

NEW FEATURES OVERVIEW

1st October 2020

Foreword

Welcome to axis diplomat 2020!

This release is the culmination of the past two years' development work since the launch of **axis diplomat 2018**.

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, approximately two thirds of those new developments have already been pre-released to our Software Assurance customers; 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. Increases in home and remote working and on-going uncertainties regarding the final shape of Brexit are just two of the challenges everyone in business is needing to meet. 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.

This means that it is vitally 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 help ensure that you are ready for whatever challenges are waiting.

Regards
The axis diplomat Development Team

October 2020

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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 2020** from the previous edition of software, **axis diplomat 2018**.

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 www.axisfirst.co.uk/software/recent/ for information on the latest updates. Level updates within the **axis diplomat 2020** release will be free to all **axis diplomat 2020** licensees with current support contracts.

In addition to the normal on-going level updates for **axis diplomat 2020**, those customers with **Software Assurance** will be offered further updates from time to time, which will be prereleases of new features from the next release of software due in 2022.

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

To make sure that you are kept up to date with the latest news and developments, please make sure you are subscribed to our email newsletters.

To update your email preferences, please go to <u>www.axisfirst.co.uk/subscribe</u>.

We also recommend that you follow us on Twitter at <u>www.twitter.com/axisfirst</u>.

axis payroll

Based on positive feedback from the launch of axis diplomat 2018 and axis payroll 2018, we are continuing to incorporate details of the enhancements to **axis payroll 2020** within this single document rather than in a separate New Feature Guide.

The following list highlights our **Top Ten Favourite New Features** of **axis diplomat 2020**:

| 1 | New Scheduler | A completely re-written scheduler with a contemporary feel and many usability enhancements. |
|----|---|--|
| 2 | Supplemental (landed) Costs | Provides greater control and analysis of the supplemental stock costs associated with purchasing stock such as transport, duty and insurance. |
| 3 | Nominal Account Reconciliation | The new Nominal Account Reconciliation function allows balance sheet nominal accounts to be reconciled to a given point in time. |
| 4 | Stock Transaction Reason Codes | Define a number of reason codes to be used when making ad hoc stock adjustments and gain greater insight into the reasons for adjustments. |
| 5 | Quotation Validity Period | Formalise the validity period on quotations as a specific date at which a quotation expires, preventing an out-of-date document from being printed or converted to an order. |
| 6 | Paperless Payroll | Have PDF copies of payslips, P60s and P45s attached to your employees' records |
| 7 | Closed and Prospective Supplier Accounts | Clear the clutter by categorising supplier accounts as Closed, Live or Prospective. |
| 8 | Send Shortcuts to Supplier Invoices and Credit Notes | Help collaboration between users (particularly those working remotely) by including links to documents in emails. |
| 9 | Integration with Weighing Scales | Reduce the occurrence of under- and over- picks by checking weights as orders are packed. |
| 10 | Data Retention Policy for PDF files | Reduce the storage requirements of your axis diplomat system and its backups whilst helping to meet your GDPR data privacy policy requirements. |

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

Upgrading to axis diplomat 2020

Customers with Software Assurance are entitled to an upgrade to their software licence to **axis diplomat 2020** under the terms of their agreement.

To request an update to **axis diplomat 2020**, Software Assurance customers should visit our web site at <u>www.axisfirst.co.uk/software/assurance/</u> and follow the link to request their upgrade. The online request form also allows training to be ordered at the same time.



Details of Enhancements

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



Ø

A standard facility within **axis diplomat 2020**, available to all



A facility within **axis diplomat 2020** that has already been pre-released to those axis diplomat 2018 customers with Software Assurance



A new facility within **axis diplomat 2020** that requires one or more existing optional modules



An optional extra, available as an add-on to **axis diplomat 2020** but not available at previous versions

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Section 1 Kernel (Core) Software

1.1. New axis diplomat Scheduler



Available to all customers with axis diplomat 2020 or above

The Scheduler is the main axis diplomat program from which users load the specific functions that they wish to run.

The axis diplomat 2020 scheduler is a completely new program, re-written from the ground up, to provide a new, contemporary, user interface, with a number of key improvements over the previous scheduler including:

- A number of built-in searches including customers, suppliers and stock.
- Complete flexibility over how panes are arranged.
- The ability to drag-and-drop panes out of the scheduler (ideal for multiple monitor setups).
- Built-in feeds for news and software updates.

A video demonstrating the new scheduler is available at:

| 2 | | DPA (EGPL Limited) | - 0 3 |
|--|---|--|---|
| File Home View Tools Help | | | |
| Customers Sales Quotations Ca Orden Sales | | With Security With Security UP My Monthmin Documents News (68) Updates (62) Monthmin Documents Information Information | |
| Quick Laurch Seanth for function. | Company DRA (BGPL Limited) | Sales Ledger Standard Sales Ledger • Purchase Ledger Standard Purchase Ledger • Date Override 16/09/2020 | 1 |
| Favourites v A X | Neru X | Customen Search 🗸 🖗 🗄 | K Supplex Search v # X |
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| Customers | V P Main Menu | Drag a column header and drop it here to group by that column | Drag a column header and drop it here to group by that column |
| Suppliers Stock | The second s | | |
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| Whats Going On | > F Bill of Materials | Sales Orders Search v 4 1 | C Quotations Search v 9 X |
| en Favourites | > P Naterial Requirements Planning | Q feart Q o v | X Q Search Q Q V X |
| Sales | > F Sales Order Processing | Drag a column header and drop it here to group by that column | Drag a column header and drop it here to group by that column |
| Purchasing | Purchase Order Processing | Reference Y Stock Description Y Customer Name Reference Y Customer Name | Reference Y Stock Description Y Con |
| Manufacturing | | Reference 1 stock Description 1 Reference 1 Customer name | Ref |
| Web Site | E Service Contract Management | | |
| imports | Data Import/Export Facilities | | |
| Month End | > E Supervisor Functions | | |
| Accounts Reporting | III My Dashboard | | |
| Generate Demo Data | E My Monitors | | |
| EPOS | 1 Maintain Printing Defaults | | |
| Stock | > E Kernel Functions | | |
| | E. HELLER CHARLEN | \odot | \odot |

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

1.2. Data Retention Policy for PDF files



Available to all customers with axis diplomat 2020 or above

axis diplomat is now able to automatically remove archived PDF copies of documents that have been generated through Document Designer once they are older than a specified retention period. Previously, these documents were retained indefinitely. A new Supervisor Function, Maintain Data Retention Settings, allows you to specify the minimum number of days to retain these archived documents. You may specify a different retention period for each document type.

| | PDF Documents | Retention | |
|-----------------|----------------------------------|-----------|------|
| | Document | (Days) | |
| | Debtor's letters | 720 | |
| | Delivery notes for ordered goods | 720 | - 67 |
| | Purchase orders | 720 | |
| | Quotations | 500 | |
| | Remttance advices | 500 | |
| | Sales credit notes | 2920 | |
| | Sales Invoices | 2920 | |
| Purchase orders | or ordered goods | 720 | |
| Quotations | | 500 | 1 |
| ittance advi | ces | 50 | |
| | Delete Documents | | |

Documents that fall outside of the specified retention period will be removed as part of background scheduled clean up operations or they may be removed immediately by clicking the "Delete Documents" button within the function.

This new function allows you to reduce your axis diplomat's storage requirements and create smaller backups whilst still ensuring that documents are available to users for the time in which they are likely to be useful.

Please note that, unless you specify otherwise using the Maintain Data Retention Settings function, all archived PDF documents will be retained indefinitely.

1.3. Improved Usability of Monitors



Available to Software Assurance customers with axis diplomat 2018

A significant improvement to the usability of monitors has been released. The periodic refresh of the list of items is now done in the background, meaning that it is still possible to interact with the items shown during the process. The only indication that the monitor is refreshing is a change to the status shown below the tab title and, in general, the user will be unaware that this is happening.

| 4 F | | | Stock Trans | actions | | | | | | |
|----------------------|------------|--|-------------|--------------------|------------|-----------|-----------|-------------------|-------------------|----------------|
| le Help | | | | | | | | | | |
| Outstanding Receipts | [+] | | | | | | | | | |
| Refreshing item List | | | | | | | | | | |
| Stock Reference | Alto | Stock Description | Quantity | Quantity Outsta | Date | Туре | Reference | Stock Location | Total (Cost / | Outst Value |
| ACMEFORK01 | ACMEFORK01 | | 180 | 121 | 05/11/2019 | GDS REC'D | 405 | 0 - Main Depot | 1447.20 | 972 |
| ACMEFORK02 | ACMEFORKO | Refreshing Item List | 145 | 92 | 05/11/2019 | GDS REC'D | 405 | 0 - Main Depot | 1009.20 | 640 |
| ACMEHOE01 | ACMEHOE01 | Heneshing item List | 185 | 120 | 05/11/2019 | GDS RECTO | 405 | 0 - Main Depot | 1783.40 | 1156 |
| ACMERAKE01 | ACMERAKE01 | | 125 | 97 | 05/11/2019 | GDS RECT | 405 | 0 - Main Depot | 1205.00 | 935 |
| ACMERAKE02 | ACMERAKE02 | Acme Standard Grass Rake | 190 | 115 | 05/11/2019 | GDS RECTD | 405 | 0 - Main Depot | 2036.80 | 1232 |
| ACMESET01 | ACMESET01 | Acme Standard Hand Tool Set trowel, fork, potting trowel) | 200 | 111 | 05/11/2019 | GDS REC'D | 405 | 0 - Main Depot | 2680.00 | 1487 |

The ability to continue using the monitor whilst it is refreshing will be particularly useful when using monitors that are listing a large amount of data or for those using monitors across a network, where reloading the data can take noticeably longer than when running in a 'thin client' environment. When not refreshing, the status line indicates the time that the last refresh occurred, giving an indication of how fresh the data shown is.

| | | | | Stock Transa | ctions | | | | | | |
|----------------------|--------|--------------------------|--------------------------|--------------|--------------------|------------|-----------|-----------|-------------------|-------------------|----------------|
| ile Help | | | | | | | | | | | |
| Outstanding Receipts | F | +1 | | | | | | | | | |
| Refresh Completed | \$ 17) | 01 Tuesday 17th De | cember 2019 | | | | | | | | |
| Stock Reference | * | Alternative Reference | Description | | Quantity Outsta | Date | Туре | Reference | Stock Location | Total (Cost / | Outst Value |
| ACMEFORK01 | | ACMEFORK01 | Refresh Completed 17 | 01 Tuesd | | Decemb | or 2019 | | 0 - Main Depot | 1447.20 | 972 |
| ACMEFORK02 | | ACMEFORK02 | Achieven Completed 17 | .ur ruesu | ay 170 | Deceni | Jei 2015 | - | 0 - Main Depot | 1009.20 | 640 |
| ACMEHOE01 | | ACMEHOE01 | Acme Standard Dutch Hoe | 185 | 120 | 05/11/2019 | GDS REC'D | 405 | 0 - Main Depot | 1783.40 | 1156 |
| ACMERAKE01 | | ACMERAKE01 | Acree Standard Rake | 125 | 97 | 05/11/2019 | GDS RECTD | 405 | 0 - Main Depot | 1205.00 | 935 |
| ACMERAKE02 | | ACMERAKE02 | Acme Standard Grass Rake | 190 | 115 | 05/11/2019 | GDS RECT | 405 | 0 - Main Depot | 2036.80 | 1232 |

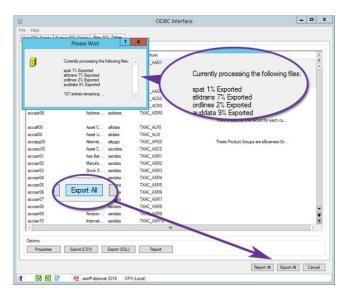
1.4. SQL Export Performance



Available to all customers with axis diplomat 2020 or above

The time taken to make the system fully available, following a software update or data restoration, is significantly reduced.

This has been achieved by improving the performance of SQL bulk export which now employs multi-threading techniques to export multiple tables simultaneously. In realworld tests, this has been seen to reduce the time taken by up to 50% when selecting Export All within the ODBC Interface.



1.5. Audit Trails for Amending Company Parameters



Available to Software Assurance customers with axis diplomat 2018

Audit Trail events are now created every time someone makes a change to axis diplomat's configuration via any of the "Amend Company Parameters" functions on the Supervisor Functions menu.

| | | | wantani sai | es Ledger Par | anneters | | | - 0 |
|--|-----------------------|--------------|----------------|---------------|-----------------------|------------------|----------------------------|--------------|
| Help | | | | | | | | |
| Documentation (cont.) | Enquire | | | Jaimees | Uper defi | | istom Data Languagee | Audt Traf |
| Control Information Custor | ner Martenance | CRM Database | Document Entry | Document Er | try (cort.) | Customer Returns | Stock Full and a store for | Documentatio |
| Sales Ledger Control Information | | | | | | | ~ | |
| edger description | Stanitant Sales | Ledger | | | | 1.1 | / | |
| liominal control account | 85 Dec | tors | 16A | - | - | | | |
| | 1000 | | - | | | | | |
| Default write off account | 63 Dec | Allowed | | | | | | |
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| Default write off account Durrency symbol Durrency Code (190:4127) | GBP | Allowed | () | | dit Trail | | | |
| Currency symbol Currency Code (190: 4127) | GBP | | aties | | dit Trail sumentat | ion | | |
| Sumency symbol | GBP GBP - United K | | () | | | ion | | |

Each of the Maintain Parameters functions now includes an additional tab to show the Audit Trail and events can also be found using the Audit Trail Search function.

1.6. Company-Specific Email Configuration



Available to all customers with axis diplomat 2020 or above

The SMTP Mail Parameters, used by axis diplomat to send emails directly from the system, are now dataset-specific; previously, all companies running on the same server shared the same parameters and credentials.

This now supports, for example, two companies using completely separate email servers (or different accounts with the same provider).

1.7. ODBC Interface now supports SFTP



Available to Software Assurance customers with axis diplomat 2018

The ability to have User SQL Scripts that create custom tables that are automatically uploaded as CSV files to an FTP server has been extended to support SFTP.

SFTP is a secure file transfer protocol that uses SSH encryption to ensure that data is protected in transit. In this respect, this is similar to using https instead of http to access a website.

An additional tick box in the User SQL Script's Properties dialog specifies that the connection should use SFTP instead of FTP.

| | | Table Details | |
|-----------------------------------|--|--|--------|
| | Table Columns | | |
| | SQL Table | | |
| | Name | DemoScript | |
| le Help | Туре | Script Priority 123 | |
| User SQL Scripts System S | Description | DemoScript | |
| User SQL Scripts | Notes | | |
| Table | reves | <u>^</u> | |
| _acc_Debtors DemoScript | | | |
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Please note that the server that you are uploading to must also support SFTP connections.

Section 2 Nominal Ledger & General Accounts

2.1. Nominal Account Reconciliation



Available to all customers with axis diplomat 2020 or above

A new Nominal Account Reconciliation function has been added.

This function allows balance sheet nominal accounts to be reconciled to a given point in time in a similar manner to the Bank Account Reconciliation function, allowing individual items to be manually selected and flagged as reconciled and the reconciliation to be suspended to allow entry of any required correction journals. Nominal Account Reconciliation can be run for any balance sheet account which has been flagged as 'Supports reconciliation' in Nominal Account Maintenance.

| Normal account number P0 Balances Normal account number P0 Currers 17450000.00 Shot gave LMN088UILD Stat of parts 17450000.00 Shot gave LMN088UILD Stat of parts 17450000.00 Shot gave Lund as Buldings Stat of parts 17450000.00 Subdiverse Asset Abality gave Stat of parts Turever Asset Abality gave S0 FXED ASSETS The parts Currers railes account Supports reconciliation V | General Details Transactio | ns Graph Notes | Attachments | | | |
|---|--|--------------------|-------------------------|-----------------|-------------|---|
| Short gave Short | Nominal Account Details | | | Balances | | |
| Spot decoption Land 8 bulding Start of yeer 17450000.00 Edi decoption Land and Buldings Turnover Accent habiting structure No No Accent habiting structure Stort for yeer No Decomption Stort for yeer Stort for yeer Decomption Stort for yeer Stort for yeer Stort for yeer Stort for yeer Stort for yeer | Nominal account number | 70 | | Current | 17450000.00 | |
| Sid description Land and Buildings Jonover Asset Asset V Asset Asset V Asset Asset V Asset Asset V Courter sales account Ladding one Supports reconciliation V | Short game | LAND&BUILD | | Start of period | 17450000.00 | |
| Accent type Accent | Short description | Land & Building | | Start of year | 17450000.00 | |
| Avert helding group Avert helding avert Avert helding group Avert helding avert Avert | Eul description | Land and Buildings | | Turnover | | |
| Laddy grue | Account type | Asset | v | This period | 0.00 | |
| Lubih pop Curter seles account Seports reconciliation | Asset/liability group | Do Even acces | 100 | This year | 0.00 | |
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| Countersales account | Nominal group | | | | - | |
| | | | <u>counter sales ac</u> | count | > | |
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| | Lisbity group Counter sales account Supports reconciliation | | <u>counter sales ac</u> | count | > | |
| | Lisbity group Counter sales account Supports reconciliation | | <u>counter sales ac</u> | count | > | |
| | Lisbilly group Counter sales account Supports reconciliation | | <u>counter sales ac</u> | count | > | _ |
| | Lisbilly group Counter sales account Supports reconciliation | | <u>counter sales ac</u> | count | > | _ |
| | Lisbilly group Counter sales account Supports reconciliation | | <u>counter sales ac</u> | count | > | |

The function also supports Importing Microsoft Excel (.xlsx) and Comma Separated Values (.csv) format reconciliation files.

2.2. Period End Audit Trail



Available to Software Assurance customers with axis diplomat 2018

A new Audit Trail tab has been added to the Period End Status Enquiry function.

| | Period Status Enguiry | - 0 |
|---------------------------|-----------------------------------|--------------|
| e Help | - | |
| Feriod Details Audt Trail | 1 | |
| Audt Tral | | |
| Sales Ledger Period En | (8/19 for 28-02-15 completed | 04-03-2015 - |
| Stock Ledger Period Er | 28-02-19-completed | 04-03-2019 |
| Furchase Ledger Feriod | Carolit 19 for 25-02-18 completed | 67-63-2019 |
| Normal Ledger Period | End 8/19 for 28-02-15 completed | 07-03-2019 |
| Sales Ledger Period En | d 09/ If or 21-03-15 completed | 01-04-2015 |
| Stock Ledger Ferrod En | d for 3 03-19 completed | 01-04-2019 |
| Furchase Ledger Period | End 05 05 for 31-03-19 completed | 09-04-2019 |
| Normal Ledger Period | End 05/11 for 31-03-19 completed | 09-04-2019 |
| Sales Ledger Feriod En | 10/19/0 test | 01-05-2019 |
| Stock Ledger Feriod En | | 01-05-2019 |
| Furchase Ledger Pen | etaile Audit Trail | 08-05-2019 |
| Nominal Ledger Period | etails / doit / dir | 08-05-2019 |
| Sales Ledger Feriod En | d hil | 03-06-2015 |
| Stock Ledger Fleriod En | d for 31-05-1a completed | 03-06-2019 |

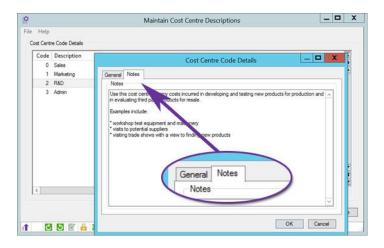
This shows the date, time and User ID for each period end, for each ledger, that has been run on the system.

2.3. Add Notes to Nominal Accounts, Departments & Cost Centres



Available to Software Assurance customers with axis diplomat 2018

It is now possible to add Notes to Nominal Accounts, Departments and Cost Centres. This is ideal for recording useful information on what particular codes are to be used for.



2.4. Nominal Goods Received Not Invoiced (GRNI) Monitor

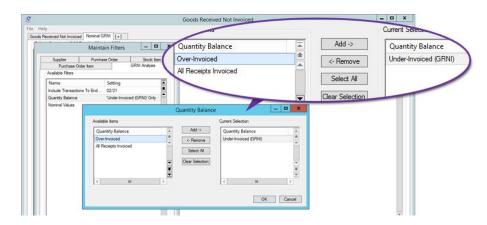


Available to Software Assurance customers with axis diplomat 2018 and the Integrated Stock Ledger module

A new monitor tab has been made available for those using the Integrated Stock Ledger called "Nominal GRNI".

This tab is designed to assist with the calculations for a Nominal Ledger accrual for Goods Received Not Invoiced. It reports the value of differences between the quantities of a stock item received from a supplier and the quantity invoiced as at a period end.

The difference between the Purchase GRNI monitor and the Nominal GNRI monitor is that the Purchase GRNI analyses the balance of the quantities only, whereas the Nominal GRNI analyses the transaction values.



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A variety of filter options exist, allowing the creation of a custom monitor with a number of separate tabs, such as one showing under-invoiced receipts and one showing those that been over-invoiced.

2.5. Goods on Account with Integrated Stock Ledger



Available to all customers with axis diplomat 2020 or above and the Goods on Account module With the release of axis diplomat 2020, enhancements have been made to Goods on Account when used in conjunction with the Integrated Stock Ledger module.

An asset account in the Nominal Ledger can now be used to hold the cost value of goods released to Goods on Account but not yet invoiced.

As goods are released to Goods on Account, the stock cost is journalled from the stock ledger's control account into this account. When a Goods on Account booking is released to invoice, the stock item costs are transferred from this account to the relevant Cost of Sales account. This ensures that the cost of goods is recorded in the Profit and Loss trading accounts in the same period as the sale.

The function Amend Goods on Account Booking has also been extended to allow reduction in booking quantities together with amendment of price and discount for stocked items on systems running with Integrated Stock Ledger.

Section 3 Sales Ledger, CRM & Sales Order Processing

3.1. Quotation Validity Period



Available to all customers with axis diplomat 2020 or above

This enhancement formalises the validity period on quotations, defining a specific date at which a quotation expires, replacing the simple free text field previously available.

It provides a number of benefits, including:

- Preventing an out-of-date document from being printed or converted to an order.
- Showing the validity period on a document which has been calculated automatically rather than relying on the user to free-type appropriate text.
- Uniformly enforcing your organisation's sales policy.

A system parameter defines a default number of days validity for your quotations whilst individual product groups may be defined as having a different validity period. This is particularly useful where, for example, some of your products have more volatile pricing and you cannot guarantee to hold a quoted price for as long as you would normally.

When entering a new document, the user, subject to the appropriate security controls, may elect to specify a shorter validity period but the document's validity period will always be the shortest of the user selected period, the overall system default and the validity period associated with each item's product group.

Repricing a quotation will reset the quotation date and its validity period. Editing a quotation beyond its validity period is allowed but the revised document may not be filed until it has been repriced. Quotations that are beyond their validity period may not be printed or converted to sales orders.

Quotations now also automatically maintain revision numbers. Each time a quotation is printed, the revision number is automatically incremented.

Quotation and Quotation Item monitor tabs, along with the Quotations tab in Customer Enquiry, have been extended to show additional columns for

- Valid until date
- Validity remaining (days)
- Revision Number
- Revision Date

Document Designers has also been extended to allow these fields to be added to document templates. By including the revision number and/or date, you can ensure that customers are referring to the correct version of the quote.

3.2. Reschedule Sales Order Line



Available to Software Assurance customers with axis diplomat 2018

It is now possible to change the due date on an individual sales order line via a rightclick option within any of the following functions:

- Sales Order Line monitor tabs
- Customer Enquiry's Outstanding Order Items tab
- Stock Enquiry's Transactions tab

| | | | | | Sales Order M | Ionitor | | | | | | | | |
|--|-------------------------------|--------------------|----------------|-------------|---|------------------|---------------------|--------------------|--------------------|-------------------|---------------------|---------------------|----------------------|----------------------|
| e Help Delivery Addresses Refresh Complete | | Sales Order Lines | | Orders That | t Can Ship [+] | | | | | | | | | |
| Sales_ Order | Customer Order Num | Stock Reference | Alter Refer | | Item Description | Case Quantity | Quantity Ordered | Quantity Despat | Quantity Outsta | Stock Location | Location On Hand | Location Free St | Location On Order | Total S. Stock O. |
| 18403 | A6909 | ACMEFORK01 | ACME | FORK01 | Acme Standard Fork | | 2 | 0 | 2 | 0 - Main Depot | 121 | 24 | 0 | |
| 19402 | Sales Order En | Inquiry | 1010 | SET01 | Acme Standard Hand Tool Set (trowel, fork, potting trowel) | | 3 | 0 | 3 | 0 - Main Depot | 111 | 14 | 0 | |
| 11 | Amend Sales | Order | | PDE01 | Acme Standard Spade | | 1 | 0 | 1 | 0 - Main Depot | 113 | 12 | 0 | |
| 12 | Reschedule Sa | | | 12 | A-Z Roses 195op | | 6 | 0 | 6 | 0 - Main Depot | 139 | 24 | 0 | |
| 11 | Stock Enquiry | | | 23 | Plumbing Made Early | | 4 | 0 | 4 | 0 - Main Depot | 114 | 29 | 0 | |
| 12 | Customer Eng Purchase Orde | | T | ~ | EGPL Dectric Chainsaw 1 240v. 35cm bar | | | 0 | 1 | 0 - Main Depot | 105 | 26 | 0 | |
| 12 | Refresh | | FS | 13 | Amend Sales Order | | | - | 3 | 0 - Main Depot | 131 | -145 | 170 | |
| 12 | Find Help | | Ctrl+F F1 | 6 | Reschedule Sales Ord | er Item | | | 02 | Main Depot | 0 | -210 | 215 | |
| 12 | Print Preview Export | | | TRM1 | Rom Chack Enquiry | | | - | - | 0 - Main Depot | 168 | -182 | 210 | |
| 14 | 100400 | | | RONT | EGPL Electric Trimmer | | 5 | 0 | 5 | 0 - Main Depot | 177 | -521 | 555 | |

| leneral Detai | is Custo | m Categories | Contacts | Campaigns Delivery Details | Customer Notes Bran | ches Acco | unt Details | Pricing eBusin | ess / EDI | Document Options | Custome | er Price List | Attachments | Traceability | Cal Het |
|-----------------|---------------|-----------------------|-------------------------------|---|--------------------------|---------------------|---------------------|------------------|-----------------------|-----------------------|----------------|---------------------------|------------------|----------------------|-------------|
| Eventa | | ations | Sales Orders | Outstanding Order Items | Service Contract | Stat | ement | Transaction Hist | ory | Rem History | Graphs | Return | Cale | ndar | Audit Trail |
| Customer D | stala | | | | | | | | | | | | | | |
| Account 0 | 1/3004 | GREE | INFING Gr | en Fingers | | | | | | | | | | | |
| Outstanding | Order items | - | | | | | | | | | | | | | |
| Order Number | Order Date | Order Age (Day(s)) | Stock Reference | Description | Customer Order Number | Ordered Quantity | Unit Price (GBP) | | Delivered Quantity | Outstandi Quantity | Weight (kg) | Required Delivery Date | Item Due Date | ltem Due (Day(s)) | Locativa |
| 18401 | 04-09-20 | 0 | EGPLCS3 | EGPL Bectric Chainsaw | 14779 | 5 | 60.86 | 304.30 | 0 | 5 | 0.0000 | 05-09-20 | 05-09-20 | 1 | 0 - Mair |
| | | | Reschedule : | Sales Order Item | | | | | | | | | | | 1000 |
| | 04-09-20 | 0 | Sales Order I Stock Enquir | | 14779 | 3 | 43.46 | 130.38 | 0 | 3 | 0.0000 | 05-09-20 | 05-09-20 | 1 | 0 - Mair |
| 18401 | 04-09-20 | 0 | Find | Ctrl+F | 14779 | 6 | 59.57 | 357.42 | 0 | 6 | 0.0000 | 05-09-20 | 05-09-20 | 1 | 0 - Mair |
| 18401 | 04-09-20 | 0 | Help | FI | EGPLCS3 | EG | PL Elect | ric Chainsa | w | 3 | 0.0000 | 05-09-20 | 05-09-20 | 1 | 0 - Mair |
| 18401 | 04-09-20 | 0 | Print Preview Export | (| Reschedu | le Sales | Order Ite | m | | | 0.0000 | 05-09-20 | 05-09-20 | 1 | 0 - Mair |
| 18401 | 04-09-20 | 0 | B00K004 | Light Fork, Steel Sha A-Z Houseplants 180xp | Sales Ord | er Enqui | y | _ | - | 6 | 0.0000 | 05-09-20 | 05-09-20 | 1 | 0 - Mair |
| 18401 | 04-09-20 | 0 | ACMESET01 | Acme Standard Hand Tool Set (trowel, fork, potting trowel) | 14779 | 4 | 19.12 | 76.48 | 0 | 4 | 0.0000 | 05-09-20 | 05-09-20 | 1 | 0 - Mair |
| 18401 | 04-09-20 | 0 | EGPLSHR1 | EGPL Electric Shvedder | 14779 | 5 | 72.43 | 362.15 | 0 | 5 | 0.0000 | 05-09-20 | 05-09-20 | 1 | 0 - Mair |

| | | | | | | 30 | ock ACMESET | | | | | | | | |
|----------------------|------------|--------------|-----------------|--------------|-------------|--------------------------|-------------------------------|---------|--------|--------------------------|---------------------|-----------------------|---|--|----------------|
| e Help | udt Trail | | | | | 1 | | _ | | | | | - | - | |
| A General Details | | | Vicing and Cost | ioogle Feed | | Additional Pricing | sta Sheet Customer Price L | - 1 | | WebS Price List | Location Details | | | ding Order items ick and Manufacturing Deta | |
| Superneded De | | ract Details | Images | Transactions | Stock N | | Custom Data | Histori | | achments | Issue History Graph | eBusines | | | botional Extra |
| Stock Referen | | | - mayes | | | | | | | | the second second | 1.0000.000 | 101101 | | percent and a |
| At reference | ACMESE | T01 | | | Stock refer | ence ACMESETO | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| item descriptio | | indard Hand | | | | | | | | | | | | | |
| Transactions | | | | | | | | | | | | | | | |
| | | | _ | | A | Account | Location | _ | _ | Location | Outstandi | | Advised | Parent | 1 100 |
| Date | lype | Re | efere | | Reference | | Code | Qu | antity | Description | Quantity | Date Due | Status | Docume. | Pric + |
| 08-08-2 9 | LS ALLOCAT | | 969 | | 01/3224 | MANDALA001 | | - | | | | | and the owner where the owner w | - | - |
| 04-09-2 5 | | Additio | nal Transactio | n Details | | GREENFING | R | esch | edul | e Sales | Order Item | | | | |
| 04-09-2. 5 | | Traceal | bility Details | | | GREEN-S001 | | | | | | | - | | |
| 04-09-2 5 | LS ALLOC | Sales O | rder Enguiry | | | GIL-ENG001 | 0 | | ~ | Non Lepor | 2 | 201052020 | | | |
| 04-09-2. 5 | | Custon | ner Returns En | auirv | | DALE-RE001 | - | - | 6 | Main Depot | 6 | 29-09-2020 | | | |
| 04-09-2. 5 | | | voice Enquiry | | | PARKS-E001 | 0 | | 4 | Main Depot | 4 | 29-09-2020 | | | |
| 04-09-2. 5 | | | ner Enguiry | | | SPIRE CAL | 0 | | 5 | Main Depot | 5 | 29-09-2020 | | | |
| 04-09-2. 5 | | | dule Sales Ord | er Hern | | Z-CAYMOOT | 0 | | 5 | Main Depot | 5 | 29-09-2020 | | | |
| 04-09-2. 5 | | | | | | G. THAM001 | 0 | | 6 | Main Depot | 6 | 29-09-2020 | | | 1 |
| 04-09-2 | | | se Order Enqu | | | DISCOUNDOG | 0 | | 3 | Main Depot | 3 | 29-09-2020 | | | |
| 04-09-2 5 | | | Received Note | | | HG-RESE001 | 0 | | 5 | Main Depot | 5 | 29-09-2020 | | | |
| 04-09-2 5 | | | y Advice Enqu | ry . | | DQ-RESE001 POWER-E001 | 0 | | 2 | Main Depot Main Depot | 2 | 29-09-2020 29-09-2020 | | | |
| 04-09-2 5 | | | er Enquiry | | | DALE-RE001 | 0 | | 3 | Main Depot | 3 | 29-09-2020 | | | - |
| 04-09-2 5 | | Print L | abels | | | Q-CORNO01 | 0 | | - | Main Depot | | 29-09-2020 | | | - |
| 6 | LO ALLOC | Works | Order Enquiry | | | a.com/001 | U | | 2 | man Liepot | 2 | 257052020 | | | > 📼 |
| 1.51 | | Print W | lorks Order | | | | | | | | | | | | 17 (14) |
| No of transact | ions 219 | Find | | | Ctrl+F | lions | v Outstanding | only 🗹 | Inclus | le archive 🗌 | l, | | | | |
| Additional Opt | ions | Help | | | F1 | | | | | | | | | | |
| View Sche | dule | Print Pr | review | | | | | | | | | | | | |
| | - | Export | | | , | | | | | | | | | | |

3.3. Exclude Sales Order and Quotation Lines from Repricing

Available to all customers with axis diplomat 2020 or above

When adding or amending sales orders and quotations, it is now possible to mark individual lines to be excluded from future repricing.

| tem Details Division | e Ordering and Delivery Details Stock Notes Sales History | |
|--|--|--|
| tem Number Item number Stock Details Stock reference Buying reference | 1 E5PLCS1 | Stock Levils Mill Locations Fire stock 16 All Locations On odder 0 Scheduler Suppler Stock Cost Datale |
| Description Specification | EGP, Peter Chansen 30c; 16' be Cu: com band Peter Chansen, subble for donestic and light professional use. | Uht cost 58.72 GBP (Standard) Per 1 EXCH Margin Datals Tade 77,440 GBP Margin (20:00 % (14.68 GBP) price GBP Margin (40:00 % (0.94 56 GBP) |
| Quantity / Priong Quantity Unit price Exclude from reprice Per Item discount Customer discount | 1 73.40 5 1 1 1 1 1 1 1 1 1 1 1 1 1 | Lag set of 1052 2020 |
| Customer discount Net value Create price Override VAT code VAT code | 1000 % 6606 GBP Margin 11.11 % (7.34 GB) | Quantity 4 |

The ability to mark specific stock items as excluded globally from repricing was introduced in axis diplomat 2018 (and pre-released to axis diplomat 2016 customers with Software Assurance). This latest modification extends this capability to allow items to be excluded only on specific documents.

