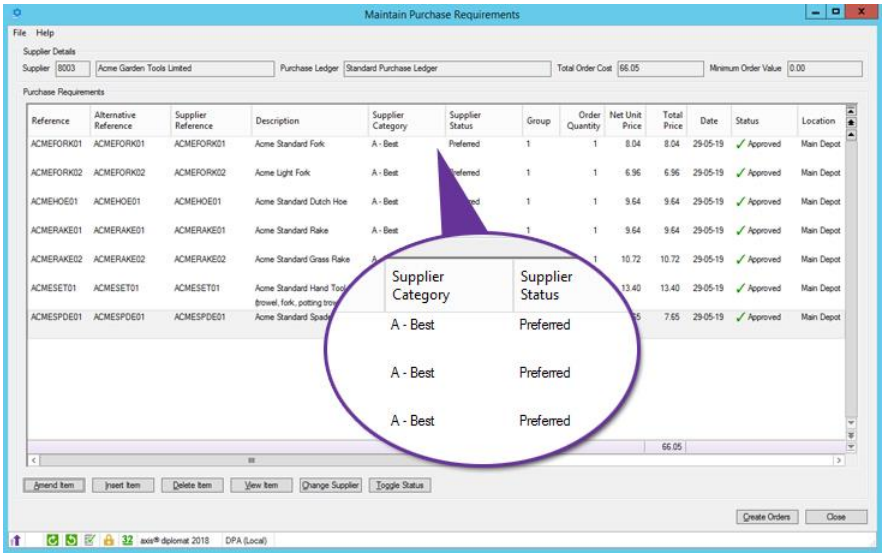
Section 4 Purchase Ledger & Purchase Order Processing

4.1. Supplier Category and Status added to Purchase Requirements

Available to Software Assurance customers with axis diplomat 2016 or above and the Purchase Requirements module

When using the Maintain Purchase Requirements function, the list of items now includes additional columns for Supplier Category and Supplier Status.



4.2. Custom Supplier Data

Available to all customers with axis diplomat 2018

You can now define any number of additional data fields that you wish against your suppliers. These fields may be used to store whatever additional information that you need and may be of a variety of data types, including simple text fields, longer notes, boolean (yes/no), numeric, dates or URLs (web addresses).

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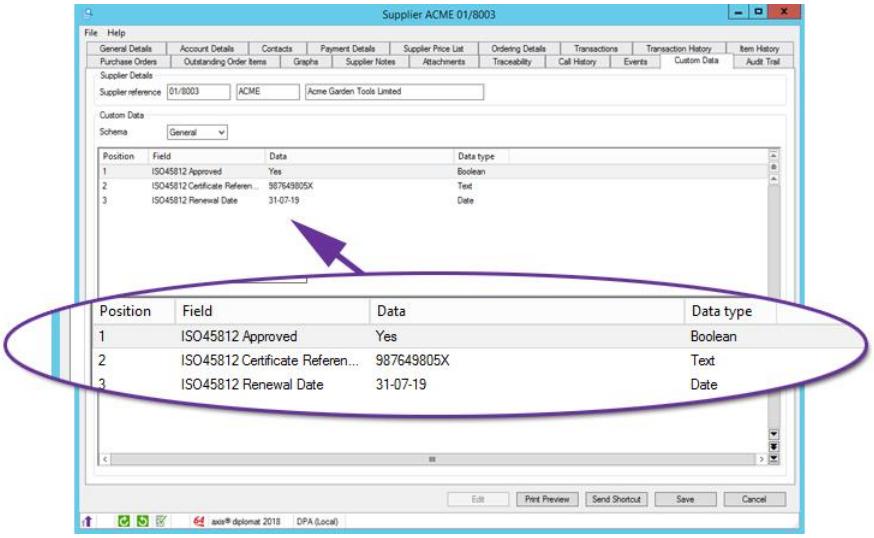

For example, if you require certain types of supplier to have particular certifications or registrations (or having such simply makes them a preferred supplier), you may wish to record the fact, along with their registration details and the date when that membership is due for renewal.

4.3. Supplier Relationship Management (SRM)

Available to all customers with axis diplomat 2018

Whilst axis diplomat has, for some time, allowed Customer (CRM) calls to be linked to suppliers, axis diplomat 2018 now features a full Supplier Relationship Management (SRM) module.

You are now able to create calls against suppliers in their own right and have access to many of the same capabilities that will be familiar to any user used to using CRM. You may allocate SRM Calls to other's responsibility, send them shortcuts to those calls via email, watch calls (to be notified via email whenever they are updated) and link calls, either to other SRM or CRM calls or to documents, such as Supplier Invoices or Credit Notes.

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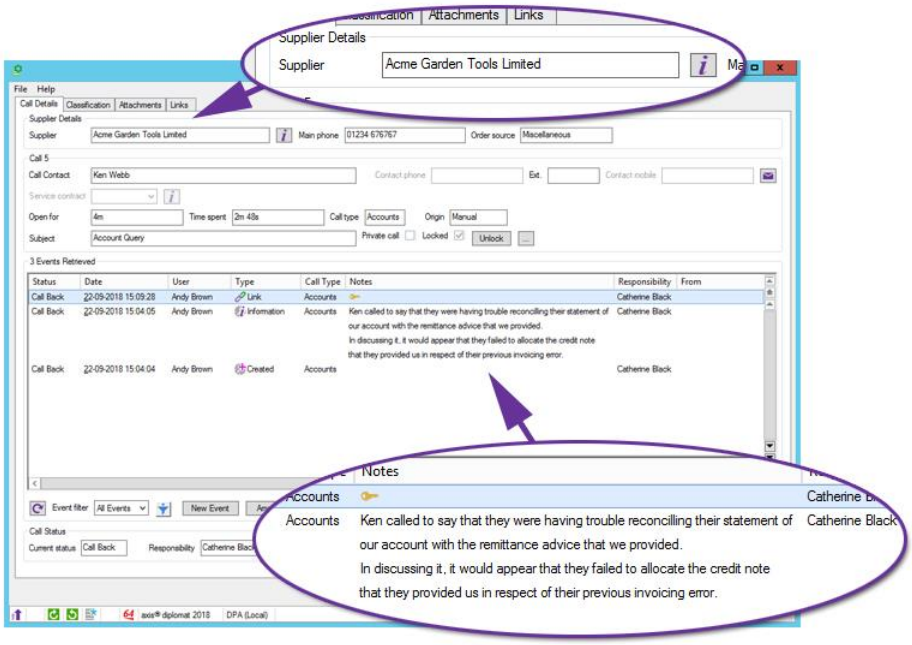

Whilst the example above shows an SRM call being used to track a discussion relating to an Accounts query, SRM calls can be used to manage many aspects of your relationship with your suppliers, including tracking fault reports and service calls, commercial discussions and R&D projects.

4.4. Edit from Purchase Order Enquiry

Available to all customers with axis diplomat 2018

The Purchase Order Enquiry now features an Edit button (subject to the user having the appropriate security permissions), allowing the Purchase Order to be amended without needing to load a separate function.

The Item Details dialog has also been amended to include all of the information from the Supplier Price List on the main Item Details tab, eliminating the need for a separate Supplier Details tab, making more information immediately accessible.

This change is also apparent when entering and amending Purchase Orders.

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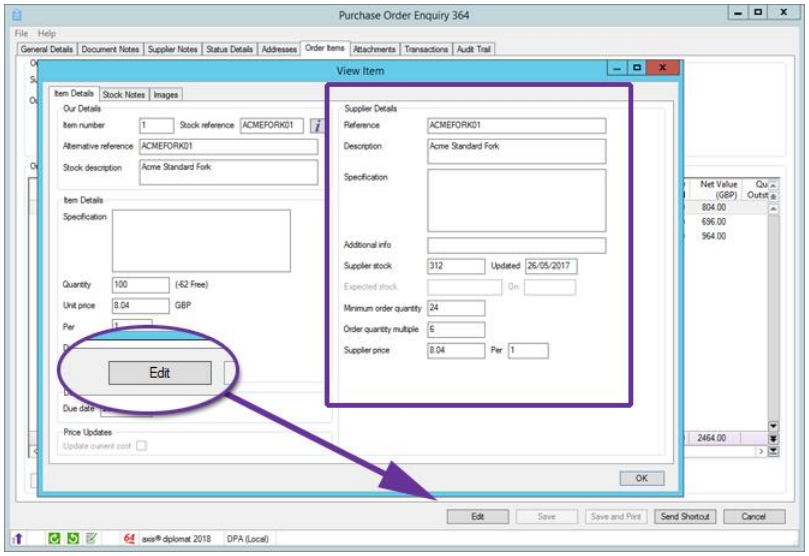
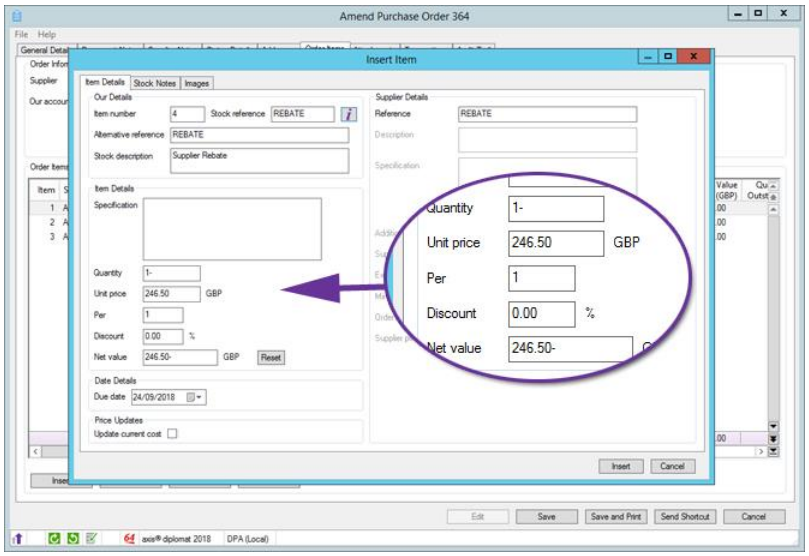


4.5. Negative Purchase Order Lines

Available to all customers with axis diplomat 2018

You are now able to enter negative (credit) items on Purchase Orders. This new capability is ideal for recording ad-hoc discounts, rebates and refunds on your purchase orders.



You are able to enter negative quantities for any product (non-stocked) item and so you can create a range of different codes to allow detailed analysis of these items.

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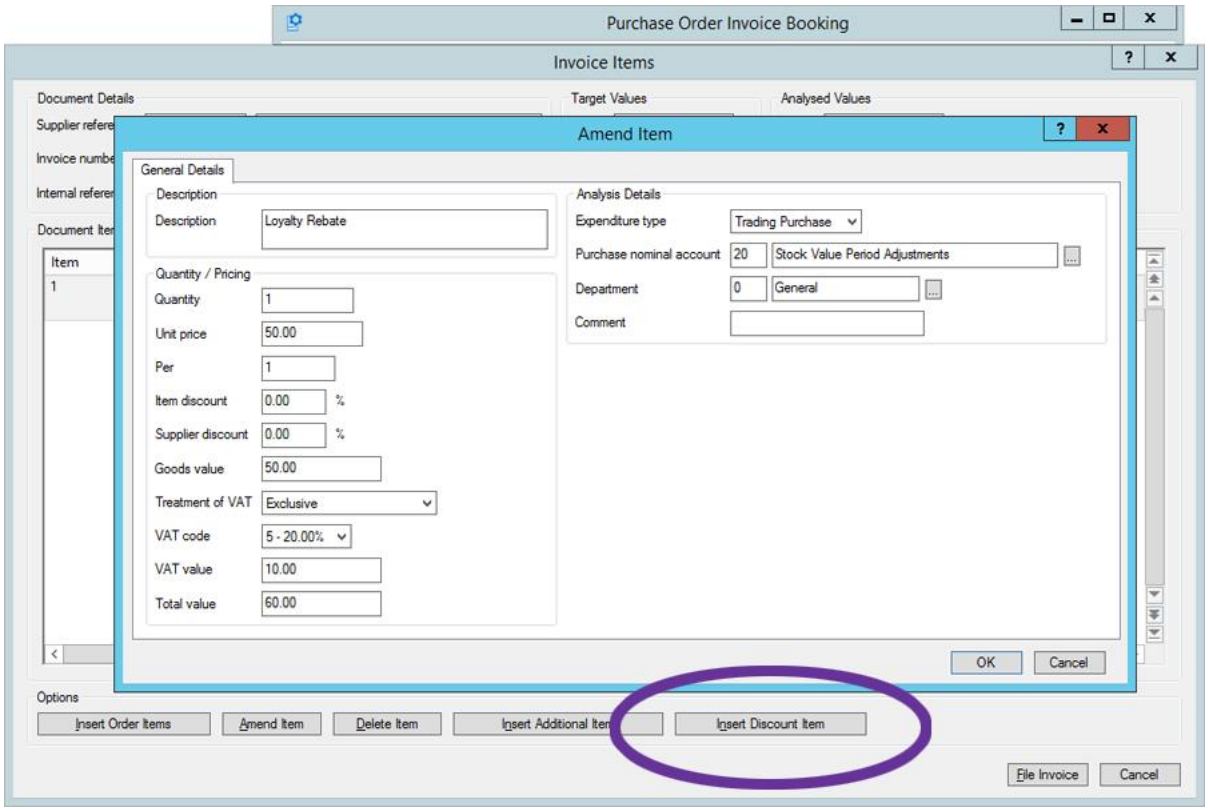
4.6. Purchase Invoice Discounts

Available to Software Assurance customers with axis diplomat 2016 or above

Purchase Order Invoice Booking has been extended to allow ad hoc discount lines to be added to a purchase invoice. This is ideal for use where discounts have been applied that do not relate to specific items on the order.



4.7. Record Supplier's IBAN and BIC Codes

Available to Software Assurance customers with axis diplomat 2016 or above

You are now able to record the IBAN number and BIC code for any suppliers whose payment method is "Auto -other".

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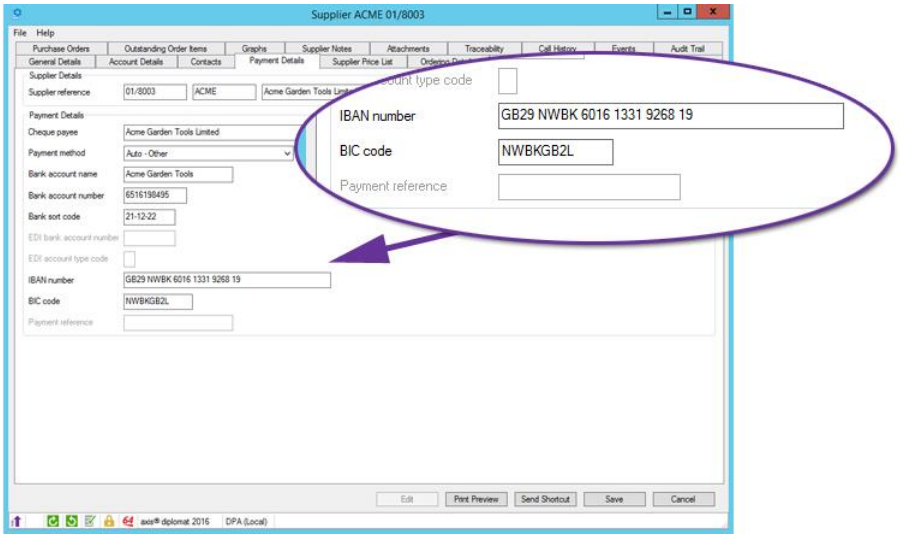
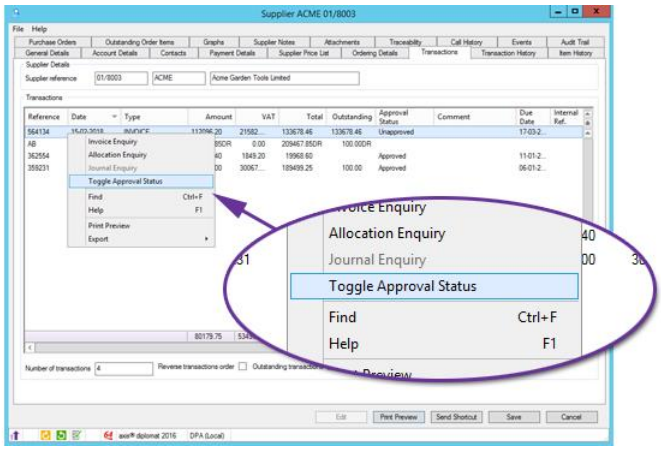


4.8. Approve Supplier Invoices from Supplier Enquiry

Available to Software Assurance customers with axis diplomat 2016 or above

It is now possible to change the approval status (from Unapproved to Approved or vice versa) of a supplier's invoice by a simple right-click from within Supplier Enquiry (in Edit mode).



The ability to do this is, of course, controlled by Security Permissions so that you can decide which users are allowed to approve invoices:

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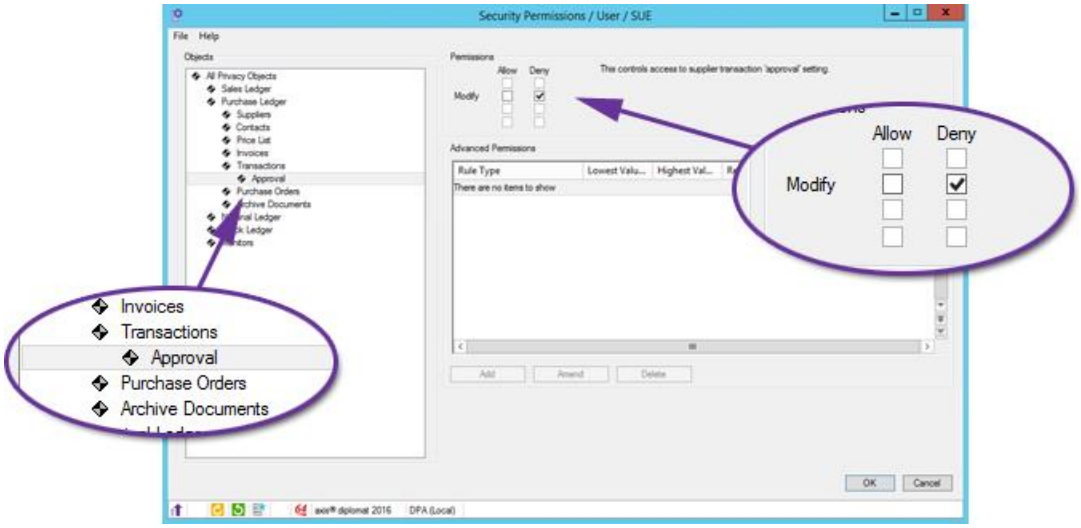
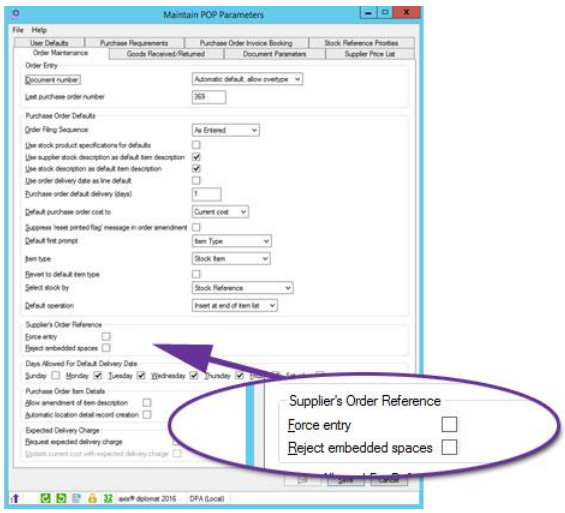


4.9. Force entry of Supplier's Order Reference

Available to Software Assurance customers with axis diplomat 2016 or above

Two new parameters have been added to Purchase Order Processing to force entry of a Supplier's Order Reference and to disallow references that contain spaces.



4.10. Supplier Category in Supplier Price List Search

Available to Software Assurance customers with axis diplomat 2016 or above

The Supplier Price List search, as used within Purchase Requirements when choosing a supplier, has been modified to include an additional column for the Supplier Category:

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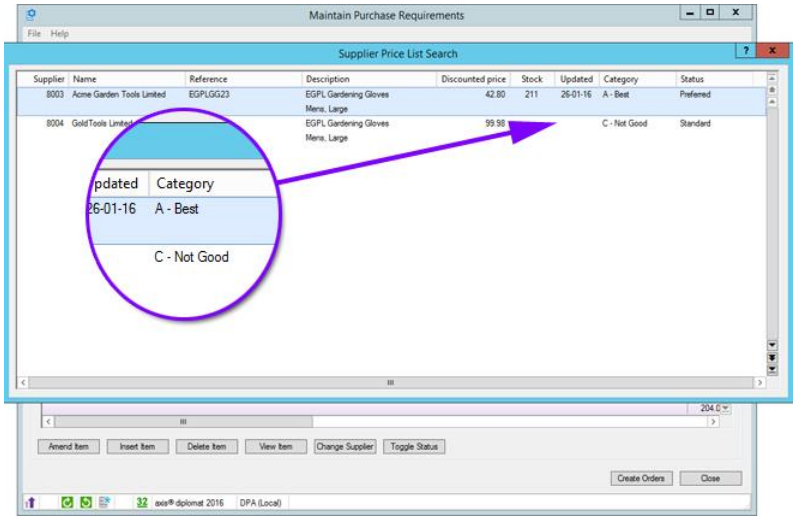
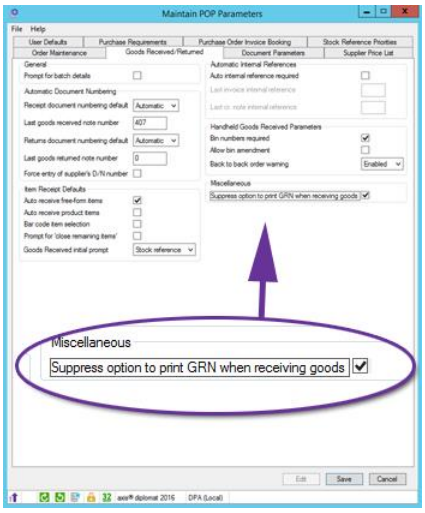


4.11. Suppress option to print Goods Received Notes

Available to Software Assurance customers with axis diplomat 2016 or above

As fewer users now opt to print Goods Received Notes (GRNs) when receiving deliveries from suppliers, there is now a parameter to suppress the option, streamlining the goods received process.



4.12. This Invoice Value in Purchase Order Invoice Booking

Available to Software Assurance customers with axis diplomat 2016 or above

Purchase Invoice Booking now shows an additional column for "This Invoice Value".

This can be particularly useful in trying to identify errors, when the analysed value differs from the target value, whether as a result of keying errors or where the supplier's calculations (for example, when applying discount) differ from what is expected.

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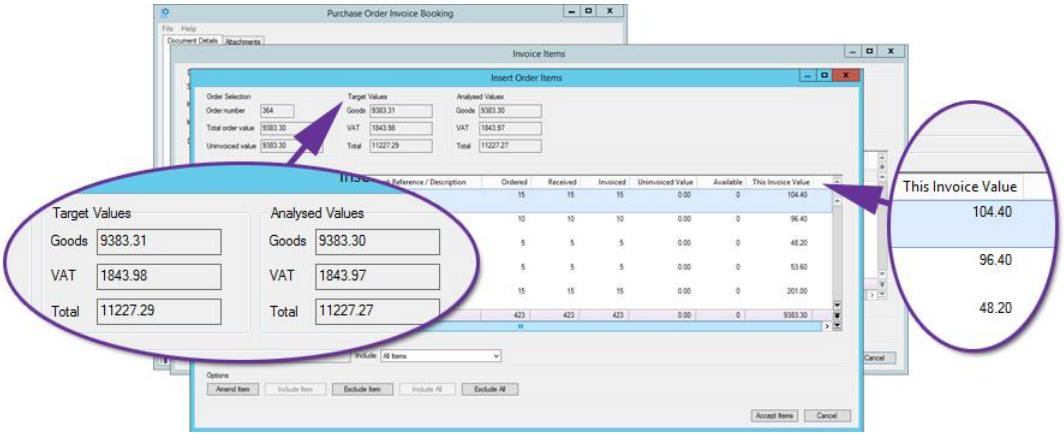
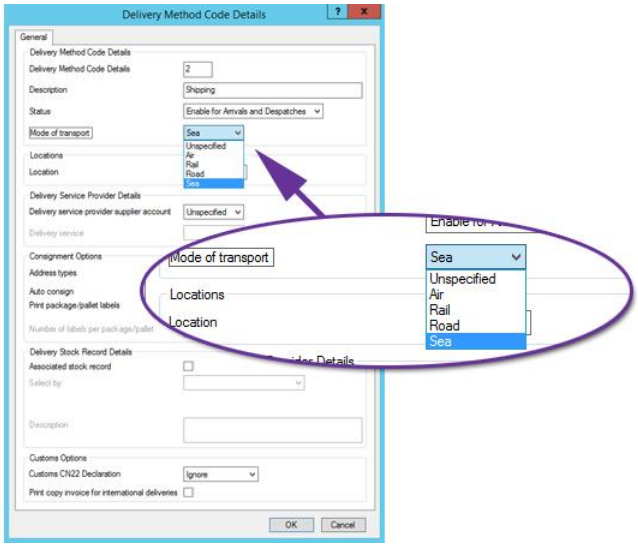


4.13. Additional Customs Data on Imports

Available to all customers with axis diplomat 2018 and the Purchase Delivery Advice module

The system is now capable of recording additional information on imported goods being shipped from suppliers for customs purposes.

Delivery Methods may now be used for shipments that you are receiving as well as for those that you are despatching; each Delivery Method may now have a Mode of Transport:



Purchase Delivery Advices associated with a Delivery Method having a Mode of Transport of either Shipping or Air can now also record the Port of Origin, the Destination Port and the Vessel:

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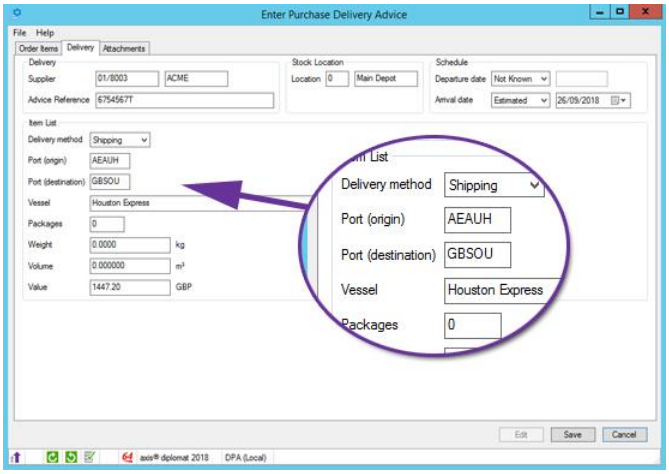
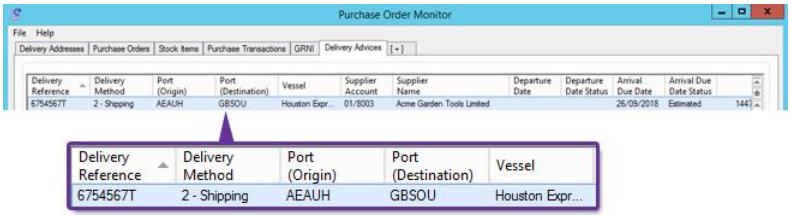


This information is also shown on Purchase Delivery Advice monitor tabs:



4.14. Larger Email Addresses on Supplier Contacts

Available to all customers with axis diplomat 2018

The length of email addresses held against supplier contacts, including contacts on purchase orders, has been extended from 50 to 100 characters.

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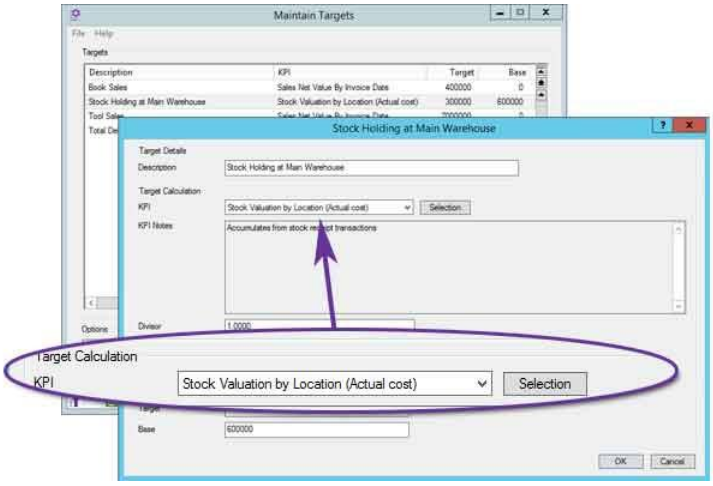
Section 5 Stock Ledger, Bill of Materials & MRP

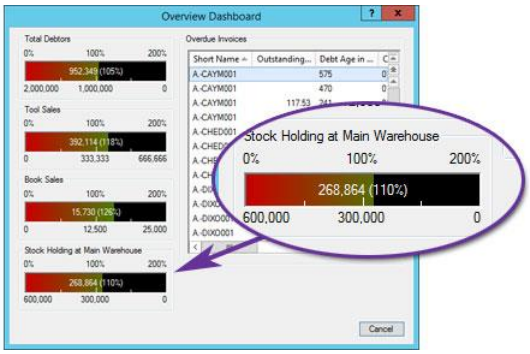
5.1. New Stock Valuation By Location KPI added to Business Intelligence

Available to all customers with axis diplomat 2018

A new KPI has been added to those KPIs available as standard, for Stock Valuation by Location using Actual Cost.



This allows you to define targets for the optimal stock holding for a specific location (or range of locations) and to add elements to Business Intelligence Dashboards to show the current position.



5.2. Net Prices shown in Supplier Price Lists

Available to all customers with axis diplomat 2018

Supplier Price List tabs (as found in Stock Enquiry and Supplier Enquiry functions) now show an additional column for the Net Price (after discounts have been applied).

In addition, for those with the Foreign Currency module, net prices are shown in both the Supplier's currency and the base currency.