3.4. Sales Order Amendment History



1

Available to all customers with axis diplomat 2020 or above

With this new facility, an axis diplomat report file (.axr) is automatically created and attached to each sales order, when it is created and every time it is amended.

This allows the full history of changes to the document to be viewed at every amendment, including items and quantities, billing addresses and order notes.

| | Amend Sales Order 18719 | × |
|---|---|---|
| | 18719 20200920T142044 ANDY | 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - |
| c Options Open Inset Debte Persme Mal Create from toropia | | |
| 🐼 🖸 🥳 ant#doinnt 2020 DPA (Local) | Page 1 of 2 ESC + Abot Pylo + Previou PyDn + Ned Hore End | Cancel |

The creation of these tracking reports is controlled by an SOP Parameter:

| | Ma | intain SOP Parameters | |
|---|---|---|---|
| e Help | | | |
| ocument Maintenance Document Maint | renance (cont.) Opayo Enquiries Documentation D | ocumentation 2 Documentation 3 Order Release | Prompt Defaults Prompt Suppression User Defaults Audt Trail |
| Document Numbering | | General | |
| Last sales order number 18718 | | Prompt for batch details | |
| Customer order number entry Allow full of | duplication V | Select customers by | Shot Name Search v |
| Credit Status Checking | | Suppress attachments tab Allow SOP attachments when in enquiry mode | |
| During Sales Order Entry the system che the customer selected. Please select the | cks the credit status of | Associated vMerchant website | EGPL (Live) - http://egpl.axisfirst.co.uk/ |
| Credit limit exceeded | Wam User Only V | Suppress supplier prices tab | R |
| Credit terms exceeded | Wam User Only 🗸 | Suppress default quantity Suppress default price | |
| Maximum credit period (days) exceeded | Wam User Only 👻 | Force creation of override product specs | |
| Customer on manual credit hold | Warn User Only Y | Allow entry of quantity in cases | No |
| Apply checks on amendment | | Ignore free stock check | |
| Agents Commission | | Display stock below minimum warning Suppress amendment if packing note printed | |
| Use sales order commission rate | | Offer short name as customer order number | |
| Quotations | | Recent sales week count | 0 |
| Allow quotes for prospects without confin | | Allow deletion of released items | |
| Allow new quotes to be filed as sales ord | | Allow cancellation of picked deliveries | 2 |
| Reset viable due dates when converting | quotes | Suppress cash with order check | |
| Copy quotes when converting | | Delivery charges from delivery methods | |
| Disable amendment of closed opecing | c stock details | Delivery charge applied to | First Release Only V |
| For Order revision h | | elivery charge | |
| | (358) <u>-</u> | ess overall due date tracking | |
| | | Suppress 'discontinued' warning message | |
| | | Suppress 'supply or cancel' orders | |
| | | Outstanding orders warning | No v |
| | | Use site specific stock details | |
| | | Order revision history | 2 |

3.5. Order Item Import by GTIN-13 (EAN-13) Reference



Available to Software Assurance customers with axis diplomat 2018

The Order Item Import feature when entering a sales order allows you to import a file (comma, tab or pipe separated) containing items and quantities. This is often used when customers supply a spreadsheet of the items that they wish to order.

This has now been extended to allow files to be imported that specify the items to be ordered by quoting their GTIN-13 (EAN-13) reference rather than your own stock reference or alternative stock reference.

| | | Enter Sales Order | _ 0 |
|-------------------------------------|--|--|-------------------------------------|
| Enquis | nes. Heln | Order Item Import | - D X |
| New 1 Dustor Dredit Delive | Re Options Import Reiname CUMeen/Vindy/Dealcop/order.cov Import Reiname Reinam | Bonse. | |
| ine | File Preview | | |
| Nun | Reference Quantity 07313681424 0 093682139942 20 079597405318 10 | Map field 7 X Map to Column V Reference Type GTH113 (EM11)) V Column V | a bla a bla a BP) s b W |
| | Mappings Field Mandatory File Column / File Item Reference ✓ Quantity ✓ | Stock Reference | () () () |
| < Dptor B | Live Roce Reformed Type Column Column Reference Type Column Reference | | |
| | | | Preview Cancel |

3.6. Faster Invoice Document Generation



Available to all customers with axis diplomat 2020 or above

Production of invoice PDF files for printing or emailing is now handled by a background process. By eliminating the need to reload the function and process document templates each time an Invoice is generated, the overhead of document production is much reduced.

3.7. Date and Time Specific Customer Price Lists



Available to all customers with axis diplomat 2020 or above and the Date Specific Prices and Discounts module

Customer Price List entries can now be date and time specific.

This allows you to pre-load future pricing agreements and, optionally, specify an end date,

This ensures that special fixed period agreements with particular customers do not get overlooked, meaning that customers continue receiving special agreed pricing for longer than they should and that future price changes come into effect automatically on the specified date.

| | | | Customer TOOLSRUS 01/3005 | | | | | | | ÷. |
|----------------|------------------------|----------------------|--|-------|------------|----------|--------------|------------|----------|-----|
| | | | Amend CSR Entry - 01/3005 - ACMEFORK01 | | | | | 1 | - 0 | 4 |
| | etails Maintain Prices | | Date Specific Price Details 🚽 🗖 | × | | | | | | |
| lustomer / St | tock Prices | | Price Details Audit Trail | | | | | | | |
| Customer | Customer name | Stock Steel | Outomer Details | argin | Unit price | Currency | Discount (%) | Start date | Start ti | il. |
| | Tools 'R Us | 1 | 0005 | | 4.00 | GBP | 0.00 | | | |
| | / | | i | | | | | | | J |
| 01/3005 | Start date | 01/10/2020 🔍 🖛 | Start time | | 9.25 | GBP | 0.00 | 01-10-2020 | | |
| 1 | | | | | | | | | | |
| | Specify end date | ✓ | | | | | | | | |
| | End date | 31/10/2020 🔲 🔻 | End time | | | | | | | |
| | | | | | | | | | | |
| | Comment | October Special Agre | ement | | | | | | | |
| | | | ~ | | | | | | | |
| | | | | | | | | | | |
| | | | Intee V | | | | | | | |
| | | | Price type Fixed V | | | | | | | |
| | | | et price 9.25 | | | | | | | |
| | | | | | | | | | | |
| | | | Per | | | | | | | |
| | | | | - | | | | | | |
| C | | | Start date 01/10/2020 💷 + Start time | | | | | | > | 1 |
| | | | Start date 01/10/2020 🗇 Start time | | | | | | | |
| lptions Add | Amend Delet | te View Import | | | | | | | | |
| A00 | Amend Deer | e view impor | units for a second | | | | | | | |
| | | | Comment October Special Agreement | | | | | | | |
| | | | | - | | | | | | |
| | | | OK Cancel | | | | | | | |

An added benefit is that, since the maintenance function shows all previous data and time specific pricing rules for this product, for this customer, it is easy to see, at a glance, what pricing agreements you may have had with this customer in the past.

3.8. Customer Price List Monitors

V

Available to all customers with axis diplomat 2020 or above

A new monitor tab type has been added, Customer Stock Price Details, which lists Customer Price List entries.

| Stock Reference | Customer Short Name | Customer Account | Customer Name | Customer Item Reference | Customer Item Description | Туре | Price | Price Per | ltem Discou | Standard Product Discount | Unit Margin (%) | 1 |
|----------------------|-------------------------|---------------------|------------------|----------------------------|--|-------|--------|--------------|----------------|---------------------------------|-----------------------|---------|
| ACMEFORK01 | TOOLSRUS | 3005 | Tools 'R Us | EGPLFORK01 | Acme Standard Fork | Fixed | 4.00 | 1 | 0.00% | Discourie | (-4) | ï |
| ACMEFORK01 | GIANT-P001 | 4001 | Giant Planet Co. | ACMEFORK01 | Acme Standard Fork | Fixed | 10.85 | 1 | 0.00% | | | 1 |
| ACMEFORK02 | GIANT-POOT | 4001 | Giant Planet Co. | ACMEFORK02 | Acme Light Fork | Fixed | 9.40 | 1 | 0.00% | | | |
| ACMEHOE01 | GIANT-P001 | 4001 | Giant Planet Co. | ACMEHOE01 | Acree Standard Dutch Hoe | Fixed | 13.01 | 1 | 0.00% | | | |
| ACMERAKE01 | GIANT-POOT | 4001 | Giant Planet Co. | ACMERAKE01 | Acme Standard Rake | Fixed | 13.01 | 1 | 0.00% | | | |
| ACMERAKE02 | GIANT-P001 | 4001 | Giant Planet Co. | ACMERAKE02 | Acme Standard Grass Rake | Food | 14.46 | 1 | 0.00% | | | |
| ACMESET01 | GIANT-P001 | 4001 | Giant Planet Co. | ACMESET01 | Acme Standard Hand Tool Set (trowel, fork, p | Fixed | 18.08 | 1 | 0.00% | | | |
| BOOK001 | GIANT-P001 | 4001 | Giant Planet Co. | BOOK001 | A-Z Weeds 214pp | Fixed | 7.96 | 1 | 0.00% | | | |
| BOOKD02 | GIANT-POOT | 4001 | Giant Planet Co. | BOOK002 | A-Z Roses 195pp | Fixed | 7.95 | 1 | 0.00% | | | |
| BOOKD03 | GIANT-P001 | 4001 | Giant Planet Co. | BOOK003 | A-Z Fruit Trees 270pp | Fixed | 7.96 | 1 | 0.00% | | | |
| BOOK004 | GIANT-POOT | 4001 | Giant Planet Co. | BOOK004 | A-Z Houseplants 180pp | Fixed | 7.95 | 1 | 0.00% | | | |
| BOOKD12 | GIANT-P001 | 4001 | Giant Planet Co. | BOOK012 | Roses Made Easy | Fixed | 4.76 | 1 | 0.00% | | | |
| BOOK013 | GIANT-P001 | 4001 | Giant Planet Co. | BOOK013 | Fruit Trees Made Easy | Fixed | 4.76 | 1 | 0.00% | | | |
| BOOK017 | GIANT-P001 | 4001 | Giant Planet Co. | BOOK017 | Weeding Made Easy | Fixed | 4,76 | 1 | 0.00% | | | |
| BOOK021 | GIANT-P001 | 4001 | Giant Planet Co. | BOOK021 | Decorating Made Easy | Fixed | 4.76 | 1 | 0.00% | | | |
| BOOK022 | GIANT-P001 | 4001 | Giant Planet Co. | BOOK022 | Re-wing Made Easy | Fixed | 4,76 | 1 | 0.00% | | | |
| BOOK023 | GIANT-P001 | 4001 | Giant Planet Co. | BOOK023 | Plumbing Made Easy | Fixed | 4.76 | 1 | 0.00% | | | |
| EGPLCS1 | GIANT-P001 | 4001 | Giant Planet Co. | EGPLCS1 | EGPL Petrol Chainsaw 33cc, 16" bar | Fixed | 78.30 | 1 | 0.00% | | | |
| EGPLCS2 | GIANT-P001 | 4001 | Giant Planet Co. | EGPLCS2 | EGPL Bectric Chainsaw 240v, 35cm bar | Fixed | 64.68 | 1 | 0.00% | | | |
| EGPLCS3 | GIANT-P001 | 4001 | Giant Planet Co. | EGPLCS3 | EGPL Electric Chainsaw 240v, 30cm bar | Fixed | 57.87 | 1 | 0.00% | | | |
| EGPLMOW1 | GIANT-POOT | 4001 | Giant Planet Co. | EGPLMOW1 | EGPL Electric Mower 12" plastic blades | Fixed | 50.00 | 1 | 0.00% | | | |
| EGPLMOW2 | GIANT-P001 | 4001 | Giant Planet Co. | EGPLMOW2 | EGPL Electric Mower 12" metal blades | Fixed | 62.44 | 1 | 0.00% | | | |
| EGPLMOW3 | GIANT-P001 | 4001 | Giant Planet Co. | EGPLMOW3 | EGPL Rotary Mower 38cm cutting width | Fixed | 99.34 | 1 | 0.00% | | | E |
| EGPLMOW3 | | 4001 | Giant Planet Co. | EGPLMOW4 | "Wimbledon" Electric Mower 5-blade steel cu | Food | 136.14 | 1 | 0.00% | | | Tel let |
| EGPLMOW3 EGPLMOW4 | GIANT-P001 | | | | | | | | | | | T |

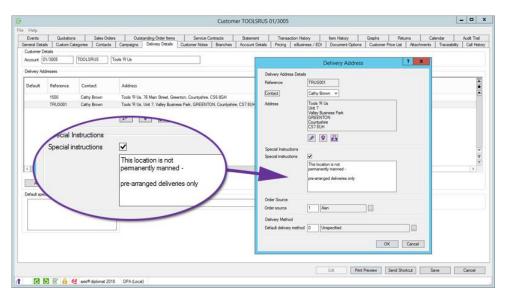
In addition to allowing all of the same filters normally available for customers and stock items (such as customer group, order source code or product group), the monitor can also be filtered by price type (for example, to just show fixed prices or those configured as margin on current cost). It can also be filtered by the date last amended. This makes it a particularly useful tool for ensuring that any special agreed prices are kept up to date, helping to maintain margins.

3.9. Default Special Instructions by Delivery Address



Available to Software Assurance customers with axis diplomat 2018

It is now possible to define separate Default Special Instructions for each additional Delivery Address held against a Customer Account.



These Special Instructions are then used when entering a Sales Order for that Delivery Address but they may then be subsequently amended for that specific Sales Order.

| le Englishe Help Ganzee Details Ganzee Notes Generae Datalis Documere Notes Rem Details Terms and Addressen New Sales Order Dutters metersons (21,0005 tools RU la Documere News (21,0005 tools RU la Docume | | | | | | E | inter Sales | Order | | | | | | | - 0 |
|---|-----------------------|---|---|--------------|------------------|------|---------------|---------|----------|----------|----------|------------|---------|-------------------|-----------------|
| New Stee Oder VValue Castomer reference 01/3005 Toude the M Image: Toule RU M Castomer reference 01/3005 Castomer reference 01/3005 Castomer reference 01/3005 Castomer reference 01/3005 Projects to Details Special inductions Castomer Cas | e Enquiries Help | | | | | | | | | | | | | | |
| Duttore reference 91/2005 feel R LA Image: Reference 91/2005 feel R LA Image: Reference 91/2005 Still R LA Image: Reference | ustomer Details Custo | mer Notes Ge | neral Details Document Notes Item Details Ten | ms and Addre | esses Atta | chme | nts Payment I | Details | inks | | | | | | |
| Dedutit 1000 GP Curret balance 10152.60 GP VX E GP | New Sales Order | | | | Values | | | | | | | | | | |
| Test 00 GBP Invoice to Details Process to Details Centerne Default Catrly Brown Or Both Detwore to Details Detwore for encloses Centrals Detwore for encloses Detwore to Details Detwore for encloses Centrals Detwore for encloses Detwore for encloses Centrals Detwore for encloses Detwore for encloses Centrals Detwore for encloses Detwore for encloses Central Catrly Brown Financeal Dreador (Man Contral) Detwore for encloses Central Catrly Brown Financeal Dreador (Man Contral) Detwore for encloses Central Catrly Brown Financeal Dreador (Man Contral) Detwore for enclose for encloses Central Catrly Brown Financeal Dreador | Customer reference | 01/3005 | Tools 'R Us | i | Net | 0.00 | | GBP | Cost | 0.00 | GBP | Margin 0.0 | D | % (0.00 GBP) | |
| Wrote to Details Wrote to Details Outwore Details Address label Max Carly Brein Operation Otherey Address Detwore to Details D | Credit limit | 10000 | GBP Current balance 10152.60 | GBP | 163. | | | | Weight | 0.0000 | kg | | | | |
| hvidos to Statement Address Cortext Context Order Default Catity Brunn Address label Mor Ging Toom Toom Toom Toom Toom Toom Toom Too | | | | | 1 | - | | | | | | | | | |
| General Cuterer Orbadi, Cefty Brown Image: Cefty Brown Address label Image: Cefty Brown Image: Cefty Brown Image: Cefty Brown Image: Cefty Brown Image: Cefty Brown Image: Cefty Brown Image: Cefty Brown Image: Cefty Brown Deliver to Details Image: Cefty Brown Image: Cefty Brown Deliver to Details Image: Cefty Brown Image: Cefty Brown Cortead Engly Brown Image: Cefty Brown Cortead Cefty Brown Image: Cefty Brown Cortead Engly Brown Image: Ce | | - | | 1.55 | | | | | | | | | | | |
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| Address ibidel | Contact | Customer | Default (Cathy Brown) 🗸 🕑 | | | | | | | | | | | | |
| Delver to Otata Delver to Delver | Address label | Tools 'R U 76 Main Si Greenton Countyshir | ls treet | | | | pre-arranged | | only | | | | | | |
| Delvers to Delvers Addess v Develop Memory Develop Memory Delvers to Delvers to Delvers Addess v Develop Memory Develop Memor | | | 1 | 1.050 | | | | | 1 | | | | | | |
| Cortad Corta Carly Bown France Detectory Man Cortax V C Corta Address Iabel Res Carly Bown France Detectory Man Cortax V C Corta Los 7 Stars Cortex To the Stars Star Cortex To the Stars Stars Cortex To the Stars Stars Cortex To the Stars Stars Cortex To the Stars Stars Cortex To the Stars Stars Stars order release mote Cortex delivery (inst until al stock available) v | Deliver to Details | | | | | | | | - | | | | | | |
| Address label His Carly Brown His Carly His His Carly His | Deliver to | Delivery A | ddress 👻 Browse | | | | | CCI | al Inst | ructions | | | | | |
| Tows R the permanently manned - contention This location is not permanently manned - pre-arranged deliveries only Image: Sales order release mode Image: Sales order release mode | Contact | Cathy Bro | wn (Financial Director) (Main Contact) 🛛 🕑 🖉 | | | | | Specia | al instr | uctions | As Belo | w v | | | |
| Sales order release mode Single delivery (wait until all stock available) | Address label | Tools 'R U Unit 7 Valley Bus GREENTO Countyshir | ineos Park N | | | (| | | | | perman | ently man | ned - | |) |
| | | 1 9 | + | | | | | | | | pre-arra | inged dell | venes | July | |
| | Sales order release m | ode Single del | very (vat until all stock available) 🗸 🗸 | | | | | - | _ | | | | | | |
| File Sales Order File Quotation Abandon Sales | | | | | | | | | | | | File Sale | s Order | File Quotation Ab | andon Sales Oro |

3.10. Urgent Quotation Notes



Available to Software Assurance customers with axis diplomat 2018

It is now possible to flag Document Notes on Quotations as Urgent.

| | | | | | Ame | end Quotatio | n 16727 | | | | | | | |
|----------------------|---------------|--------------------------------|-------------------|---------------|-------|------------------------|------------|--------|-------------|-----|--------|-------|--------------|----|
| Enquiries Help | > | | | | | | | | | | | | | |
| stomer Details Cus | tomer Notes G | ieneral Details Document Notes | tem Details Ter | ems and Addre | ses A | tachments Links | Audit Trai | | | | | | | |
| | | odfied by ANDY on 31-07-2019 a | # 13.04 | | Value | | | | | | | | | |
| Customer reference | 01/3005 | Tools 'R Us | | i | Net | 1056.97 | GBP | Cost | 904.00 | GBP | Margin | 14,47 | % (152.97 GB | P) |
| Credit limit | 10000 | GBP Current balance 10 | 0152.60 | GBP | VAT | 211.39 | GBP | Weight | 0.0000 | kg | | | | |
| | Lange and the | | | | Total | 1268.36 | GBP | Suppre | es totals 🔲 | | | | | |
| Document Notes | | | | | | | | | | | | | | |
| ictes type Urgent | v | | | | | | | | | | | | | |
| | | | (| No | | ent Notes /pe Urger | nt V | |) | | | | | |
| | | | | | | | | | | | | | | |

As with other items that support Urgent Notes, opening a quotation that has Document Notes marked as Urgent will automatically display the notes to the operator.

| Notes | Quotation | Deliver to Contact | Invoice a |
|---|--------------------------|-----------------------|-------------------------------|
| | | | |
| | Cathy Brown (Fina | Cathy Brown (Fina | Contact a |
| te was based on a special purchase agreed with the suppler. If the customer does not order within the original timeframe, | Sathy Brown (Final | Cathy Brown (Fina | Cathy Br |
| go back to the supplier and re-check whether the orginal deal still stands before extending the validity of this quote. | | | Biten Bro |
| | Par Power Protect | and a second dramatic | Cathy Bro |
| 1 | | | Cathy Br |
| | | | Cathy Bro |
| | | | Cathy Br |
| | | | Cathy Br |
| Quotation Notes (Urgent) | 4 | | |
| | | | |
| | | | 5 |
| | | | |
| | | | |
| I purchase agreed with the supplier; if the customer does not order within the | e original timefram | e | > |
| | Quotation Notes (Urgent) | han Bown Fluch. | Pan Bown Puch. Ben Bown Puch. |

3.11. Allow Deletion of Customer Contacts



Available to Software Assurance customers with axis diplomat 2018

It is now possible to permanently delete unused Customer Account Contacts rather than mark them as left.

This is ideal for situations where contacts have been added in error - for example, after adding a contact for "Jim Brown" before realising that this is the same person as the existing "James Brown" contact.

| 10000000000 | | | | | | | | Custo | mer TOOLSRUS (| 1/300 | 15 | | | | | | |
|----------------------------------|-------------------|----------|----------------------------------|------------|----------------|--------------------------|----------------|----------------------|---|-------|-------------------------|-----------------|----------------|--------------------------------------|------------------------|-------------------------|---------------------|
| Help | | | | | | | | | 144 | | | | | | 13. X | | |
| Events Quota sneral Details C | tions ustom Ca | | Contact | | ing Order Iter | ns Serv Iverv Details | Customer Notes | Statement Branche | Transaction Histor s Account Details | | tem History eBusines | Graphs | Site Details | SolarWinds RM Customer Price List | Returns Attachments | Calendar Tracesbilty | Audit Tr Call He |
| Customer Details | ustom Ca | segones | Consecs | * Camp | aigna De | Ivery Details | Customer Notes | s branche | s Account Lietais | mong | 2 ecusines | EVEDI Do | cument Options | Customer Price List | Attachments | Insceability | Las Hs |
| Account 01/3005 | - | TOOL | 0110 | Tools 'R L | la. | | 1 | | | | | | | | | | |
| account [analous | | 1000 | 51105 | 10000 11 0 | e | | | | | | | | | | | | |
| Contacts | | | | | | | | | | | | | | | | | |
| Display Name | . I. | Job Titl | e | Status | Joined Date | Left Date | Telephone | Number | Extension Mobile N | umber | Notes | | Default | Email | | Email | shots |
| Andy Brown | | Managin | g Director | Active | 15-09-201 | | 01432 55566 | 6 | | | | | | ab@cheap.net | | 1 | 1 |
| Brtan Brown | - 34 | Purchas | ng Manager | Active | | | 01432 55566 | 6 | | | Brian is And | y's Younger Br | other | brian brown@toolsr. | s.co.uk | 1 | |
| athy Brown | | Financia | Director | Active | 03-12-199 | 5 | 01432 55566 | 6 | | | | | • : | cathy brown@toolar | us.co.uk | 1 | |
| john Keele | | Wa | View Con Amend C Create Ne | | t | | 3566 | 6 | | | | | | john keele@toolar.s | i co uk | 1 | |
| | | | Delete Co | intact | | | | | | | | | | | | | |
| | | | Print Labe Add to M | contact as | | ard (vcf) | | F | | - | ena Cor | tact Contact | | | | | |
| | | | | ault Conta | | | | 1 | | | | | | | | _ | |
| | | | Find | | | | Ctrl+F | | | Dele | te Cont | act | | | | | |
| | | | Help | | | | F1 | | | ÷ | | | | | | | - |
| | | | Print Pres | Anna | | | | | | Send | d e-mail | | | C. C. C. | - | | |
| | | | Export | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | 2 |

You will be able to delete contacts only if the contact:

- Has not been used as the document, "invoice to" or "deliver to" contact on a sales order, quotation or service contract.
- Is not the call contact for any outstanding or completed CRM call.
- Is not a member of a Campaign.
- Is not the owner or user of a Customer Asset.

The ability to delete contacts is controlled by Security Permissions and so can be removed on a user, group or system-wide basis:

| t Help Disjects | Penissions |
|---|--|
| Al Phracy Objects Sales Ledger Contacts Contacts Colls Moreceeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeeee | Allow Dary This controls access to customer contact mantenance. Read |
| Credit Not Goods On Archive Data Customer Quote | Advanced Permaions Rule Type Valu Highest Val Read Mod Create Delete There are to fermit to show Image: State of the |
| Song Contacts Song Calls Calls Call Booing Partiae Booing Partiae Loger Booin ciger Booing Booing Monton | And Amond Come Delete Vi |

3.12. Automatically Adjust VAT on Delivery



Available to Software Assurance customers with axis diplomat 2018

axis diplomat is now able to automatically adjust the VAT rate on delivery charges, changing the VAT rate to 0% when all of the items on the order are zero-rated.

The functionality is enabled via a Sales Ledger Parameter:

| | | | | Maintain Sale | es Ledger Parameters | | | |
|-----------------------------|-----------------------------|-----------|--|--|------------------------|--------------------|----------------------------|---------------|
| Help | | | | | | | | |
| Documentation (| (cont.) | Enquiries | | General | eBusiness | User defaults | Custom Dat | a Languages |
| Control Information | Customer Maintenance | CRM | Database | Document Entry | Document Entry (cont.) | Customer Returns | Stock Reference Priorities | Documentation |
| Inclusions / Exclusions | | | Macellary | sous | | | | |
| Deplay case quantity | | | Unit or line | price calculation | Line v | | | |
| Enable price per | | | | y of decimal places on s | sales prices | | | |
| Price at | | | | y of decimal places on s es/credit notes in bin ref | | | | |
| Customer discount % | | | | t of sales payment/refur | | | | |
| Cash discount % | | | | les payment/refund pro | | | | |
| Suppress SOP message | e during invoice entry | | | l'inclusive prices on PO | | | | |
| Suppress 'due in' details | | | | inclusive prices on POS | | | | |
| Display earliest 'due in' d | | | | customer/stock price | | | | |
| Suppress default batch | | | | n-returnable tem | | | | |
| Suppress default departs | | | | ash with order' for invoic | | | | |
| Suppress default order s | | | | I code on delivery char | | | | |
| Suppress default our ref | | | | | Ann (G) | | | |
| Suppress default quantit | ty . | | 1. | ecial Instructions | | | | |
| Suppress default price | | | Special in | structions | | | | |
| Suppress 'Deliver to' add | | | | | | | | |
| Suppress proft margin d | | | | | | | | |
| Suppress profit margin d | | | | | | | | |
| Suppress previous sale | | | | an manufacture | | | | |
| Suppress item customer | | | | ebit Card Details | | | | |
| Suppress favourtes faci | ity | | | cardholder name | | | | |
| Previous sale details | | | Mandator | r card verification code | | | | |
| Use parent sales order fi | or previous sale cost compa | rison 🗌 | Review C | ptions | | 011111010000-010-0 | | |
| | | | Maximum | Adjust | VAT code on delive | on obaraoa | | |
| | | | 1.01.00 | Aujusi | VAT CODE ON DEIVE | ery charges | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | 1000 |
| | | | | | | | Edit Sa | ve Cancel |
| | | | | | | | | |

Once enabled, an additional tick box appears on stock records to indicate that they are a Delivery Charge item and that their VAT rate should be adjusted, depending on the other items on the shipment.

| | | | | | Stock CARR | IER | | | | | > |
|-----------------------------------|-------------------|---------------------|-------------|------------------------|------------------------|---------------------------|----------------|-------------|----------------|-------------------|-----------------|
| Help | | | | | | | | | | | |
| | | ibutes Custom D | | | | iness Details Links | Optional Ex | | | gle Feed Data S | |
| eneral Details Stock Reference | | Fricing and Costing | Discounting | and Additional Pricing | Customer Price List S | appler Price List Stock | bins Stock i | and Manufac | turing Details | Superseded Detain | Contract Detail |
| At reference | CARRIER | | | Stock reference | CARRIER | | | | | | |
| | | | | | creation | | | | | | |
| item description | Delivery by C | mer | | | | | | | | | |
| Pricing | | | | | Costing | | | | | | |
| Sales group | 0 | Macellaneous | | | Cost per | 1 | | | | | |
| VAT group | 1 | Standard Rate | | | Standard cost | 6.00 | GBP | Updated | 180215 | | |
| Value added tax | Exclus | ive Y | | | Current cost | 6.00 | GBP | Updated | 180215 | | |
| Delivery item | | - | | | Transfer cost from ord | | | | | | |
| Commissionable i | | | | | Invoice cost amendm | | | | | | |
| Quantity on invol | ce Print | v | | | Cr Note cost amendm | ert 🗌 | | | | | |
| Price per | 1 |] | | | Delivery item | | Ň | | | | |
| Sell in | Units | | | | Delivery item | | | | | | |
| Retail price | 9.00 | GBP | | | Type of Supply (VAT) | | | | | | |
| Trade price | 9.00 | GEP | | | Type of supply | Goods | ~ | | | | |
| Default price | Retail | | | | Commodity code (CN/ | TARIC) | | | | | |
| Now price amen | Sector Contractor | - | | | | | | | | | |
| Exclude from rep | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | Edit | Print Pre | view S | and Shortout | Save | Cancel |
| | | | | | | | | | | | |

3.13. Monthly Schedule in Sales Order and Quotation Monitors

Available to all customers with axis diplomat 2020 or above

14 new columns have been made available in a number of monitor tabs including:

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- Sales Orders
- Sales Order Items
- Quotations
- Quotation Items

These columns show the value due in each of the next twelve months, with additional columns for overdue and beyond twelve months.

These columns allow the monitors to be used to provide a quick and easy forecast of expected revenue over coming months. This is also helped by each column being totalled at the bottom of the monitor tabs.

| Sales | Order | Customer | Customer | | Outstanding Overdue | Outstanding Value Sept 2020 | | Outstanding Value Nov 2020 | Outstanding Value Dec 2020 | Outstanding Value Jan 2021 |
|----------------|----------|--------------|------------------------------------|----------|------------------------|--------------------------------|-------------|-------------------------------|-------------------------------|-------------------------------|
| | On Hold | Account | Name | | (GBP) | (GBP) | | (GBP) | (GBP) | (GBP) |
| 18369 | | 3224 | Mandalay Supplies Co. | | 1299.55 | | 1 | | | |
| 18361 | - | - | | _ | | | | | | |
| 184 | Outstar | nding Valu | e Outstandin | g Value | Outstandin | g Value | Outstanding | | | |
| 6 | | Sept 202 | 0 0 | oct 2020 | N | ov 2020 | Dec | | | |
| 18 | - | (GBF | | (GBP) | | (GBP) | | · | | |
| 18409 | - | (001 | 1 | (001) | | (001) | | | | |
| 18410 | | 3110 | | _ | | | 1859.35 | | | |
| 18417 | | 3874 | GIL Engineering Inc. | | | | 951.37 | | | |
| 18418 18424 | | 3039 3442 | AGI Worldwide Inc. Mandalay Red | | | 1010.09 2323.59 | | | | |
| 18425 | | 3842 | DWP Retail Limited | | | 2323.53 | | 730.00 | | |
| 18426 | | 3232 | Apollo & Sons Technology | 0000 | | | 2545.24 | 130.00 | | |
| 18427 | | 3492 | Dale Retail Patners | | | | | 1005.73 | | |
| 18429 | | 3462 | Exe Technology Inc. | | | 478.56 | | | | |
| 18431 | | 3518 | Mega Trading Co. | | | 1124.29 | | | | |
| 18433 | | 3567 | JD Developments | | | 592.75 | | | | |
| 18437 | | 3858 | Ward Red Inc. | | | 2049.85 | | | | |
| | 891.73 | 1 | 198186.69 | | 5365.96 | 173 | 6.73 | | | |
| 18442 18444 | Oliveran | 3766 | Black Tools Limited | _ | ~ | 1746.91 | | | | |
| 18448 | | 3561 | PYW Logistics Co. | | 2 | 1619.29 | | | | |
| | | | | | 11891.73 | 198186.69 | 5365.96 | 1736.73 | 0 | 0 |
| | | 10 | | | | | | | | > |
| Filter | Tab Opt | No. | | | | | | | | en Count 158 |

On systems with the Foreign Currency module, two sets of columns are available; one set of figures are provided in the documents own currency and one set in the base currency.