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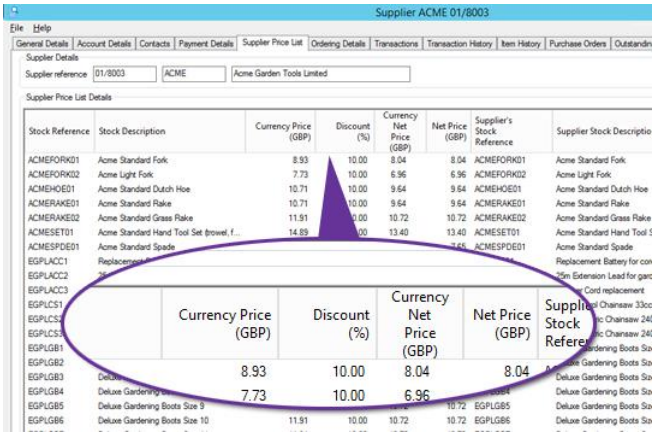


5.3. Custom Stock Data now standard

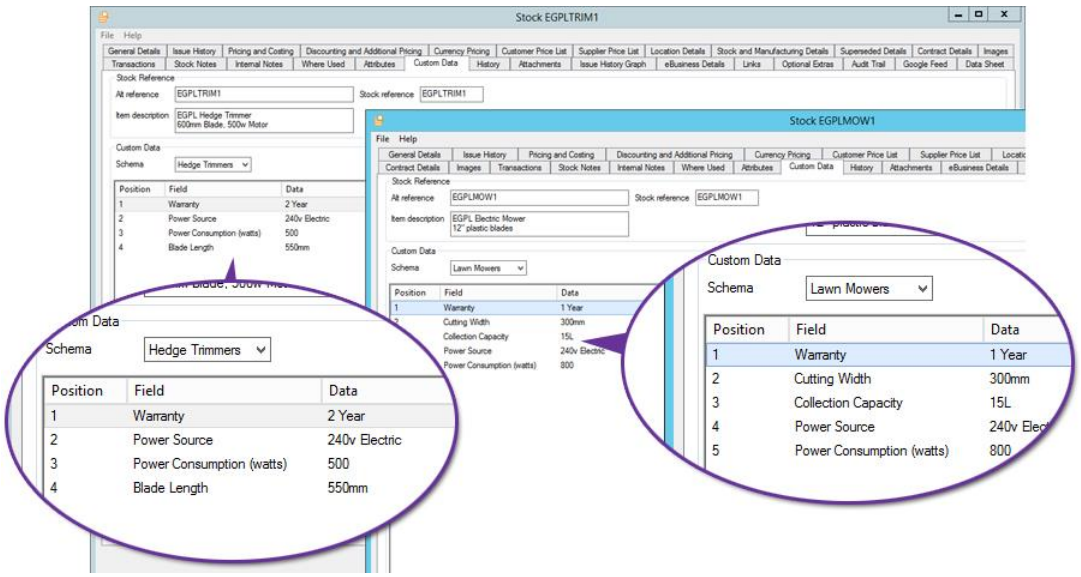
Available to all customers with axis diplomat 2018

The Custom Stock Data module, previously an extra-cost option, is now provided as standard.

The module allows you to extend the data that you hold for products to include all of the additional specifications and attributes that you wish. This data is ideal for publishing to a website as well as providing your own staff with easy access to more detailed product data.

Each field that is defined can have a range of pre-set options (where the user then chooses from a list) or be a free-typed field. The types of data supported include text, numbers, dates and notes.

Any number of fields can be created and grouped in many combinations, for different types of product.



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5.4. Multi-Location Stock now standard

Available to all customers with axis diplomat 2018

The Multi-Location Stock Module, previously an extra-cost option, is now provided as standard.

This module allows stock to be held at a number of distinct locations - either separate physical locations (such as branches or warehouses) or logically separated stock (such as quarantine stock or stock awaiting repair).

Stock is issued from, received at, and transferred between locations, so that accurate stock-on-hand figures at each location are maintained.

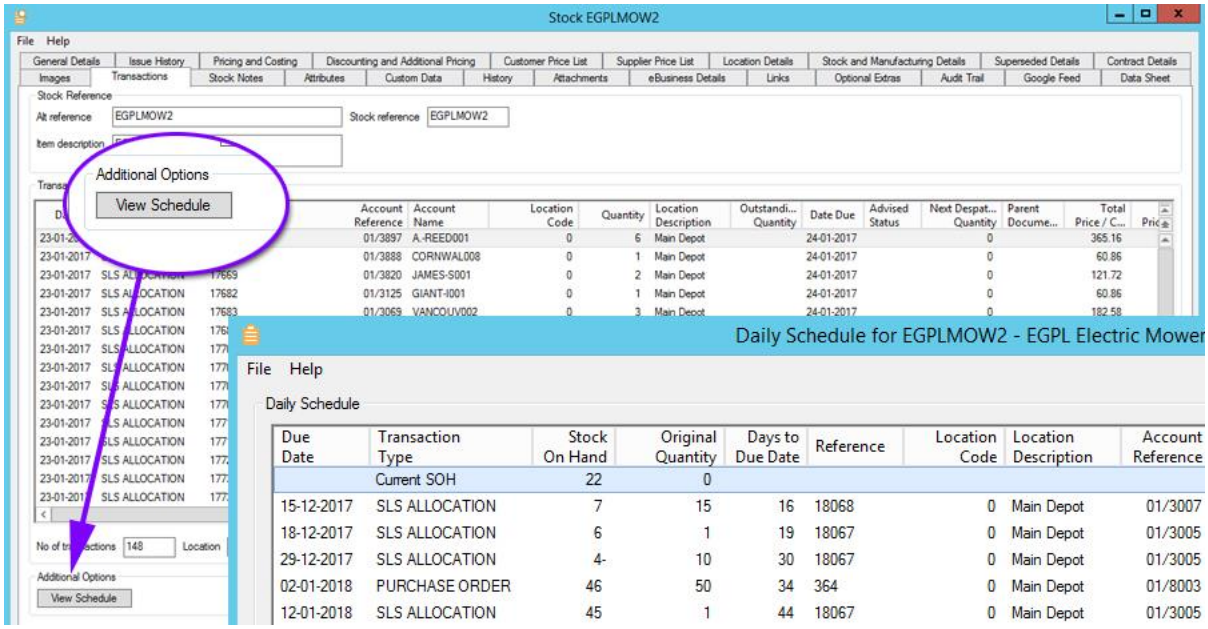
Additional information about stock at each location is also recorded, including Stock on hand, Stock on order from suppliers, Stock on order by customers, Re-order level (minimum stock), Re-order quantity, Maximum stock quantity and Bin location

5.5. Daily Schedule added to Stock Enquiry

Available to Software Assurance customers with axis diplomat 2016 or above

A new option has been added to the Transactions tab of Stock Enquiry to provide a simple overview of the forecast stock position over time.

The Daily Schedule displays a chronological view of when stock is expected to be received and issued, based on the due dates of sales orders and purchase orders.



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This option provides an overview of when stock is likely to be available and, equally importantly, if and when you are expected to run out.

The same schedule can also be viewed from within Enter/Amend Sales Order when adding or amending items.

5.6. Commodity Codes added to Stock Function

Available to Software Assurance customers with axis diplomat 2016 or above

The Stock function has been extended to include an additional column showing the Commodity Code.

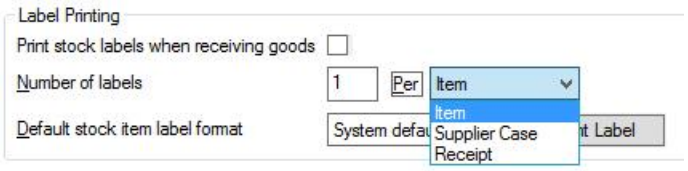
Match Type	Match Text	Stock Reference	Description	Commodity Code	Stock Issues this Period	Stock Issues last 12 Periods	on
Stock Reference	ACMEFORK01	ACMEFORK01	Acme Standard Fork	82011000	245	1487	
Stock Reference	ACMEFORK02	ACMEFORK02	Acme Light Fork	82013000	226	1455	
Stock Reference	ACMEHOE01	ACMEHOE01	Acme Standard Dutch Hoe	82013000	157	1520	
Stock Reference	ACMERAKE01	ACMERAKE01	Acme Standard Rake	82013000	209	1370	
Stock Reference	ACMERAKE02	ACMERAKE02	Acme Standard Grass Rake	82013000	240	1551	
Stock Reference	ACMESET01	ACMESET01	Acme Standard Hand Tool Set (trowel, fork, potting ...	82019000	226	1562	
Stock Reference	ACMESPDE01	ACMESPDE01	Acme Standard Spade	82011000	230	1516	

5.7. Print Stock Labels by Item, by Supplier Case or by Receipt

Available to Software Assurance customers with axis diplomat 2016 or above

You are now able to determine, on a stock item-by-stock item basis, whether the quantity of labels printed at the goods receipt stage is based on a specific number per item, the number of supplier cases being received or the total receipt quantity.

The setting is configured on the General Details tab of Maintain Stock Details:



Setting the number of labels to "Supplier Case" will instruct the Goods Received function to divide the received quantity by the Case Quantity from the Supplier Price List entry. This is useful when the goods are shipped by the supplier in a carton that does not get unpacked immediately, allowing you to place one label on each carton.

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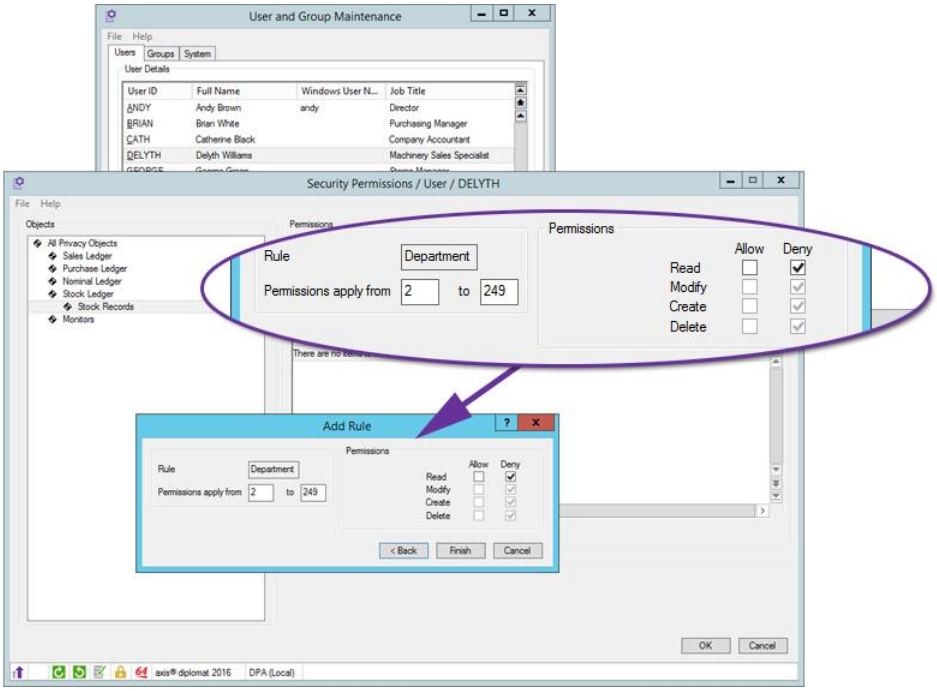
5.8. Restrict User Access to Stock by Department

Available to Software Assurance customers with axis diplomat 2016 or above

For systems configured to allow Departmental and Cost Centre analysis by sales invoice line, the Security Permissions within axis diplomat have been extended to allow or deny access to stock by its default department.

For users that operate solely within a single department, for example, this allows you to restrict the range of stock items that they see (such as when searching or adding items to a sales order) to just the relevant items.

This not only has a security benefit but also makes the system easier for them to use.



5.9. Hide Specific Stock Locations from Stock Figures

Available to Software Assurance customers with axis diplomat 2016 or above

It is now possible to exclude stock at specific locations from the overall stock figures shown by the system.

An additional tick box has been added to Maintain Stock Locations to specify that a location's stock figures are to be excluded:

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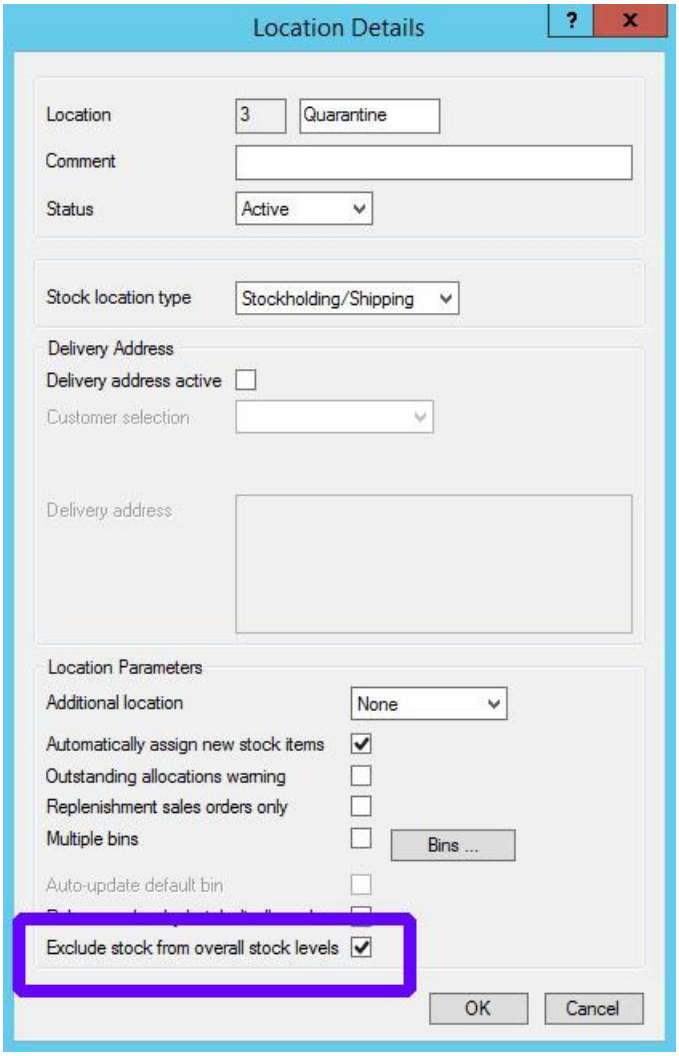

Functions within axis diplomat which then show overall stock figures for items will then exclude the stock at such locations:

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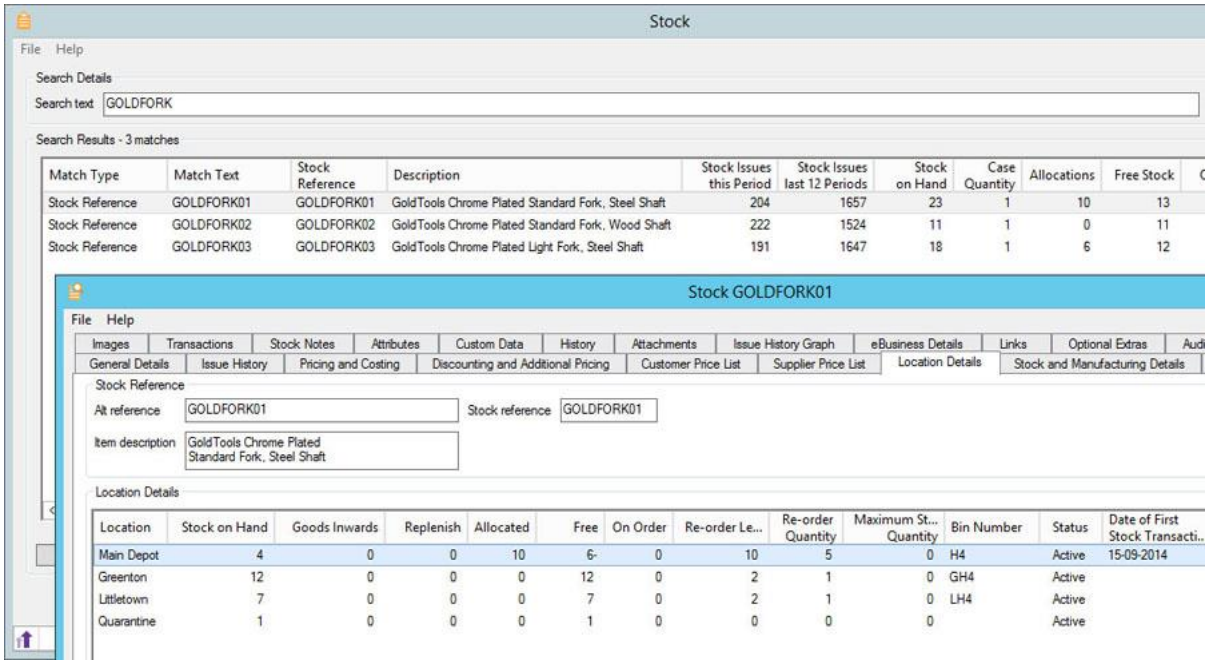

The example above shows the Stock function indicating a Free Stock figure of 14, which includes the stock at Main Depot, Greenton and Littletown but does not include the stock at the Quarantine location.

This facility is ideal for those wanting to ensure that users (especially those in sales and customer services departments who may quote stock availability to customers) do not include stock that is not generally available. This might not only include a Quarantine location as shown in the example above but could also include consignment stock held on a customer's site, demonstration stock or stock held by particular members of staff (such as in an engineer's car or van).

5.10. Hide Overall Stock Figures

Available to Software Assurance customers with axis diplomat 2016 or above

It is now possible to hide the Overall Stock Levels group from the Stock Enquiry function. It was already possible to hide specific stock figures (such as the On Hand figure) but this enhancement now means that the entire section can be hidden.

One possible use for this could be on systems with the Multi-Location Stock module if you wish to force operators to look at the stock figures by location rather than making assumptions on stock availability by looking at the overall figures.

The presence of the Overall Stock Levels section is controlled via a checkbox within the Maintain Stock Ledger Parameters function:

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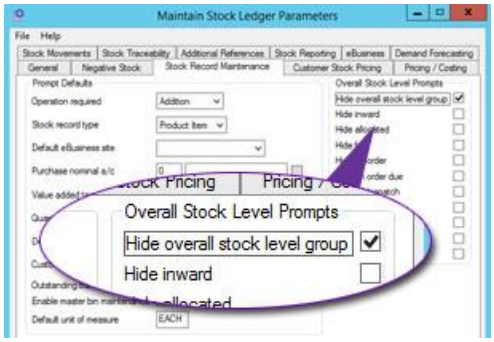
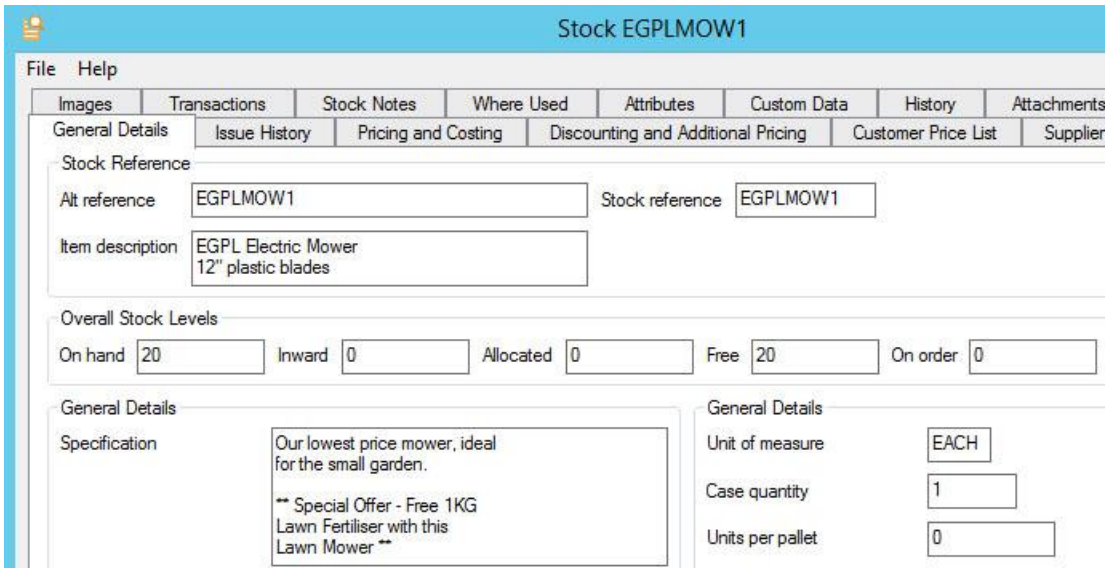
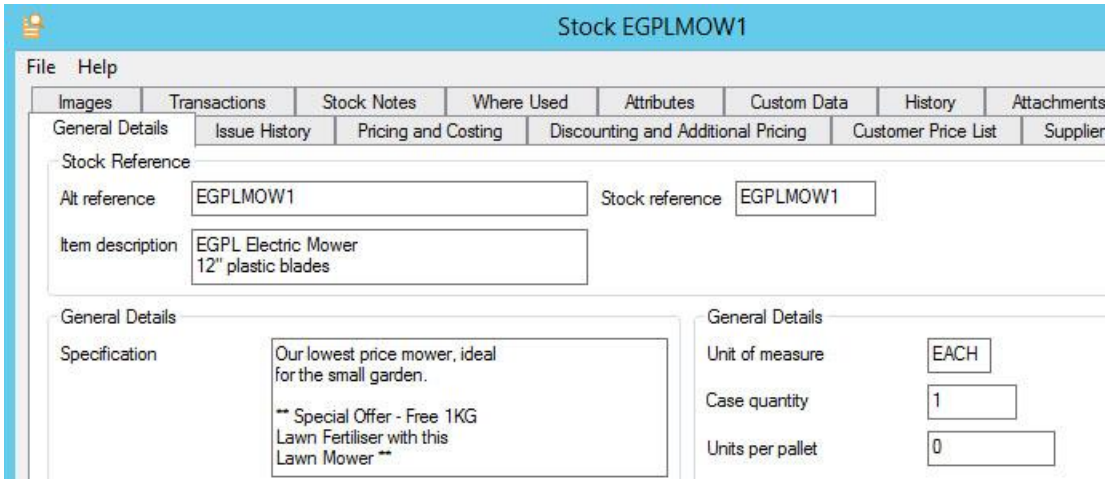




Stock Enquiry showing Overall Stock Levels



Equivalent Stock Enquiry with Overall Stock Levels hidden

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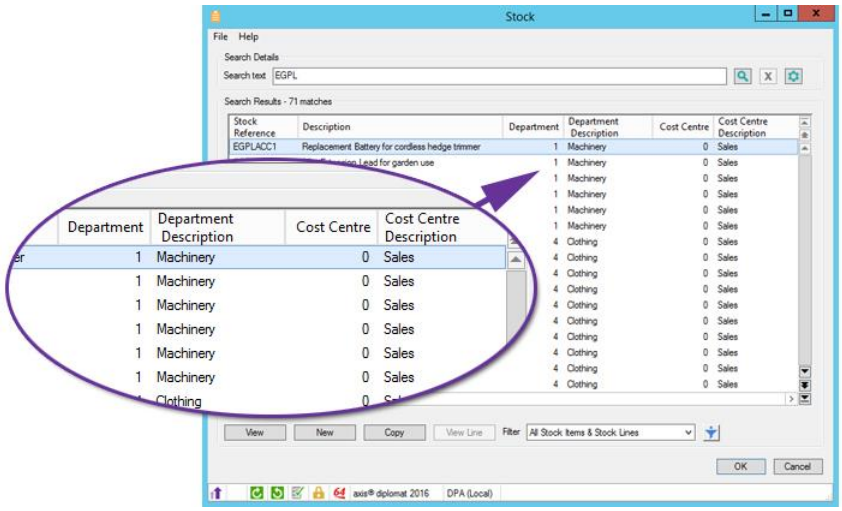
5.11. Department and Cost Centre added to Stock Search Results

Available to Software Assurance customers with axis diplomat 2016 or above

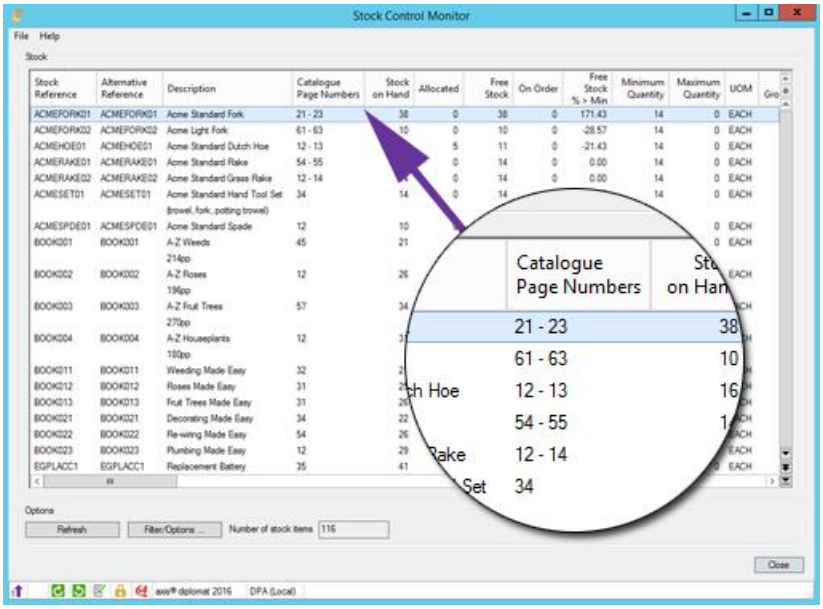
On systems that are configured to allow Departmental and Cost Centre analysis by sales invoice line, where the default department and cost centre codes are recorded against each stock item, these are now shown in stock search results.



5.12. Catalogue Page Numbers in Stock Control Monitor

Available to Software Assurance customers with axis diplomat 2016 or above

An additional column has been added to the Stock Control Monitor to show the Catalogue Page Number(s):



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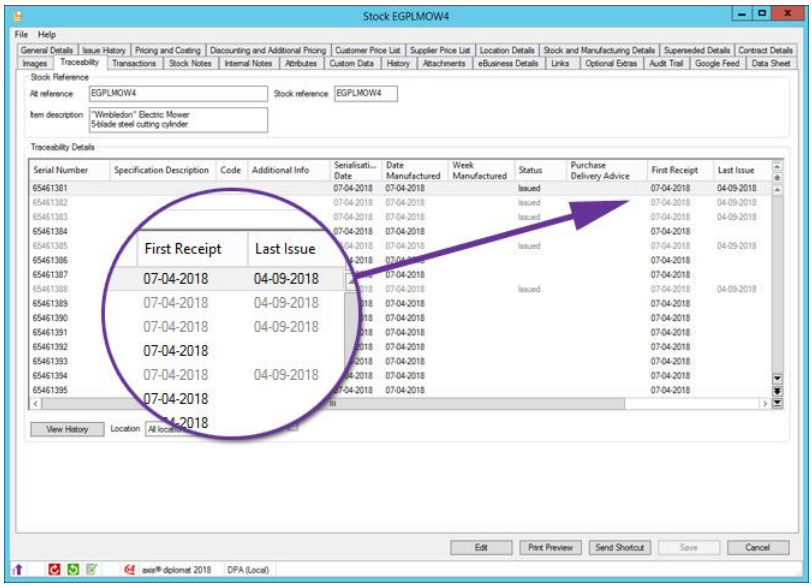
5.13. Additional Information on Stock Traceability Details

Available to Software Assurance customers with axis diplomat 2016 or above and the Stock Transaction Traceability module

The Traceability tab within Stock Enquiry has been extended to add columns showing the date that a given item was first received and the date that it was last issued.



BY showing the dates of the first receipt and the last issue, this covers situations where a particular item was, for example, sold, returned and sold again.

5.14. Customer-Specific Stock Labels

Available to all customers with axis diplomat 2018 and the Bartender Bar Code Labels module

For those using the third-party application BarTender to produce stock labels, in conjunction with the axis diplomat BarTender Interface module, it is now possible to override the standard stock label templates with customer-specific templates.

This is particularly useful where particular customers have their own requirements, such as including their logo or simply having a specific layout.

5.15. Unit Price displayed in Supplier Price Lists

Available to Software Assurance customers with axis diplomat 2016 or above

The Supplier Price List tab in Stock Enquiry now includes an additional column for the equivalent unit price. This now makes it much easier to compare supplier prices where different suppliers provide the same product but in different pack sizes and priced by the pack.

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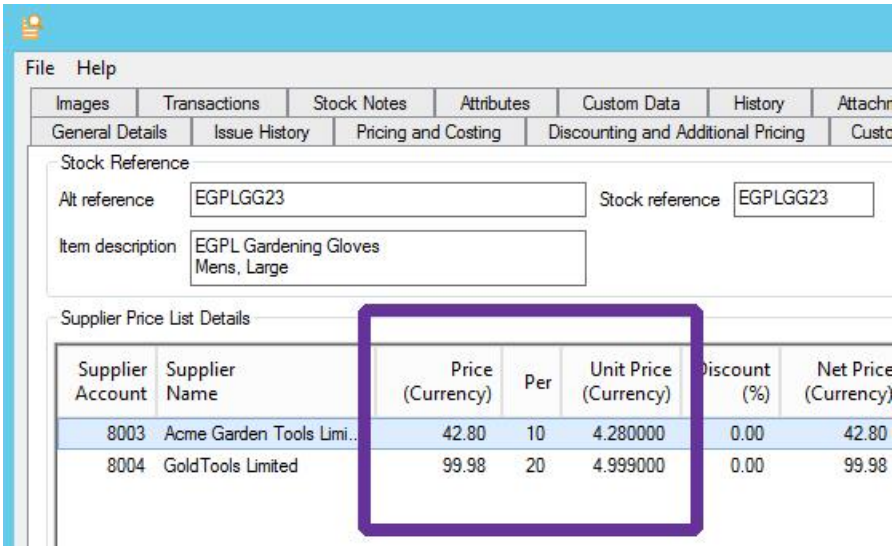

The equivalent unit price is calculated to six decimal places to provide meaningful comparisons between suppliers even when the individual items are of very small value or the pack sizes are very large.