3.14. New Companies House Lookup



Available to all customers with axis diplomat 2020 or above

The facility to lookup a company's information based on its registration number has been changed to use the latest government portal, https://www.gov.uk/getinformation-about-a-company

This can be accessed by clicking the button next to the registration number on the Account Details tabs in Customer Enquiry and Supplier Enquiry:

| | | | | | Custon | ner TOOLSRUS | 01/3005 | | | | | | | - • × |
|--|----------------------|-----------|-------------------|-------------------|-----------|-----------------|---------|-----------------|----------------|-----------|----------------|-------------|--------------|--------------|
| Help | | | | | | | | | | | | | | |
| Events Quotations | | | nding Order Items | Service Con | | Statement | | tion History | Item History | Graphs | Retur | | lendar | Audit Trail |
| General Details Custom Cat Customer Details | egories Contacta | Campaigns | Delivery Details | Customer Notes | Branches | Account Details | Pricing | eBusiness / EDI | Document Optio | ns Custor | ner Price List | Attachments | Traceability | Call History |
| | TOOLSRUS | la 18 Us | | - | | | | | | | | | | |
| Account 01/3005 | TOOLSHUS | 88 1K US | | | | | | | | | | | | |
| Account Details | | | | Mscellaneous | | | | | | | | | | |
| Account classification | Standard UK Customer | 11 | | Order number re | | | | | | | | | | |
| Company registration number | 2370905 | | Lookup | Call special stat | v# | 1.C | | | | | | | | |
| | | | | Industry code | | | | | | | | | | |
| VAT Details | - | | | Comments | | | | | | | | | | |
| Country | United Kingdom | | | | | | | | | | | | | |
| EC Country Code | GB | | | | L | | | | | | | | | |
| VAT registration number | 515859912 | 100 16 | eck for existing | Stool Transfer | Details | | | | | | | | | |
| EORI number | - | | | Stock transfer a | account 🗌 | | | | | | | | | |
| | | - | Cherry Street | 100 | | | | | | | | | | |
| Nature of Transaction | 0 0 | Compa | ny registratio | n number | 23709 | 05 | | | Lookup | | | | | |
| Account Operation | | - | 14 9 | | | | | | | - | - | | | |
| Short term credit rating | 65 | | | | _ | | _ | - | | | | | | |
| | | | | | | | | | | | | | | |
| Long term credit rating | 75 | | | | | | | | | | | | | |
| Credit rating last updated date | 240418 | | | | | | | | | | | | | |
| Worst debt period | 811 | | | | | | | | | | | | | |

3.15. Search added for Delivery Addresses in Sales Order Maintenance



Available to Software Assurance customers with axis diplomat 2018

A search facility has been added to the Enter/Amend Sales Order functions, as well as those for Quotation and Service Contract maintenance, when the "Deliver to" option is set to "Account Address".

| | | Amend Sales Order 18401 | |
|-----------------------|--|---|--|
| Enquiries Help | | | |
| tomer Details Cust | omer Notes General Details Document Notes Item Details | Tems and Addresses Attachments Payment Details Links Audt Trail | |
| | ar 18401 - Last modified by ANDY on 04-11-2019 at 14:03 | Values | |
| Customer reference | 01/3004 Green Fingers | Net 2600.72 GBP Cost 1634.09 GBP Margin 37.17 % (966.63 GBP) | |
| Credit limit | 1000 GBP Current balance 0.00 | GBP VAT 513.77 GBP Weight 0.9000 kg | |
| Statem S | | | |
| | | Total 3114.49 GBP | |
| invoice to Details | | Special Instructions | |
| nvoice to | Statement Address 🗸 | Special instructions 🛛 Aa Below 🛩 | |
| Contact | Mr G Green [Main Contact] | | |
| | | | |
| Address label | Mr G Green Green Fingers 12 High Street | | |
| | 12 High Street Greenton | | |
| | Countyshine C56 82X | | |
| | C36 62A | Terra | |
| | | Account Address | |
| | | | |
| Deliver to Details | | Seen [Main Contact] | |
| Deliver to | Account Address 👻 🔍 | | |
| Contact | Mr G Green [Main Contact] 🗸 💽 | | |
| Address label | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | A 8 + | | |
| Sales order release m | ode Single delivery (wat until all stock available) | ~ | |
| | | | |
| | | | |
| | | | |
| | | | |

When clicking the Search icon, a full search dialog is offered, making it much easier to find the appropriate account.

| | | eral Details Document Notes | | | | Payment Det | ila Linka / | udit Trail | | | | | |
|-------------------------|---------------------------|----------------------------------|-----------------------|---|-------------|-------------|-------------------------------|---|---------|---------------------|-------------------|---------------------|----|
| | | fied by ANDY on 04-11-2019 at | | Value | | | | provide the second s | 10000 | CONTRACTOR PROPERTY | 1.000-0001 | | |
| Customer reference | 1/3004 | Green Fingers | | i Net | 2600.72 | G | BP Cost | 1634.09 | GBP | Margin 37.17 | 14 (966 | 8.63 GBP) | |
| Credit limit 1 | 000 | GBP Current balance 0.00 | GB | P VAT | 513.77 | G | BP Weight | 0.9000 | kg | | | | |
| | | 100 | | Total | 3114.49 | G | BP | | | | | | 19 |
| Invoice to Details | | | | | | | | Search | | | | × | |
| invoice to | Statement A | ddress v | Search Details | | | | | | | | | | |
| Contect | Mr.G.Gman | [Main Contact] ~ C | Search text GREEN | 6 | | | | | | | | Q X D | |
| | - 1 C | pren conset | Search Results - 46 m | atches | | | | | | | | tends, month balled | |
| Address label | Mr G Green Green Finge | s . | | 1 | | Customer | | 20101 | Account | Customer | Customer | Custra | |
| | 12 High Stre Greenton | et i | Match Type | Match Te | | Number | Customer N | | Туре | Group Code | Group Description | | |
| | Countyshire CS6 8ZX | | Short Name | GREENFIN | IG | 01/3004 | Green Fingen 12 High Stree | | Live | 1 | Garden Centres | - | |
| | | | Short Name | GREENTH | ING | 01/3006 | Green Things | | Live | 3 | DIY Stores | | |
| | # 9 | | 0.000000000 | | | | 32 9. Cuthbe | | | | | | |
| Deliver to Details | | | Short Name | GREEN-80 | 01 | 01/3029 | | n Research Part | Live | 5 | High St Retail | | |
| Deliver to | Account Ad | žess v 🔍 | Shot Name | GREEN-AD | 121 | 01/2020 | Unit 47] Green Apollo | Instead | Live | | Garden Centres | | |
| Contact | Mr G Green | [Main Contact] v C D | Scot ridine | GHEENMA | NI. | 003030 | Unit 17 | Duiteo | Die . | 83 | Cardeo Centres | | |
| Address label | - | insurround title of | Short Name | GREEN-SC | 101 | 01/3056 | Green Supple | 16 | Live | 5 | High St Retail | | |
| | | | | 540350 58900 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 - 1939 | | 10010000000 | White House | | | 101 | | | |
| | | | Shot Name | GREEN-W | 001 | 01/3083 | Green World Davis House | Limited | Live | 2 | Mail Order | | |
| | | | Short Name | GREEN-GO | 001 | 01/3103 | Green Garder | com | Live | 1 | Garden Centres | * | |
| | 1000 | press . | < | 10 | | | | | | | | > 🔳 | |
| | 9 | (±) | | | 8 | | | | | | | | |
| Sales order release mor | de Single delive | ry (wat until all stock availabl | Vew | New | Filter Al C | ustomens | v | Ý | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | 0 | K Cancel | |

This also provides the ability to create a new account for the delivery from within the document maintenance function.

3.16. Enhancements to Amend Payment Due Date



Available to Software Assurance customers with axis diplomat 2018

Two enhancements have been released to the function Amend Payment Due Date. The initial dialog now includes a tick box to allow you to select Outstanding transactions only:

| ile Help | | |
|-------------------------|--|---|
| Customer Selection | | |
| Qustomer selection | Shot Name Search v | |
| Short name | TOOLSRUS | |
| Name and address | Toola R UK 76 Man Smet Greenton Courtybrie CS6 8GH | |
| Qutstanding transaction | any 🖉 Outstanding transactions only | 1 |
| | OK Cancer | - |

Secondly, two additional columns have been added to the list of transactions, showing the Allocated and Outstanding values for each transaction:

| Customer Details Customer number | 3005 | | Tools 'R Us 76 Main Street Greenton Countyshire CS6 8GH | | | | | | | |
|-------------------------------------|-----------|----------|---|--------|-------------|-----------|-------------|----------|-----------------|-----|
| Short name | TOOLSRU | 5 | | | | | | | | |
| Туре | Reference | Date | Net Value | VAT | Total Value | Allocated | Outstanding | Due Date | Settlement Date | 1.2 |
| NVOICE | 24670 | 11-10-19 | 1217.79 | 230.64 | 1448.43 | 0.00 | 1448.43 | 10-11-19 | | |
| NVOICE | 24687 | 11-10-19 | 699.21 | 139.85 | 839.06 | 2 | 839.06 | 10-11-19 | | |
| NVOICE | 24727 | 11-10-19 | 3292.76 | 650.92 | 3943.68 | - 00 | 3943.68 | 10-11-19 | | |
| NVOICE | 24733 | 11-10-19 | 1171.08 | 231.03 | 1402.11 | 0.00 | 1402.11 | 10-11-19 | | |
| NVOICE | 24778 | 06-11-19 | 1396.36 | 272.73 | 1669.09 | 0.00 | 1669.09 | 05-12-19 | | |
| NVOICE | 24852 | 06-11-19 | 206.92 | 41.38 | 200 | 0.00 | 248.30 | 05-12-19 | | |
| | alu | Je | Allocated | Outst | anding | DO | | | | |
| | 8.4 | 3 | 0.00 | 1 | 448.43 | 10 | | | | |
| | | | 0.00 | | 839.00 | | | | | |

3.17. Minimum Statement Amount



Available to Software Assurance customers with axis diplomat 2018

The Print Sales Ledger Statements function has been extended to allow you to specify a Minimum Statement Value. Statements below this value are ignored.

| 3 | | Print Sales Ledger Stat | ements | - • × | |
|------------------|-----------------------------------|-------------------------|-----------------|--|---|
| F | ile Help | | | | |
| | Document Selection Message D | etais | | | |
| | Range Selection | | | | |
| | Customer number(s)) | | 1 | | |
| | Customer group(s) | | 1 | | |
| | Order source(s) | | | | |
| | Inclusions/Exclusions | | | | |
| | Credit period (days) | | | | |
| | Include accounts with credit ball | ances | | | |
| | Include accounts with credit bal | | nsactions 🗌 | | |
| | Include accounts with zero bala | nces | | | |
| | Mnimum statement value | | 0.00 | | |
| | Account credit status | | All accounts | ~ | |
| | Calculate debt age using transar | tite | | | |
| | Accounts with current debts only | | 2 | | |
| | Acceptorbalances | | 12 | | |
| | | | | Contraction of Contra | - |
| Minimum statemer | it value | | | 0.00 | |
| | | | | - | |
| | Statement date | | 13/11/2019 | | |
| | Completed transactions | | None | ~ | |
| | Include disputed transactions | | 2 | | |
| | Present in order of | | Account num | | |
| | | | L'ACCOUNT (100) | ***. · · · | |
| 4 | | | | | |
| | | | Next : | > Cancel | |
| 1 | C 🖸 🖉 🔒 🤮 | axis® diplomat 2018 DPA | Local) | | |

This avoids sending statements to customers whose balance is only a few pence (perhaps because they have paid the incorrect amount previously).

3.18. Suppress Statements for Specific Customers



Available to Software Assurance customers with axis diplomat 2018

If you have specific customer accounts that do not require statements to be generated, you are now able to set the "Deliver statements by" option to "None".

| | | | | | Cust | omer TOOLSRI | /S 01/3005 | | | | | | - • × |
|---|-----------------|----------------------|---------------|------------------|-----------------------|-----------------|------------|-----------------|------------------|---------------------|-------------|--------------|-------------|
| Help | | | | | | | | | | | | | |
| | ales Orders | Outstanding Or | | Service Contract | | | | | sphs Ste Details | SolarWinds RM | Returns | Calendar | Audit Trail |
| meral Details Custom Catego Customer Details | ries Contac | ta Campaigna | Delivery | Details Custome | r Notes Branch | es Account Deta | is Pricing | eBusiness / EDI | Document Options | Customer Price List | Attachments | Traceability | Call Histor |
| | OLSRUS | Tools 'B Us | | | 1 | | | | | | | | |
| Lauran and Lauran | 0001100 | 1004 1100 | | | | | | | | | | | |
| Document Options | - | | | | | | | | | | | | |
| Allow entry of | All Document | t Types | | v | | | | | | | | | |
| Restrict sales to price list | | | | | | | | | | | | | |
| Consolidated invoicing required | No v | | | | | | | | | | | | |
| Allow sales order release to | Invoice and | Goods on Account | t v | | | | | | | | | | |
| Sales order release mode | Allow multiple | e partial deliveries | (Back orders) | ~ | | | | | | | | | |
| Show price on GOA delivery note | | | | | | | | | | | | | |
| Cetificate of Conformity required | Yes - With I | voice v | | | | | | | | | | | |
| Minimum shelf life | 0 d | lay(a) | | | | | | | | | | | |
| Deliver statements by | | 10 | | | ~ | | | | | | | | |
| Deliver debtors letters by | | to Cathy Brown | | | | | - | | | | | | |
| Deliver invoices and credits by | Post | v to Unsp | ecfied v | | and the second second | - | | 10.00 M 10.00 | | | | | |
| Only advise main contact of orders | | | | | | 7 | Deliver | statements | sby | None 🗸 | to | | |
| Label printing | | | | | | (| | | | Post | | | |
| Default stock label format | Stock Defa | # ¥ | | | | | Deliver | debtors let | ters by | Email | to Cat | 7 | |
| | | | | | | | | 25.871955-515 | 1 | None | | - | |
| | | | | | | | Deliver | nvoices a | nd credits by | Post | | | |
| | | | | | | | | - | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | Edit Print | Preview Send Sh | ontout | ave | Cancel |
| C 5 5 6 6 4 . | nds® diplomat 2 | 018 DPA (Loc | aŭ | | | | | | | | | | |

This setting can be imported from a CSV file using the "Import Customer Records" function and so, if you have a range of accounts for whom you wish to suppress statements, you are able to prepare the list as a spreadsheet.

For users of the axis portal, these customers are still able to access statements online.

3.19. Override Document Delivery Method for Debtors Letters



Available to Software Assurance customers with axis diplomat 2018

When using the Print Debtors Letters function to send Debtors Letters (from either Document Designer or Microsoft Word templates), you can now override the customer's default document delivery method and force the letters to be printed.

| | Print Debtors Letters | - 0 |
|------------------------|---|-----------------|
| le Help | | |
| Document Selection N | escege Details | |
| Range Selection | | |
| Customer number(s) | | |
| Customer group(s) | | |
| Order source(s) | | 1 |
| Inclusions/Exclusions | | |
| Credit period (days) | | 1 |
| Include accounts with | oredt balances | 1 |
| include accounts with | credit balances and outstanding debt transactions | |
| | reto belance - CCOURTE TIUMDO | |
| Mnimum statement va | | |
| Account credit status | Customer default 🗸 | |
| Calculate debt age us | Customer default | |
| Accounts with ourset | Post (print) | <i>(</i> |
| Accounts with debts u | e to Th Next > | |
| Accounts with debts is | p to 2 periods ovwode | |
| Accounts with debts of | ver 2 periods overdue | |
| Presentation Options | | |
| Statement date | 25/0: | 1/2020 ID+ |
| Completed transaction | e Nam | |
| include disputed trans | actions | |
| Present in order of | Acco | urt number 🔍 |
| Document delivery me | ehod Cuar | |
| | | Next > . Cancel |
| | 64 axis® diplomat 2018 DPA (Local) | |

This is ideal if, for example, you want to email your 30 and 60 day letters but send 90 day letters by post. In this case, you could first run the function, selecting up to 1 period overdue and up to 2 periods overdue and choosing a document delivery method of Customer default. You then run the function a second time, selecting only accounts with debts over 2 periods overdue and choosing a document delivery method of Post (print):

| Print Debtors | Letters 🗢 🗢 🗶 | 2 | Print Debtors Letters | - 0 |
|---|------------------|--------------------------------|---------------------------------------|--|
| ite' Help | | File Help | | |
| Document Selection Message Details | | Document Selection Message | Details | |
| Range Selection | | Range Selection | | |
| Customer number(s) | | Customer number(s) | | |
| Customer group(s) | | Customer groupit) | N T | |
| | | Order sourceb) | | |
| Construction of the second s | | Copy started) | | |
| Inclusions/Exclusi | | Inclusions/Exclusion | | |
| Credt period (days | | Credit period (days) | | |
| the second se | | include accounts we | | 1 |
| | transactions 🛄 | include accounts wit | ces ar outstanding debit transactions | 1 |
| Include accounts with | | Include accounts with | | 1 |
| Mnimum statement value | 0.00 | Minimum statement value | 10 | 00 |
| Account credit status | Al accounts w | Account credit status | | il accounts w |
| Calculate debt age using transaction alue date | | Calculate debt ege using tran | aaction due date | 1 |
| Accounts with current dobts only | | Accounts with current debts of | why 🔪 🗋 | 1 |
| Accounts with debts up to 1 period overdue | 2 | Accounts with debts up to 1 p | | 1 |
| Accounts with debts up to 2 periods overslue | 2 | Accounts with debts up to 2 p | | 1 |
| Accounts with debts over 2 periods overdue | | Accounts with debts over 2 p | erods overdue 😨 | 1 |
| Presentation Options | 20 A | Presentation Options | 12 | |
| Statement date | 25/03/2020 | Statement date | 2 | 5/03/2020 🗊+ |
| Considerate | Nane v | Completed transactions | h | ione |
| Customer default | N | Include deputade | | 4 |
| Preser | Account number | Present IN Pros | t (print) V | ccount number v |
| Document delivery method | Customer default | Document delivery | | but (print) |
| Locrumers derively method | Luitoner defaut | Locument delively | 1 | pat (print) |
| | Next > Cancel | · | | Next > Cancel |
| 💽 💽 🖉 🔐 axis® diplomat 2018 | DPA (Lacal) | 1 2 5 2 4 | axer# dolomet 2018 DPA (Local) | Transa I I I I I I I I I I I I I I I I I I I |

3.20. PDF Tab added to Sales Invoice Enquiry



Available to Software Assurance customers with axis diplomat 2018

For convenience, an additional tab has been added to the Sales Invoice Enquiry function, showing a preview of the PDF version of the invoice, as it was originally generated.

| | | | Document items 004C91_P PDF 28 | | | | | | - | _ |
|--------------|---------|---|---|-------------------------|---------------------------|---------------------|-----------|--------------------|-----------|----------|
| E | G | PL | ļ | | | | In | voice | s Sales I | nvoice P |
| Tool 76 H | Eyshine | | | | | | | | | |
| Date | | | r Reference | Account | | Reference | | Invoice No. | | |
| 11-0 | 1-20 | C82- | 47 | 01/3005 | ENV3 | 24687 | | 24687 | | |
| Qua | | Descriptio | | | Reference | | Per | Net Value | | |
| | | tomestic un | cm, green tose Pipe, for se. | | H058002 | | EACH | 127.60 | | |
| | | Economical suitable for light profes | dant Spade I Garden Spade, domestic and sional use. Great digging and | | ACMESPIDEDE | 12.7 | 6 RACH | 102.08 | | |
| | | EGPL Electr 12" plastic 1 Dur lowest for the sma | blades price mower, ideal | | EGPUMOWS | 52.1 | F EACH | 469.53 | | |
| | | | iser with this | | | | | | | |
| | | | | | | Goods V | | 2699.21 | | |
| | | | | | | Total VI Invoice | | £139.85 £839.06 | | |
| PLEA | SE NOT | C: Dur Terr | er GB 12345678 ms are STRICTLY Pa mult in your account | yment 30 t be placed | ays from Date on stop. | of Invoice. Fe | dure to w | ettie this envolce | | |
| | | | | | | | | | | |
| Oper | 08 | | Сору | | Print | | Create N | ew Hardcopy | | |

Buttons allow the original PDF to be opened, printed or re-generated. Particularly useful, is the Copy button, which will copy the PDF to the clipboard, allowing you to paste the document elsewhere (on your Desktop or directly into an email, for example).

This was possible previously but would have included a number of additional steps, including opening the PDF from the Audit trail and using Save As in the Adobe's PDF Viewer).

3.21. Sales Group Details added to Sales Invoice Enquiry



Available to Software Assurance customers with axis diplomat 2018

The Document Lines tab of Sales Invoice Enquiry has been extended to include details of the Sales Group for each item. Separate columns are included for the Sales Group Code and Description, allowing convenient sorting and filtering of the invoice lines.

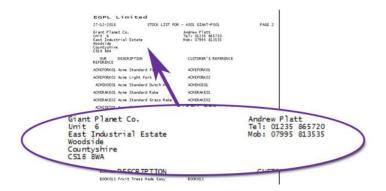
| e Help | | | | | Invol | ce Enq | uny | | | _ 0 |
|--------------------------|--------|------------|----------------|-----------|----------------------------|--------|---------------|-----------------------|----------------------|--------|
| e meip Document Detai | | days Dated | Document ter | | location Details | Data | A -10 T-1 | Attachments | | |
| Invoice/Cred | | | 8 Document ter | | location Details | Unks | Augt Irai | Attacriments | | |
| Customer | | 3005 | Tools 'R Us | | | | | | | |
| Invoice Number 24655 | | | 1 | | | | | | | |
| Invoice date 111118 | | 1 | | | | | | | | |
| | | 1 | | | | | | | | |
| Due date 111218 | | 1 | | | | | | | | |
| Credit Period | (days) | 30 | | | | | | | | |
| Location | | 0 M | ain Depot | Print b | atch number 55 | E. | | | | |
| Document ite | ms | | | | | | | | | |
| ost of Sales | | Centre | | | Sales Group | | Nominal | Nominal Short Name | Nominal Account | 4 |
| 152.82 | Sales | ription | | roup 3 | Description Power Tools | | Account 10 | SALES | Description Sales | * |
| 11200000 | | | | | | | | | | |
| 182.32 | Sales | | | 3 | Power Tools | | 10 | SALES | Sales | |
| 464.91 | Sales | | | 3 | P Tools | | 10 | SALES | Sales | |
| 91.25 | Sales | | | 3 | Prive Tools | | 10 | SALES | Sales | |
| 16.38 | Sales | | | 4 | Gardening Boo | ice. | 10 | SALES | Sales | |
| | | | | | | 272 | | | | |
| 31.00 | Sales | - | - | - | ale a | - | 10 | SALES | Sales | |
| 57.84 | Sales | | | | | | 10 | SALES | Sales | |
| 875.12 | | | Sales | Sa | les Grou | р | 10 | SALES | Sales | |
| 1072.1 | | | Group | D | escription | 1 | 10 | SALES | Sales | |
| 1 | | | 3 | Po | wer Tools | | | SALES | Sales | • |
| 2975 | | | | | | | | | | |
| C . | | | 3 | P- | wer Tools | 2 | 1 | | m | > |
| | - | | 3 | ru | Wei Tools | 1 | - | | (| |
| | | | | _ | | Save | G | ienerate Credit | Reprint Document | Cancel |

3.22. Contact Details added to Customer Price List Report



Available to Software Assurance customers with axis diplomat 2018

The Customer Price List Report has been extended to optionally report each customer's contact details (company name and address, main contact's name and telephone numbers) at the head of the report.



The information can be included by ticking the "Report contact information" box on the Presentation Options tab:

| ile Help | | |
|-----------|------------------------|--------------------|
| Selection | Presentation Options | 6 |
| Present | ation Options | |
| Report p | price information | |
| | case quantity | |
| Report | case price info | |
| | discount information | |
| 1000 | ast update details | |
| 1200 | rade price | |
| 0.000 | retail price | |
| | tock selling price per | |
| | standard cost | |
| 100000 | current cost | |
| | tock buying price per | |
| | ast bought date | |
| Report | order source | |
| Custome | er details to report | Short name 🗸 |
| Report | contact information | |
| Re | eport contact | information |
| | Preview | Print Write Cancel |

3.23. Product Group details in Sales Order Maintenance



Available to Software Assurance customers with axis diplomat 2018

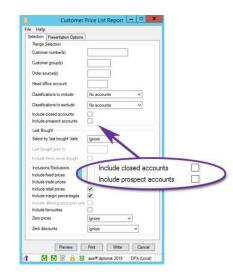
The Sales Order, Quotation and Service Contract Maintenance and Enquiry functions have been extended to include columns showing the Product Group Code and Product Group Description.

| | | Notes General Details Document - Last modified by ANDY on 09-10-2 | | Tems and Addr | values | schments Paym | ent Details Links | Audit Tr | le | | | | | | | |
|--|--------------------|---|-------------|------------------------------|---------------------|-----------------|-------------------------|----------------|-------------------|----------------------|-------------|------------------|-----------------------|----------------|-------------|------------------|
| ustomer re | ference 01/3 | GIL Engineering Inc. | | i | Net | 951.37 | GBP Cost | 657 | 61 | GBP | Margin 30 | 88 | 1. (293.7 | GBP) | | |
| Credt linit 5000 GBP Current balan Delivery Carrier 10.80 GBP (9.00 ex. VAT) Image: Carrier 10.80 GBP (9.00 ex. VAT) I | | e 709.29 | GBP | 169.7 | 184.82 | GBP Weigt | leight 0.3000 | | kg | | | | | | | |
| | | 10.80 GBP /9.00 m VAD | 1.1.1. | | | | - Loose | 20 | | | | | | | | |
| 10004 | - | | | | 1 4 4 4 | 1100.10 | | | | | | | | | | |
| elivery cha | arge Custo | mer defauit (add charge at order enti | y) | | | | | | | | | | | | | |
| urrent ben | rds - | | | | | | | | | | | | | | | |
| | Stock Reference | Description | | Product Group Description | Ordered Quantity | | Outstanding Quantity | Free Stock | Supplier Stock | Uni Price (GBP | e Cost | ltem Discount | Net Value (GBP) | Print Value | Status | V, Val (GE |
| | EGPLSPRYOT | Budget Hand Sprayer | 1 | | | 0 | 1 | 145 | | 4.16 | 0.98 | 0.00% | 3.47 | Yes | Outstanding | 0 |
| 2 | EGPLCS1 | EGPL Petrol Chainsaw 33co, 16" bar Our own brand Petrol Chainsaw, suitable for domestic and light professional use. | 21 | Chansaws | 2 | • | 2 | 16 | _ | 78.25 | 58.72 | 0.00% | 156.50 | Yes | Outstanding | 31. |
| 3 | GOLDWDG01 | Splitting wedge for use in conjunction with a sledge | 2 | Prof Tools | 1 | ٥ | | Pro | duct Gro Co | ode | Description | | 12.72 | Yes | Outstanding | 2.5 |
| 4 6010 | GOLDFORKO | hammer. GoldTools Ovome Plated | 2 | Prof Tools | 1 | 0 | | 1 Budget Tools | | | ools | 23 | Yes | Outstanding | 4 | |
| | 001010104 | Light Fork, Steel Shaft Gold's Light (Border) Fork, Guaranteed for ilfe! | | | | | | 8 | | 21 | Chainsaw | is | | | Contrary | |
| 5 | EGPLMOW4 | "Wimbledon" Bectric Mower | 19 | Mowers | 2 | 0 | 2 | | | | | 0.00% | 278.24 | Yes | Outstanding | 55.0 |
| | | | | | 28 | 0 | 28 | | - | _ | - | | 942.37 | | | 183.0 |
| 6 | | // | | | | | | | | | | | | | | , |
| ptions insert 1 | tem A | nend item | Delete tors | Vew tem | Move b | em Up Mo | ve Item Down | Review | Favourte | 55 | Options | Import ben | | Reprice A | 41 Pm | t Label(s) |

This is particularly useful when working with large documents since it allows the lines to be sorted or filtered to find a particular range of products on the document. 3.24. Exclude Prospect and/or Closed Accounts from Customer Price List Report

Available to Software Assurance customers with axis diplomat 2018

Additional options have been added to the Selection Criteria for the Customer Price List Report to optionally include price list entries for Closed and/or Prospect accounts. By default, these are not included.



This can make the report easier to read by excluding unnecessary information.

3.25. Additional information in Recent Sales dialog



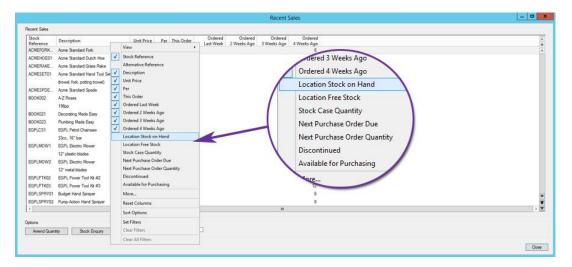
Available to Software Assurance customers with axis diplomat 2018

A number of additional columns have been added to the Recent Sales dialog in Sales Order Maintenance, providing a wealth of information that is particularly useful in a telesales environment:

- Location Stock on Hand
- Location Free Stock
- Case Quantity
- Next Purchase Order Due Date
- Next Purchase Order Quantity
- Discontinued?
- Available for Purchasing?

| | 0 | | | _ | | | | Enter Sales Ord | ter | | | | | - 1 | | _ |
|------------------------------------|---|-----------------------|--------|-----------------------|---|------------------------|------------------------|-------------------------|---------------------------|------------------------|------------------------|---------------------------|-----------------------------|--------------|-----------------------------|---|
| | | | | | | | F | lecent Sales | | | | | | | | 0 |
| ent Sales | | | | | | | | | | | | | | | | |
| tock eference | Description | Unit Price | Per | This Order | Ordered Last Week | Ordered 2 Weeks Ago | Ordered 3 Weeks Ago | Ordered 4 Weeks Ago | Location Stock on Hand | Location Free Stock | Stock Case Quantity | Next Purchas Order Due | | Discontinued | Available for Purchasing | 1 |
| MEFORK | Acme Standard Fork | 4.00 | 1 | 2 | | | | 6 | 121 | 24 | 1 | | | | 1 | |
| MEHOE01 | Aome Standard Dutch Hoe | 11.48 | 1 | 0 | | | | 3 | 120 | 11 | - | | | | 1 | |
| MERAKE | Acme Standard Grass Rake | 12.76 | 1 | 0 | | | | 3 | 115 | 11 | 1 | | | | 1 | |
| MESET01 | Acme Standard Hand Tool Set (prowel, fork, potting trowel) | 15.95 | 1 | 0 | | | | 1 | 111 | 14 | 1 | | | | 1 | |
| CMESPDE | Acme Standard Spade | 9.57 | 1 | 0 | | | | 1 | 113 | 1 | 1 | | | | 1 | |
| OOK002 | A-Z Roses | 3.19 | 1 | 0 | | | | 3 | 139 | 24 | 1 | | | | 1 | |
| DOK021 | 196pp Decorating Made Easy | 4.46 | 1 | Ĉ. | | | | 4 | 111 | 27 | 1 | | | | 1 | |
| ооко23 | Plumbing Made Earry | 4.46 | 1 | 0 | | - | | | - | | | | | | 1 | |
| PLCS1 | EGPL Petrol Chainsaw | - | - | - | | | | | | | | | | | 1 | |
| | 33cc. 16" bar | | | | | | | | | - | | | | | | |
| GPLMOW1 | EGPL Electric | Location ck on Har | | Location Free Stoc | | Sto ase Quant | | d Purchase Order Due | | Purchase Quantity | Disconti | nued | Available for Purchasing | | 1 | |
| GPLMOW2 | 12 plastic blages | 12 | | 24 | 5 C C C C C C C C C C C C C C C C C C C | | 1 | | | | | - | | | 1 | |
| Gr LHO HZ | 12" metal blades | 1 and 1 and 1 | - | 24 | <u>)</u> | | - 1 | | | | | | | | * | |
| GPLPTK02 | EGPL Power Tool Kt #2 | 76.57 | 1 | 0 | | | | 1 | 0 | 159- | 1 | 30-01-20 | 175 | | 1 | |
| | EGPL Power Tool Kt #3 | 82.95 | 1 | 0 | | | | 12 | 0 | 210- | 1 | 30-01-20 | 215 | | 1 | |
| SPLPTK03 | | 4.49 | 1 | 0 | | | | 6 | 265 | 146 | 1 | | 1000 | | 1 | |
| | | | - 22.5 | | | | | 6 | 233 | 128 | 1 | | | | 1 | |
| SPLPTKO3 SPLSPRY01 SPLSPRY02 | | 8.99 | 1 | 0 | | | | | | | | | | | | |

To keep the information shown as concise as possible, these additional columns are not enabled by default - to enable them, simply right-click on the header and enable just the additional columns that are relevant to the way that you work:



The Recent Sales option is ideal for users who take frequent repeat orders from customers as it allows the operator to prompt the customer for items they may have forgotten to order. It is accessed from the "Insert Item" dialog:

| | | | | | Enter Sales Orde | n. | | | | | | - | • |
|--|-----------------------------------|---|-------------------------------------|--------------------------------|---|----------|------------------------|-----------------------|------------------|------------|----------------|--------|-------|
| Enquiries Help | | | a Mutual Rem Datale | T | Attachments Payment Details | Turke 1 | | | | | | | |
| iomer Details [Cus lew Sales Order | scottier rvoteis | General Decars Docume | R NOTES New Docume | Temis and Addresses | Adacriments Payment Details | | | | | | | | |
| ustomer reference | 01/3005 | Tools 'R Us | | | Insert Item | ? X | GBP 1 | Aargin 0.00 | 0 | % (0.00 GE | BP) | | |
| edt imt | 10000 | GBP Current bala | nce 10152.60 | Item Position | | | kg | | | | | | |
| livery | Unspecified | | | Operation | Insert at End | | | | | | | | |
| livery charge | | efault (add charge at order e | tail k | tem number | 1 | | | | | | | | |
| ment Berns | Costonie de | erabit (abb charge at orber e | uy) • | Item Selection | | | | | | | | | |
| rent tens | | | | Entry type | Recent Sales | ~ | | | | | | | - |
| Item Stock lumber Refere | nce De | Boription | Product Group P Code D | Select by | Stock Item Additional Description Archive History | | Unit Price (GBP) | Unit Cost (GBP) | ltem Discount | | Print Value | Status | 4 4 4 |
| ere are no items t | to show | | | Assembly type | Recent Sales | | (00+) | (00+) | | (00+) | | | |
| En | try type | | t Sales | | | | | | | | | | |
| Se | try type Idect by sembly ty | Recen Stock Additio Archive | tem nal Description e History | | | | | | | | | | |
| Se | try type | Recen Stock Additio Archive | tem nal Description e History | Additional Deec Description | | | | | | | | | |
| Se | try type | Recen Stock Additio Archivy Recen | tem nal Description e History | Additional Desc | | | | | | 0 | | | ¥ |
| Se | try type | Recen Stock Additio Archive | tem nal Description e History | Additional Desc | | | | | | 0 | | | |
| (Se | try type | Recen Stock Additio Archivy Recen | tem nal Description e History | Additional Desc | | OK Canod | 1 Incode | : tema | Reptice | | Print Lab | sel(s) | ¥ |

3.26. Additional Columns added to Customer Monitor tabs



Available to Software Assurance customers with axis diplomat 2018

Customer monitor tabs now include additional columns for the default contact's details:

- Name
- Email address
- Telephone Number
- Mobile Number

| Account | Customer | Default Contact | | Default Contact | | ult Contact | Default Contact Mobile Number | Customer Address | 4 |
|----------------|--------------------------------|---------------------|-----------------------------|---|-------|----------------|----------------------------------|----------------------|---|
| 3967 | A. Cayman Engineering Co. | Name Mas Pauline | Scott (Operations Manager) | Email pauline scott@acaymanengineeringco.net | 0123 | 5 998577 | | Post Code CS5 68V | * |
| 3769 | A Cheddar Marketing Co. | | nonds (Financial Director) | jane editionds@acheddamarketingco.net | | 5 158892 | | CS10 4LL | |
| 3367 | A Direct Europe Co. | | r (Operations Manager) | ane fire er@adxoneuropeco.co.uk | | 5 824961 | 07999 938777 | CS13 5VZ | |
| 3897 | A Reed Logistics | | unson (Accounts) | steve, son@areedogistics.com | 0123 | 6 351881 | | CS5 5QU | |
| 3893 | AAM Research .com | | Wright (Financial Director) | pauline might @aamresearch net | | 6 609021 | | CS19 6FD | |
| 3390 | ADP Management Inc. | | (Managing Director) | steve w ite@adpmanagementinc.co.uk | | 4 930734 | 07998 798327 | CS13 90Z | |
| 3216 | Arica imports com | | (and a second) | | 014.0 | | 07996 787160 | CS20 4CI | |
| 3352 | New Hypers Look | | | | | Stores and the | and an an an an | CC20 280 | |
| ame Pauline | Scott (Operations Ma | nager) | Email | acaymanengineeringco.net | - | 01235 998 | 577 | | |
| 3039 | Astronomic period Direct | | | Pacheddamarketingco.net | - | 01235 158 | | OS12 SPH | |
| 3274 | AO Wholesale Inc. | tor) | | acheddarmarketingco.net | - | 01230 108 | 07992 573074 | CS14 5RD | |
| 3232 | Apollo & Sons Technology .com | Rachel Wate | ers (Director) | rachel waters@apolicsonstechnology.net | 0123 | 5 599504 | 07997 299154 | CS10 4NZ | |
| 3282 | Apollo & Sons Property Inc. | | ds (Operations Manager) | mary edmonds@apolicsonspropertyinc net | 0123 | 4 116119 | 07997 353279 | CS5 SMI | |
| 3329 | Apollo Logistics | Lucy Hugher | (General Manager) | lucy hughes@apollologistics.co.uk | 0123 | 5 933916 | 07998 251578 | CS1 3FR | |
| | Apollo & Sons Logistics Partne | Mr Alan How | ell (Purchasing Assistant) | alan howell@apollosonslogisticspatners net | 0123 | 4 209305 | | CS2 35Y | |
| 3512 | | | | | | | | | |
| 3512 | | | | | | | | | |
| 3512 | (II) | | | | | | | | |
| | 83 | | | | | | | | |

3.27. Delivery Charge Information in Sales Order Monitor



Available to Software Assurance customers with axis diplomat 2018

Sales Order monitor tabs now feature four additional columns to add clarity to the delivery charge element of sales orders.