5.16. Works Order Status Codes

Available to Software Assurance customers with axis diplomat 2016 or above and the Compact MRP module

For users of the Compact MRP module, Document Status codes have now been extended to apply to Works Orders.

Document status codes were introduced in axis diplomat 2010 to allow user-defined statuses against sales orders and quotations. Since then, they have also been extended to apply to contracts and contract requests, for users of the Service Contract Management module.

By extending document status codes to Works Orders, you are now able to define your own states for Works Orders. For example, a works order might be "Awaiting Scheduling", "Awaiting Components", "In Production" or "In QC".

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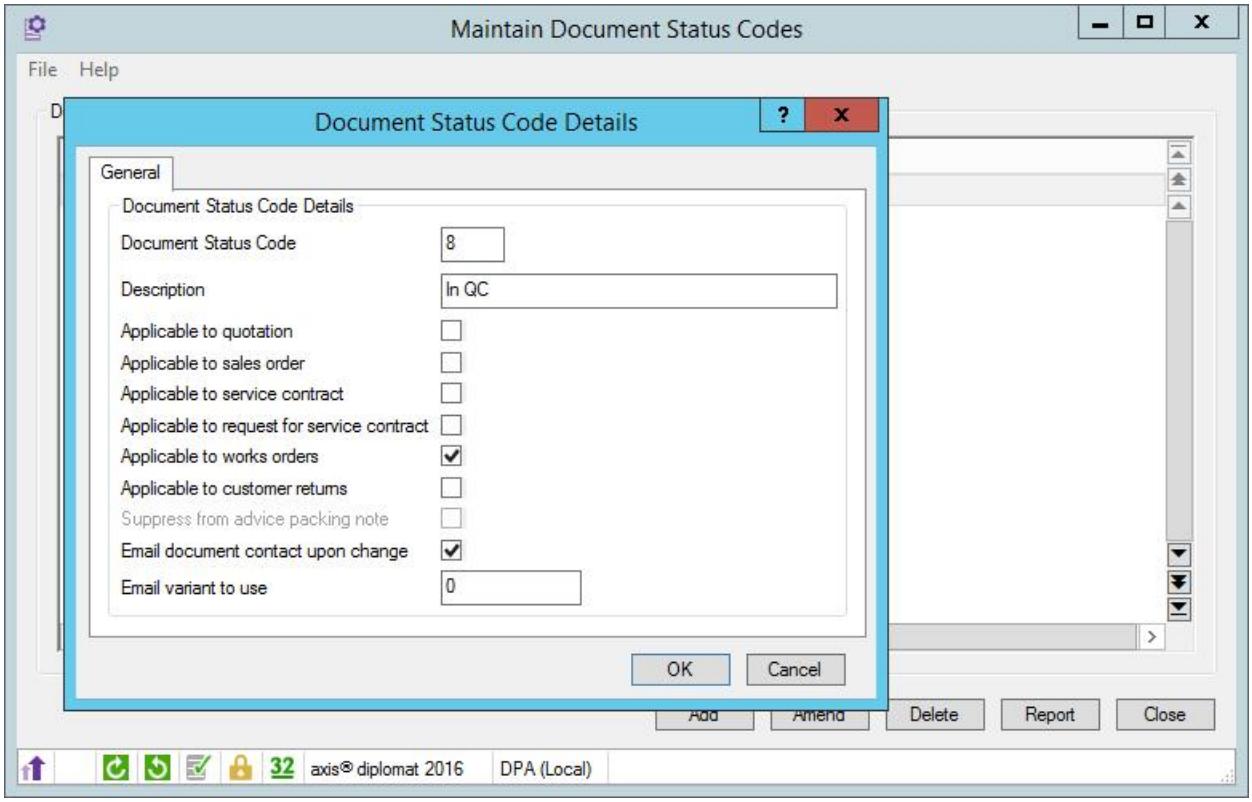

Furthermore, you can also indicate that certain status codes should trigger an email to the customer at the point a works order is changed to that status - this might, for example, be an email to explain that the order has now entered production and should be ready for despatch within one week.

5.17. Amend Document Status Code from Works Order Monitor

Available to Software Assurance customers with axis diplomat 2016 or above and the Compact MRP module

It is now possible to amend a Works Order's Document Status Code simply by a right-click option within the Works Order Monitor.

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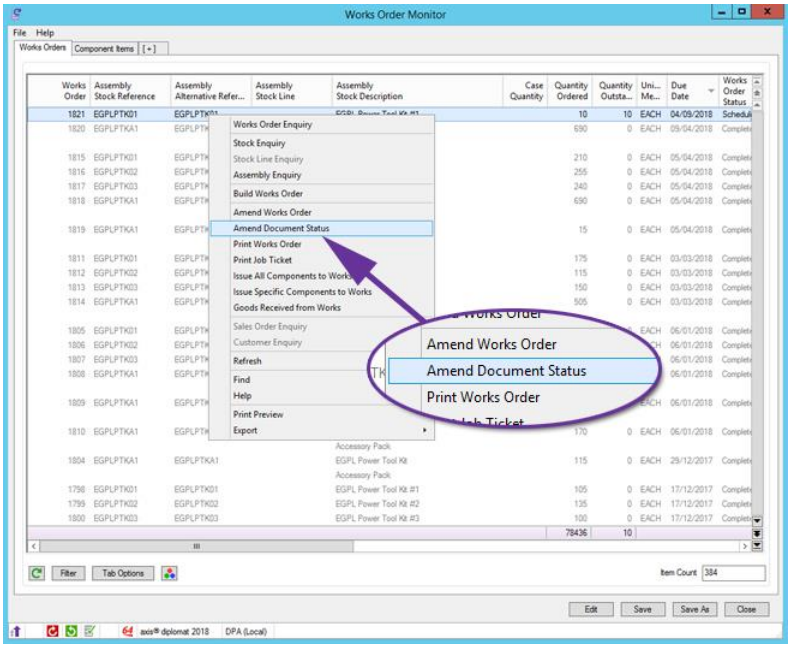
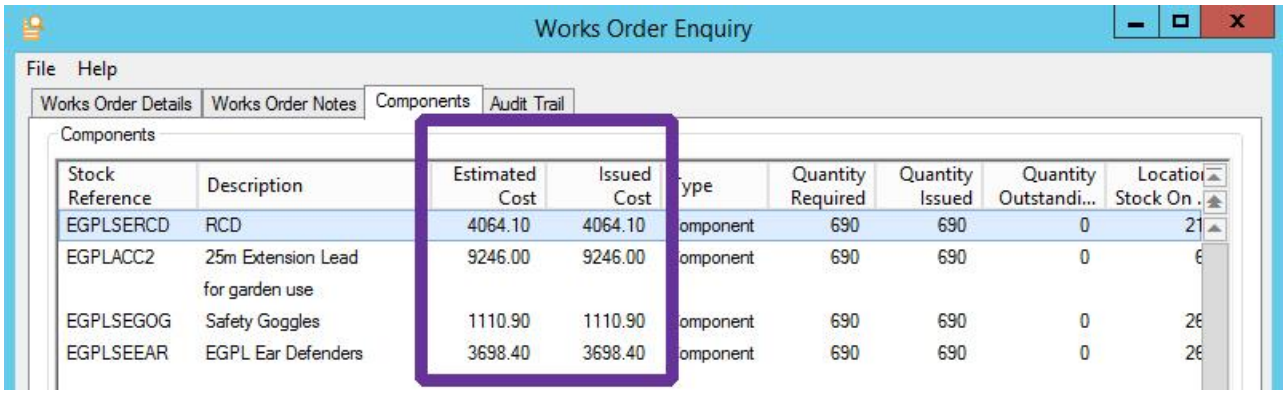


5.18. Component Costs within Works Order Enquiry

Available to Software Assurance customers with axis diplomat 2016 or above and the Compact MRP module

Additional columns have been added to the Components tab of Works Order Enquiry to show Estimated Cost and, for components that have been issued, Actual Cost.



The appearance of these columns is subject to the user having the appropriate security permissions.

5.19. Build Works Order

Available to Software Assurance customers with axis diplomat 2016 or above and the Build Assembly module

A new menu option has been added for users of the Build Assembly module called Build Works Order. This function, designed to be used from a handheld PDA but also suitable for use on your desktop, allows the components for a works order to be

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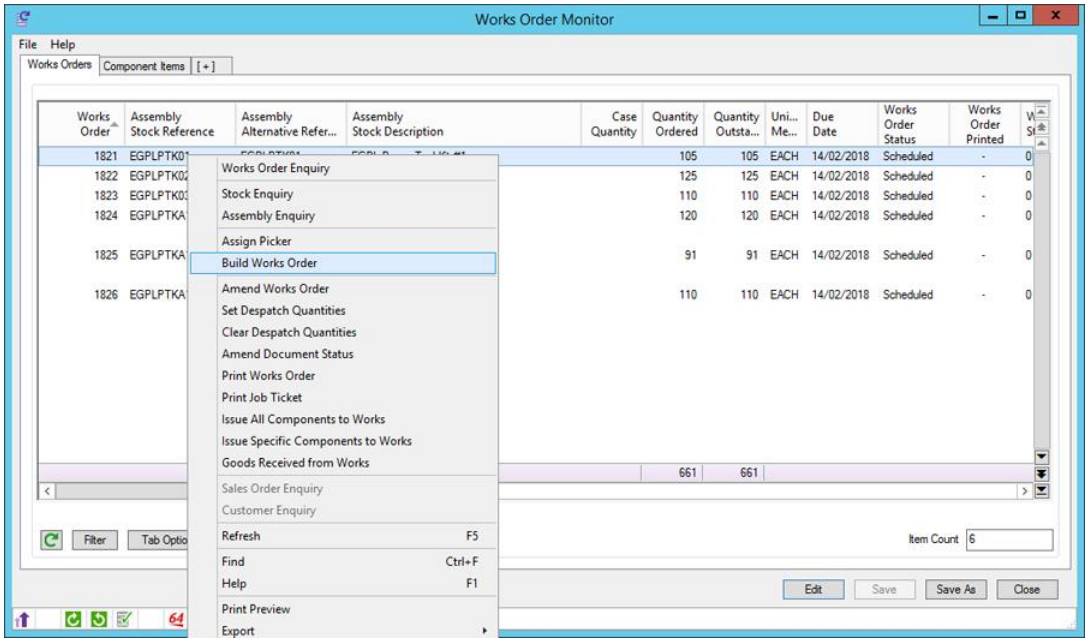
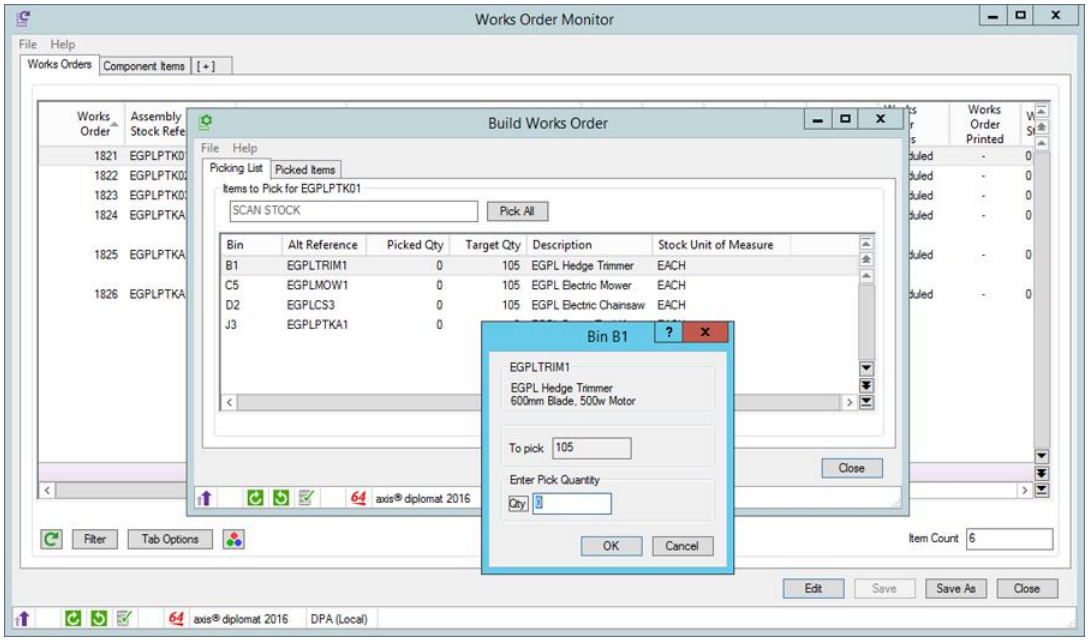
picked, and the finished goods received, in one easy operation. The function can also be accessed via a right-click menu option within Works Order Monitor.





5.20. Default Quantities on Custom Builds

Available to Software Assurance customers with axis diplomat 2016 or above and the Custom Build Assemblies module

For those users with the Custom Build Assemblies module, it is now possible to specify a default quantity against each item in an option list:

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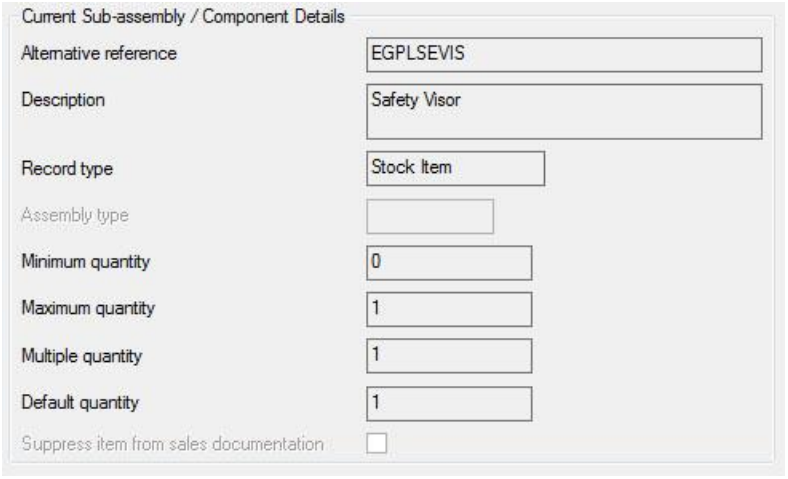

The default quantity is then used when adding the Custom Build to a Sales Order or Quotation:

The addition of a default quantities can make Custom Build items much easier to add to orders. For example, a chair can now default to having two standard arms whilst still allowing the operator to specify different arms or no arms at all. The minimum and maximum quantities specified would still prevent the configuration of a chair with, for example, four arms. Similarly, a PC could be configured with a standard hard drive but a larger, smaller or faster alternative could be chosen if required.

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Section 6 Warehouse Management

6.1. Picked and Unpicked Quantities added to Handheld Functions

Available to all customers with axis diplomat 2018 with Warehouse Management

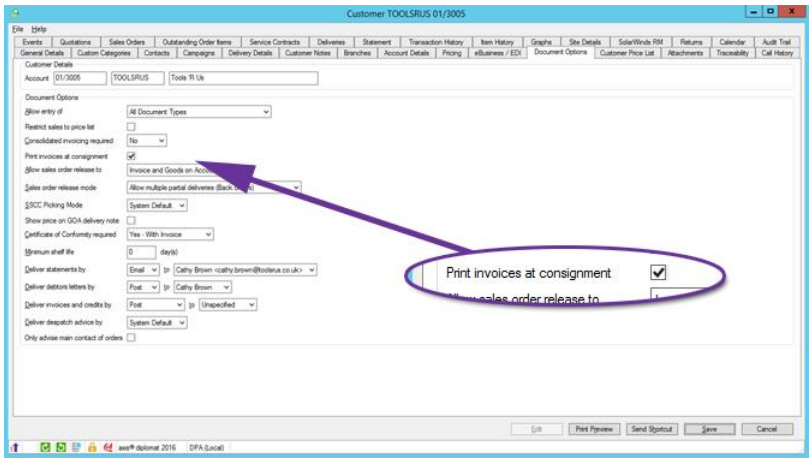
The Handheld Stock Enquiry function has been extended to show columns for Picked and Unpicked quantities on the Bins tab.

These quantities have also been added to the Handheld Bin Enquiry.

6.2. Print Invoices at Despatch

Available to Software Assurance customers with axis diplomat 2016 or above and the Despatch & Delivery Management module

For those using the Despatch & Delivery Management module, you are now able to mark specific customers to automatically create and print invoices at the point of consigning a delivery.



As well as configuring individual customers via Maintain Customer Details, the option can also be set for a selection of customers by using Customer Record Block Amendment or from a CSV file using Import Customer Records.

6.3. Suppress Partial Kit Release

Available to Software Assurance customers with axis diplomat 2016 or above and the Bill of Materials module

For those using handheld sales order picking in conjunction with kits, it is now possible to configure axis diplomat to prevent the partial picking of kits.

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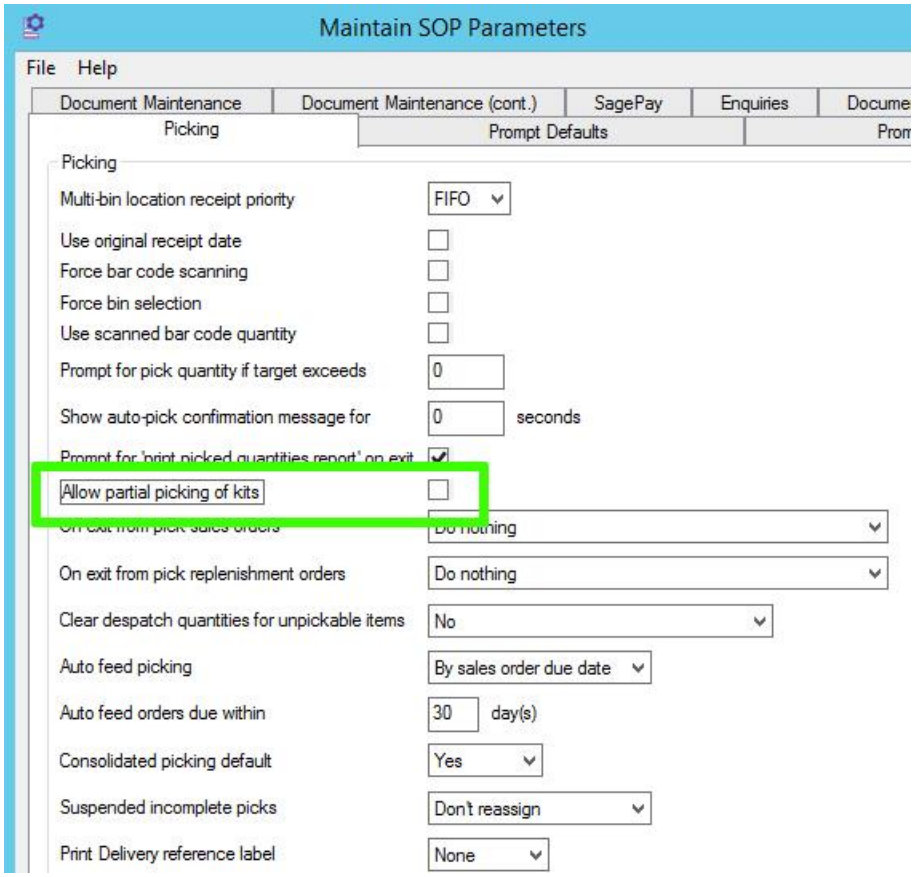
This allows you to set despatch quantities for partial kits (to ensure that stock is reserved) whilst preventing those incomplete kits from being inadvertently sent to the customer.



6.4. Document Status Codes allow Orders to be suppressed from Picking

Available to Software Assurance customers with axis diplomat 2016 or above with Warehouse Management

Users with the Warehouse Paper-based Sales Order Picking module can now create Document Status Codes that suppress orders with those statuses from being included in the creation of provisional deliveries.

This is ideal, for example, where certain orders require special processing before they can be picked, such as embroidery or printing.

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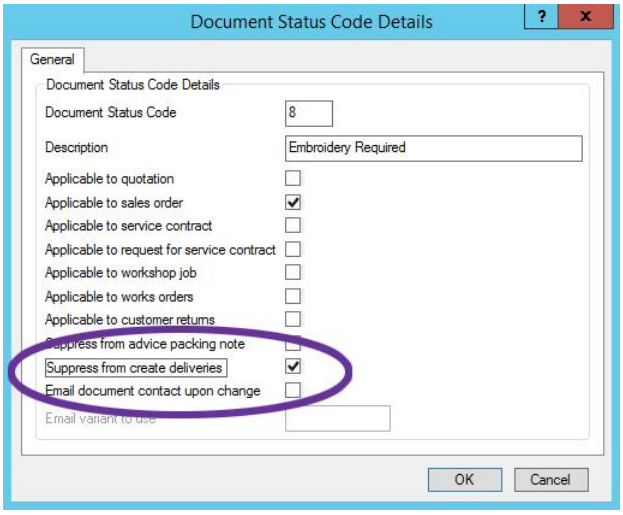
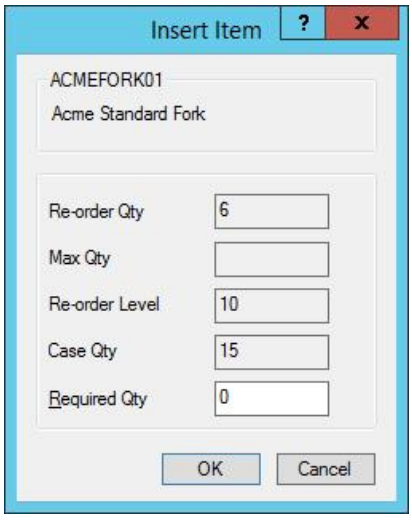


6.5. Handheld Purchase Requirements

Available to Software Assurance customers with axis diplomat 2016 or above with Warehouse Management

A new function has been added to allow Purchase Requirements to be created using a handheld unit.

This now makes it easy to walk around your warehouse or shop, adding items to an ordering list by simply scanning barcodes and confirming quantities.



Having selected an item, its Re-Order Quantity, Maximum Quantity, Re-Order Level and Case Quantity are displayed to assist in deciding on the appropriate quantity to order.

As well as scanning barcodes, items can be added to the "shopping list" by entering part codes or by searching - this is useful, not only for items that are not barcoded, but

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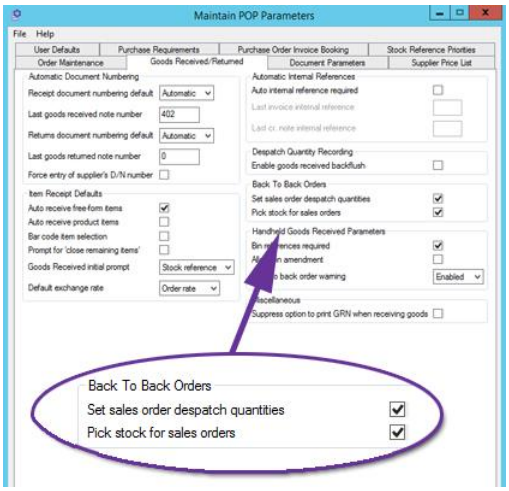
when items are completely out of stock and the shelves are not labelled with barcodes.

6.6. 'Pick All' option for Back-to-Back Orders

Available to Software Assurance customers with axis diplomat 2016 or above with Warehouse Management

It is now possible to automatically pick items when receiving goods against a back-to-back purchase order.

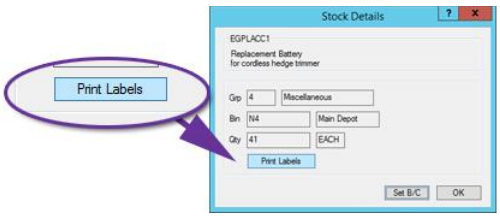


This functionality is enabled by a Purchase Order Processing parameter

6.7. Handheld Stock Label Printing

Available to Software Assurance customers with axis diplomat 2016 or above with Warehouse Management

The Handheld Stock Enquiry function has been extended to allow printing of labels for stock items:



The parameters used (such as the format and the number of labels to print) are taken from the stock record, as found on the General Details tab of Stock Enquiry:

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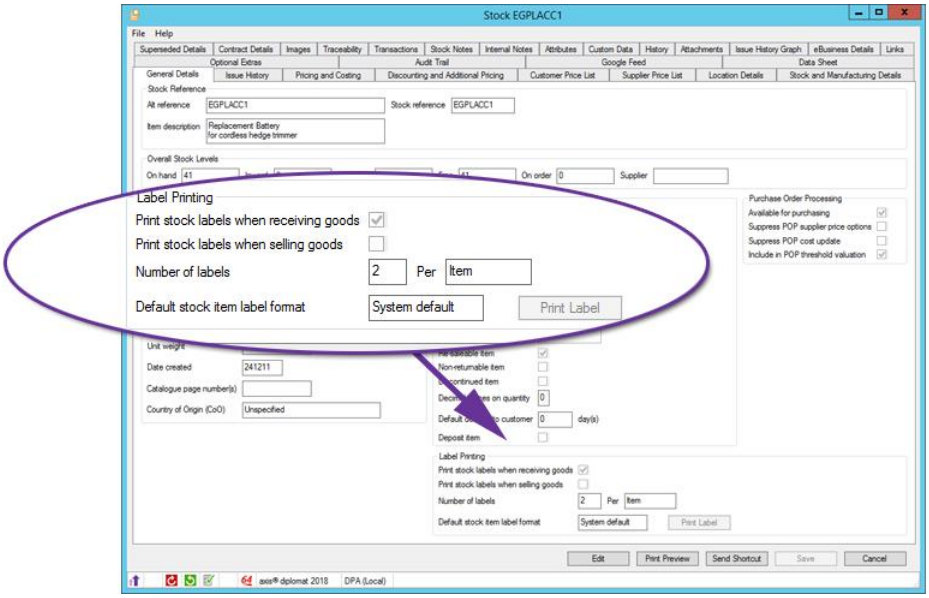
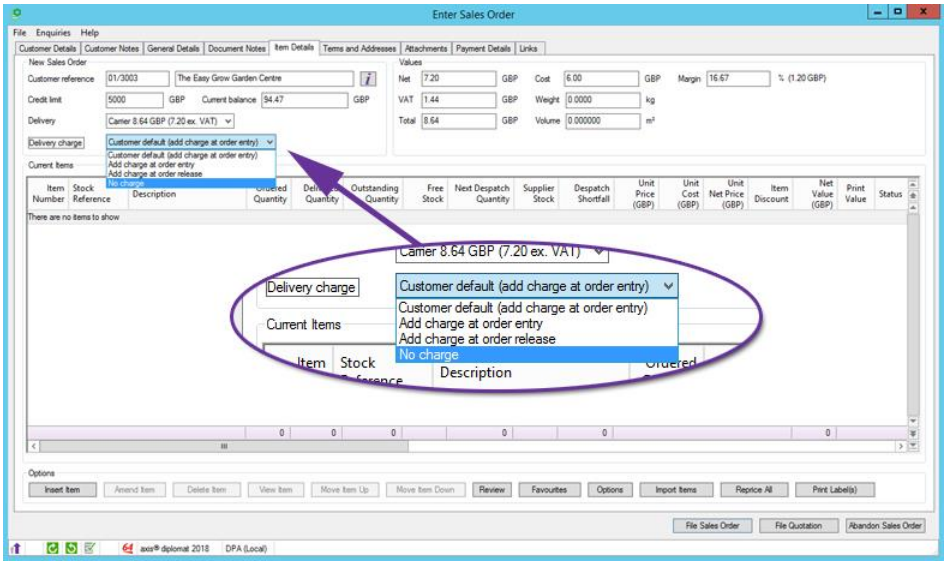


6.8. Greater Flexibility with Customer Delivery Charges

Available to Software Assurance customers with axis diplomat 2016 or above and the Despatch & Delivery Management module

Sales Order Maintenance has been modified to allow you to override the Delivery Charge option specified on the Customer Account for this particular order.



6.9. New Options for Bin Picking Sequence

Available to Software Assurance customers with axis diplomat 2016 or above with Warehouse Management

It is now possible to configure individual users to invert the bin sequence when determining which bins to choose for picking. This would, for example, result in them being sent to Bin ZZ99 first and Bin AA00 last.

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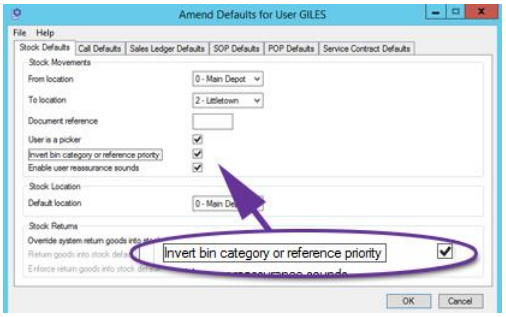
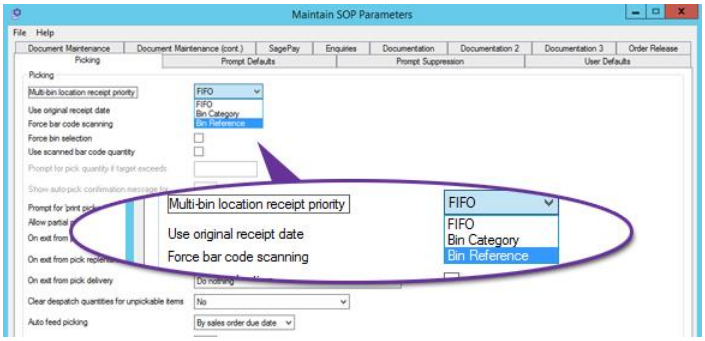
This is ideal in situations where some pickers are based at the opposite end of your warehouse to others, in which case picking for them can be biased towards the bins closest to them.



To further support this method of operation, an additional Sales Order Processing parameter has been added to indicate whether reverse picking should function within the category (i.e. Category A is still preferred over Category Z) or whether the categories themselves are reversed.



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Section 7 Office Products

7.1. Support for Vow ePremium Product Files

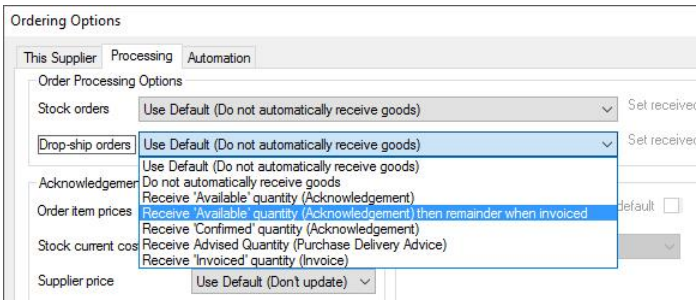
Available to Software Assurance customers with axis diplomat 2016 or above with Office Products

The Import VOW Product File function has been extended to support the XML format product files supplied by Vow to subscribers to their ePremium service. axis vMerchant already offers support for ePremium rich data.