These columns show

- Order Value (excluding delivery)
- Outstanding Order Value (excluding delivery)
- Delivery Charge
- Outstanding Delivery Charge

| Customer Name | Sales Order | Order Value (Excluding Delivery) (GBP) | Outstanding Value (Excluding Delivery) (GBP) | Delivery Charge (GBP) | Outstanding Delivery Charge (GBP) | Outstanding Value (GBP) | | Available Stock Value (GBP) | Customer Credit Limit Exceeded | Order On Hold | Insufficient Stock |
|------------------------------|----------------|--|--|--------------------------|---|----------------------------|-------|---|-----------------------------------|------------------|------------------------|
| Tools Y Us (Easton) | 18709 | 139.12 | 139.12 | 9.00 | 9.00 | 148.12 | | 148.12 | Credit limit exceeded | | |
| Green Fingers | 18401 | 2602 80 | 2602.80 | 0.00 | 0.00 | 2602.80 | | 1862.49 | | | S insufficient stock |
| Sant Developments Limbed | 18402 | 1915.77 | 1915,77 | 0.00 | 0.00 | 1915.77 | | 1252.17 | | | She ficient stock |
| ireen Supplies | 18403 | 1485.65 | 1486.65 | 0.00 | 0.00 | 1486.65 | | 1265.45 | Credt limt exceeded | | Constitioent stock f |
| ixon & Sone Marketingcom | 18408 | 917.94 | 917.94 | 00 | 0.00 | 917.94 | | 254.34 | | | The ficent stock |
| UI Distribution Limited | 18409 | 890.37 | 890.37 | 9.0 | 9.00 | 899.37 | | 899.37 | | | |
| IGB Agency Patners | 18410 | 1869.35 | 100 | and the second designed | | | | and the second se | | | () insufficient stock |
| EL Engineering Inc. | 18417 | in the second se | Contraction in Array | | 0.44 | terer | | | Notation of the state | | |
| GI Worldwide Inc. | 18418 | Order Va | lue (Excluding | 1 7283 | Outstand | | De | livery | Outstanding | 0 | |
| fandalay Red | 18424 | | Delivery) (GBP) | | lue (Exclud | ing c | | (GBP) | Delivery | Va | () Insufficient stock |
| WP Retail Limited | 18425 | | venvery) (ODF) | D | elivery) (G | BP) | large | (ODF) CI | harge (GBP) | 10 | |
| pollo & Sons Technology .com | 18426 | | 139.12 | | 139.12 | 2 | 0 | 00 | 9.00 | | () Insufficient stock |
| Dale Retail Partners | 18427 | 1006 73 | 133.12 | | | - | | | 0.00 | | () insufficient stock |
| ixe Technology Inc. | 18429 | 478.56 | 478.56 | - | 2602.80 | | 0 | 1/2 29 | | | Shufficient stock |
| lega Trading Co. | 18431 | 1124.29 | 1124.29 | 0.00 | 0.00 | 1124.29 | | 511.75 | | | () Insufficient stock |
| D Developments | 18433 | 592.75 | 592.75 | 0.00 | 0.00 | 592.75 | 10 | 507.73 | 🕫 Credt limt exceeded | | S Insufficient stock |
| Vard Red Inc. | 18437 | 2049.86 | 2049.86 | 0.00 | 0.00 | 2049.86 | | 816.01 | | | () Insufficient stock |
| Rica & Africa Engineering In | 18439 | 1008.69 | 1008.69 | 0.00 | 0.00 | 1008.69 | | 787.49 | | | S Insufficient stock |
| V Technology Limited | 18441 | 3001.08 | 3001.08 | 0.00 | 0.00 | 3001.08 | | 1520.46 | | | S Insufficient stock f |
| iolden Planet Limted | 18442 | 1793.45 | 1793.45 | 0.00 | 0.00 | 1793.45 | 10 | 1240.45 | | Olos_ | S Insufficient stock! |
| | 18444 | 1746.91 | 1746.91 | 0.00 | 0.00 | 1746.91 | 15 | 1636.31 | | | S Insufficient stock |
| Rack Tools Limited | | 217118.11 | 217118.11 | 63.00 | 63.00 | 217181.11 | | 133446.38 | | | |
| Rack Tools Limbed | | 6.17110.11 | | | | | | | | | > |

This relies on the delivery charge being identified as one of the following:

- A delivery charge associated with an imported order where the source identifies the delivery separately.
- A charge associated with a delivery method (for users of the Delivery Charges by Delivery Method module).
- A product item flagged as being a delivery charge.

The ability to flag individual product items as being a delivery charge was introduced as part of the development to allow VAT on delivery charges to be adjusted https://www.axisfirst.co.uk/software/recent/automatically-adjust-vat-on-delivery/235

3.28. Additional Columns added to Customer Transaction History Monitor tabs

Ø

Available to all customers with axis diplomat 2020 or above

Customer Transaction History monitor tabs now have additional columns to show the Settled Date and Settled (Days).

Settled Date is the date that the transaction was fully allocated (for example, by making the final payment or allocating a credit note) and Settled (Days) is the number of days between the document date and the settled date.

| | | | | | Tr | ansactions T | This Year | | | | | | | |
|------------------------|---------------------|--------------------------|----------|-----------------------|------------|-----------------|-------------------|---------------------|-------------|-----------------|-----------------------|--------------|-------------------------|--------|
| e Help | | | | | | | | | | | | | | |
| uppler Transaction | History Cust | omer Transaction History | +1 | | | | | | | | | | | |
| Refresh Complete | ed 14:53 Monda | ay 14th September 2020 | | | | | | | | | | | | |
| Customer Short Name | Customer Account | Customer Name | | Document Reference | Docum | Settled Date | Settled (Days) | Transacti Period | Due Date | Transac Type | Net Value (GBP) | VAT (GBP) | Total Value (GBP) | Unalic |
| GARDEN-008 | 3909 | Garden Supplies .com | | 23388 | 12/04/2020 | 14/05/2020 | 63 | 09/20 | 12/05/2020 | INVOICE | 1799.41 | 356.10 | 2155.51 | |
| KMA-SER001 | 3588 | KMA Services Patners | | 23389 | 12/04/202 | /05/2020 | 63 | 09/20 | 11/06/2020 | INVOICE | 307.51 | 59.32 | 365.83 | |
| MEGA-AG001 | 3694 | Mega Agency Inc. | | | 12/04 | 14/06/2020 | 63 | 09/20 | 11/06/2020 | INVOICE | 1229.11 | 241.84 | 1470.95 | |
| JXF-TEC001 | 3736 | JXF Technology Patners | | | 1/2020 | 16/07/2020 | 55 | 09/20 | 12/05/2020 | INVOICE | 1318.42 | 261.29 | 1579.71 | |
| ROYAL-L001 | 3105 | Royal Land Co. | Settled | Sett | lad T20 | 24/05/2020 | 42 | 09/20 | 11/06/2020 | INVOICE | 481.29 | 96.27 | 577.56 | |
| DKENT001 | 3213 | D. Kent Engineering Li- | | | | 20/08/2020 | 130 | 09/20 | 11/06/2020 | INVOICE | 161.65 | 32.33 | 193.98 | |
| OBS-MAR001 | 3065 | OBS Marketing Partner | Date | (Da | iys) P | 20/08/2020 | 130 | 09/20 | 12/05/2020 | INVOICE | 183.17 | 30.45 | 213.63 | |
| DEVON-G002 | 3756 | Devon Garden Co. | | - | 0203 | 16/07/2020 | 95 | 09/20 | 11/06/2020 | INVOICE | 50.98 | 10.20 | 61.18 | |
| OLDEN-R001 | 3797 | Olden Retail Limited | /06/2020 | 100 | 62/04/2020 | 20/08/2020 | 130 | 09/20 | 11/06/2020 | INVOICE | 633.08 | 117.89 | 750.97 | |
| PEAKS-T001 | 3119 | Peaks Thames Co. | | 25406 | 12/04/2020 | 14/06/2020 | 63 | 09/20 | 11/06/2020 | INVOICE | 717.36 | 143.47 | 860.83 | |
| GREEN-C001 | 3789 | Green Cleeves Co. | | 23407 | 12/04/2020 | 20/08/2020 | 130 | 09/20 | 11/06/2020 | INVOICE | 1734.28 | 341.40 | 2075.68 | |
| IYN-MAN001 | 3107 | IYN Management | | 23408 | 12/04/2020 | 14/05/2020 | 63 | 09/20 | 12/05/2020 | INVOICE | 2251.42 | 445.92 | 2697.34 | |
| | | | | | | | | | | | | | | |

3.29. Sales Group Selection added to Invoice Items by Invoice Report



Available to Software Assurance customers with axis diplomat 2018

The Invoice Items by Invoice report has been extended to allow selection by a range of Sales Groups.

| Range Selection | | - |
|-------------------------------|---|---|
| Gustomer number(s) | | |
| Stock reference(s) | | |
| Product group(s) | | |
| Sales group(s) | | |
| Invoice number(s) | | |
| Invoice date(s) | | |
| Quantity range | | |
| Period number(s) | | |
| Sales group(s) | I | |
| | | - |
| Print customer name and addre | | |
| Brint selection criteria | ä | |

3.30. Additional Options for Goods on Account Monitor



Available to Software Assurance customers with axis diplomat 2018 and the Goods on Account module

Monitor tabs for Goods on Account Bookings now have additional right-click options to Amend Booking Details and to Print Goods on Account Delivery Notes.

3.31. Trading Identity by Product Group

 \checkmark

Available to all customers with axis diplomat 2020 or above and the Multi-brand Trading Identities module

The Multi-Brand Trading Identities module has been extended to allow selection of the correct Trading Identity based on the product group of the items on the sales order when importing eBusiness orders.

The Import eBusiness Orders function will use the product group for the first item on the order to determine the correct trading identity and set the order source code appropriately.

3.32. Quantity Break Pricing on Customer Price Lists



Available to purchase for all customers with axis diplomat 2020 or above and the Date Specific Prices and Discounts module

On systems using Date Specific Pricing and Discounting, it is now also possible to define quantity break pricing for specific customers, for particular products.

| | | Date Specific Pr | ice Details | ? × | | | | | | |
|---------------------------------------|-------------------------------|--|------------------------|--------|----------|-------------------------|---------|------------------------|-------|----|
| | Price Details | | | | | | | | - | |
| 9 | Customer De Reference | tals 01/3005 | | | | | | - | | × |
| File Help | | L | | | | | | - | | x |
| | Name | Tools 'R Us | | i | | | | | - 1 | - |
| Maintain CSR Details Maintain Prices | Stock tem (| | | | | | | | _ | - |
| | Dack stee | ACMEFORKD1 | | | | | | | 1.000 | 31 |
| Customer Customer name reference | 224 224 | | | i na | Break 1 | Quantity Bre Price 1 | Break 2 | Quantity Bre. Price | ź 🛔 | |
| 01/3005 Tester Quantity Break Pricing | g | | | | 99999999 | 4.00 | | | - | |
| 1st qty/unit price 9 | 0.50 | Quantity break 1 | 99 | | 99999999 | 5.25 | | | | |
| 2nd quantity price 9 | .25 | Quantity break 2 | 199 | | 99999999 | 5.75 | | | | |
| 3rd quantity price 9 | 0.00 | Quantity break 3 | 299 | | | | | | | |
| 4th quantity price 8 | 8.80 | Quantity break 4 | 499 | | | | | | | |
| 5th quantity price 8 | 1.70 | Quantity break 5 | 99999999 | | | | | | | |
| | | NOR 13:50 | Quantity break 1 99 | _ | | | | | | |
| | 210 020 | | Quantity break 2 199 | _ | | | | | | |
| | 3rd quantity | and the second s | Quantity break 3 [299 | | | | | | | |
| | 1.2.2 | | COLOR DONNE DATE | | | | | | | |
| | 4th quantity | | Quantity break 4 499 | | | | | | - | |
| C | 5th quantity | price 8.70 | Quantity break 5 99999 | 999 | | | | | 2 🖻 | 6 |
| Options | and the second | | | | | | | | | |
| Add Amend Delote View | Import Start date Specify end | 01/10/2020 | Start time | 1 | | | | | | |
| | End date | date [_] | Endline | | | | | | | |
| | Comment | | - income | | | | | | | |
| | Continents | | | | | | - | ок | ancel | |
| | | | ОК | Cancel | | | | | 01.00 | - |
| | | | | | | | | | | |

In this example, this one customer has an agreed price of £9.50 if they purchase up to 100 of this particular stock item, £9.25 each when purchasing between 100 and 199, £9.00 for between 200 and 299 and so forth.

As with the general Quantity Break Pricing module, up to five separate breaks can be defined for a given product, for a given customer - different customers and different products may all have differing break points.

3.33. Sales Ledger Buying Groups

Available to purchase for all customers with axis diplomat 2020 or above

This module (standard with the axis diplomat 2020 Office Products module and available as an optional addition for other axis diplomat systems) provides a mechanism to link a number of customers together to share pricing without the combined accounting information that is a feature of using head office and branch accounts.

A member of a buying group may have their own agreed pricing for certain products but, by default, they will inherit all of the pricing associated with the buying group.

| G Customer TOOLSRUS 01/3004 |
|--|
| File Help |
| Ouctations Sales Orden Outstanding Order Items Deliveries Statement Transaction History Item History Graphs Returns Cafendar Audit Tra |
| General Details Cution Colegones Contacts Campagne Delivery Details Cutioner Notes Branches Account Details Priorig eBuaness / EDI Document Options Cutioner Price Lat Atsichments Call History Et Cutioner Enda |
| Latone Details Account [01/3004 TOOLSRUS Tools Y Us |
| |
| Ptong Settement Discourt Terms |
| Buying group 5060 Northem Independent Retailers 🔍 Tach discount 0.00 % |
| Default sales price to Trade Price V Discourt terms |
| Customer proce group Margin Details |
| Use head office pricing |
| Decomp |
| Lescouring Loss 100 % |
| |
| Customer discourt group Pricing |
| Custory |
| Buying group 5060 Northern Independant Retailers |
| |
| Cute to less price to Trade Price V |
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| Edit Print Preview Send Shotout Save Cancel |
| 1 😺 😼 🥳 🏄 asis® diplomat 2020 OPD (Local) |

Section 4 Purchase Ledger & Purchase Order Processing

4.1. 50,000 Supplier Accounts



 $Available \ to \ Software \ Assurance \ customers \ with \ axis \ diplomat \ 2018$

The maximum number of supplier accounts has now been increased to 50,000.

To increase the number of Supplier Accounts available on your system, simply use the "Amend Data File Sizes" Kernel Function.

| 1. | Supplier Account | its | ? X | |
|------------------------|---|---------|----------------------|---|
| | entre de la construcción de la cons | 100 | | |
| | Current Details (Reco | | | |
| 4 | File Size | 50 | | |
| H | In Use | 16 | | |
| | Mnimum Permissible | 16 | | |
| 1 | | | | |
| | Maximum Permissible | 50001 | | |
| | New File Size | 50000 | | |
| 49 | Sales Ledger Descript | ОК | Cancel | |
| 50 | Eurchase Ledger Des | | 10 | |
| 63 | Stock Location File | | 10 | |
| | CRM Contact Groups | File | 10 | |
| 100 | | | 1.000 | |
| - | ew File Size | 5000 | 00 | - |
| N | | | | |
| N 181 | Intege Calego au | | 1024 | |
| N 181 191 | Inage Calegona gBusiness Attachmen Gall Email Types VAT Group Descripto | t Types | 10000 250 250 | |
| N 181 191 213 | Inage Calegonia gBusiness Attachmen Gall Email Types VAT Group Descripto | t Types | 1024 10000 250 | |

For systems with Multiple Purchase Ledgers, you are now able to manage up to 50,000 Supplier Accounts per ledger.

4.2. Prospective Supplier Accounts

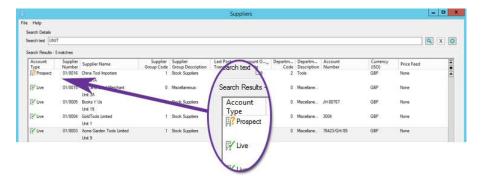


Available to Software Assurance customers with axis diplomat 2018

It is now possible to create Prospective Supplier Accounts.

The system will prevent you from entering Purchase Orders for Prospective Suppliers and Purchase Requirements will ignore Prospective Suppliers when identifying the best suppliers to fulfil demand.

| Help neral Details Account Detail | - Contractor | Durant Datate | Outron Datate | D mbrue O | dens Outstanding | Order Brenn | Constant Matter | Second second of | Torrechille | CALIFORNIA D | on Test |
|--------------------------------------|--|------------------|------------------|-----------|--------------------|-------------|-----------------|------------------|--------------|------------------|----------|
| General Details | e consecta | r ayment Details | Urbering Decails | | nover | Order cents | Supplier notes | Auschments | Traceability | Call History / | UOE ITAI |
| Account | 01/8016 | Short name | TOOLSASIA | Tu | mover year to date | 0 | | | | | |
| Account type | Prospect | - | | Tu | mover last year | 0 | 1 | | | | |
| Name and address | Uve Gallows End Riverside Countyshire CS23 8GH | r industrial Es | | | | | | | | | |
| | 9 | | | | | | | | | | |
| Telephone number | 01264 5654 | 12 | | | | | | | | | |
| Fax number | 01264 5654 | 13 | | | | 1.1 | _ | | | | |
| Contact | Unspecified | ~ + | _ | | - | | | 01/80 | TU | | |
| Contact email | - | | | 1 | Account ty | mal | | Prospe | ect v | | |
| Suppler Web URL | | | 3 | (| Piccountry | pe | | Live | 501 Ŧ |) | |
| Deliver remittance advices by | Post v | 10 | | | Name and | address | | Prospe | ct | | |
| Deliver purchase orders by | Post v | 1ú | | ~ | | | | Gallow | s End In | du | |
| Date account opened | 110119 | | | | | _ | _ | Rivers | | | |
| Suppler group | 0 Misc | ellaneous | 10 | | | | | | | | |
| Default department | 0 Mac | ellaneous | | | | | | | | | |
| Default cost centre | 0 Sale | • | | | | | | | | | |
| Account number | | | | | | | | | | | |
| | | | | | | | | | | | |



Monitor tabs that allow filtering by Supplier can now also be filtered to only show prospective Suppliers or, conversely, to only show live Suppliers.

| | Previous Year 13-24 months Turnover 0.00 | Turnover vs. Previous Ye | | Acce Class Stand |
|------|---|-----------------------------|----------|------------------------|
| 0.00 | 0.00 | | | Stand |
| | | | | |
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| 0.00 | 0.00 | | | |
| 0.00 | 0.00 | | | > |
| 0.00 | 0.00 | 2 | Court 1 | |
| | | Pr | Prospect | Prospect |

4.3. Closed Supplier Accounts



Available to Software Assurance customers with axis diplomat 2018 It is now possible to mark supplier accounts as "Closed".

As with Prospective accounts, the system will prevent you from entering Purchase Orders for Closed Supplier Accounts and Purchase Requirements will ignore them when identifying the best suppliers to fulfil demand.

Monitor tabs supporting filtering by Supplier will also allow lists to be limited to just Closed Supplier Accounts or to exclude them and Monitors will show Closed accounts in grey.

| 1000 | Help | | | | 1 | | | | | 1 | | | |
|-----------------------|--|--|--|------------|--------------------|----------|----------------------------|-----------------|-------------------------------|-----------|-----------|------------|--------------|
| | Purchase Orders Serveral Details | Outstanding | | Graphs | | sr Notes | Attachm | | sceability | | History | | Audt Trail |
| | Seneral Details | Account Details | Contacts | Payment | Detala | Turno | Price List | Ordering Detail | Trac | neactions | Transacti | on History | item History |
| | | 01/8006 | 10.0 | me BLACK | | | | 0 | | | | | |
| | ccount | 01/8006 | Short na | me BLALA | | Sumov | ver year to date | | | | | | |
| 2 | Account type | Closed | ~ | | | Tumos | er last year | 0 | | | | | |
| | ame and address | Uve Octed | arte. | | | Balanc | e Breakdown | | | | | | |
| | | JA righ S Lower Ba | ton-in-the-Ma | - | | Current | t Balance | 0.00 | | 1 | | | |
| | | Countyshi CS3 8FG | ie . | | | This ro | 126 | 0.00 | | | | | |
| | | | | | | | | | | | | | |
| | | 9 | | | 1 | 1 mont | h | 0.00 | | | | | |
| | elephone number | 01234 33 | | _ | | 2 mont | hs | 0.00 | | | | | |
| | | | | - | | Previo | us months | 0.00 | | | | | |
| F | ax number | 01234 23 | 2323 | | | | ted allocated ca | Letter. | _ | | | | |
| 0 | Contact | Mr I Black | · · + | | | P DOS | eu allocated ca | 81 0.00 | _ | | | | |
| 0 | Contact email | | | | | | | | | | | | |
| | upplier Web URL | | | 3 | - | - | - | | | | | | |
| | | | | | - | | | - | | | | | |
| | | vices by Post v | | | | | | | | | | | |
| Ū | Veliver remittance adv | vices by Post V | to | - (| Account | t type | | CI | osed | × | | | |
| |)eliver remittance adv)eliver purchase orde | | | 6 | Account | t type | | | | * |) | | |
| | | ers by Post v | | | Account Name ar | | tress | Liv | e | - | nts | | |
| с с | Deliver purchase orde Date account opened | ers by Post v a 300704 |] to [| | | | lress | | | ta | nts | | |
| C S | Deliver purchase orde Date account opened Supplier group | ers by Post v a 300704 2 Se | | | | | dress | | e sed | ta | nts | | |
| C S | Deliver purchase orde Date account opened | ers by Post v a 300704 2 Se |] to [| | | - | tress | | e sed High S | ta | nts | | |
| 0 0 5 0 | Deliver purchase orde Date account opened Supplier group | ers by Post v d 300704 2 Se 0 M | | | | - | tress | | e sed High S | ta | nts | | |
| 0 5 5 0 0 | Deliver purchase orde Date account opened Supplier group Default department | ers by Post v d 300704 2 Se 0 M | to | | | - | lress | | e sed High S | ta | nts | | |
| 0 5 5 0 0 | Deliver purchase orde Date account opened Auppler group Default department Default cost centre | ers by Post ~ d 300704 2 Se 0 M | to | | | - | dress | | e sed High S | ta | nts | | |
| 0 5 5 0 0 | Deliver purchase orde Date account opened Auppler group Default department Default cost centre | ers by Post ~ d 300704 2 Se 0 M | to | | | - | | | re osed High S wer P | treet | | | |
| 0 5 5 0 0 | Deliver purchase orde Date account opened Auppler group Default department Default cost centre | ers by Post ~ d 300704 2 Se 0 M | to | | | - | dress | | e sed High S | ta | | Save] | Cancel |
| 0 5 5 0 0 | Velver purchase orde Date accourt opened hippler group Vefault department Vefault cost centre Accourt number | ers by Post ~ d 300704 2 Se 0 M | to | | | - | | | re osed High S wer P | treet | | Save | Cancel |
| 0 5 0 4 | Velver purchase orde Date accourt opened hippler group Vefault department Vefault cost centre Accourt number | ers by Post ~ 3 300704 2 54 0 M 0 55 - | to | | | - | | | re osed High S wer P | treet | | Save | Cancel |
| 0 5 0 4 | Velver purchase orde Date accourt opened hippler group Vefault department Vefault cost centre Accourt number | ers by Post ~ 3 300704 2 54 0 M 0 55 - | to | | | - | | | re osed High S wer P | treet | | Save | Cancel |
| 0 5 0 4 | Velver purchase orde Date accourt opened hippler group Vefault department Vefault cost centre Accourt number | ers by Post ~ 3 300704 2 54 0 M 0 55 - | to | | | nd add | | | re osed High S wer P | treet | | Søre | Cancel |
| 0 5 0 4 | Velver purchase orde Date account opened hippler group Vefault department Vefault cost centre Account number | ers by Post ~ 3 300704 2 54 0 M 0 55 - | to | | | nd add | Edt | | re osed High S wer P | treet | | Søve | |
| | Velver purchase orde Date account opened hippler group Vefault department Vefault cost centre Account number | ans by Post v a 300704 2 Sc 0 M 0 Sc 0 Sc | to contract of the second seco | PA (Local) | Name ar | nd add | Edt | | re osed High S wer P | treet | | Save | |
| | behver purchase orde bate account opened huppler group Arfault department befault dopartment cocount number | ans by Post v a 300704 2 Sc 0 M 0 Sc 0 Sc | to contract of the second seco | PA (Local) | Name ar | nd add | Edt | | re osed High S wer P | treet | | Seve | |
| | lelver purchase orde hite account operad kopier group Wrauk dopatment what dopatment what cost centre cocount number | ans by Post v a 300704 2 Sc 0 M 0 Sc 0 Sc | In contract of the section of the se | PA (Local) | Name ar | nd add | Edt opliers Supplier | | re sed High S wer D | treet | | | Last Tran |

| | Supplier Short Nat | me Account Number | Supplier Name | Currer Balance | | | Supplier Group | Default Nominal Account | Current Year 1-12 months Turnover | | Turnover vs. Previous Ye | | Acce Class |
|---|-----------------------|---------------------------------------|---|-------------------|-----------|---------|-------------------|-------------------------------|--|-------------------|-----------------------------|------------|---------------|
| | GLOBALP | R 8014 | Global PR | 0.00 | 0 | 0.00 | 2 - Services | Maccount | 0.00 | 0.00 | | | Stand |
| | PROPERT | FYMA 8007 | Property Management Ltd | 0.00 | 0. | 0.00 | 0 · Mscellane | 35 - Rent and | 0.00 | 0.00 | | 01/07/2013 | Stand |
| | | | Maintain Filters | | x | | | | | | | | |
| | 5 | Supplier | | | | | | | Account Types | | - 0 | × | |
| | | Available Filters | Setting | | = | Ava | lable items | _ | raccount types | Current Selection | | | |
| | | Suppler | setting | | • | L. | ccount Type | (A) | Add -> | Account Ty | | 1 | |
| | | Account Type | Closed | | | | Prospect | * | <- Remove | Closed | P. | | |
| | | Suppler Group | | | | | Live | A) | house of the second sec | | | | |
| | | Account Classifica Default Nominal | tion | | | | | | Select All | | | | |
| | | Payment Method | | | | | - | | Clear Selection | | | | |
| | | Oldest Debt | | | | | | | | | | | |
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| | | 0 | Account Ty | pes | | | < | • | | | | * | |
| | | D | Account Ty | | | | \leq | • | | ¢ | W > | * | |
| le Items | | 8 | Account Ty | | urrent Se | lection | | | | | | 14 4 | |
| 25 LUCE INC. | | | Account Ty | | | | | \geq | | | III > | 14 4 | |
| unt Ty | pe | | | | Accou | t Type | | | | | | 14 4 | |
| unt Ty | pe | | | | | t Type | | |) | | | 14 4 | |
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| ount Typ Prospect | pe | | Add -> <- Remove | c | Accou | t Type | | | 0.00 | | | 14 4 | |
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| able Items count Typ Prospect Live | < | | Add -> <- Remove Select All Clear Select | c | Accou | t Type | | | 0.00 | | OK Canc | 14 4 | |

4.4. Send Shortcuts to Supplier Invoices and Credit Notes



Available to all customers with axis diplomat 2020 or above

Adding to the existing capabilities for emailing other axis diplomat users with links to a customer, supplier, purchase order, etc., you now have the ability to email shortcuts to supplier invoices and credit notes.

| voice details | | | Suppler Details | | | |
|-----------------|-----------|-----|----------------------|--------------------------------------|---------------|---|
| voice number | 366978 | | Supplier reference | 01/8003 | ACME | i |
| voice date | 040820 | | Name and address | Unit 9 | Tools Limited | |
| urchase order | 366 1 | | | Townal Indu Townal Countyshire | stral Estate | |
| lefod / year | 02/21 | | | CS31 1DS | | |
| latch number | 0 | | Supplier group | 1 Stool | k Suppliers | |
| temai reference | | | Discount and Paymer | t Details | | |
| Comment | | | Supplier discount | 0.00 % | | |
| Document Values | | | Cash discount | 0.00 % | | |
| oods value | 113393.40 | GBP | Discount period | 0 day(s) | | |
| AT value | 22678.68 | GBP | Payment due by | 031020 | | |
| nvoice total | 136072.08 | GBP | Approval Status | | | |
| Discourt amount | 0.00 | GBP | Approved for payment | : 🖂 | | |

Clicking the Send Shortcut button within Purchase Invoice Enquiry or Purchase Credit Note Enquiry will create an email including a shortcut.

| ੑ <u>ਜ਼</u> ७ ୯ ↑ ↓ % - - | Purchase Invoice 366978 - Acme Garden Tools Limited - Message (HTML) | m o × |
|---|--|-------|
| File Message Insert Options Format Text Image: Second sec | Review Help Q Tell me what you want to do <u>U</u> <u>∠</u> - <u>A</u> - <u>□</u> - <u>□</u> - <u>□</u> <u>□</u> <u>□</u> · · ₁ <u>0</u> - <u>□</u> + <u>↓</u> <u>P</u> u - | |
| To Send Cc Subject Purchase Invoice 300/72 - Arr | Purchase Invoice 366978.axs 6 KB | |
| HI | | |
| This is the invoice we were discussing earlier - can you hav Regards | e a look and let me know what you think we should do? | |

Anyone receiving that email, provided that they are a valid user of your axis diplomat system with appropriate permissions, can double-click on the attachment and be taken directly to the specific document.