7.2. Processing Back Orders through Online Order Processing

Available to Software Assurance customers with axis diplomat 2016 or above and the EDI Purchasing Foundation module

A new option has been introduced within the Online Order Processing function (available to users of EDI Purchasing) to change the way in which back orders are processed. The new option allows the balance of any items left outstanding from the original order to be automatically received on receipt of the invoice.



7.3. Excluding Specific Suppliers from Automatic Price Feeds

Available to Software Assurance customers with axis diplomat 2016 or above with Office Products

A new setting has been added to suppliers supporting price feeds to allow you to exclude them from the automatic background feed process. Options have also been added to the Amend Scheduled Processing Settings function to allow you to configure start and end times for the automatic feed processes.

7.4. Price Feed Type added to Supplier search results

Available to Software Assurance customers with axis diplomat 2016 or above and the Supplier Price Feed Foundation module

For customers with one or more Supplier Price Feeds, the Suppliers function has been extended to include a column in the search results indicating the type of price feed associated with each supplier account listed.

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Search Results - 139 matches

Match Type	Supplier Name	Price Feed
Account Address	(Advent) Exertis Supplies Unit H4, Premier Way	Advent
Account Address	Toner Inc Ltd, Unit F4, Bluegate Park,	Badger / IJD
Postcode	Beta Distribution Plc Unit 2, Quebec Wharf	Beta Distribution
Email Address	CTS Toner Supplies Ltd. Trent Bridge Farm	CTS
Short Name	Everything Imaging Ltd Unit S1, Mendip Industrial Est	Everything Imaging
Short Name	EXERTIS (UK) LTD, Technology House	Exertis

7.5. EDI with CTS Toner Supplies

Available to purchase for all customers with axis diplomat 2018 and the EDI Purchasing Foundation module

A new module is now available as an option for axis diplomat 2018 to support EDI ordering with CTS Toner Supplies. This module is available in addition to the existing price feed module.

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Section 8 eBusiness

8.1. Payment Reconciliation added for trademe.nz Payments

Available to all customers with axis diplomat 2018 and the Cloudhub 247 Interface module

The support for the trademe.nz marketplace, announced earlier this year for users of the CloudHub 247 Interface module, has been extended to support automated reconciliation from their payment files.

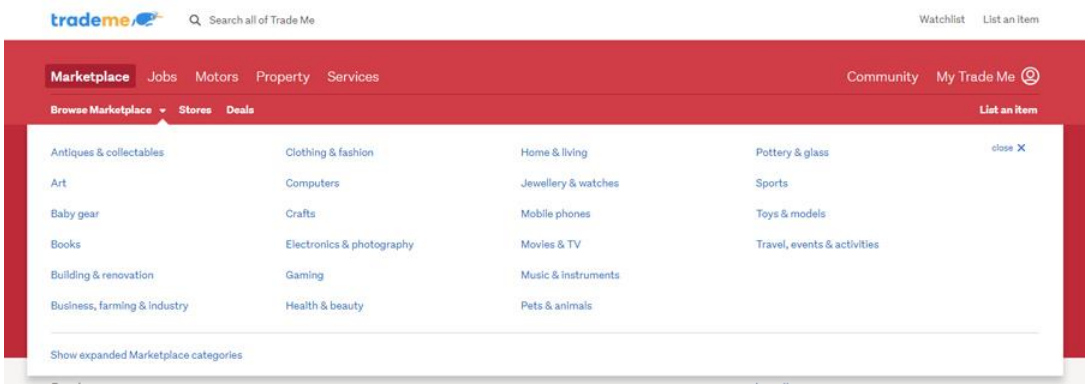
8.2. Support added for trademe.nz

Available to all customers with axis diplomat 2018 and the Cloudhub 247 Interface module

For those using the CloudHub 247 Interface to trade on a variety of marketplaces such as eBay and Amazon, this module now also supports an additional marketplace, trademe.nz.

trademe.nz describe themselves as "the leading online marketplace and classified advertising platform in New Zealand. This includes auctions and fixed-priced sales for new and used goods."

Since sales via trademe.nz will be in New Zealand Dollars, the Foreign Currency module in also required in order to trade via this marketplace.



8.3. Support added for Microdata

Available to all customers with axis diplomat 2018 and the axis vMerchant module

All axis vMerchant websites are now capable of including Microdata on product pages. This includes both template-based and bespoke websites, irrespective of age.

Microdata provides a more structured representation of the product, invisible to the visitor but which helps search engines to better understand the content of the page and provide more relevant results to users.

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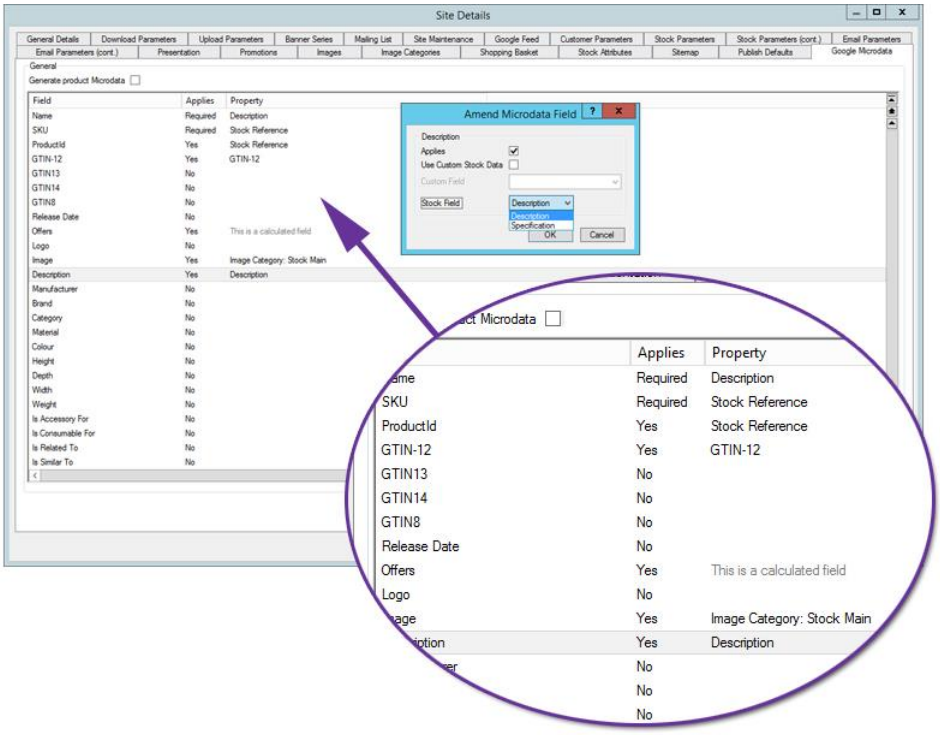
Enabling and configuring Microdata is done simply via a new tab within the Maintain Sites function.



Each possible Microdata field can be mapped to the matching field for the stock records and the Microdata is then automatically generated on every product page.

8.4. eBusiness Mailing List module made standard

Available to Software Assurance customers with axis diplomat 2016 or above and the axis vMerchant module

To better equip axis diplomat users to handle the requirements of GDPR, the eBusiness Mailing List module has now been made standard on systems with links to axis vMerchant-based websites.

The module allows you to configure a pseudo customer account to hold details of people who use your website to subscribe to, or unsubscribe from, your marketing emails or newsletters without purchasing on your site.

If one of these subscribers subsequently places an order on your website, their details are moved to an actual customer account so that, at any point in time, the pseudo account only holds details of those who have subscribed but not yet purchased.

For those with template-based websites, subscribe and unsubscribe pages already exist. Bespoke axis vMerchant websites will need the appropriate pages creating.

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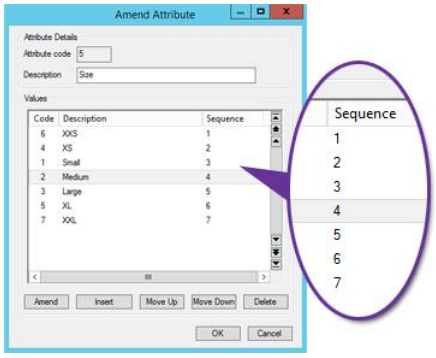
8.5. Attribute Value Ordering for Website

Available to all customers with axis diplomat 2018 and the axis vMerchant module

It is now possible to control the sequence in which attributes are offered on your axis vMerchant website.

Previously, attributes would have to be ordered numerically by their Attribute ID or alphabetically by their description. The ability to manually override the sequence is particularly useful when there is a definite order required that does not suit alphabetical ordering and it is not possible to arrange the attribute IDs in the desired order (such as when adding a new option into an existing list).



This example shows clothing sizes where the sequence has been set to ensure that sizes are shown in the correct order from smallest (XXS) to largest (XXL).

Re-ordering can be achieved easily - either by simply keying the correct sequence number against a given value or by using keyboard shortcuts in the list view (shown above) or via right-click options to move up/move down.

8.6. Inter-Company EDI

Available to all customers with axis diplomat 2018 and the Axis2Axis XML Ordering module

The Axis2Axis XML Ordering module is designed to allow two businesses, both using axis diplomat, to trade electronically by sending purchase orders from one system to be imported as sales orders on the other. Originally designed for use by totally separate organisations, running on separate networks, documents were exchanged over the Internet using FTP (File Transfer Protocol). This required one of the organisations to operate an FTP Server to facilitate the transfer.

Axis2Axis XML Ordering has now been extended to allow documents to be exchanged via a local folder instead, making the module easier to install and maintain when used for trading between multiple companies running on the same server. It can also eliminate the cost of running an FTP server.

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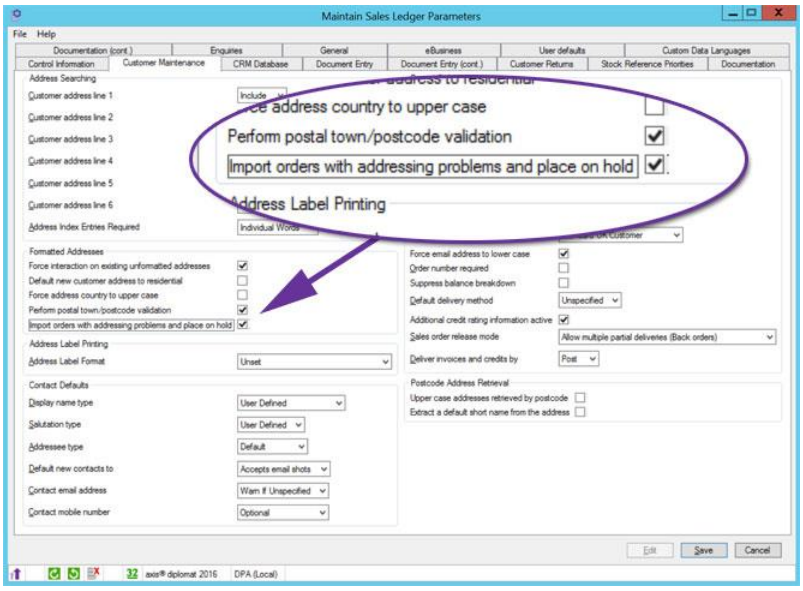
8.7. Handling eBusiness Orders with Address Validation Issues

Available to Software Assurance customers with axis diplomat 2016 or above and the eBusiness module

A new parameter has been added for those who have configured their system to perform address validation when importing sales orders. Any orders that have an unrecognisable address may now be either

- Automatically imported but placed on hold
- Not automatically imported

When an order with an addressing issue is not imported automatically, the address can be checked and updated by running Import eBusiness Orders manually.



A further parameter has been added for those using Despatch Quantity Recording to determine whether orders that are imported and placed on hold have Despatch Quantities set:

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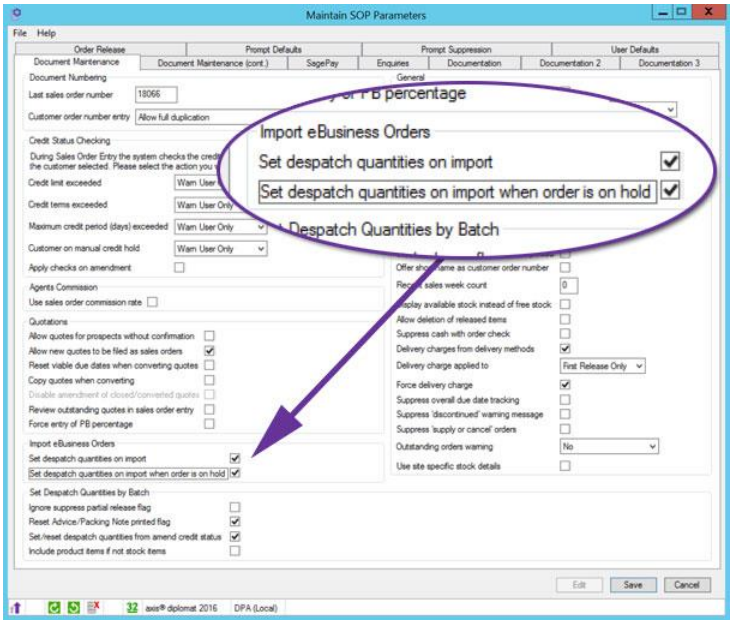

8.8. Additional Marketplaces via Channel Advisor

Available to Software Assurance customers with axis diplomat 2016 or above and the Channel Advisor Interface module

For users of the axis diplomat Channel Advisor Interface module, a number of additional marketplaces are now supported:

- SKU Cloud
- Shop.com
- Tesco

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Section 9 Hire Management

9.1. Additional Description Lines on Hires

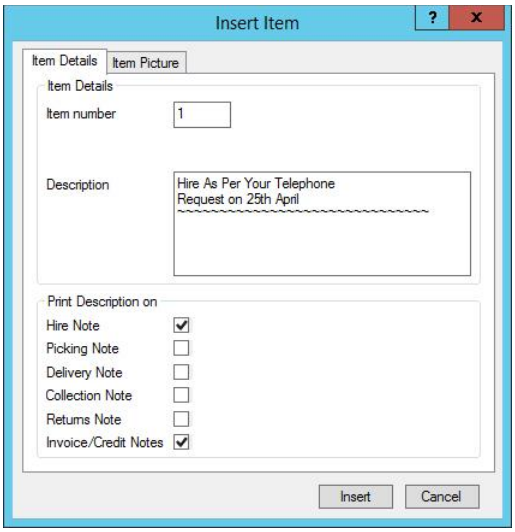
Available to Software Assurance customers with axis diplomat 2016 or above with Hire Management

The axis diplomat Hire module has been enhanced to allow Additional Description Lines to be added to Hires, mirroring the facility offered with Sales and Purchase documents such as Sales Orders, Invoices and Purchase Orders.

This development allows you to add unlimited narrative to your hire documents and Additional Description lines may be inserted at any point within the document lines, allowing you to sub-divide the hire into sections, if you wish.