4.5. Supplier Price List Monitors



Available to all customers with axis diplomat 2020 or above

A new monitor tab type has been added, Supplier Stock Price Details, which lists Supplier Price List entries.

| stomer Pricing Sup | oler Pricing 1+1 | | | | | | | | | | |
|--------------------|--------------------------|------------------------|---------------------|----------------------------|----------------------------|---|---------------|-------------|-----------------|------------|--------|
| | 2:18 Wednesday 18h | September 2020 | | | | | | | | | |
| Stock Reference | Alternative Reference | Supplier Short Name | Supplier Account | Supplier Name | Supplier Item Reference | Supplier Item Description | Cost Price | Cost Per | Discount (%) | Category | Tracks |
| ACMEFORK01 | ACMEFORK01 | ACME | 8003 | Acme Garden Tools Limited | ACMEFORK01 | Acme Standard Fork | 8.93 | 1 | 10.00% | | 1 |
| | | | | | | | | | | A - Best | |
| ACMEFORK02 | ACMEFORK02 | ACME | 8003 | Acree Garden Tools Limited | ACMEFORK02 | Acree Light Fork | 7,73 | 1 | 10.00% | | |
| | | | | | | | | | | A - Best | |
| ACMEHOE01 | ACMEHOE01 | ACME | 8003 | Acme Garden Tools Limited | ACMEHOE01 | Acres Standard Dutch Hoe | 10.71 | 1 | 10.00% | | |
| | | | | | | | | | | A - Best | |
| ACMERAKE01 | ACMERAKE01 | ACME | 8003 | Acme Garden Tools Limited | ACMERAKE01 | Acme Standard Rake | 10.71 | 1 | 10.00% | | |
| ACMERAKE02 | ACMERAKE02 | ACME | 8003 | Acme Garden Tools Limited | ACMERAKE02 | Acme Standard Grass Rake | 11.91 | 1 | 10.00% | A - Best | |
| ACMEROALEUZ | AUMENANEVA | ACHE | 0003 | Achie Garben Tools United | ACMEROAREUS | Acme Standard Grata Hake | 11,51 | 1 | 10.00% | A - Best | |
| ACMESET01 | ACMESET01 | ACME | 8003 | Acme Garden Tools Limited | ACMESET01 | Acres Standard Hand Tool Set Browel, fork, p. | 14.89 | 1 | 10.00% | N. Man | |
| | | | | | | | | | | A - Best | |
| ACMESPDE01 | ACMESPDE01 | ACME | 8003 | Acree Garden Tools Limited | ACMESPDE01 | Acme Standard Spade | 8.50 | 1 | 10.00% | | |
| | | | | | | | | | | A - Best | |
| BOOK001 | BOOK001 | BOOKSRUS | 3005 | Books Y Us | BOOK001 | A-Z Weeds 214pp | 2.34 | 1 | 0.00% | | |
| | | | | | | | | | | A - Best | |
| BOOK002 | BOOK002 | BOOKSRUS | 8005 | Books Y Us | BOOK002 | A/Z Roses 196pp | 2.34 | 1 | 0.00% | | |
| | | | | | | | | | | A - Best | |
| BOOK003 | BOOK003 | BOOKSRUS | 3005 | Books Y Us | BOOK003 | A-Z Fruit Trees 270pp | 2.34 | 1 | 0.00% | | |
| BOOK004 | BOOK004 | BOOKSRUS | 8005 | Books Y Us | BOOK004 | A-Z Houseolants 150pp | 2.34 | 1 | 0.00% | A - Best | |
| DUNHANS | 5007004 | bookanus | 0013 | DODKS 7. US | 00000004 | we constructs codd | 2.34 | 10 | 0.00% | A - Best | |
| BOOK012 | BOOK012 | BOOKSRUS | 8005 | Books Y Us | BOOK012 | Roses Made Easy | 3.28 | 1 | 0.00% | 11 million | 5 |
| | | | | | | | | | | A - Best | |
| < | | | 10 | | | | | | | | > |
| _ | | | | | | | | | | | _ |
| C Fiter | Tab Options | | | | | | | | item Count | 112 | |

In addition to allowing all of the same filters normally available for suppliers and stock items (such as supplier group, product group or default department), the monitor can also be filtered by price category (for example, to show just your Category A suppliers for each product).

It can also be filtered by the date last amended. This makes it a particularly useful tool for ensuring that information on your agreed pricing is kept up to date, helping contribute towards better purchasing decisions.

4.6. Update Purchase Ledger Archive Analysis Codes



Available to Software Assurance customers with axis diplomat 2018

A new Supervisor Function has been added to the system to update analysis codes on purchase archive transactions. For selected suppliers, this function will update all historical transactions with the current default codes from the supplier accounts. This allows Purchase Business Intelligence and other reports to use current codes for historical analysis.

The codes that may be updated are:

- Supplier Group Code
- Department Code
- Cost Centre

| ile He | lp | | | | |
|-----------------|--------------------------|---------|-------|---|-----------|
| Range | Selection | | | | |
| Supplie | er number | (s) | Γ | | |
| <u>S</u> upplie | r <mark>group(</mark> s) | | | | |
| Update | Options | | | | |
| Update | supplier | group o | ode 🗌 | | |
| Update | departme | ent cod | le 🗌 | | |
| <u>U</u> pdate | cost cen | tre cod | le 🗌 | | |
| | | | | C | OK Cancel |
| | | =/ | A 32 | | |

4.7. Verify Supplier's VAT Number in Purchase Order Invoice/Credit Note Booking 🗙

Available to Software Assurance customers with axis diplomat 2018

The recent modification to allow a supplier's Account Classification to be overridden in Purchase Order Invoice Booking and Purchase Order Credit Note Booking has been extended, for axis diplomat 2018 customers with Software Assurance to include the ability to verify an EC VAT Registration Number using VIES (VAT Information Exchange System).

| | Purchase | Order Invoice Booking | | | |
|--------------------------|----------------------|------------------------|---------------------------|--------------|----------|
| e Help | | | | | |
| locument Details Attache | ients | | | | |
| Supplier Selection | | Supplier Details | | - | |
| Select by | Short Name Search 💙 | Supplier reference | 01/8003 | ACME | i |
| Search text | ACME | Name and Address | Acme Garden T | ools Limited | |
| Account classification | EC Member State 🗸 | | Townal Industri Townal | al Estate | |
| EC Country Code | FR - France v | | Countyshire CS31 1DS | | |
| VAT Registration number | 12345678501 Check | Contact name | Ken Webb | | |
| Document Details | _ | Telephone | 01234 676767 | | |
| Batch number | 0 | Account number | 76423/GH/85 | 1 | |
| Invoice number | | Suppler decourt source | Purchase Order | ~ | |
| Invoice date | 180319 | coley docount | 1 | | |
| Internal reference | | | | | |
| Department code | 0 Mscellaneous | | | | |
| Cost centre code | 0 Sales | THT Honce | | | |
| Comment | | | | 1 | |
| Goods value | VAT Registration num | ber 1234567890 | 1 | Che | eck |
| VAT | 0.00 | | | | |
| Total | 0 00 GBP | | | | |
| | | | | 0 | K Cancel |
| | | | | 0 | Cancel |

4.8. Security Permissions on Supplier Payment Details



Available to Software Assurance customers with axis diplomat 2018

You are now able to restrict the ability for operators to change a supplier's payment details whilst allowing them to change other aspects of a supplier account.

Previously, it was necessary to block all amendment of supplier accounts to prevent the bank details being changed.

One scenario this protects against is a malicious attempt to divert supplier payments to a different bank account by a rogue employee.

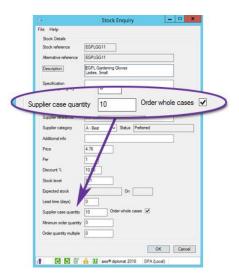
| 2 | Security Permissions / User / CATH | X |
|---|--|--|
| ile Help Objects ♦ Al Physoy Objects ▶ ♦ Sales Ledger | Permasions Allow Deny This defines the access rights to payment details Read III | |
| Purchase Ledger A Suppliers Balance Details Pricing Details Pricing Details A Payment Details | Advanced Permissions | |
| ⊿ ♦ Supj ♦ | Deer se no tens to show | , Create Delete (*) (* |
| 🖸 🖸 🧭 🎒 😂 ass® diplomat 2018 | DPA (scen) | OK Cancel |

4.9. Supplier Case Quantity

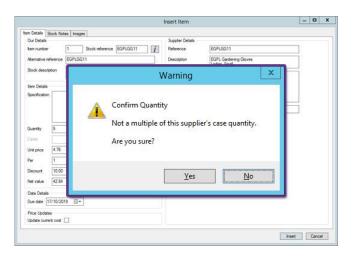


Available to Software Assurance customers with axis diplomat 2018

It is now possible to record a Supplier's Case Quantity against an individual Supplier Price List entry. You can also indicate whether you should always order in multiples of the case quantity.



When raising a Purchase Order for a Supplier where the price list entry indicates that there is a case quantity, the quantity defaults to the case quantity. If the supplier price list entry has been marked as "Order whole cases" then you may still place an order for other quantities but you will be warned:



This functionality is enabled via a parameter within "Maintain POP Parameters":

| User D |)efaults | Purchase Requ | irements | Purch | ase Order Invoice B | looking | Stock Reference Prioritie |
|---------|--------------------|----------------------|-----------------------|----------|---------------------|------------|---------------------------|
| Order | Maintenance | Goods | Received/F | Returned | Document | Parameters | Supplier Price List |
| Suppler | Price List Updat | ies . | | | | | |
| Now au | tomatic price list | update | | | | | |
| Delaut | update option | | | | | | |
| Update | tpecification del | int in | | | | | |
| | dering by supplie | | | | | | |
| | | supplier description | an 🗍 | | | | |
| | | price list record | 1 | | | | |
| Categor | y Details | - | | | | | |
| Code | Description | -HUS | | | | | |
| A | Best | RECE | RED | | | | |
| В | Good | STAND | 0 | | | | |
| C | Not Good | STANDA | RD | | | | |
| D | Avoid | WARNIN | IG N | 1 | | | |
| | | | | | | | |
| | | | | - | | | |
| | - | | and the second second | | | | |
| | | Supplier | 200 0112 | ntity on | price list red | cond | |

4.10. Purchase Requirements and Back-to-Back Orders



Available to Software Assurance customers with axis diplomat 2018 and the Back to Back Ordering module

The function Create Requirements from Stock File has been extended to allow back-toback orders to be ignored when calculating On Order quantities.

| Slock Record Selection Select stock by Slock Reference V Slock Inference(s) Product group(s) Slock for group(s) Slock to back to back orders Slock location I March Report Product group(s) Recommended Recorder Reson Reverse Inference Slock Suba On Otor I Reson Reverse Inference Slock Suba On Otor I Reson Reverse Inference Reson Reverse Inference Reson Reverse Inference Reson Reverse Inference Reverse Infe | | Create Rec | quirements from Stock File | |
|--|---|-------------------|--|----------------------|
| Create requirement # Below Re-Ode Level v V Clear equirement a requirement access of Market exception and the set of the | Select stock by Sock reference(s) Noduct group(s) Sales group(s) Sales group(s) Sales boation Include from all defaunt for Sock Oracing Default Base mgurement on Create mgurement f Intale moder levels by (2) Indude terms with zone moder level | Stock Reference v | Disregard back to back on Repersional Parameters Organy to other Of Distances of requirement location Pachase location | Recommended Re-order |

When this option is selected, back-to-back purchase orders, sales orders and any associated receipts are excluded. This helps to avoid situations where, for example,

stock destined for a specific order is included in the calculated 'On Order' quantity because the purchase order falls within the selected date range but the sales order does not.

4.11. Update Payment Due Date on all Supplier Transactions



Available to Software Assurance customers with axis diplomat 2018

The Purchase Ledger function Amend Purchase Invoice/Credit Note Status has been updated to include an additional option, "Update due date".

This allows you to update all outstanding transactions with a new due date, based on the current Credit terms from the Supplier account.

| ile Help | | | |
|--------------------------------|------------------------|----------------------------------|---------------------|
| Account Selection | | | |
| Transactions to include | Approved and Unapprove | ed v) | |
| include completed transactions | | Adjustments | |
| Selection by | Suppler Number V | Contraction of the second second | |
| Suppler number | 8001 | Update due date | ✓ |
| Adjustments | - | | |
| Update due date | R. | | |
| | OX | Cencel | |

This is ideal for use where new payment terms are agreed with a supplier and these are to be applied retrospectively to outstanding transactions - for example, when a supplier changes payment terms from 30 days to 60 days.

4.12. Purchase Order Attachments shown in Supplier Enquiry



Available to Software Assurance customers with axis diplomat 2018

The Purchase Orders tab in Supplier Enquiry now includes an additional column to indicate whether the purchase order includes attachments.

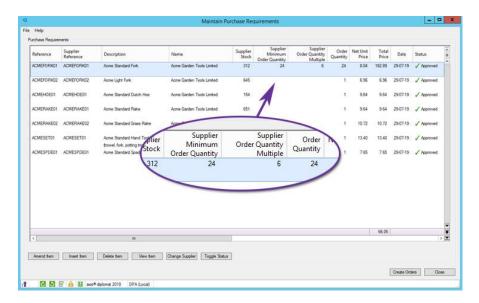
| General Details | Account Detail | le Contacte | Pav | ment Details | Suppler Pr | tce List | Ordering Details | Transactions | Transaction He | tory 1 | em Histon |
|-------------------|----------------|------------------|--------------|----------------|-------------------------|----------|------------------|-----------------|----------------|--------------|------------|
| Purchase Orders | Outstand | ng Order bems | Graph | # S. | ppler Notes | Attachme | nta Trac | eability Call | History Eve | nta | Audt Trail |
| Supplier Details | | | | | | | | | | 200 - 11 - C | |
| Suppler reference | 01/8003 | ACME | Acree G | iarden Tools L | inted | | | | | | |
| Purchase Orders | | | | | | | | | | | |
| Order Number | Attachments | Net Order V | alue 58Pi | Order Date | Due Date | Approved | Due (Days) | Our Sales Order | Sent/Exported | Printed | Aca |
| 369 | 0 - | 69948.2 | | 05-11-2019 | 05-11-2019 | 1 | 42 | | x | 1 | |
| 366 | - | 113393.4 | 0 | 04-11-2019 | 04-11-2019 | 1 | | | x | x | 1 |
| 363 | | 210,921 | 5 | 08-10-2019 | 08-10-2019 | 1 | | | × | × | |
| 362 | | 18115.4 | | 09-09-2019 | 09-09-2019 | 1 | | | x | × | |
| 359 | | 159432.0 | 0 | 0. 59.2019 | | - | | | x | × | |
| 356 | | 135155.6 | 5 | | 0.1 | | | | x | x | |
| 353 | | 92324,5 | 5 / | urchase | Urders | | | | x | × | |
| 350 | | 182259.5 | | | | | | - | × | × | |
| 347 | | 43509.5 | 41 | Order N | lumber | Attach | ments | | x | × | |
| 343 | | 83932.3 | 5 | | | | | | × | × | |
| 342 | | 20185.3 | | 369 | | a | | | x | * * * * | |
| 338 | | 187587.5 | 5 | | | | - | | × | × | |
| 334 | | 75170.5 | | 03-03-2019 | No. of Concession, name | - | | | x | × | |
| 330 | | 166307.8 | | 05-02-2019 | 05-02-2019 | 1 | | | × | × | |
| 326 | | 73210.4 | | 05-01-2019 | 05-01-2019 | 1 | | | x | × | |
| 322 | | 191079.4 | | 04-12-2018 | 04-12-2018 | 1 | | | × | × | |
| 318 | | 74131.5 | | 64-11-2018 | 04-11-2018 | 1 | | | x | × | |
| 317 | | 5010.3 | 0 | 27-10-2018 | 27-10-2018 | 1 | | | x | × | * |
| < | | 81 | | | | | | | | |) E |
| Enter Purcha | se Order | Amend Purchase C | kder- | Dutstanding | orders | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | Edit | Print Pr | eview Send Sho | offout Save | 11 10 10 | Cancel |

4.13. Additional Columns added to Maintain Purchase Requirements



Available to Software Assurance customers with axis diplomat 2018

Additional columns have been added to the Maintain Purchase Requirements dialog to show the Supplier's Minimum Order Quantity and the Supplier's Order Quantity Multiple.



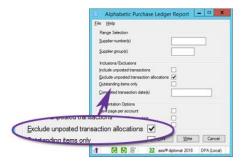
For example, the illustration above shows an item for which the chosen supplier has a minimum order quantity of 24 and must be ordered in multiples of 6.

This additional information allows buyers to make better informed decisions when choosing the right supplier.

4.14. Exclude Unposted Allocations from Alphabetic Purchase Ledger Report 📩 🧭

Available to Software Assurance customers with axis diplomat 2018

The Alphabetic Purchase Ledger Report now allows you to exclude unposted allocations. This is particularly useful when the Purchase Ledger Period End has not yet been run but payments have already been made in the current period, as it allows the report to be produced as at the end of the previous period.



4.15. Purchase Order Due Dates



Available to Software Assurance customers with axis diplomat 2018 and the Purchase Order Acknowledged Receipt Date module

The Transactions tab within Stock Enquiry has been extended to include a column showing the Original Due Date for Purchase Orders.

| | | | | | | | Stock ACM | EFORK01 | | | | | | |
|------------------|------------|-----------|--------------|----------------------|--------------------|--------------|----------------------|---------------------|----------------------|-------------------------|-----------------------|------------|------------------|--------|
| le Help | | _ | | - | | | | | | | | | | |
| General Details | | | | | g and Additional P | | | Supplier Price List | | | Stock and Man | | | |
| Stock Referen | | neaction | Stock Notes | Atributes | Custom Data H | History Atta | chments Issue | History Graph eBusi | iness Details Lini | a Optional E | ixtras Audit Trail | Google Fee | d Data Shee | t WebS |
| At reference | ACMEFOR | K01 | | | Stock reference | ACMER | ORK01 | | | | | | | |
| item description | Acme Stan | dard Fork | 6 | | 1 | | | | | | | | | |
| Transactions | | | | | | | | | | | | | | |
| 10 Th 10 10 | ype | | Date Due | Original Date Due | Reference | Account | t Account t Name | Location | | Location Description | Outstandi Quantity | | Parent Docume | Price |
| 17-12-2 P | URCHASE OF | RDER : | 23-12-2019 2 | 0-12-2019 | 370 | 01/8003 | ACME | 0 | 24 | Main Depot | 24 | | | 14 |
| | | | (| 6 | Date Du | e | Original Date Due | Ref | | | | | | |
| | | | | DER | 23-12-201 | 9 2 | 0-12-2019 | 37 | | | | | | |

If this is overdue then it is shown in red.

| | | | | | St | ock ACME | FORK01 | | | | | - | - |
|-----------------|--|------------|----------------------|---------------------------------------|----------------------|----------------------------|------------------|-------------|-------------------------|--------------------------------------|-------------------|------------------|---|
| e Help | | | | | | | 100000 | | | | | | |
| Seneral Details | Issue History Pricing Images Transactions | | | and Additional Pri Custom Data H | | r Price List ants Issue | Original | ion Details | | Stock and Manufa as Audit Trail G | | | |
| At reference | ACMEFORK01 | | | Stock reference | ACMEFORK | 01 (| Date Due | | | | | | |
| tem description | Acme Standard Fork | | | 1 | | 2 | 10-12-2019 | | | | | | |
| Transactions | | | | 1 | / | | - | | | | | | |
| Date | Туре | Date Due | Original Date Due | Ret | Account Reference | Account Name | Location Code | Quantity | Location Description | Outstandi Quantity | Advised Status | Parent Docume | |
| 17-12-2019 | PURCHASE ORDER | 23-12-2019 | 10-12-2019 | 370 | 01/8003 | ACME | 0 | 24 | Main Depot | 24 | | | ٠ |

4.16. Approval Status now shown in Purchase Invoice Enquiry



Available to Software Assurance customers with axis diplomat 2018

The General Details tab of Purchase Invoice Enquiry now includes an additional field, showing the approval status of the invoice.

| | reference 01/8003 ACME nd address Acme Garden Tools Limited Link 9 Townal Industrial Estate Townal Countyshrie CS31 1DS |
|---|---|
| Purchase order 359 i Period / year 12/20 Suppler | Unit 9 Townal Industrial Estate Townall Countryshire |
| Suppler | |
| | group 1 Stock Supplers |
| VAT value 1055432.00 GBP Cash de Discours Ivvalue 30067.25 4 Payment Ivvalue 188459.25 GBP Approva | t period 0 day(s) t due by 060420 |
| Discount amount 0.00 GBP Approve Amount due 185499.25 GBP | d for payment 🕑 |
| Total (STERLING) 189499.25 GBP | |

4.17. Additional Columns added to Supplier Transaction History Monitor tabs



Available to all customers with axis diplomat 2020 or above

Supplier Transaction History monitor tabs now have additional columns to show the Settled Date and Settled (Days).

Settled Date is the date that the transaction was fully allocated (for example, by making the final payment or allocating a credit note) and Settled (Days) is the number of days between the document date and the settled date.

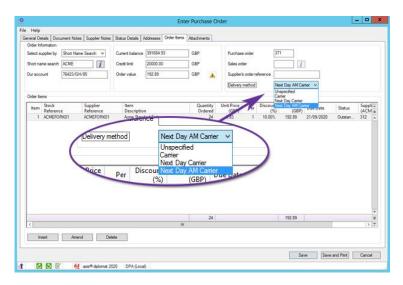
| | | | | | Tra | nsaction | s This Year | | | | | | | | • |
|------------------------|---------------------|-------------------------------|-----------------------|------------|-----------------|-------------------|---------------------|-------------|-----------------|--------------|---------|---------|-----------|-------------------|-----|
| e Help | | _ | | | | | | | | | | | | | |
| upplier Transaction | History Cus | tomer Transaction History [+ | 1 | | | | | | | | | | | | |
| Refresh Complete | d 14:52 Mond | ay 14th September 2020 | | | | | | | | | | | | | |
| Supplier Short Name | Supplier Account | Supplier Name | Document Reference | Docum | Settled Date | Settled (Days) | Transacti Period | Due Date | Transac Type | Net Value | VAT | Total | Unallocat | Purchase Order | Cor |
| ACME | 8003 | Acme Garden Tools Limited | 334901 | 07/01/2020 | 20/01/2020 | 13 | 06/20 | 06/02/2020 | INVOICE | 75170 | 15034 | 90204 | | 334 | |
| GOLDTOOLS | 8004 | GoldTools Limited | 335600 | 07/01/2020 | 01/2020 | 13 | 06/20 | 06/02/2020 | INVOICE | 25534 | 5105.87 | 30641 | | 335 | |
| BOOKSRUS | 8005 | Books Y Us | 335550 | | 0/01/2020 | 13 | 06/20 | 06/02/2020 | INVOICE | 3208.40 | 0.00 | 3208.40 | | 336 | |
| BSMERCHANT | 8015 | Bulb and Seed Merchant | | | 91/2020 | 13 | 06/20 | 07/01/2020 | INVOICE | 11925 | 2385.06 | 14310 | | 337 | |
| ACME | 8003 | Acme Garden Tools Ling | 5-C | - | 20 | 18 | 07/20 | 09/03/2020 | INVOICE | 18758 | 35511 | 22309 | | 338 | |
| GOLDTOOLS | 8004 | GoldTools Limited | Settled | Sett | led To | 18 | 07/20 | 09/03/2020 | INVOICE | 27501 | 5500.23 | 33001 | | 339 | |
| BOOKSRUS | 8005 | Books Y Us | Date | (Da | vs) P | 18 | 07/20 | 09/03/2020 | INVOICE | 3929.80 | 0.00 | 3929.80 | | 340 | |
| BSMERCHANT | 8015 | Bub and Seed Merchan | 20/01/2020 | | | 18 | 07/20 | 68/02/2020 | INVOICE | 12242 | 2448.42 | 14690 | | 341 | |
| ACME | 8003 | Acme Garden Tools Limited | 20/01/2020 | | 13 1/2020 | 35 | 07/20 | 20/03/2020 | INVOICE | 20185 | 2063.60 | 22248 | | 342 | |
| ACME | 8003 | Acme Garden Tools Limited | 347100000 | | 25/03/2020 | 17 | 08/20 | 07/04/2020 | INVOICE | 83932 | 16786 | 10071 | | 343 | |
| GOLDTOOLS | 8004 | GoldTools Limited | 344123 | 08/03/2020 | 25/03/2020 | 17 | 08/20 | 07/04/2020 | INVOICE | 23172 | 4534.41 | 27806 | | 344 | |
| BOOKSRUS | 8005 | Books Y Us | 345910 | 08/03/2020 | 25/03/2020 | 17 | 08/20 | 07/04/2020 | INVOICE | 4253.20 | 0.00 | 4253.20 | | 345 | |
| BSMERCHANT | 8015 | Bulb and Seed Merchant | 346400 | 08/03/2020 | 25/03/2020 | 17 | 08/20 | 08/03/2020 | INVOICE | 12359 | 2471.88 | 14831 | | 346 | |

4.18. Purchase Order Delivery Methods



Available to Software Assurance customers with axis diplomat 2018

You are now able to assign a delivery method to purchase orders. The available delivery methods include all of those defined as being applicable to arrivals.



Document designer has been extended to allow the selected delivery method to be shown on the purchase order and, for those using the Order Processing Assistant module, supplier delivery charges can be dependent on the delivery method selected:

| Help | | | - | | | |
|-----------------------------|--|--|------------------------------------|------------------|-------|---|
| | Delivery method | 1 - Next Day - Roy | al Mail | | | ~ |
| | thod 1 - Next Day - Royal Mai | - | | | | |
| arges | Description | Charge | Next Day | | | |
| arges | Description | Charge Amount | Cut-Off | Stock Referen | | |
| arges Priority 1 | Description Next Day Printers - Over £100 | Charge | | | 11411 | |
| arges Priority 1 | Description Next Day Printers - Over £100 Next Day Printers £50-£100 | Charge Amount 3.50 | Cut-Off 14:00 | | | |
| arges Priority 1 2 | Description Next Day Printers - Over £100 Next Day Printers £50-£100 Next Day Printers - Under £50 | Charge Amount 3.50 5.00 | Cut-Off 14:00 14:00 | | 4 4 4 | |
| 1 2 3 | Description Next Day Pinters - Over £100 Next Day Pinters £50-£100 Next Day Pinters - Under £50 Next Day Catridges Over £100 | Charge Amount 3.50 5.00 6.00 | Cut-Off 14:00 14:00 14:00 | | 4 4 | |

4.19. Price Feed Calculation Rules by Product Group

Available to all customers with axis diplomat 2020 or above and the Supplier Price Feed Foundation module

Supplier price feeds normally only recalculate selling and current costs when the number of current supplier price list entries reaches a fixed threshold.

It is now possible to define, for specific product groups, a lower threshold. This is ideal for more specialised items where perhaps there may be only one supplier. This provides the flexibility to ensure such items are repriced without compromising the averaging used for other products.

4.20. Purchase Invoice Booking by Delivery Advice



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

For situations where you have entered (or received via EDI) a Purchase Delivery Advice in advance of receiving a delivery from a supplier, it is now possible to book a supplier's invoice against that Delivery Advice rather than against the original purchase order(s).

This can be very convenient and speed up the invoice booking process since a single delivery can include partial shipments and/or items from multiple purchase orders and an invoice may more closely match the Delivery Advice than the original Purchase Orders.

Once a Delivery Advice has been selected, individual items may be excluded or additional items added, for situations where the Invoice does not exactly match the Delivery Advice. You may also select additional Delivery Advices if a single invoice is a consolidation of multiple deliveries.



| Document Details Ag | | | | Insert | Order Items | | | 2 | _ D X | _ 0 |
|---------------------|----------------------------|--|--|-------------|--|----------------------|----------|---------------------|--------------|----------|
| Document Deta | Document Sele | | | Target V | | 10.000 | 1.000 | ed Values | | |
| Supplier reference | Select by | | Advice v | Goods (| | GBP | Goods | - | GBP | GBP |
| Invoice number | Reference Total value | 753152 | 5 GBP | | 1.00 | GBP | VAT | 0.00 | GBP | GBP |
| Internal reference | Uninvoiced value | 1.000 | | Total [| .00 | GBP | lotal | 0.00 | GBP | GBP |
| Document items | Available tems | e [34301.4 | | | | | | | | |
| Item | Orde | ltem | Supplier Reference | Description | Stock Referen | ce / Descrip | tion | Ordered Quantity | Receia | ds Value |
| There are no it | 369 | 1 | EGPLSHR1 EGPL Electric Shred 1800w Induction Mot | | EGPLSHR1 EGPL Bectric S 1800w Inductio | 100 C. 100 C. 100 C. | | 210 | Qua <u>*</u> | |
| | 369 | 2 | EGPLSTRM1 EGPL Bectric Terrin 30cm Cu | ent Selec | - | | _ | 555 | | |
| | 369 | 3 | EGP Select I | by | Delivery | Advice | ~ | | | |
| | | | Referen | nce | 753152 | | | | | * |
| < | < | 6 | | alue | 69948.2 | 5 | G | 100 | > | > |
| Options Inset On | Number of items Options | U | Include A | tenis | | - | | | | |
| | Amend item | 1. | lude item E | xclude item | Include All | | clude Al | | | |

4.21. Document Notes added to Purchase Delivery Advice



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

A Document Notes tab has been added to Purchase Delivery Advice maintenance functions (both when adding a new Purchase Delivery Advice and using Edit mode from Purchase Delivery Advice Enquiry).



This plain text area allows you to record any additional information that may be relevant to the expected delivery, such as arrangements with haulage and freight forwarding companies.

4.22. Supplier Delivery Charge by Sales Group



Available to Software Assurance customers with axis diplomat 2018 and the Order Processing Assistant module

Sales Group selection has been added to the list of criteria that can be used when defining a supplier's delivery charge.

This is designed for situations where a supplier has a different delivery charge for certain types of products because, for example, they need special handling. Typical

| | | Maintain Supplier Delivery Charge | jes – 🗆 X |
|----------------------|--|-----------------------------------|-----------|
| e Help | | | |
| Selection | | Help | |
| Select supplier by S | hort Name Search 🗸 | Report | |
| Short name search | | Charge Details ? | × |
| Suppler name | Delivery Charge | | |
| Delivery method | Description | Next Day Up to £100 | |
| Charges | | | |
| | Туре | Fixed Amount | 7 |
| Priority Desc | Anount | 5.00 | max. |
| 1 Next 2 Next | Stock reteren | | max. |
| | Purchase order delly Change sales order Applies to Purchase Value min. [Weight min.] Sales group min. 1 | delvey method | |
| | | OK Cancel | 6 |
| < | | 18 - | 2 |
| C Add | Amend Dele | | |

examples might include furniture or large format printers that require a two person delivery team.

4.23. Date and Time Specific Price Feeds

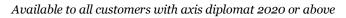


Available to all customers with axis diplomat 2020 or above and the Supplier Price Feed Foundation module

For those using Date and Time Specific Pricing on their stock items, the option is now available for automated Supplier Price Feeds to update the date and time specific current cost details for the items in a feed.

Section 5 Stock Ledger, Bill of Materials & MRP

5.1. Landed and Supplemental Stock Cost



This new module provides greater control and analysis of the supplemental stock costs associated with purchasing stock. It will be particularly valuable to importers, who need to ensure that transport, duty and insurance costs are correctly analysed.

It is available as an additional option for axis diplomat 2020 but with no additional licence or support costs,

For further information, please refer to the Landed and Supplemental Stock Cost module overview at www.axisfirst.co.uk/software/axisdiplomat/modules/

5.2. Stock Transaction Reason Codes

Available to all customers with axis diplomat 2020 or above

You are now able to define a number of reason codes to be used when making ad hoc stock adjustments (i.e. those that are not associated with the day-to-day buying, selling or consumption of stock items).

This allows you to gain a greater insight into the reasons for stock adjustments, for example, whether a significant amount of stock is being written off due to damage or age.

A new Stock Ledger Supervisor function, 'Maintain Stock Transaction Reason Codes', allows you to define your own reason codes for making stock adjustments:

| Code | Description | | |
|------|-----------------|------------------|--|
| | Unspecified | | |
| | Counting Error | | |
| 2 | Damagé | | |
| 3 | Too Old | Complete Free | |
| | | 1 Counting Error | |
| 5 | From Exhibition | 2 Damage | |
| | | 3 Too Old | |

When making a stock adjustment, the operator simply chooses the reason from the list:





| e Help | | | |
|-----------------------------|--|----------------------------|---------------------------|
| Batch Details | | 7.5 | |
| Batch number | 0 Batch comment | | |
| Batch date | 260920 | | |
| Reason Codes | | | |
| Negative adjustment reason | Damage v | Reason Codes | |
| Positive adjustment reason] | Counting Error V Unspecified | Negative adjustment reason | Damage v |
| Location Selection | Counting Error | | |
| Rock location | Damage From Exhibition To Exhibition | Positive adjustment reason | Counting Error 🗸 |
| Rock Selection | Too Old | | Unspecified |
| select by | Stock Reference | Location Selection | Counting Error |
| Rock Reference | | Stock location | Damage From Exhibition |
| | | Stock Selection | To Exhibition Too Old |

It is also possible to define a default reason for each type of adjustment:

| | | | Maintain Stock L | edger Parameters | | | |
|----------------------|----------------------------|--------------------------|------------------------|-------------------|---------------------|--------------------|----------------------|
| Help General | Negative Stock | Stock Record Maintenance | Customer Stock Pitcing | Pricing / Costing | Stock Movements | Stock Traceability | Additional Reference |
| General | Stock Reporting | | iness | | Transaction Reasons | atook inaceabley | Audt Trail |
| Default Stock | Adjustment Reasons | 1 | | | | | |
| Negative To | | | | | 1 | | |
| in the second second | nory our correction of the | | | | | | |
| Positive Fro | m Exhibition v | | | | portering | | |
| Default Stock | Take Adjustment Reason | 4 | 1 | Defa | ult Stock Transa | ction Reasons | |
| Negative Co. | unting Error v | | | | | | |
| Postive Co | unting Error v | 1 | | | - | | |
| | | Stock | Reporting | | | | |
| Default Stock | Transfer Reasons | erault Stock Adjustm | ant Bassons | | | | |
| Out Unspecif | fied v | | | | | | |
| In Unspecif | fied v | Negative To Exhibiti | on v | | | | |
| history | | | | | | | |
| | 1 | Positive From Exhib | ition ¥ | | | | |
| | | THOM EARL | ALION + | 1 | | | |
| | | | | 1 | | | |
| | | Default Stock Take A | djustment Heasons | | | | |
| | 1 | Negative Counting E | mor v | | | | |
| | 1 | reguire counting t | | | | | |
| | | Positive Counting E | | | | | |
| | | Positive Counting E | irror 🗸 | | | | |
| | | | | | | | |
| | | Stock Transfe | r Reaso | | | | |
| | | | | | | | |
| | | | | | | | |

The Transactions tab within Stock Enquiry and Stock Transaction monitor tabs provide visibility of the reasons specified for each adjustment.

5.3. Gross and Net Unit Weight on Stock



Available to all customers with axis diplomat 2020 or above

All axis diplomat 2020 systems now feature two unit weight fields on stock records. Net unit weight is used to record the weight of the actual product or material without any packaging whilst Gross unit weight includes its immediate packaging. For example, if selling jars of jam, the net unit weight would hold the weight of jam only whilst the gross unit weight would include the weight of the jar.

Users of the Intrastat module should note that the field used for Intrastat purposes is the gross unit weight since you are expected to report weights inclusive of immediate packaging.

| uperseded Detail | Centre | act Details | Images | Transaction | Stock Note | Atributes | Quitom Data | Heter | Attachments | Issue History Graph | eBusiness D | Mals Li | 4a 0a | tional Extra |
|-------------------|------------------------|--------------------|---------------|-------------|-----------------|---------------------------------------|---------------------|----------|----------------------------|---------------------|---------------|----------------|-------------|--------------|
| Add | | | mager | Google Feed | | | ata Sheet | | Web | | | lutistanding O | | |
| General Details | Issue Hi | istory F | ticing and Co | sting Dia | ounting and Add | tional Pricing | Customer Price I | ist | Supplier Price List | Location Details | Stock Bins | Stock an | d Manufactu | ring Detai |
| Stock Reference | | | | | 21 | 12 | 122 | | | | | | | |
| At reference | EGPLCS1 | | | | Stock reference | e EGPLCS1 | | | | | | | | |
| tem description | EGPL Petr 33cc, 16" | ol Chainsaw bar | | |] | | | | | | | | | |
| Overall Stock Le | rels | | | | | | | | | | | | | |
| n hand 157 | | Inward 0 | | Alocated 1 | 41 | nee 16 | On order | 1 | Suppler | | | | | |
| Seneral Details | | has | | | | Seneral Details | | | | | Purchase On | des Deservoire | | |
| eneral Details | 31 | 0 | nd Petrol Cha | | | John of measure | EACH | 1 | | | Available for | | | |
| pechication | | suitable for a | fomestic and | sugaw. | | | EACH | 1 | | | Suppress PO | | | |
| | | light profess | onal use. | | | Case quantity | 1 | 1 | | | Suppress PO | P cost updat | te . | |
| | | | | | | | | | | | Include in PC | P threshold | valuation | • |
| raceability mode | 1 | None | | Gr | ss unit we | abt | 6,100 | 1 | ka | | | | | |
| | - 8 | 21 0 | ainsaws | Circ | SS UTIL WC | grit | 0.1000 | | Ng | | | | | |
| roduct group | 1 | 21 0 | ansaws | Net | unit weigh | | 5 700 | | kg | | | | | |
| urchase nomine | | | | | unit weigi | IL. | 5.7000 | <u>.</u> | Kg | / | | | | |
| orce nominal de | partment [| Departr | nent Machin | very v | | mumba | -(-) | | | | | | | |
| orce nominal co | st centre { | Cost ce | ntre Sales | ~ | | ion-returnable a | en 🗌 | - | | | | | | |
| iross unit weight | 1 | 6.1000 | kg | - | - | Discontinued iter Decimal places (| | | | | | | | |
| let unit weight | 1 | 5.7000 | kg | | | | | - | | | | | | |
| atalogue page n | unberis) | | _ | | | Default delivery t | | day | h(tr) | | | | | |
| | | | | | | Deposit item | | | | | | | | |
| | (080) | Unspecified | | | | label Printing | | | | | | | | |
| | | | | | | | when receiving go | | | | | | | |
| | | | | | | unt stock labels | s when selling good | | international and a second | | | | | |
| Country of Origin | | | | | | | | 1 | Per bem | ¥ | | | | |
| | | | | | 1 | Default stock ite | m label format | Sy | vstem default 🔍 | Print Label | | | | |
| | | | | | | | | | | | | | | |

5.4. Re-Arrange Items within Assemblies



Available to Software Assurance customers with axis diplomat 2018 and the Bill of Materials module

You can now re-order the items within a Bill of Materials' Assembly or Kit.

For many, the sequence of the components or sub-assemblies within a Bill of Materials Assembly or Kit is important because it may, for example, indicate the order in which the items are required or used.

Within Assembly Structure Maintenance, you can now move an item up or down in the list by:

- right-click on the item and choosing Move Item Up or Move Item Down from the context menu
- highlighting the item and using the Move Item Up or Move Item Down buttons at the bottom of the dialog

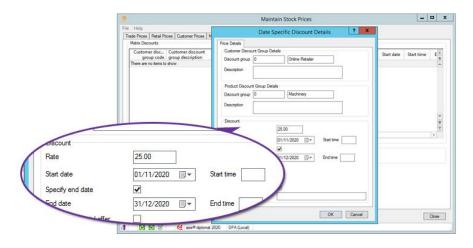
| Help | -unc | nbly Structure Maintenance | |
|--|--|--|--|
| 1055 Auguston | | | |
| EGPLSTRM1 - EGPL E | edge Trimmer 600mm Blade, 500w Motor Jectric Trimmer 45cm Cut. 340w motor | Main Assembly Details Alternative reference Description | EGPLPTK03 EGPL Power Tool Kit #3 |
| EGPLPTKA1 - EGPL Po EGPLSERCD - RCD | otension Lead for garden use | | Component v |
| EGALSEEAA EC | Component Enquiry Sock Enquiry Context New Asambly Inset Component Amend Component Delete Component More Item Up More Item Down Find | Account of the second s | em Down |
| Œ | Stock Enquiry Move Item Up Move Item Down | Accelution for the second seco | 1 3 Jaset Component Arend Component |
| | | Sock Enquiry Sock Enquiry Nove item Lo Nove item Coun | |
| | | | Q |

5.5. Date and Time Specific Discount Matrix



Available to all customers with axis diplomat 2020 or above and the Enhanced Price / Discount Matrix module

For users of Date and Time Specific Stock Pricing, the Discount Matrix has been extended to also allow date and time specific discounts to be provided, to override the base discounts from the matrix.



This example shows that customers in the Online Retailer discount group will receive 25% discount on products in the Machinery discount group between 1st November and 31st December.

5.6. Additional Serial Numbers



Available to all customers with axis diplomat 2020 or above and the Stock Transaction Traceability module

For serial number tracked stock items, you are now able to record up to three serial numbers. In addition, the third serial number may be up to 50 characters instead of the standard 30 characters.

| | | | | Receipt | Details | ? X |
|----|---------------|-------------|----------------|--------------------------|---|-----------|
| ¢ | Stock De | | | 1.2.0 | | |
| E | Stock ref | erence | EGPLMOW3 | Description | EGPL Rotary Mower 38cm cutting width | |
| L | Atemativ | e reference | EGPLMOW3 | | | |
| L | Default b | in | C7 | | | |
| 1 | | | Tra | ceability De | etails (1 of 1) | ? |
| Ts | aceability De | tais | | | | |
| Se | stal number | EGM3-89Y | 79879068 | | | |
| Se | rtal #2 | XX98-089 | 3-8-898080 | | | |
| Se | etal #3 | 48764-544 | 76564646789867 | 67 | | |
| Sp | ecfication | | | | | |
| н | omation | Ly De | taile | | | |
| | / | | 22.55 | | 10.04 | |
| 1 | Serial n | umber | EGM3-89 | Y798790 | 58 | |
| | Serial # | 2 | XX98-08 | 98 <mark>-8-89</mark> 80 | 80 | |
| | Serial # | 3 | 48764-54 | 47656464 | 4678986767 | |
| W | - | tion | | | | / |
| W | anarity and | | | _ | | |
| | | | | | [| OK Cancel |

This is ideal for situations where the manufacturer issues multiple references for one item (such as a serial number and a licence number) or where a single bought in item includes different parts that each have their own visible serial numbers which may be quoted by a customer in the future (for example smartphones which have a serial number and one or more IMEI numbers).

5.7. Outstanding Order Items tab in Stock Enquiry



Available to all customers with axis diplomat 2020 or above

A new tab has been added to Stock Enquiry, showing outstanding sales order and/or quotation lines for the item.

| Superseded Detail | | t Details | Images | Traceability | Transactions | Stock Notes | Athbutes | Custom De | | Attachments | eBusiness Deta | | Optional Extras | |
|--|---------------------------|-----------|----------------|--------------|---------------------|-------------|--------------------------|-----------|-----------------|--------------|----------------|------------|------------------------------------|---------------|
| General Details | Issue Ha | | Pricing and Co | seting De | counting and Add | | Customer P | | Suppler Price L | ist Locatio | n Details Sto | | Stock and Manufai o Order items | during Detail |
| Stock Reference | Google Fee | d | | | Data Sheet | | | | WebSync | | | Outstandin | g Urder sens | |
| At reference | EGPLMOW | | | | 1.0.1.1 | EGPLMOW | | | | | | | | |
| AL INFORMACE | EGPUNOW | a | | | Stock reference | EGPLMOW | 3 | | | | | | | |
| item description | EGPL Rotal 38cm cuttin | | | | | | | | | / | | | | |
| Outstanding Ord | er berns | | | | | - | CK BINS | | ock and i | | | | | |
| Document | Order | Order | Account | Acco | unt | -(| Outs | tanding | Order Iter | ns | Ordered | | Unit Price | Net Val |
| Туре | Number | Date | Reference | | | (08) | | | | iber | Quantity | Currency | | * |
| Sales Order | 18433 | 04-09-2 | 0 01/3567 | JD D | evelopments | 10 | EGPERIO | - | | 10542 | 5 | GBP | 86.95 | 434. |
| | | | | | | | 38cm outtin | | | | | | | |
| Sales Order | 18442 | 04-09-2 | 0 01/3185 | Golde | n Planet Limited | 10 | EGPL Rota | | ł | 81883 | 3 | GBP | 86.95 | 260.8 |
| Sales Order | 18444 | 04-09-2 | 01/3766 | | Tools Limited | 10 | 38cm cuttin EGPL Rota | | | 19925 | 5 | GBP | 86.95 | 434.1 |
| Sales Order | 15444 | 04-09-2 | 0 01/3/66 | Black | Tools Limited | 10 | 38cm outtin | | | 53520 | 5 | GBP | 86.30 | 434.1 |
| Sales Order | 18454 | 04-09-2 | 0 01/3752 | Dear | & Sons Marketing | 10 | EGPL Rota | | 84 | 1480 | 4 | GRP | 86.95 | 3471 |
| Sales Orde | 104.04 | 04-03-2 | 01/3/32 | 000 | a sons marketing | 19 | 38cm outtin | 1000 C | | 1400 | | Gibr | 00.33 | 347.2 |
| Sales Order | 18467 | 04-09-2 | 01/3053 | RED | Engineering Inc. | 10 | EGPL Rota | | | 05788 | 2 | GRP | 86.95 | 173.5 |
| Sans or se | 10407 | 04031 | | | a develop inc. | | 38cm outtin | | | | - | 0.0 | | |
| Sales Order | 18470 | 04-09-2 | 0 01/3495 | I. Smi | h Retail Patners | 10 | EGPL Rota | | 1 | 4272 | 5 | GBP | 86.95 | 434.1 |
| | | | | | | | 38cm outtin | g width | | | | | | |
| Sales Order | 18471 | 04-09-2 | 0 01/3761 | Silver | Developments Lim | | EGPL Rota | ry Mower | F | 19191 | 4 | GBP | 86.95 | 347.8 |
| | | | | | | | 38cm cuttin | g width | | | | | | |
| Sales Order | 18496 | 04-09-2 | 0 01/3405 | Ched | dar & Cheddar Dist | r 10 | EGPL Rota | ry Mower | 1 | 18863 | 4 | GBP | 86.95 | 347.8 |
| 10.000 | | | | | | | 38cm cuttin | g width | | | | | | |
| Sales Order | 18520 | 04-09-2 | 0 01/3553 | Powe | Developments P. | 10 | EGPL Rota | | . / | 49680 | 4 | GBP | 86.95 | 347.8 |
| 38 933 | | | | | | | 38cm cuttin | | | | | | | - |
| Sales Order | 18529 | 04-09-2 | 0 01/3665 | G. De | skens Logistics Lin | r., 10 | EGPL Rota | ry Mower | 1 | 13523 | 6 | GBP | 86.95 | 521.7 |
| | | | | _ | | | _ | | | | 115 | | | 9999.2 |
| < | | | | | | | | | | | | | | > |
| Include Sales o | orders only | | ✓ Refr | esh | | | | | | | | | | |
| Longer and Longer | | | and being the | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | 112 | Edit | Print Previe | w Send Sho | | Save | Cancel |

5.8. Works Order Enquiry

 \checkmark

Available to all customers with axis diplomat 2020 or above and the Compact MRP module axis diplomat 2020 features a completely redesigned Works Order Enquiry.

Included amongst the many improvements in this new function are

- the Works Order Details tab has been removed and the information that was shown is now featured in a header that is shown across all tabs
- the Components tab is now the default tab
- the Components list now shows more information, such as allocation status and issued cost

Most significantly, the new function also incorporates an Edit button to allow amendment of works orders.

Amending a Works Order makes it easy to add or substitute components by closing existing lines and inserting new ones.

| | | | | | | | 1010 01 | rder Enquir | y roco | | | | | | | |
|---------------------------------|--------------------------|----------------------|----------------|--|----------------------|----------------------|--------------------|-----------------------------|--|---------------------|-----------------------|----------------------|------------------------|--------------|----------------------------|--------------|
| Help | | - | | | | | | | | | | | | | | |
| ponents Work | us Order Notes Works C | Orders Audit Trail | | | | | | | | | | | | rder Details | | |
| rder information lorks order | 1828 | Overall works o | der 1828 | | | | | Assembly De Stock refere | | SPLPTK01 | i 5 | | Sales u | | ĩ | |
| rder date | 05/09/2020 | Stock location | 0 | Main Depot | | | | Atemative re | 1997 - Carlon - Carlo | SPLPTK01 | | | Custom | | | i |
| antity to make | - | Works order sta | tus Scher | Concession and the second seco | 100 | | | Stock descri | 12112 | SPL Power Tool K | 2 221 | | Custom | es name | | 1.04.1 |
| | | | _ | | | | -1-0 | | | | | | 1 | | | |
| ate required | 29/09/2020 | Document statu | s 0 | Outstanding | | | - | | | | | | | | | |
| required | 29/09/2020 | Estimated cost | 24349 | 05 | | | | | | | | | | | | |
| mponents | | | | | | | | | | | | | | | | |
| tock eference | Stock Description | | Compon Type | Stocked | Quantity Required | Quantity Outstand | Quantity Issued | Issued Cost | Allocation | Overall Stock On | Overall Free Stock | Location Stock On | Location Free Stock | | Unit Of Measure | |
| 3PLCS3 | | | Component | Stocked | 165 | 160 | 5 | | Pat Issued | 131 | 14 | 131 | | D2 | EACH | |
| PLMOW1 | EGPL Bectric Mor | wer 12" plastic bl | Component | Stocked | 165 | 165 | 0 | 0.00 | Outstanding | 145 | -147 | 145 | -147 | C5 | EACH | |
| PLTRIM1 | EGPL Hedge Trim | mer 600mm Blad | Component | Rocked | 165 | 165 | 0 | 0.00 | Outstanding | 159 | -353 | 159 | -353 | B1 | EACH | |
| PLSTRM1 | EGPL Bectric Trin | nmer 45cm Cut. 3 | Component | Rocked | 165 | 165 | 0 | 0.00 | Outstanding | 177 | -356 | 177 | -356 | AB | EACH | |
| PLPTKA1 | EGPL Power Tool | Kit Accessory P | ill of Mat | Stocked | 165 | 165 | 0 | 0.00 | Outstanding | 0 | -555 | 0 | -555 | J3 | EACH | |
| | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
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| | | | | | | | | | | | | | | | | 5 |
| | | | | | | | | | | | | | | | | 1 |
| | | | | | | | | 112 | | | | | | | | > [2 |
| | | | | - Wednesday | | | | | 11. 19. 2 | | | | | | ddiional not stocked ile | 173 |
| Inset | View | Close | Delete | marks aloc | awa 🗶 🖓 | and and places | a completents | C. conposi | | ien LT withing | A neverbook i | | in the sourced | - 11 y | conversion of the contents | 04 L-1 |
| | | | | | | | | | | | | | | | Edit | Save Cancel |
| | | | | | | | | | | | | | | | | []] (Sectors |

5.9. Export Archived Stock Transaction Details



Available to Software Assurance customers with axis diplomat 2018

The function Export Stock Transaction Details has been extended to allow inclusion of archived stock transactions:

| | Expor | rt Stock Transacti | on Details | | |
|---|--------------------|--------------------|------------|--------------------|------------|
| le Help | | | | | |
| Range Selection | | | | | |
| Select stock by | Stock Reference | ~ | | | |
| Stock reference(s) | | | | | |
| Product group(s) | | | | | |
| Sales group(s) | | | | | |
| Transaction date(s) | | | Include | archived tr | ansactions |
| | | | | | |
| Inclusions/Exclusions | 1 | | | 0 | |
| Inclusions/Exclusions Outstanding transactions only | . ~ | - | | - <u></u> | |
| | | - | | O _m yin | |
| Outstanding transactions only | | _ | | | |
| Outstanding transactions only Include archived transactions | | ~ | | • *** | |
| Outstanding transactions only Include archived transactions Presentation Options | | | | | |
| Outstanding transactions only Include archived transactions Presentation Options Negative Indicator for Issues | Leading Minus Sign | | | <u> </u> | |

5.10. Change Works Order Planned Status from Works Order Monitor



Available to Software Assurance customers with axis diplomat 2018 and the Compact MRP module

It is now possible to change a Works Order from Unplanned to Planned, or from Planned to Unplanned, by a simple right-click option in Works Order Monitor.

| elp Ontern (Cou | | | | | | | | | | | | dietinena. |
|--------------------|-----------------------------|---------------------------------------|------|--|--|--------------------------|---------------------------|-----------------------------|--------------------------------|------------------|------------------|-------------------------------|
| Crues Con | mponent bems [+] | 1 | | | | | | | | | | |
| 1100 | | | | | | | | | | | | |
| Works_ Order | Assembly Stock Reference | Assembly Stock Description | | Quantity Dutsta | Uni Due Me Date | Works Order Status | Works Order Printed | Works Order Stock Locati | Component Stock Location | Product Group | Sales Group | Sales Custon Order Short M |
| 1834 | EGPLPTKA1 | EGPL Power Tool Kit Accessory Pack | 100 | | EACH 05/12/2019 | | | 0 - Main Depot | | 12 - PowerTo. | 3 - Power Tools | |
| 1812 | EGPLPTKA1 | EGPL Power Tool Kt | 215 | - | Works Order Enquiry | | | 0. Main Daniel | 0. Mars Danat | 12 · PowerTo | 2 . Davage Taula | |
| 1655 | Dar Lr 1990 | Accessory Pack | 2107 | | Stock Enquiry | | | U. Har Dopos | o rindir Depor | az crowerro | | |
| 1832 | EGPLPTKA1 | EGPL Power Tool Ka | 160 | | Assembly Enquiry | | | 0 - Main Depot | 0 - Main Depot | 12 - PowerTo | 3 - Power Tools | |
| | | Accessory Pack | | | Build Works Order | | | | | | | |
| 1831 | EGPLPTKA1 | EGPL Power Tool Kt | 190 | | Amend Works Order | | | 0 - Main Depot | 0 - Main Depot | 12 - PowerTo | 3 - Power Tools | |
| | | Accessory Pack | | 1 | Toggle 'Planned' Sta | | | | | | | |
| 1830 | EGPLPTK03 | EGPL Power Tool Kt #3 | 215 | - | Amend Document S | | | 0 - Main Depot | 0 - Main Depot | 12 - PowerTo | 3 - Power Tools | |
| | EGPLPTK02 | EGPL Power Tool Kit #2 | 175 | | Print Works Order | | | | | 12 - PowerTo | | |
| 1828 | EGPLPTK01 | EGPL Power Tool Kit #1 | | | Print Job Ticket | | | 0 - Main Depot | 0 - Main Depot | 12 - PowerTo | 3 - Power Tools | |
| | | | | | Issue All Component | 1.000 | | | | | | |
| | | | | | Issue All Component Issue Specific Comp | | | | | | | |
| | | | | | Goods Received from | | | | | | | |
| | | | | | Print Labels Format 1 | | | | | | | |
| | | | | | Print Labels Format 1 Print Labels Format 1 | | | | | | | |
| | - Inch | a works Order | | - | Print Labels Format | | | | | | | |
| | T 1 | IDI | | _ | Poimst i | ¥ () | | | | | | |
| | I oggi | e 'Planned' Status | | | ~~~~ | | | | | | | |
| | | | | | and the second second | | | | | | | |
| Q | Amen | d Document Status | | and the second division of the second divisio | | | | | | | | |
| 9 | Amen | d Document Status | | | Refresh | | F5 | | | | | |
| Q | Amen | d Document Status | | | Find | | F5 Ctrl+F F1 | | | | | |
| Q | Amen | d Document Status | - | 1 | Find Help | | Ctrl+F | - | | | | |
| Q | Amen | d Document Status | | | Find Help Print Preview | | Ctrl+F F1 | - 1 | | | | |
| Q | Amen | d Document Status | | | Find Help | | Ctrl+F | | | | | |
| Q | Amen | d Document Status | | | Find Help Print Preview Export | | Ctrl+F F1 | | | | | |
| Q | Amen | | 1210 | | Find Help Print Preview Export | | Ctrl+F F1 | | | | | |
| 0 | Amen | d Document Status | 1210 | | Find Help Print Preview Export | | Ctrl+F F1 | | | | | |
| Fiter | Amen Tab Options | | 1210 | | Find Help Print Preview Export | | Ctrl+F F1 | | | | Rem | () Count 7 |
| Fitter | | | 1210 | | Find Help Print Preview Export | | Ctrl+F F1 | | | | Bern | |

5.11. Calculate New Rolled Up Weight



Available to Software Assurance customers with axis diplomat 2018 and the Bill of Materials module

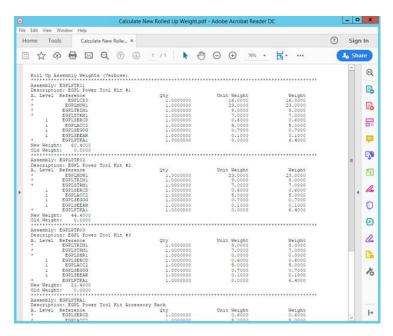
A new function has been added to the system, Calculate New Rolled Up Weight:

| 4 0 | DPA (EGPL Limited) | - • × |
|--|--|--------|
| File Start Tools View Help | | |
| Home Favourtes Sales Purchasing Manufactur | | |
| Checkpoint Backups Home Up Users | Starch Supervisor Favourites Record Play Documents Monitors Help Documentation | 10 🗊 🕈 |
| Guick launch Calculate New Rolled Up Weight | Company Group DPA (EGPL Limited) | |
| Farourites Cutomers Suppliers Suppliers Sock Contact Control Sales Contact Control Sales Contact Purchase Control Purchase Co | de æls defonst | |
| favourites f | P Purchase Order Processing P Basics Contract Masagement P Data Import Specific Science P Data Import Specific Science P Superviser Functions P Stermel Functions P Basenet Functions P Works Intelligence Beta My Databoard SMy Monitors Monitain Printing Defaults | |

This function will update the Unit Weight on Assembly items by accumulating all of the weights of the components (down to the lowest level), multiplying by the component quantities.

| 8 | Calculate New Rolled Up Weight |
|---|------------------------------------|
| File Help Range Selection Select assembly by Assembly reference(s) Product group(s) Sales group(s) | Assembly Reference v |
| Presentation Options Produce verbose report | Report Only Update Cancel |
| 1 0 5 2 | 32 axis® diplomat 2018 DPA (Local) |

The function can also produce a verbose report at the end of the operation, detailing how each rolled up weight has been derived:



As an additional safeguard, a Stock Ledger Parameter allows you to configure the system to not update the weight on assemblies where any component has a zero weight:

| Stock Movements | Stock Trac | | Addtonal References | Stock Reporting | eBusiness |
|--|-----------------------|-----------------|------------------------|---------------------------|-------------------|
| General Neg | ative Stock | Stock F | Record Maintenance Ci | ustomer Stock Pricing | Pricing / Costing |
| Prompt Defaults | | | | | ck Level Prompts |
| Operation required | | | Addton | | stock level group |
| Stock record type | | | Product tem | Hide inward | |
| | | | | Hide allocat Hide free | ed L |
| Default eBusiness ste | | | EGPL | Hide on ord | - F |
| Purchase nominal a/c | | | 0 | Hide supple | - |
| Value added tax | | | Exclusive | | |
| Quantity on invoice | | | Print | | |
| | | | 1.144 | | |
| Default price | | | Retail | | |
| Customer discount | | | Applicable | | |
| Dutstanding transactions i | only | | | | |
| Enable master bin mainter | ance | | | | |
| Default unit of measure | Assembly | Weight | Rollup | | |
| Default to print | and the second second | the contraction | | | |
| General Details | Do not up | date as | sembly if any compo | nents are zero we | ight |
| | | | | | - |
| | | | | | |
| Last stock reference | | _ | | | |
| Last stock reference Default delivery period (da | ys) | - | 0 | | |
| Last stock reference Default delivery period (da | ya) | 1 | 0 | | |
| Last stock reference Default delivery period (da Assembly Maintenance | ya) | 1 | 0 Bill of Materials | | |
| Last stock reference Default delivery period (da Assembly Maintenance Default assembly type | (er | X | 0 Bill of Materials | | |
| Last stock reference Default delivery period (da Assembly Maintenance Default assembly type Assembly Weight Rollup | | X | | | |
| Last stock reference Default delivery period (da Assembly Maintenance Default assembly type Assembly Weight Rollup | | | | | |
| Last stock reference Default delivery period (da Assembly Maintenance Default assembly type Assembly Weight Rollup | | | | | |
| Last stock reference Default delivery period (da Assembly Maintenance | | | | | |
| Last stock reference Default delivery period (da Assembly Maintenance Default assembly type Assembly Weight Rollup | | - | | | |

5.12. Stock Control Monitor



Available to Software Assurance customers with axis diplomat 2018

Two additional columns have been added to the Stock Control Monitor. These columns indicate 'Discontinued' and 'Available for Purchasing'.

| Stock | Alternative | Concernance | Catalogue | | Available for | Stock | | Free | | 6 |
|-----------|-------------|---|---------------|--------------|---------------|---------|-----------|-------|----------|--------|
| Reference | Reference | Description | Page Numbers | Discontinued | Purchasing | on Hand | Allocated | Stock | On Order | St |
| | | Mens, XL | | | | | | | | - |
| EGPLMOW1 | EGPLMOW1 | EGPL Bectric Mower 12" plastic blades | | | 1 | 145 | 457 | -312 | 340 | -117 |
| EGPL,MOW2 | EGPLMOW2 | EGPL Electric Mower 12" metal blades | | 1 | 1 | 110 | 89 | 21 | 0 | -2 |
| EGPLMOW3 | EGPLMOW3 | EGPL Rotary Mower 38cm cutting width | | | 1 | 144 | 115 | 29 | 0 | - 1 |
| EGPLMOW4 | EGPLMOW4 | "Wimbledon" Bectric Mower Soliade steel cutting cylinder | | | 1 | 112 | 89 | 23 | 0 | -21 |
| EGPLMOW5 | EGPLMOW5 | "Wimbledon" Electric Mower 2016 Model | | 1 | | 0 | 0 | 0 | 0 | |
| EGPLPTK01 | EGPLPTK01 | EGPL Power Tool Kit #1 | | | 1 | 0 | 151 | -151 | 165 | -225 |
| EGPLPTK02 | EGPLPTK02 | EGIPL Power Tool Kit #2 | | 1 | 1 | 0 | 159 | -159 | 175 | -237 |
| EGPLPTK03 | EGPLPTK03 | EGPL Power Tool Kit #3 | | | 1 | 0 | 210 | -210 | 215 | -310 |
| EGPLPTKA1 | EGPLPTKAI | EGPL Power Tool Kt Accessory Pack | | 1 | 1 | 0 | 720 | -720 | 655 | -1038! |
| EGPLRG1 | EGPLRG1 | EGPL Rigger Gloves Medum | 1 | | 1 | 1267 | 0 | 1267 | 0 | 735; |
| EGPLRG2 | EGPLRG2 | EGPL Rigger Glove | | - | 1 | 951 | 0 | 951 | 0 | 549 |
| EGPLRG3 | EGPLRG3 | 7 | | vailable for | | 1014 | 0 | 1014 | 0 | 586 |
| EGPLRUCK1 | EGPLRUCK1 | bers Discontin | ued | urchasing | op | 0 | 0 | 0 | 0 | , |
| tions | - | | | | / | | | | | |
| Refresh | File | r/Options Number of stoc | x Stime (1110 | | | | | | | |

5.13. Filter Stock Monitor Tabs by Custom Data Schema



Available to Software Assurance customers with axis diplomat 2018

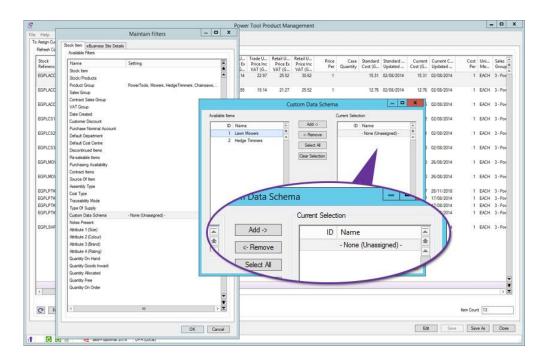
The filter options available on Stock Item monitor tabs have been extended to allow the list of stock items to be filtered by the Stock Custom Data Schemas assigned to them.

| | Maintain Filters | DX | | anagement | | | | | | | The first |
|--|--|--------------------------|-----------|------------------|------------------------|-----------------|---------------------------------|-----------------|-------------------------------------|---------------------------------------|-----------|
| Stock item eBusiness Ste Deta | | | | | | | | | | | |
| Available Fitters | 88. | | | | | | | | | | |
| Name | Setting | Custom Data Schema | Warranty | Cutting Width | Collection Capacity | Power Source | Power Consumption (watts) | Blade Length | Trade Unit Price Ex VAT (G8P) | Retail Unit Price Inc VAT (GBP) | Pri |
| Stock item Stock/Products | | Lawn Mowers | | | 12L | | (watts) 500 | | 56.66 | 79.99 | |
| Product Group Sales Group | PowerTools, Mowers, HedgeTimmers, Chainsaw | us | | | 12L | | 550 | | 70.76 | 99.90 | |
| Contract Sales Group VAT Group | | JC | _ | | 15L | | 0 | | 105.54 | 149.00 | |
| Date Created Customer Discount | Type Of Supply | | | | | | 340 | | 21.72 | 34.75 | |
| Purchase Nominal Account Default Department | Custom Data Sc | chema La | wn Mowers | , Hedge | Trimmers |) | 500 | | 32.59 | 52.15 | |
| Default Cost Centre Discontinued Items | Notes Present | | | - | - | | 300 | | 27.15 | 43.44 | |
| Re-caleable terrs Purchasing Availability | | | | | | | | | | | |
| Contract items Source Of item | | | | | | | | | | | |
| Assembly Type | | | | | | | | | | | |
| Cost Type Traceability Mode | | | | | | | | | | | |
| Type Of Supply Custom Data Schema | Lawn Mowers, Hedge Trimmers | | | | | | | | | | |
| Notes Present | Sources and a second se | | | | | | | | | | |
| Attribute 1 (Size) Attribute 2 (Colour) | | | | | | | | | | | |
| Attribute 3 (Brand) | | | | | | | | | | | |
| Atribute 4 (Rating) | | | | | | | | | | | |
| Quantity On Hand | | | | | | | | | | | |
| Quantity Goods Inward | | | | | | | | | | | |
| Quantity Alocated | | | | | | | | | | | |
| Quantity Free | | | | | | | | | | | |
| Quantity On Order | | - | | | | | | | | | Ę |
| (| | > ¥ | | | | | | | | item Count 6 | |
| | | | | | | | | | | | |

An additional column has also been added to the monitor, showing the Custom Data Schema:

| | | | Power Tool | Product Ma | inagement | 5. C | | | | | 1 | |
|--------------------|---|---------------------------------------|--------------------------|------------|------------------|------------------------|-----------------|---------------------------------|-----------------|-------------------------------------|---------------------------------------|---------|
| Help | | | | | | | | | | | | |
| | k Data Custom Stock Data Assgined | [+] | | | | | | | | | | |
| Refresh Completed | 14:47 Finday 7th February 2020 | | | | | | | | | | | |
| Stock Reference | Stock Description | Specification | Custom Data Schema | Warranty | Cutting Width | Collection Capacity | Power Source | Power Consumption (watts) | Blade Length | Trade Unit Price Ex VAT (GBP) | Retail Unit Price Inc VAT (GBP) | Price * |
| EGPLMOW1 | EGPL Bectric Mower 12" plastic blades | Our lowest price mower, ideal [More] | Lawn Mowers | - | | 121. | | 500 | | 56.66 | 79.99 | 1 |
| EGPLMOW2 | EGPL Electric Mower 12" roetal blades | A superb domestic mower, ideal [More] | Lawn Mowers | | | 121. | / | | | 70.76 | 99.90 | 1 |
| EGPLMOW3 | EGPL Rotary Mower 38cm cutting width | This professional-grade mower [More] | Lawn Mowers | | | 151 | F | Custom | | 105.54 | 149.00 | 1 |
| GPLSTRMI | EGPL Bectric Trimmer 45cm Cut, 340w motor | Ideal for edging and tidying [More] | Hedge Trimmers | | | | | Data | | 21.72 | 34.75 | - 3 |
| EGPLTRIM1 | EGPL Hedge Trimmer 600mm Blade, 500w Motor | A long bar domestic-grade [More] | Hedge Trimmers | | | | More1 | Schema Lawn Mo | | 32.59 | 52.15 | 1 |
| EGPLTR/M2 | EGPL Cordeos Hedge Trimmer 12V, 45cm Blade | Enjoy the flexibility of a [More] | Hedge Trimmers | | | | | | | 27.15 | 43.44 | ា |
| | | | | | | | [More] |] Lawn Mo Hedge T Hedge T | rimmers | / | | |
| < | EI . | | | | | | | | | | | > 💌 |
| C* Fiter | Tab Options | | | | | | | | | | tem Count 6 | |
| | | | | | | | | | 5.0 | | Seve A- | Close |
| 0 0 e | 64 axis® diplomat 2018 DPA | (Local) | | | | | | | Edi | Save | Save As | Cla |

It is also possible to filter the monitor list to show items that have not been assigned to a custom data schema:



The example above shows a Stock Items Monitor tab that has been filtered to show only stock items within the various Product Groups for power tools that have not yet been assigned to a Custom Data Schema. In this way, the monitor can be used to identify those products in need of updating.