Each Additional Description line may, optionally, be printed on:

- Hire Notes
- Picking Notes
- Delivery Notes
- Collection Notes
- Returns Notes
- Invoices



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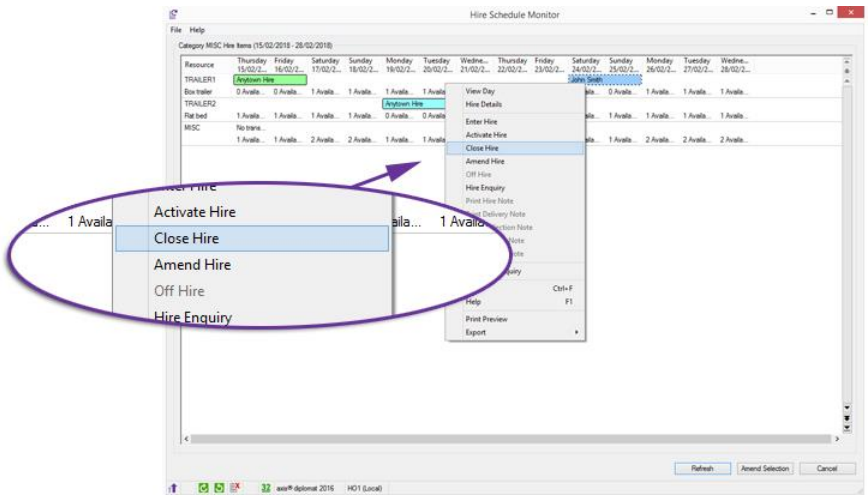
9.2. Closing Forward-Dated Hires

Available to Software Assurance customers with axis diplomat 2016 or above with Hire Management

The Hire Schedule Monitor has been enhanced to allow forward-dated bookings to be closed. This allows you to retain the details of the booking for future reference whilst removing the allocations of the hire items.



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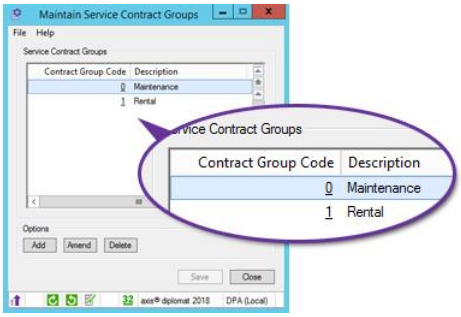
Section 10 Service Contract Management

10.1. Service Contract Groups

Available to all customers with axis diplomat 2018 with Service Contract Management

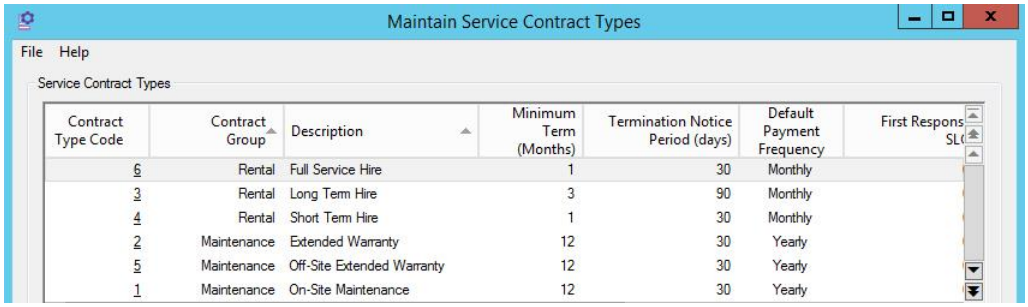
You can now define a number of Service Contract Groups to help you analyse your contracts, contract requests and service calls.



10.2. Service Contract Types

Available to all customers with axis diplomat 2018 with Service Contract Management

In addition to Service Contract Groups, you can also define a number of Service Contract Types. Each Contract Type is assigned to a Contract Group. Individual Service Contracts and Service Contract Requests are assigned to a specific Contract Type; its associated Contract Group is derived automatically from the assigned Type, providing two levels of analysis.



Contract Type Code	Contract Group	Description	Minimum Term (Months)	Termination Notice Period (days)	Default Payment Frequency	First Respons SL
6	Rental	Full Service Hire	1	30	Monthly	
3	Rental	Long Term Hire	3	90	Monthly	
4	Rental	Short Term Hire	1	30	Monthly	
2	Maintenance	Extended Warranty	12	30	Yearly	
5	Maintenance	Off-Site Extended Warranty	12	30	Yearly	
1	Maintenance	On-Site Maintenance	12	30	Yearly	

In addition, each Service Contract Type can dictate a number of aspects of the behaviour of contracts of that type, including the Minimum Term of the contract (the number of months that it has been active before it can be cancelled), the Termination Notice Period (the number of days beyond the date that the contract is marked as cancelled before it actually ceases) and whether it is allowed to associate service calls with that type of contract.

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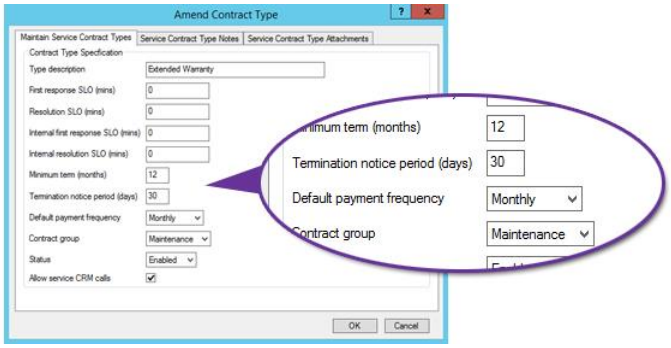
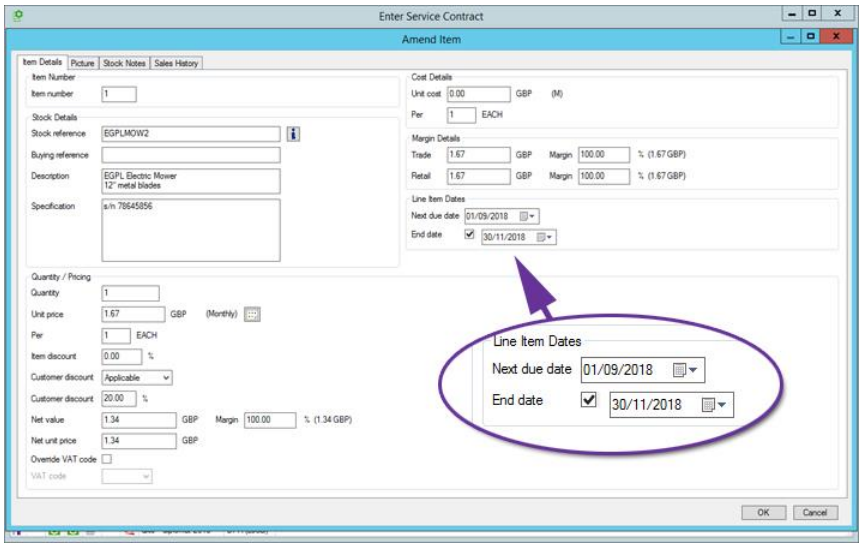


Finally, you can define a number of Service Level Objectives (SLOs) with each contract to allow analysis of the number of Service CRM calls that meet those SLOs.

10.3. Contract Item Start and End Date

Available to all customers with axis diplomat 2018 with Service Contract Management

It is now possible to record the start and end dates for individual items on a Service Contract. When generating Invoices for Service Contracts, the system will detect if the start or end date is part-way through the invoicing period and, if so, pro rata the charge.



10.4. Date & Time-Specific Contract Pricing

Available to all customers with axis diplomat 2018 with Service Contract Management

With the release of axis diplomat 2018, Date and Time-Specific Pricing and Discounting has been extended to encompass Contract Pricing.

It is now possible to define future pricing and discounting for contract items whilst also defining other future changes, such as whether customer discounts may be applied when the item appears on a contract.

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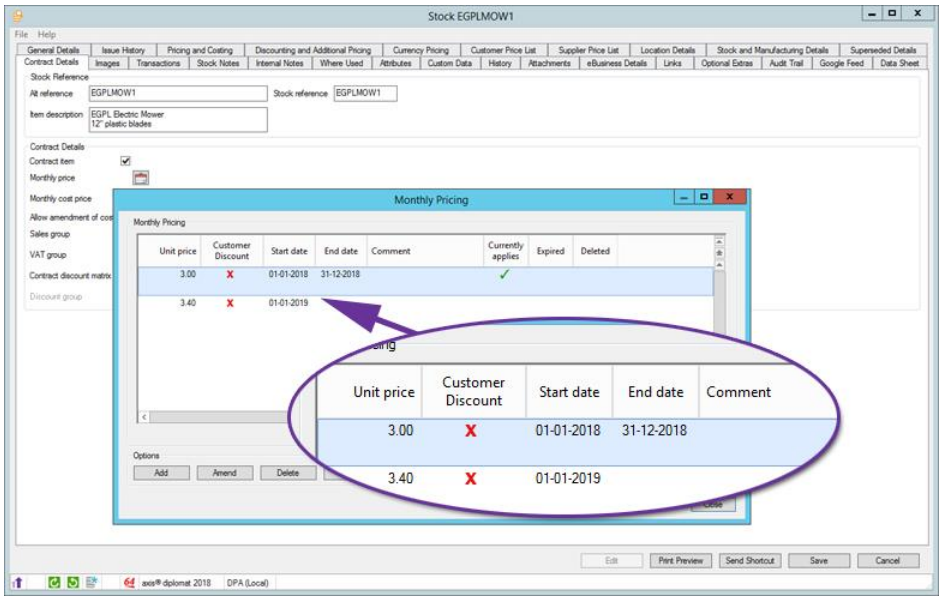
It is also possible to define pricing as a percentage of the retail price. For example, the cost of maintaining an item could be set as 2% of the item's selling price per month; in this way, not only do you eliminate the need to calculate the maintenance cost but, if the selling price changes, the maintenance charge will change in line with it.



This example shows an item whose monthly maintenance charge increases from £3.00 per month to £3.40 per month from 1st January 2019

10.5. Default Service Contract Payment Method

Available to Software Assurance customers with axis diplomat 2016 or above and the Direct Debits module

When entering a Service Contract, a Request for Service or converting a Request to a Contract, the system will now check the customer's account to see if a Direct Debit Mandate has been received. If it has, the Payment Method now defaults to Direct Debit, rather than the account's Default Payment Method.

This helps to avoid errors when the customer's default is "On Account" but Direct Debits are usually used for contracts.

10.6. Default Payment Frequency by Contract Type

Available to all customers with axis diplomat 2018 with Service Contract Management

It is now possible to define, for each Contract Type, the default Payment Frequency. For example, maintenance contracts could default to monthly, whilst extended warranties could default to annual.

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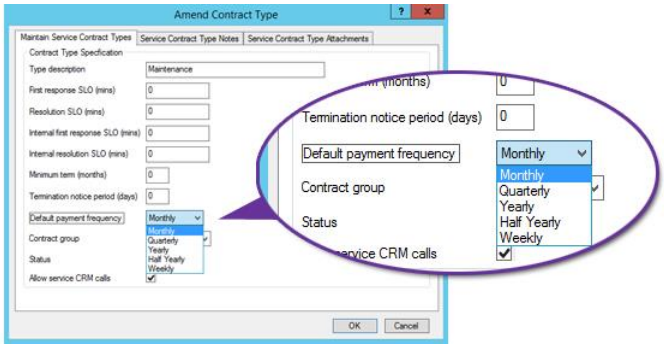

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Section 11 axis payroll

11.1. Support for NEST Pension Schemes

Available to all customers with axis payroll 2018

The government introduced the Nest (National Employment Savings Trust) workplace pension scheme to support automatic enrolment. Whilst it was set up by the government, it is run as a trust.

As Nest is very popular with SMEs, support has been added to axis payroll 2018 as standard and made available to axis payroll 2016 customers through Software Assurance.

For those using other workplace pension schemes, optional modules are also available to link with a number of providers, including Peoples Pension, Scottish Widows, Legal & General and Aviva AME.

11.2. Automatic Workplace Pension Assessment

Available to all customers with axis payroll 2018

A new system parameter has been added to enable automatic workplace pension assessment. A second parameter allows you to specify the deferral period (0-3 months) for new employees.

With this parameter set, whenever an employee start date is changed, the system will automatically set the assessment due date (based on the start date and deferral period) if the assessment due date falls before or within the current payroll period. A new "Calculate" button will automatically determine the employee's category.

In addition, the "Calculate Gross Pay" function checks that employees are correctly categorised.

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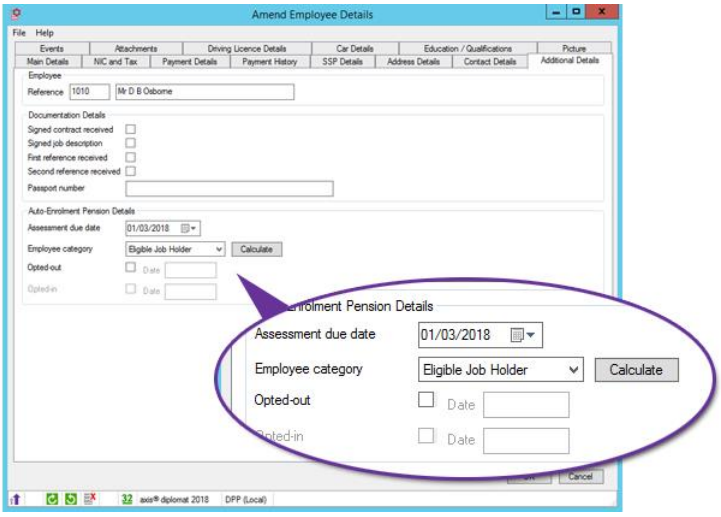

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Section 12 Upgrade Options and Pricing

12.1. Upgrade Pricing

Product	axis diplomat 2014	axis diplomat 2016
axis diplomat 2018 Express Client	£795	£445
axis diplomat 2018 Small Business Edition Client	£1295	£745

12.2. Transition Pricing

Transition To	Transition From
	axis diplomat 2018 Express
axis diplomat 2018 Small Business Edition Client	£395

12.3. Software Assurance Pricing

From January 2019, Software Assurance will be offered as a second tier of Software Support Contract, replacing the existing "per client" pricing. This allows pricing to scale more fairly as it is proportionate to the complexity of the particular system. From 2020, axis diplomat version upgrades will also be priced as a percentage of the software licence ensuring that Software Assurance remains cost-neutral.

Contract Tier	
Software Support	1.50%
Software Support, Software Assurance	2.75%
Software Support, Software Assurance, Software Rental	6.00%

axis payroll Software Assurance is unaffected by these changes.

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12.4. 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 2018. It is not intended as a substitute for training – onsite training is strongly recommended for all upgrades to axis diplomat 2018 in order to maximize the return on investment.

12.5. Software Assurance Upgrades

For customers subscribing to Software Assurance only

A number of the new developments within axis diplomat 2018 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 2018 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 2018, please go to our web site at

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

and click on the link to request your upgrade.

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Section 13 Supported Environments

For the latest information on **axis diplomat 2018**'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/

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

E & OE.

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