5.14. Over Issue Components from Handheld Works Order Picking



Available to Software Assurance customers with axis diplomat 2018 and the Warehouse Handheld Works Order Picking module

The function Handheld Pick Works Order has been modified to allow you to pick additional quantities of components, over and above the quantity originally specified in the works order.

| Help | | | | | | | |
|--------------|----------------|----------|--------|--------------------|--------|-------|-------|
| king List F | Picked items | | | | | | |
| Picked terra | s for EGPLPTKA | đ | | | | | |
| SCAN ST | оск | | | 0 | | | |
| Bin (fro | Stock Refe | Alt Refe | Picked | Description | Picke | Picke | 4 |
| N5 | EGPLACC2 | EGPLA. | 725 | 25m Extension Lead | 0.000 | 0.000 | |
| | | | | Unpick Items | | | î |
| | | | | Picks More Items | | | |
| | | | | Show Description | | | |
| | | | | Stock Available | | | |
| | empile | K items | | | Ctrl+F | | |
| | | | | | Chi+r | | * |
| | Picks | More It | ems | | Y | _ | > 1 |
| | | | | | | | |
| - | | D | dia a | export | , | - | 77. |
| | | | | | | | Close |

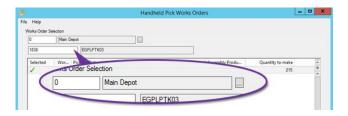
This is ideal for situations where the manufacturing or assembly process can incur wastage or damage to components that then need to be replaced.

5.15. Location prompt added to Handheld Works Order Picking



Available to Software Assurance customers with axis diplomat 2018 and the Warehouse Handheld Works Order Picking module

The Handheld Pick Works Orders function now includes a location prompt. This is ideal for those pickers who frequently pick orders from more than one physical location and want to filter the list of orders shown to just those works orders at their current location.



5.16. Auto feed Handheld Works Order Picking



Available to Software Assurance customers with axis diplomat 2018 and the Warehouse Handheld Works Order Picking module

A new MRP Parameter has been added to enable auto feed to Handheld Pick Works Orders.

This option causes the next pickable works order (excluding those already assigned to a picker) to be automatically offered to the picker.

| File Help MRP Parameters Works Order Picking Audit Trail | |
|--|--|
| Works Order Picking Multi-bin receipt promy RPD v | |
| Force har code scanning Force har andexton Force har andexton Force har andexton Force har andexton Force har and | |
| Auto feed picking Consolidated picking default No V | |

5.17. Sub-Contract Manufacturing

G 💋

Available to purchase for all customers with axis diplomat 2020 or above and the Compact MRP module

A new module, available as an add-on to Compact MRP, is available, designed to assist those businesses who issue stock to sub-contractors for the manufacturing process before receiving the assembled items back into stock.

It also manages the creation of purchase orders to the sub-contractors to cover their processing.

For further information, please refer to the Sub-Contract Manufacturing module overview at www.axisfirst.co.uk/software/axisdiplomat/modules/

Section 6 Warehouse Management

6.1. Integration with Weighing Scales

Available to all customers with axis diplomat 2020 or above with Warehouse Management

The Warehouse Management module's Pack and Despatch process can now incorporate an automated real-time check of the actual weight of packages being despatched against the expected weight (calculated from the sum of the items contained within the package plus the weight of the shipping container/package).

This can help reduce the occurrence of under (or over) picks and, in particular, scenarios where:

- The correct item has been picked but with the incorrect quantity
- A case of the item has been picked instead of a single
- A single item has been picked instead of a case

This is achieved by interfacing with network-enabled weighing scales and currently supports the Ohaus Navigator range of weighing scales.



The weight checking mechanism is unobtrusive to the user and does not affect the Pack and Despatch process unless a weight out-of-tolerance error is detected.

The benefits of integrated weight checking include reducing the cost of re-processing and additional shipping costs in correcting an under-picked delivery (plus loss of customer good-will) and avoiding the costs of over picking (not only the financial loss of having shipped items that are not being paid for but also operational costs due to stock errors and higher than expected shipping costs).

6.2. Net Unit Volume



Available to Software Assurance customers with axis diplomat 2018 and the Despatch & Delivery Management module

The Net Unit Volume on stock records is now standard on all systems with Despatch & Delivery Management.

| | | | | Stock | BUTANE1 NEW | | | | | | | |
|--|----------------------------------|-------------------------|---------------------------------------|--|---------------------------------|---------------|-------------------|-------------------|-------------------------------------|----------|------------------------------|--------------------------|
| Help | | | | | | | | | | | | |
| Atributes eneral Details Issue I Stock Reference | Custom Data History Pricing a | History nd Costing D | Attachment accounting and Addition | | eBusines Supplier Price List | Location Deta | Links Is Stock | | stional Extras k and Manufacturi | | ogle Feed Superseded Details | Data Sheet Stock Note |
| At reference BUTAN Bern description 227g Bu | E1 .tane Cylinder | | Stock reference | BUTANE1 | | | | | | | | |
| General Details | | | G | ieneral Details | | | | Purchase Ord | er Processing | | | |
| Specification | | | 9 | Int of measure EACH [ase quantity] | | | | Suppress POP | supplier price opti | | | |
| [raceability mode | None | v | . 15 | bock record type Stock | ten v | | | Depth / length | 0 mm | | | |
| Yoduct group Purchase nominal a/c | 0 | | | nit weight | 0.4800 | | kg | Widh | 0 mm | | | |
| force nominal department force nominal cost centre | | ~ | | et unit volume | 0.3500 | |]] [L | J) | 0 mm | | e ^j | |
| int weight | 0.4800 | kg | | ld by | Weight | ~ | - | Pangerous go | | 2 | | |
| jet unit volume | 0.3500 | L * | | ecimal places on quantity 0 | | | | Dangerous Go | ods Class/division | 1,2 | | |
| old by | Weight v | | 2 | efault delivery to customer 0 | day(s) | | | <u>U</u> N number | | UN1011 | | |
| late created | 200920 | | 5 | jepost item | CARGOOD C | | | Description | | Unspecif | ied description | |
| atalogue page number(s) |) | 1 | | abel Printing | | | | Packing Group | 2 | | v | |
| Country of Origin (CoO) | Unspecified | | | jint stock labels when receiving go jint stock labels when selling goods jumber of labels jefault stock item label format | | v Pirt L | abel | | | | | |
| | | | | | | | | | | | OK | Cancel |

6.3. Improved performance when printing Delivery Notes



Available to Software Assurance customers with axis diplomat 2018 and the Despatch & Delivery Management module

Production of Delivery Notes as part of the Consignment process is now handled by a background process. By eliminating the need to reload the function and process the document templates each time a Delivery Note is generated, much of the overhead of document production is eliminated.

In tests, some users have reported that the time taken to generate a Delivery Note during Consignment is reduced to just 5% of the time previously taken. The actual time saving will vary from system to system but should, for all users, provide a significant improvement. Those with more complex templates, involving multiple document variants, will benefit even more.

6.4. Faster Picking Note Document Generation



Available to all customers with axis diplomat 2020 or above and the Warehouse Paper-based Sales Order Picking module

As with sales invoices, production of Picking Notes is now handled by a background process. By eliminating the need to reload the function and process the document templates each time a picking note is generated, much of the overhead of document production is eliminated.

6.5. Default Bin by Stock Location



Available to Software Assurance customers with axis diplomat 2018 and the Multi Location Multi Bin Stock module

It is now possible to define a Default Bin against each stock location, to be used when creating new stock records.

| ock Locatio | ns | | Local | tion Details | ? X | |
|---|--|---|-------------|---|-----------|----------|
| 0 1 2 3 4 5 6 7 8 | Description Main Depot Generiton Littletown Ousrantine Not in use Not in use Not in use Not in use Not in use Not in use Not in use | Location Comment Status Stock location type Delivery Address Delivery address activ Cunteries selection | 0 Man Depat | Location Parameters Additional location Advanced a wags new stock items Outstanding allocations warning Replenishment sales orders only Multiple bris Definit Bin Ado-sociale definit Release definit Release definit Release definition overall stock levels | None • | |
| | Default | bin default bin | TEMP | \supset | OK Cancel | > ano |

This is particularly useful when those creating new stock items do so before the appropriate space has been allocated in the warehouse or are not responsible for warehouse management. For example, a temporary bin location can be created to which all new items default - allowing the Warehouse Manager to review and allocate bins as and when appropriate.

6.6. Customs Data

Available to Software Assurance customers with axis diplomat 2018 and the Despatch & Delivery Management module

As part of preparations for Brexit, systems with both the Despatch and Delivery Management and Purchase Delivery Advice modules (which together also form part of Warehouse Management) now benefit from additional fields on the Purchase Delivery Advice in which to record additional customs data including:

- Delivery Method this links to a list of delivery methods that are flagged as in use for 'Arrivals'. Each delivery method will have the 'Mode of Transport' defined against it.
- Number of packages.
- Total Weight (Kgs) this defaults to the sum of the weight of the items received based on the stock record weight.
- Total Volume (m³) defaults to the volume based on the sum of the volumes calculated by the stock record's dimensions.

Where the Delivery Method is configured with a 'Mode of Transport' set to 'Sea' or 'Air', the following additional fields will be presented:

- Port (Origin).
- Port (Destination).
- Vessel (ship or plane on which the delivery was transported).
- 6.7. Check for Best Delivery Method when Consigning a Delivery



Available to Software Assurance customers with axis diplomat 2018 with Warehouse Management

When consigning or amending a delivery, the system can now re-check whether the selected method still offers the best delivery option. This helps ensure that the optimal delivery method is being used, particularly when orders are split across multiple deliveries.

| Prompt Suppression | | - | | User De | fuite | | | | udit Trail | |
|---|---|----------|-----------|-----------------------------------|--|---------|-----------------|-------------------------|------------|-------------|
| ocument Maintenance Document Main | | Opeyo | Enquiries | Documentation | Documentation 2 | Do | cumentation 3 | Order Release | Picking | Prompt Defa |
| locument Numbering | | 1 | 1 | General | | 1.00 | | | | |
| ast sales order number 18712 | | | | Prompt for bat | ich details | | 1 | | | |
| ast delivery note number 0 | | | | Select custom | ers by | | Short Name Se | sarch v | | |
| ast delivery note number 0 | | | | Suppress atta | character tab | | 0 | | | |
| ustomer order number entry Allow full duplica | tion | ~ | | | achments when in enqui | rv mode | | | | |
| Jedit Status Checking | | | | | Aerchant webste | | | ttp://egpl.axisfinit.co | uk/ | |
| Juring Sales Order Entry the system checks th | a court status of | | | Concerns a se | plier prices tab | | 2 | | | |
| he customer selected. Please select the action | | | | Suppress defa | | | | | | |
| vedit limit exceeded Warr | User Only | | | Suppress defa | | | H | | | |
| redit terms exceeded War | User Only | 1 | | | of override product spe | CS | ō | | | |
| | | 1 | | Allow entry of | quantity in cases | | No | ~ | | |
| faximum credit period (days) exceeded | WILL DIGET | CHECK | | | sck check | | | - | | |
| ustomer on mage Enable "Best" | delivery me | thod sel | ection | ~ | w minimum warring | | H | | | |
| | 1000 C | | | | nt & packing note | hatrin | ä | | | |
| Suppress Une | cking best | method | | | es oustomer order nu | | ä | | | |
| Igents Commission | e from deli | verv met | hode | - A Contraction | week count | | 0 | | | |
| | o nom don | rory mor | neue | | | | | | | |
| luotations | | | | | ble stock instead of free of released terms | stock | H | | | |
| low quotes for prospects without confirmation | | 1 | | | tion of picked deliveries | | | | | |
| low new quotes to be filed as sales orders | 2 | 1 | | | h with order check | | | | | |
| leset viable due dates when converting quote oov quotes when converting | • E | 1 | | | delivery method selects | | | | | |
| opy quotes when converting heable amendment of closed/converted cucke | . 18 | 1 | | | ecking best method" | | ñ | | | |
| leview outstanding guotes in sales order entry | 3 NH | 1 | | | ges from delivery method | | 2 | | | |
| arce entry of PB percentage | - | 1 | | Delivery charg | | | First Release 0 | niv v | | |
| low negative despatch quantities to be set wi | en converting | 1 | | 15 Mar. | | | v | | | |
| mport eBusiness Orders | | | | Force delivery | charge od selection mandatory | | 191 | | | |
| et despatch quantities on import | | | | | rall due date tracking | | m | | | |
| et despatch quantities on import when order is | en hold | | | | continued warning mess | 806 | H | | | |
| et Despatch Quantities by Batch | | | | | ply or cancel' orders | | | | | |
| | 100 | | | Outstanding o | | | No | 1 | | |
| | | | | ÷ | | | (17) | | | |
| prore suppress partial release flag | · (*) | | | Use ste speci | fic stock details | | LI | | | |
| prore suppress partial release flag leset Advice/Packing Note printed flag | and | | | | | | | | | |
| prore suppress partial release flag leset Advice/Packing Note printed flag et/reset despatch quantities from amend cred | t status 🔽 | | | | | | | | | |
| prore suppress partial release flag leset Advice/Packing Note printed flag | t status 🗹 | | | | | | | | | |

This can be suppressed via an SOP parameter.

6.8. Amend Delivery Address in Pack and Despatch



Available to all customers with axis diplomat 2020 or above and the Warehouse Paper-based Sales Order Picking module

The Pack and Despatch function now allows Delivery Address information to be amended prior to consignment.

If using Best Delivery Method selection, this can also advise if a better delivery method then exists for the revised delivery address.

6.9. Stock Bins tab in Stock Enquiry



Available to Software Assurance customers with axis diplomat 2018 and the Multi Location Multi Bin Stock module

A new tab, Stock Bins, has been added to Stock Enquiry to show a list of the bins holding the item across all of the stock locations.

| | | | | | | | Stock EG | PLACC3 | | | |
|------------------------------------|-------------------------|------------------|-----------------|----------------|------------------|---------|--------------------------|-------------------------------------|---------------|----------------------------|---|
| Help | | | | | | | | | | | |
| | nsactions | Stock Notes | Attributes | Custom Date | | Atach | | | | Audt Tral Google Feed | Data Sheet WebSy ed Details Contract Det |
| ieneral Details Stock Reference | Issue Hist | ory mong an | nd Costing 0 | accounting and | Additional Price | g Lus | omer Price List Supple | er Price List Location Details Stoc | stock and Man | facturing Details Supersed | ed Details Contract Det |
| At reference | EGPLACC | 3 | | Stock | reference EG | PLACC3 | 1 | | 1 | | |
| tem description | Trimmer Co | | | = | | | | | | | |
| tem description | replacement | | | | | | | | | | |
| Overall Stock L | evels | | | | | | | | 1 | | |
| On hand 653 | | Inward 0 | Aloca | ted 0 | Free 6 | 53 | On order 0 | To despatch 0 | Picked C | Available 653 Su | ppler |
| Stock-Bin Deta | 6 | | | | | | | s | Stock Bins | | |
| Location | Location Description | Bin Reference | Bin Category | Stock o | on Hand | Picked | Unpicked | 6 | | 2 | |
| | Main Depot | D3 | A | | 125 | 0 | 125 | | - | | |
| | Main Depot | L6 | A | | 513 | 0 | 513 | | | | |
| 0 | Main Depot | N6 | A | | 15 | 0 | 15 | | | | |
| | | Coc | | ription | Bin Refe | ence | Bin Category | Stock on Hand | Picked | Unpickee | |
| | | | 0 Main | Depot | D3 | | А | 125 | 0 | 125 | |
| | | | 0 Main | Depot | L6 | | A | 513 | 0 | 513 | |
| | | | 0 Main | Depot | N6 | | A | 15 | 0 | 15 | / |
| | | | - | | | | | | | | |
| | | | | | | - | | | | | |
| | | | | | | | | | | | |
| | | | | | 653 | 0 | 653 | | | | |
| < | | | | | | | H | | | | 3 |
| | | | | | | | | | | | |
| | | | | | | | | Ed | Print Preview | Send Shortcut S | ave Cancel |
| 00 | gy . | axis® dploma | - | (Local) | | | | | | | |

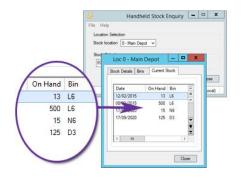
This additional tab provides a quick and easy way of locating stock that is potentially spread across a number of different bins in each location.

6.10. Handheld Stock Enquiry Current Stock Tab



Available to Software Assurance customers with axis diplomat 2018 and the Multi Location Multi Bin Stock module

A new tab has been added to Handheld Stock Enquiry showing, for the selected location, all of the bins currently holding stock of the chosen item.



6.11. Bin Quantities in Goods Received from Supplier



Available to Software Assurance customers with axis diplomat 2018 and the Multi Location Multi Bin Stock module

When receiving stock using the function Goods Received from Supplier, a new information icon adjacent to the bin prompt will show, when clicked, a list of suggested bins to contain the item.

| Holip Coder Naturdians Stadler References Fill (19803) ACME Del velage < | |
|--|----------|
| Order Hornston Sapader Reference (11:000) KOME ↓ Delvery Note 113554 Puchase Order Number 220 Our A C number 76422.GK1/85 Becore Value 000 gale Seles Order Number 210 Our A C number 76422.GK1/85 Becore Value 1361.00 GBP Suggler Order Reference ▲ Remond Item 1 Suggler Datals Images Sales Order Our Datals Nem Datals GEFUACC3 Stads descoption (EGFUACC3 Stads descoption (EGFUACC3 Recore value 000) 100 GBP Control (EGFUACC3 Recore value 000) 100 S Ret value 2218 GBP Suppler Order Control (EGFUACC3 Recore value 000) 100 S Ret value 2218 GBP Suppler Order Control (EGFUACC3 Recore Value 000) 100 S Ret value 2218 GBP Suppler Order Control (EGFUACC3 Recore Value 000) 100 S Ret value 000 S Ret value 000 S Ret value 0000 S Ret value 0000 S Ret value 0000 S Ret value 0000 S Ret value 00000 S Ret value 0000 S Ret value 00000 S Ret value 000000000000000000000000000000000000 | |
| Sapeler Reference (01/8003) KAME I Defwery Note 313554 Purchase Order Number 320 Our AC number 78423.GM HIS Recept Value 000 GBP Sales Order Number 32 Order Value TMI 100 GBP Sageber Order Allerber 32 32 Ammend Item - • | |
| AC A Cruster 76423.GN/85 Recept Value 000 GP Sele Oder Nuture 1 Order Value 1941.00 GP Sele Oder Nuture 1 Americal Item Annual Suppler Oder Parlemence Control 1 Recept value 1941.00 GP Sele Oder Parlemence 1 Americal Item 1 Tem Details Indexes Seles Oder Oder Oder Parlemence 1 Americal Item 1 Suppler Oder Bander 1 Suppler Oder Parlemence 1 Control 1 Suppler Oder Parlemence 1 Control 1 Suppler Oder Darlemence 1 Recept value 1 Suppler Oder Darlemence 1 Recept value 1 Suppler Oder Darlemence 1 Bin reference 15 Suppler Oder Quarter 1 Oder Quarter 1 Suppler Oder 2 Suppler Oder Quarter 1 Suppler Oder 2 Suppler Oder Quarter 1 Suppler Oder 2 Suppler Oder 2 Sup | |
| Order Value 13/100 GBP Siggleter Order Reference Nem Defails Siggleter Order Reference — Nem Defails Siggleter Order Reference — Nem Defails Siggleter Order Reference — Nem Defails Siggleter Order Reference EGPLACC3 Rein Defails EGPLACC3 — Rein Defails © — Order quartity 660 — Recept und code 2566 — Recept und code 2566 — Discourt 1000 % Net value 1233 GBP Signer Order Outerty 600 % Net value 1233 GBP Signer Order Outer Coartities Minum of Coartities Minum of Coartities Order Coartity Malpine — — | |
| Order Value TSk1.00 GBP Suppler Order Reference Name Details Suppler Order Reference Image: Sales Order Name Details Sales Order Image: Sales Order Out Details Image: Sales Order Image: Sales Order Name Details Image: Sales Order Image: Sales Order Out Details Image: Sales Order Image: Sales Order Received Image: Sales Order Image: Sales Order Oder guarty 560 Image: Coding Received out once 256 Image: Sales Order Proto Updates Image: Coding Image: Sales Order Informer Coding Coding Image: Sales Order Received out once 256 Image: Sales Order Discourt 1000 Image: Sales Order Net value 123 OBP Order Out Ope: Sales Image: Sales Ope: Sales | |
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| Our Details Note And Memore EGPLACC3 Remuture memore EGPLACC3 Stock memore EGPLACC3 Stock deception Termer Cod Without Stock Termer Cod Without Stock Termer Cod Order querty 500 Recept out cod Termer Cod Proce Update Cost type Recept out cod Termer Cod Proce Update stored cod Termer Cod Bon Details Bon Terleence Scoper Oder Quartity Terleence Scoper Oder Quartity Code Namure Ode Coarties Monure Ode Coarties Order Quarty Multiple | |
| ken nurber 1 Sock reference EGFLACC3 Ramative reference EGFLACC3 Stock decoption Immed Code Item Deals Cost oper Locial v Receipt unt cost 256 Receipt unt cost 258 Net value 218 Net value 228 Net value 218 Net value Certop Supper Oder Quarthy 00 | |
| Atendive reference EGFL/LCZ Stock decoption Temper Cod tem Details Costing Order quartery 500 Recept quartery Cost type Pace by date Udde at andref cost Recept quartery 12 Ubde at andref cost Bin Petails Par 1 Discort 1100 % 15 Scoper Oder Quartery 0 Order Quartery 16 Order Quartery 16 | |
| Stock desception Temmer Card lightchefert Nem Datals Costing Order quently 500 Returned 0 Recogt und cost Cost type Recogt und cost 238 Per 1 Discourt 1600 Net value 2218 Net value Cost Suppler Older Quartery Reference INS | |
| Iven Detals Costing Order quarty 500 Petuned 0 Recept unit cos 1 Decourt 1000 Par 1 Discourt 1000 Net value 22.13 Net value 22.13 Order Quarty 000 | |
| Iven Detals Costing Order quarty 500 Petuned 0 Recept unit cos 1 Decourt 1000 Par 1 Discourt 1000 Net value 22.13 Net value 22.13 Order Quarty 000 | |
| Order gunrity 880 Rithunds 0 Receipt quartery 12 Receipt quartery 12 Decourt 10 Decourt 10 Bin reference 35 Supper Older Quartery 08P Supper Older Quartery 08P | |
| Order quartity 500 Rithunds 0 Recept quartity 12 Recept quartity 12 Recept quartity 12 Bit Details 100 Bit reference 55 Supper Older Quartity 08P Supper Older Quartity 08P | |
| Returned 0 Record quartery 12 Ubdete currer cost Ubdete currer cost Record unit cost 1 Per 1 Decord 1000 % Net value 22.12 Suppler Older Quartery GSP Minum Olde Quartery 0 Order Quartery Maty pie | |
| Recept quartity 12 Recept unit cost 256 Per 1 Discourt 1000 % Net value 22.18 Surgitor GBP Surgitor GBP Menum Code Quartity GBP | - 1 |
| Nacety use call 12 Pacety use call 28 Par 1 Bit Details Bit Details Bit value 22:18 Observet 56 Suppler Older Quarties Minum Ode castrey Older Quartery Multiple | |
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| Per 1 Brin reference 16 2213 Brin reference 1 | |
| Decourt 15.00 % Net value 22.18 GBP Suppler Older Quartities Minimum Older Quartity Older Quartity Multiple | |
| Net value 2218 GBP Suppler Oter Quantities Meanum Order Quantity Multiple | |
| Suppler Order Quantities Meinum Order Quantity Order Quantity Multiple | |
| Menum Oder Quartity | |
| Order Quartity Multiple | |
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| | 2 3 |
| | |
| Update Cancel | 1 |
| | |
| | 0 |
| File Datals File and Pint Send Shortout | Cancel |

The suggested bins will include any bin that currently has that item in it or, if there no bins currently holding the item, any bin that has held that item in the preceding 60 days.

| Order Information upplier Reference 01/800 | 3 ACME | Delivery Note | 313654 | Purchase Order Number 370 | |
|---|---------------------------|---------------------|-------------|---------------------------|-----------|
| ur A/C number 76423/ | GH/85 | Receipt Value | 0.00 GBP | Sales Order Number | 2 |
| | | Order Value | 1341.00 GBP | Supplier Order Reference | x |
| | | | end Item | | |
| Rem Details Supplier D | letails Images Sales Orde | r | | | |
| item number | 1 Stock reference | EGPLACC3 | | | |
| Abemative reference | EGPLACC3 | | | | |
| Stock description | Trimmer Cord | | OnH | and / Bin 🔄 🗖 🗙 | n 1 |
| | replacement | | | | |
| tem Details | | Costing | Bris | | |
| Order quantity 50 | 0 | Cost type Actual 🗸 | Bin Refe | erence On Hand A | |
| Returned 0 | | Price Updates | A3 | 75 | |
| Receipt quantity 12 | 1 | Update current cost | D8 | 125 | |
| Receipt unit cost 2 | 50 | atandard cost | NS | 428 | |
| Per | C | | | | |
| Decourt Bi | n Reference | On Hand | | | |
| Net val | 1 | 25 | | | |
| Suppl A3 | 2 | 75 | - | - | |
| Merima | | | | Ŧ | |
| Order C DS | | 125 | | H > 🗵 | |
| Suppler N | 6 | 428 | | OK Cancel | |
| X | | | | Un Cance | |
| | | | | | |
| | | | | | |
| | | | | Upde | te Cancel |

Page 77 of 98 Copyright © 2020 Systems AXIS Ltd

6.12. Bin Pop Up in Handheld Goods Received

Available to all customers with axis diplomat 2020 or above and the Multi Location Multi Bin Stock module

When receiving stock into a multi-bin stock location, the Handheld Goods Received function has been modified so that, when selecting by stock item, a pop-up dialog will appear to show a list of bins where that item is currently stored and to select the bin to be used to hold the newly received stock from the list if desired.

The list will include any bin that currently has that item in it or, if there no bins currently holding the item, any bin that has held that item in the preceding 60 days.

| /S Items Co | On Hand / | Bin 🗕 🗖 | x | |
|-------------|--------------|---------|------|--------------|
| EGPLACC3 | NG | _ | | 1 |
| Outstanding | | | | |
| Bin Ref | On Hand / Bi | n | | ved 🔺 |
| N6 | Bin Ref | On Hand | | 0 |
| INO | L6 | 25 | * | • |
| | A3 | 75 | | |
| | D8 | 125 | | |
| | NG | 428 | | Y |
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| | | | | 3 |
| | | OK Ca | ncel | OK |

6.13. Allow users to flag deliveries as consigned



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

A new flag has been added to the user defaults to specify whether the user is able to flag deliveries as consigned, by-passing any communication with the Delivery Service Provider.

| User ID | Full Name | Job O Amend Defaults for User GEORGE | Email |
|--|--|--|--|
| ANDY BRIAN CATH DELYTH GEORGE SUE | Andy Bown Bisin White Catherine Back Delyh Williams George Green Sue Orange | Dere Fei Help Fein Help Sein Ortekats Call Defaults Seins Lodger Defaults SoP Defaults Service Context: Defaults SoP Defaults Seine offer approval required Seine offer approval requ | and y brown (leggl couk brown shellergy clouck cath black (leggl couk george black (leggl couk sun amgel (leggl couk |



6.14. UPS and Dangerous Goods



Available to all customers with axis diplomat 2020 or above and the Dangerous Goods module

The UPS interface now works in conjunction with the Dangerous Goods module in order to pass the additional information required to UPS based on the fields provided on the stock record.

| | | | | Stock BI | JTANE1 NEW | | | | - • × |
|--|-------------|----------------|--|--|----------------|--|--|--|------------|
| Help | | | | | | | | | |
| Attributes C.C. anneal Details Issue Hat Sock Reference BLTANET Bern description 227g Buter General Details Specification | | History Decour | 7.6.52 | is goods item is Goods Class/divis | Ouncess Peters | Unka Stock Bra | Optional Edites Stock and Manufactu | Google Feed ing Details Superveded | Data Sheet |
| Product group Pruchase nominal department Ence nominal department Ence nominal cest centre Ence nominal cest centre Ent Westpht Ent Set unt volume Estit But Uset Uset Estit E | Cost centre | | Boduct Be sale Non-retu Disconti Withhold Decimal | Broup bin reference bin reference bin etem bin etem bin detem bin despecto bin desp | Unspecified de | V Width Height Solume Dange Dange Dange Dange Dange Dange | rous Goods rous goods item rous Goods Class/divisio rober | m ³ 22 1.23 UNI011 | |
| Catalogue page number(s) | Unspecified | | Port sto Number | inting ck labels when receiving goods | 1 Ber tem v | | tion g Group | Unspecified description | OK Cancel |

6.15. Support for Carriers offering Extended Liability



Available to Software Assurance customers with axis diplomat 2018 and the Despatch & Delivery Management module

For those using DPD or Royal Mail as Delivery Service Providers, support has now been added for services offering extended liability or consequential loss insurance.

On services defined as allowing extended liability, the consignment process will request extended liability cover and pass the cost value of the delivery to the delivery service provider.

| | Delivery M | ethod Code Details | | | 2 |
|--|------------------------------|----------------------------------|--------|---|-------|
| eneral | | | | | |
| Options | | Delivery Stock Record Details | | | |
| Delivery Method Code Details | 2 | Associated stock record | | | |
| Description | DPD Next Day with Insurance | Stock reference | | Q | |
| Status | Enable for Despatches only v | Description | | | |
| Mode of transport | Unspecified v | Customs Options | | | |
| Address types | All types V | Customs CN22 Declaration | Ignore | v | |
| Locations | | | | | |
| Location | All Locations V | Print customs/commercial invoice | | | |
| Delivery Service Provider Details | | | | - | - |
| Delivery service provider supplier account | 8017-DPD ¥ | Request extended liability | | ~ | - |
| Delivery service | DPD Parcel Before 12:00 | | _ | | |
| Request extended liability | 2 | | | | |
| Consignment Options | | | | | |
| Consignment | Permitted v | | | | |
| Print package/pallet labels | Label format | | | | |
| Number of tabels per package/pallet | | | | | |
| | | | | | Cance |

Section 7 eBusiness

7.1. Exclude Trusted Items from Repricing

Available to all customers with axis diplomat 2020 or above with eBusiness

When orders are imported from an eBusiness site (whether axis vMerchant or other sites, such as those using Generic XML), any item marked as having trusted pricing is now automatically flagged as to be excluded from future repricing.

Trusted pricing is normally used only for situations where the site has calculated pricing that may vary from order to order and so may differ from the price held in axis diplomat, such as delivery charges and discounts.

7.2. First Published Date



Available to Software Assurance customers with axis diplomat 2018 and the axis vMerchant module

The "Maintain e-Business Catalogue" function has been extended to include an additional column on the Stock View tab showing the date an item was first published to the website.

| Selected | Stock Reference | Alternative Reference | Description | Site Specific Description | Primary eBusiness Group Reference | First Published | Primary eBusiness Group Description | Primary Group F | efil |
|-------------------|-----------------|-----------------------|-----------------------|------------------------------|--------------------------------------|--------------------|--|--------------------|------|
| | 1 | EGPLGG | EGPL Gardening Gloves | EGPL Gardening Gloves | HN020-020-2 | 24-07-12 | Gloves | Gloves | 1 |
| | 10 | EZGTU | Easy Grow Tulip Bulbs | Eavy Grow Tulip Bubs | 02 | 25-07-17 | Bulbs | Bubs | - |
| | 2 | First | EGPL Rigger Gloves | EGPL Rigger Gloves | HN020-020-2 | 24-07-12 | Gioves | Gloves | |
| | 3 | Published 24-07-12 | Love Gardening Boots | De la Gardening Boots | HN020-020-3 | 24-07-12 | GBoots | Boots | |
| | 4 | 24-07-12 | tional Welly | Traditional Welly | HN020-020-3 | 24-07-12 | GBoots | Boots | |
| | 5 | 25-07-17 | BL Crow Lawn Seed | Easy Grow Lawn Seed | HN020-050-1 | 25-07-17 | Seed | Seed | |
| | 5 | | Grow Lawn Seed | Easy Grow Lawn Seed | HN020-050-1 | 25-07-17 | Seed | Seed | |
| ¢ | п | 24-07-12 | G | | | | | 1 | > |
| tens Total 128 | Selected 0 | 24-07-12 | Select Al Deselect Al | Amend Selected | | | | | |
| 1008 125 | Selected [U | 24-07-12 | Select Al Deselect Al | Amend Selected | | | | | |
| | | - | | | | | | | |
| | | | | | | | | | |

7.3. Minimum Stock Feed Levels by Product Group



Available to Software Assurance customers with axis diplomat 2018 with eBusiness

It is now possible to define, for a given product group, the minimum available stock to report when uploading stock figures to websites. This is supported for both axis vMerchant websites and links to third party eCommerce solutions such as Channel Advisor and CloudHub.

For those using the "Customer Price Feed Delivery" module, customer price feed files will also report the minimum stock level where appropriate.

This is ideal for situations where products can be made on demand, or intangible items, such as software licences, that can be issued as required yet are to appear as normal stocked items to your customers.

| | roup Code Details | Product Group | Code Details | ? X |
|--|--|---|--------------|-----|
| Code | Description Budget Tools | General Data Sheet Price Feeds Product Group Code Details Product Group Code 2 | 7 | |
| 3 4 | Prof' Tools Prof' Tools Books Miscellaneous Safety Clothing Garden Tools | Description Prof 1 Mnimum margin applicable Mnimum acceptable shell life at recept (days) 0 Mnimum stock feed level 25 | | v |
| 11 12 19 20 21 22 30 | HandTools PowerTools Mowers Minimur MiscPower WaterEgpt | n stock feed level | 25 | |

7.4. Easier Website Management with Stock Monitors



Available to Software Assurance customers with axis diplomat 2018 with eBusiness

Enhancements to the options available on "Stock Items" Monitor tabs now make it much easier to manage your online products.

The Tab Options dialog now allows you to add in information on one or more eBusiness sites.

| Help | | | | Website Man | ogenien | | | | | harmathara |
|--------------|-----------------------|-----------------------|-------|---------------------------|------------|-------------------|-------------|--|---------------|--------------|
| ite tems [| 1 | | | | | | | | | |
| | | Tab Mainte | nance | - 0 | × | | | | | |
| Stock items | Tab | 10 Sector 2010 | | | 0 'EGPL' | Site 0 'EGPL' Sit | e 0 'EGPL' | Site 0 'EGPL' | Site 0 'EGPL' | Site 0 'EGPI |
| | Webste tems | | -1 | | cial Offer | Featured It Fo | rce Publish | Best Seller | Cash With O | Use eBusin |
| | | | | | - | 1 | | | | |
| Description | | | | | | | | | | |
| Notes | | | | | - | 1 | | | | |
| rvotes | | | | 12 | 1 | 1 | | | | |
| | | | | ^ | | 1 | | | | |
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| Filters Used | By This Tab | | | | Stock Loc | ations | | None ser | - | |
| Name | | Туре | Store | | eBusiness | Sites | | EGPL | | |
| | | Stock item | | | | 0100 | | LOIL | | |
| | | Stock Line | 1 | | < | | | | | |
| | | eBusiness Ste Details | 30 | | 1 | _ | _ | - | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| 4 | | | | | | | | | | |
| | | | | | | | | | | |
| Amendable I | Properties | | | | | | | | | |
| Name | | Setting | | | 1 | | | | | |
| Analysis: 1 | This Year vs Previous | Enabled | | | | | | | | |
| Analysis: 1 | Year To Date vs Pre | Enabled | | | | | | | | |
| Analysis: 8 | By Period | None selected | | | | | | | | |
| Column To | stalling | Enabled | | | - | | | | | |
| Stock Loc | ations | None selected | 1 | | | | - | | | E. |
| eBusiness | Stes | EGPL | | 12 | | | | | | |
| < | | 38 | | > | | | | | | |
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| | | | | OK Cancel | | | | | | |

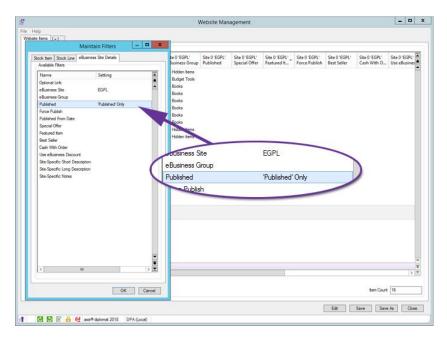
For each site, a number of additional columns are then added to the Monitor, including

- eBusiness Group
- Published

- Special Offer, Featured Item and Best Seller
- eBusiness Discount
- Site Specific Short Description, Long Description and Notes
- First Published Date

| bste tens [+] | | | | | | | | | | | | |
|--------------------|-----|--------------------------|------------------|---|----------------------------------|----------------------------|--------------------------------|------------------------------|--------------------------------|------------------------------|------------------------------|-------------------------------|
| Stock Reference | • | Alternative Reference | Stock Descr | | Site 0 'EGPL' eBusiness Group | Site 0 'EGPL' Published | Site 0 'EGPL' Special Offer | Site 0 'EGPL' Featured It | Site 0 'EGPL' Force Publish | Site 0 'EGPL' Best Seller | Site 0 'EGPL' Cash With O | Site 0 'EGPL' Use eBusines |
| ACMESET01 | | ACMESET01 | | Standard Hand Tool Set fork, potting trowel) | 1 - Budget Tools | 1 | | 1 | | | | |
| EGPLMOW4 | | EGPLMOW4 | | ledon" Bectric Mower e steel outing cylinder | 19 - Mowers | 1 | | 1 | | | | |
| EGPLSEGOG | | EGPLSEGOG | | Goggles | 31 - Misc Safety | 1 | | 1 | | | | |
| EGPLTRIM2 | | EGPLTRIM2 | EGPL | Cordless Hedge Trim Som Blade | 20 - Hedge Trim | 1 | 1 | 1 | 7 | | | |
| GOLDHTC01 | | GOLDHTC01 | Gold H (Hatch | land Axe et) 2b | 2 - Prof' Tools | 1 | | 1 | | | | |
| ACMEFORK01 | | ACMEFORK01 | Acme | Standard Fork | 1 - Budget Tools | 1 | | | | | | |
| ACMEHOE01 | | ACMEHOE01 | Acre | Stolad G | and the second second | and become and the | | | | | | |
| ACMERAKE01 | | ACMERICAN | | | | | | | | | | |
| ACMERAKE02 | - | | | 1 | | | | | | There are | | |
| BOOK001 | 4 | Site 0 'EGPL | ÷ | Site 0 'EGPL' | Site 0 ' | EGPL' | Site 0 'EGR | PL' Sit | e 0 'EGPL' | Site 0 | FGPL' | Site |
| BOOK002 | 117 | Business G | | Published | Specia | | Featured | | rce Publish | | | Cas |
| BOOK003 | | BOOK003 | ols | 1 | | | 1 | | | - | | |
| | | | 270pp | | | 100 | | | | | | |
| BOOK004 | | BOOK004 | | ouseplants | 3 - Books | 1 | | | | | | |
| | | | 180pp | | | | | | | | | |
| EGPLACC1 | | EGPLACC1 | | cement Battery | 23 - Power Spares | - | | | | | | |
| | | | | dess hedge trimmer | | 14.1 | | | | | | |
| EGPLACC2 | | EGPLACC2 | | itension Lead | 23 - Power Spares | - | | | | | | |
| EGPLACC3 | | EGPLACC3 | | den use er Cord | 23 - Power Spares | 1 | | | | | | |
| EUPLAUL3 | | ear Dious | replace | | 23 - rower spares | * | | | | | | |
| | | | replace | DIRE | | | | | | | | |
| < | - | | _ | | | | | | | | | > |
| | | | | | | | | | | | | |
| C Fiter | Ta | ab Options | | | | | | | | | item Count | 106 |
| | | | | | | | | | | | | |

In addition, it is now also possible to filter the products shown by their eBusiness parameters.



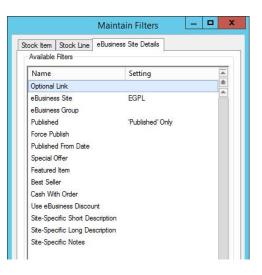
These enhancements would allow you, for example, to produce a dedicated Website Management Monitor with separate tabs including:

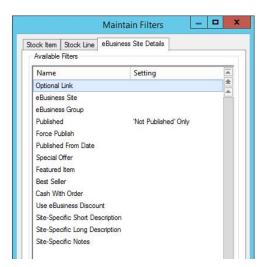
- All items published to the site
- All items not published to the site

- All Special Offer items
- All Featured items
- All Best Sellers
- Published items without Site-Specific Notes

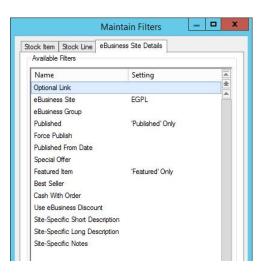
| 1 | | | | | | Website Management |
|---------------|-------------------|----------------|----------------|--------------|---------------|--------------------|
| ile Help | | | | | | |
| Website Items | Non-Website Items | Special Offers | Featured Items | Best Sellers | No Site Notes | [+] |

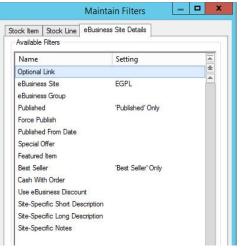
The Filter options for these tabs would be, respectively:

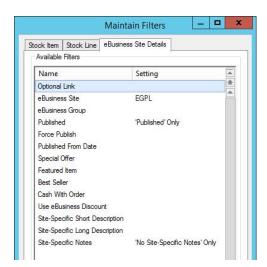




| ock Item Stock Line eE | Business Site Details | |
|----------------------------|-----------------------|---|
| Available Filters | | |
| Name | Setting | - |
| Optional Link | | 1 |
| eBusiness Site | EGPL | |
| eBusiness Group | | |
| Published | "Published" Only | |
| Force Publish | | |
| Published From Date | | |
| Special Offer | 'Special Offer' Only | |
| Featured Item | | |
| Best Seller | | |
| Cash With Order | | |
| Use eBusiness Discount | | |
| Site-Specific Short Descri | ption | |
| Site-Specific Long Descri | ption | |
| Site-Specific Notes | | |







7.5. eBusiness Site added to Sales Order Monitor



Available to Software Assurance customers with axis diplomat 2018 with eBusiness

An additional column has been added to the Sales Order Monitor (and when adding additional Sales Order type tabs to 'My Monitors') showing the eBusiness Site from which each order was imported:

| Customer Name | Sales Order | Manufactured Items | eBusiness Site | Outstanding Value (GBP) | Traceable Items | Available Stock Value (GBP) | Customer Credit Limit Exceeded |
|--------------------------------|-----------------|------------------------------|-----------------------------|----------------------------|----------------------------|--------------------------------|-----------------------------------|
| Green Fingers | 18401 | Contains manufactured stock, | 1 - https://www.egpl.co.uk/ | 2602.80 | | 1862.49 | |
| Giant Developments | Limited 18402 | Contains manufactured ga | 1 - https://www.egpl.co.uk/ | 1915.77 | | 1252.17 | |
| Green Supplies | 12400 | Contains manufacture ak | 1 -https://www.egpl.co.uk/ | 1486,65 | | 1265.45 | Credit limit exceed |
| Dixon & Sone Market | ng con | ice manufacture & elock | 1 - https://www.egol.co.uk/ | 917.94 | | 254.34 | |
| BJI Distribution Limite | | | 1 - https://www.egpl.co.uk/ | 899.37 | | 899.37 | |
| NGB Agency Partner | | ctured stock | 1 - https://www.egbl.co.uk/ | 1869.35 | | 1333.30 | |
| Gil Engineering | | | 1 - https://www.egpl.co.uk/ | 951.37 | | 951.37 | |
| AGI Worldwide | eBusiness | N 1 | 1 - https://www.egbl.co.uk/ | 1010.09 | | 1010.09 | |
| Mandalay Re | Site | stock | 1 - https://www.egol.co.uk/ | 2323.59 | | 1489.95 | |
| DWP Reta | | | 1 - https://www.egbl.co.uk/ | 730.00 | | 730.00 | |
| Apollo & Stock | 1 - https://www | v.eapl.co.uk/ | 1 - https://www.egpl.co.uk/ | 2545.24 | | 1133.04 | |
| Dale Ret | | ox. | 1 - https://www.egbl.co.uk/ | 1006.73 | | 496.28 | |
| Exe Tech stock | 1 - https://www | v.egpl.co.uk/ | 1 - https://www.egol.co.uk/ | 478,55 | | 172.29 | |
| Mega Tr stock | 1 - https://www | | 1 - https://www.egpl.co.uk/ | 1124.29 | | 511.75 | |
| JD Deve | 1-110ps.//www | egpico.uk/ | 1 - https://www.egol.co.uk/ | 592.75 | ✓ Contains traceable stock | 507.73 | 😴 Credt limt excee |
| Ward Restock | 1 - https://www | v.egpl.co.uk/ | 1 - https://www.egpl.co.uk/ | 2049.85 | | 816.01 | |
| Africa & A | | ck . | 1 - https://www.egol.co.uk/ | 1008.69 | | 787.49 | |
| KV Techno | 1 - https://www | v.egpl.co.uk/ | 1 - https://www.egpl.co.uk/ | 3001.08 | | 1520.46 | |
| Golden Plan | 1 - https://www | n agal og uk / | 1 - https://www.egpl.co.uk/ | 1793,45 | Contains traceable stock | 1240.45 | |
| Black Tools Li | 1 nups.//www | stock | 1 - https://www.egpl.co.uk/ | 1746.91 | ✓ Contains traceable stock | 1636.31 | |
| PYW Logistics C | 1 - https://www | v.egpl.co.uk/ and stock | 1 - https://www.egpl.co.uk/ | 1619.29 | | 1313.02 | 🐒 Credit limit excee |
| | | | | 217032.99 | | 133298.26 | |
| < III | 1 - https://www | v.egpi.co | | | | | 0 |
| C Fiter | Tab Options | VA | | | | | n Count 157 |

It is also possible to filter the orders shown to just those from a specific eBusiness Site:

| | | | Sales Order Mor | nitor | | | |
|----------------|---|----------------------|-----------------|-------------|-----------------------------|--------------------|-----------------------------------|
| e Help | Maintain Filter | | | | | | |
| Delivery Addre | Maintain Filter | 5 | | | | | |
| Refresh Cor | Customer Sales Order Stock Item Sales C | Inder Item Quotation | | | | | |
| Customer | Available Fitters | | | Outstanding | Tourselde | Augustable Chevely | Customer Credit |
| Name | Name Setting | | | Value (GBP) | | | Customer Credit Limit Exceeded |
| Green Fing | Open/Closed Open/O | NY A | www.egpl.co.uk/ | 2602.80 | | 1862.49 | |
| Gant Deve | Completion Status Incomple | te'Only | www.eqpi.co.uk/ | 1915.77 | | 1252.17 | |
| Green Supe | Date Completed | 00042 | www.egpl.co.uk/ | 1486.65 | | 1265.45 | Credt limt exceede |
| Depn & So | Order Source | | www.eqpi.co.uk/ | 917.94 | | 254.34 | 201 C |
| BJI Distribu | Department | | www.ecri.co.uk/ | | | 899.37 | |
| NGB Agen | Cost Centre | 1010 | r Origin | | 0.000 | | |
| GIL Engine | Document Status | | 5/2000 C | | | | |
| AGI Workh | Stock Location | eBus | iness Site | | https://www.eg | pl.co.uk/ | |
| Mandalay R | Replenishment Orders | Dave | nent Terms | | | | |
| DWP Reta | Replenish Location | Fayn | ient remis | | | - | |
| Apollo & Sc | Delivery Method | | Mill Spectrum | | | 1133.04 | |
| Dale Retail | Date Created | | www.ecreto.uk/ | 1006.73 | | 496.28 | |
| Exe Techn | Created By | | Wegol co.uk/ | 478.56 | | 172.29 | |
| Mega Trad | Date Last Amended | | www.egpl.co.uk/ | 1124.29 | | 511.75 | |
| JD Develop | Last Amended By | | www.egpl.co.uk/ | 592.75 | ✓ Contains traceable stock | 507.73 | 🕫 Credit limit exceede |
| Ward Red | On Hold | | www.egpl.co.uk/ | 2049.86 | | 816.01 | |
| Africa & Afr | Order Date | | www.egpl.co.uk/ | 1008.69 | | 787.49 | |
| KV Techno | Required Delivery Date | | www.egpl.co.uk/ | 3001.08 | | 1520.46 | |
| Golden Pla | Order Origin | | www.egpi.co.uk/ | 1793.45 | ✓ Contains traceable stock | 1240.45 | |
| Black Tool | eBusiness Ste https://w | ww.egpl.co.uk/ | www.egpl.co.uk/ | 1746.91 | ✓ Contains traceable stock. | 1636.31 | |
| PYW Logis | Payment Terms | | www.egpl.co.uk/ | 1619.29 | | 1313.02 | 🐒 Credit limit exceede |
| 2 | Order Value | | 1 | 217032.99 | | 133298.26 | |
| < | Outstanding Value | | | | | | > [|
| | Remarks Present | | | | | | |
| C FR | Special Instructions | | | | | 100 | n Count 157 |
| Dell Eth | Notes Present | | | | | | and the second |
| _ | Order Priority | | | | ana ana | | |
| | Earliest Item Due Date | | | | Ed | t Sove | Save As Close |
| 10 | Earliest Item Requested Date | | | | | | |
| | Product Groups | | | | | | |

7.6. Axis2Axis EDI using local folders

Available to all customers with axis diplomat 2020 or above and the Axis2Axis XML Ordering module

The Axis2Axis EDI module allows two axis diplomat systems to exchange orders - sales orders raised in one system become purchase orders in the other.

This module has traditionally used an FTP server to exchange order files. This has now been extended to allow a local folder to be used instead.

This is ideal in situations where both systems reside on the same server, such as when multiple trading companies purchase their stock from a stock holding company, often using back-to-back orders.

7.7. Amazon Invoice Upload



Available to Software Assurance customers with axis diplomat 2018 and the Amazon Seller Central Interface module

axis diplomat can now upload PDFs of invoices to Amazon via the Seller Central API.

Once enabled (by a simple tickbox within the Supervisor Function Maintain Sites), the process is completely automated and requires no user intervention. The invoice generation function will recognise invoices for orders received via the Amazon interface and upload invoices as a matter of course.

| Site Detai | |
|--|--|
| | Site Details |
| General Details Download Parameters Uplo | load Parameters Qustomer Parameters |
| Stock Levels Use stock location | Stack Iscalian |
| Include locations flagged as exclude from 'or | |
| Calculate stock level as | Back office stock on hand less allocations |
| Analgamate supplier stock on hand | |
| Customer Default Location | |
| Use customer default location | |
| Location | |
| Documentation | |
| PDF document upload enabled Amazon Invoice PDF upload enabled | |
| Real Time Updates | × |
| Stock levels upload enabled | X |
| | |
| | |
| Amazon | nvoice PDF upload enabled |
| | |
| | |

Section 8 Hire Management

8.1. Provisional Future Hires

Available to Software Assurance customers with axis diplomat 2018 with Hire Management

The Hire module has been extended to allow unconfirmed or provisional forwarddated hires to be recorded.

When entering a forward-dated hire, you are now able to specify whether the hire is confirmed or unconfirmed.

The Hire Schedule Monitor has also been enhanced to identify unconfirmed forward dated hires by extending the colour-coding used - confirmed hires are shown in dark blue whilst unconfirmed hires are shown in light blue. Similarly, items that are forecast to be over-allocated at a particular date due to confirmed hires are shown in red whilst over-allocations due to unconfirmed hires are shown in amber.

This development allows more accurate forecasts of the likely availability of hire items as well as providing a means of recording hire quotations.

8.2. Audit Trail on Hires

Available to Software Assurance customers with axis diplomat 2018 with Hire Management

The Hire module now maintains a detailed audit trail of events for each hire. This can be seen on the Audit Trail tab in Hire Enquiry:

| louty Hire 13876 - Closed Fi ustomer number 01/3005 udt Trail | | LSRUS Current balance | | Credit | ustomer Notes Audit Trail | |
|---|---------|-----------------------|------------------|---------|---------------------------|---|
| Description | | Dat | e and Time | User ID | Function | 4 |
| Forward hire entered by AND | NY | 314 | 7 0.020 15:15:18 | ANDY | Enter Hire | |
| Forward hire amended by Al | IDY | 054 | 8-2020 17:52:23 | ANDY | Amend Hire | â |
| Forward hire closed by AND | | udit Trail | 08-2020 11:50:35 | ANDY | Close Foward Dated Hire | |
| | Notes A | | | | | |





Section 9 Service Contract Management

9.1. Contract Request Validity Period

Available to all customers with axis diplomat 2020 or above with Service Contract Management

The Service Contract Management module has been extended to provide the same range of developments relating to validity and revision numbering as released for quotations.

Please refer to the Sales Ledger, CRM & Sales Order Processing section for more information.

9.2. Start and End Time by Contract Line



Available to all customers with axis diplomat 2020 or above with Service Contract Management

Individual contract lines can now start and end part way through a billing period. Service Contract invoice generation will automatically determine the billing amount for items that start or end midway through the billing period on a pro rata basis.

| | | | Insert Item | | | | | | |
|--------------------|------------------------------|------------------|--|--|--|--|--|--|--|
| m Details Stock | Notes Sales History | | | | | | | | |
| tem Number | | | Cost Details | | | | | | |
| ten number | 2 | | 32nit cost 120.00 GBP (Y) | | | | | | |
| Stock Details | | | Ew 1 EACH | | | | | | |
| Stock reference | MACHMAINT | i | Margo Detals | | | | | | |
| Buying reference | | | Trade 190.00 GBP Margin 33.33 % (60.00 GBP) | | | | | | |
| Description | Garden Machinery Maintenance | = | Retail 180.00 GBP Margin 33.33 % (60.00 GBP) | | | | | | |
| nearchrou | Contract (Small Machine) | | | | | | | | |
| Specification | | | Analysis Details | | | | | | |
| | | | Department Miscellaneous v | | | | | | |
| | | | Gost centre Sales ✓ | | | | | | |
| | | | Line item Dates | | | | | | |
| Quantity / Pricing | | | Next due date 01/10/2020 | | | | | | |
| Quantity | 1 | | End date 🐼 30/11/2021 | | | | | | |
| Unit price | [180.00] GBP (Yearly) | | | | | | | | |
| Per | 1 EACH | | Line Item Dates | | | | | | |
| ten discourt | 0.00 % | | Drie item Dates | | | | | | |
| St. 2. States | | | Next due date 01/10/2020 | | | | | | |
| Çustoner discount | | | | | | | | | |
| Customer discount | 0.00 % | | End date 🗹 30/11/2021 🗐 🗸 | | | | | | |
| Net value | 180.00 GBP Margin 33. | 33 % (60.00 GBP) | | | | | | | |
| Qvemide VAT code | | | | | | | | | |
| ⊻AT code | ¥ | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

9.3. Date and Time Specific Contract Pricing



Available to purchase for all customers with axis diplomat 2020 or above with Service Contract Management

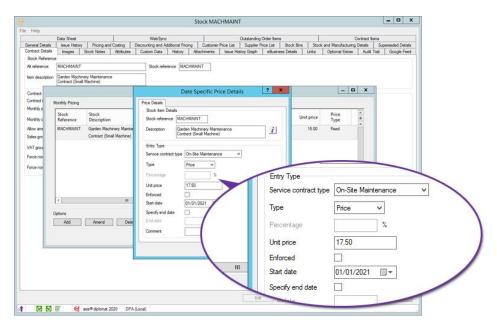
A new additional module for Service Contract Management users allows future contract pricing and costing to be defined.

You may either define a fixed contract price for an item or specify a percentage of the selling price of the item. You may also define different pricing for different contract types. This allows you to have different tiers of contract pricing for the same item.

For example, an extended warranty for an item might be 1% of its retail price per month for a "return to base" contract or 2% for an "on site" contract.

You may also specify an end date for the pricing or, by not supplying an end date, allow that pricing model to continue until it is superseded by a newer price rule.

Pricing that is marked as Enforced will automatically update all relevant service contracts during the next invoice creation. Pricing that is not enforced can manually be updated on a service contract by using the 'reprice' option when amending the contract.



Please note: you do not need to be using Date and Time Specific Stock Pricing in order to be able to take advantage of Date and Time Specific Contract Pricing.

9.4. Recalculate Pricing in Service Contract Maintenance



Available to Software Assurance customers with axis diplomat 2018 with Service Contract Management

A new button has been added to Service Contract and Contract Request amendment functions to reprice all of the items on the contract using current pricing.

| | A COMPANY | tes General D | etalis Document Notes R | en Decais Ter | ms and Add | | | os Audt Tr | al l | | | | | | | | |
|---------------|---------------|-----------------|-------------------------|-----------------|------------|----------|--------|--------------|----------------|--------|-------------|-----|--------|--------|---------|----------------|-----|
| Amending Co | erence 01/376 | | Cheddar Marketing Co. | | 1 (20) | Value | 105.00 | GBP | Cost | 70.00 | | GBP | Margin | 100.00 | | (35.00 GBP) | |
| | | | | | i | | | | | | | | Margin | 33.33 | | (35.00.00%) | |
| Credit limit | 1000 | GBP | Current balance 1129.9 | 32 | GBP | VAT | 21.00 | GBP | Weight | 0.0000 | | kg | | | | | |
| | | | | | | Total | 126.00 | GBP | | | | | | | | | |
| Current items | | | | | | | | | | | | | | | | | |
| ltern | Stock | Description | | Quantity | Unit | ltem | | VAT Value | Total Value | Print | Status | Del | livery | End | Unit of | Invoice/Credit | Inv |
| | Reference | | | 1.5 | (GBP) | Discount | (GBP) | (GBP) | (G8P) | Value | | | e Date | Date | Measure | Number(s) | |
| 1 | MACHMAINT | | nery Maintenance | 7 | 15.00 | | | | | | | | | | | | |
| | | Contract (Sma | i Machine) | | | 0.00% | 105.00 | 21.00 | 126.00 | Yes | Outstanding | 164 | 09-20 | | EACH | | |
| | | Contract (Sma | (Machine) | | | | | price All | | | 4 | 164 | 09-20 | | EACH | | |
| 4 | | Contract (Sma | (Machine) | 7 | | | | | 126.00 | | 4 | 164 | 09-20 | | EACH | | |
| | | Contract (Sma | (Madene) | | | | Re | price All | | | 4 | 164 | 09-20 | | EACH | | |
| < Options | | Contract (Sma | Didde item | W | we been Up | 65 | Re | price All | | | 4 | | os-20 | | EACH | Pret La | 3 |

When used in conjunction with date and time specific contract pricing, this will automatically use the pricing as at the next due date for each item.

9.5. Contract Items tab in Stock Enquiry



Available to all customers with axis diplomat 2020 or above with Service Contract Management

A new tab has been added to Stock Enquiry, for items that are enabled for use on Service Contracts, listing the contracts on which the item appears.

| | | | | | | Stock M/ | ACHMAINT | | | | | - |
|------------------|-----------------------------------|--------------------------|-------------------------|---------------|------------------|-------------|------------------|------------------|----------------------|----------------------------|--------------------------|--------|
| e Help | | | | | | | | | | | | |
| Contract Details | Images | Stock Notes | Atributes | Custom Data | History | Attachments | Issue History | Graph eBut | iness Details | Links Optional Extras | Audit Trail Goo | igle F |
| General Details | Issue History | Pricing a | nd Costing De | scounting and | Additional Price | g Custom | er Price List S | ppler Price List | Stock Bins | | g Details Supersede | d De |
| | Data Sheet | | | Web.Sy | nic | | Outs | tanding Order Ib | 0716 | | Contract Items | |
| Stock Reference | , | | | | | | | | | - | | |
| At reference | MACHMAINT | | | Stock of | ference MACI | IMAINT | | | | | | |
| | | | | _ | | | (| Co | ntract Item | IS | | |
| item description | Garden Machine Contract (Small | ey Maintenar Machine) | nce | | | | | - | _ | | | |
| Contract items | | | | | | | | | | | | |
| Document Type | Frequency | End | Document Termination | Quantity | Unit Price | Net Value | Cost of Sales | Document | Account Reference | Account | Service Contract Type | |
| | | Date | Date | | | | | | | | 21 | |
| Service Contract | t Annual | | | 7 | 180.00 | 1260.00 | 840.00 | 18714 | 01/3769 | A. Cheddar Marketing Co. | On-Site Maintenance | |
| Service Contrac | t Annual | | | 8 | 180.00 | 1188.00 | 960.00 | 18715 | 01/3076 | Black Jersey | On-Site Maintenance | |
| Service Contrac | t Annual | | | 2 | 180.00 | 360.00 | 240.00 | 18716 | 01/3590 | Cheddar Manufacturing | On-Ste Maintenance | |
| Service Contract | t Annual | | | 21 | 180.00 | 3780.00 | 2520.00 | 18717 | 01/3566 | EDV Developments .com | On-Ste Maintenance | |
| Service Contrac | t Annual | | | 13 | 180.00 | 1872.00 | 1560.D0 | 18718 | 01/3371 | Gien Distribution Partners | On-Ste Maintenance | |
| | | | | | | | | | | | | |
| | | | | 51 | | 8460.00 | 6120.00 | | | | | 1000 |
| < | | | 10. | | | | - Charling and - | | | | | > |
| Include Service | Contracts only | | v Ocsed | ines Exclud | ed v Re | fresh | | | | | | |
| | | | | | | | | Edit | Print Preview | Send Shortout | Save Car | ieor |
| | Z 64 1 | | 2020 DPA (L | ocal) | | | | | | | | |

Selections at the base of the tab allow the list to be filtered to show just service contracts, just contract requests or both and whether to include closed lines.

Section 10 axis payroll

10.1. PDF Payslip Attachments



Available to all customers with axis payroll 2020 or above

The axis payroll can now create PDF copies of employee's payslips against their employee record. For security, each PDF is password-protected.

| | | Empl | oyee Enquiry | | | |
|--------------------------|---------------------------------|-------------------------|------------------------------|---------------------------|---------------------|-------------------|
| e Help | | | | | | |
| Main Details Events | NIC and Tax Payr Attachments | Driving Licence Details | y SSP Details Car Details | Address Details Educat | Contact Details | Additional Detail |
| Employee Reference 10 | 01 Mr J H Smith | | | | | |
| Attachments | | | | | | |
| Filename | | File Type | | Size (KB) | Date Modified* | - |
| A 1001 Pays | p 25-09-2020.pdf | Adobe Acrobat Docum | nent | 185 | 21-09-2020 16:19:04 | |
| A 1001 Paysk | p 28-08-2020 pdf | Adobe Acrobat Docur | ient | 186 | 19-08-2020 12:58:20 | Ê |
| A 1001 Paysl | p 31-07-2020.pdf | Adobe Acrobat Docur | nent | 186 | 27-07-2020 10:28:20 | |
| | p 26-06-2020 pd | Adobe Acrobat Doow | and a second | 186 | 23-06-2020 13:48:56 | |
| A 1001 Paysi | p 24-04-2020.pdf | 1001 Devel | p 25-09-2020.p | 186 | 22-04-2020 12:39:20 | |
| A 1001 P60 0 | | Tuur Paysi | p 20-00-2020.p | 5107 | 23-03-2020 14:36:04 | |
| | p 27-03-2020 pdf | 1001 Pavsli | p 28-08-2020.p | df 185 | 23-03-2020 12 36:00 | |
| | ip 31-08-2018.pdf | | | 186 | 01-03-2020 12:30:18 | |
| | ip 31-05-2019.pdf | 1001 Paysi | p 31-07-2020.p | | 01-03-2020 12:30:18 | |
| | ip 31-01-2020.pdf | 1001 Paveli | p 26-06-2020.p | 186 | 01-03-2020 12:30:18 | |
| | p 30-08-2019.pdf | | | | 01-03-2020 12:30:14 | |
| | ip 29-11-2019.pdf | Adobe manual Disaus | | 186 | 01-03-2020 12:30:14 | |
| A 1001 Pays | p 29-06-2018.pdf | Adobe Acrobat Docur | | 186 | 01-03-2020 12:30:14 | |
| < | | | | | | > |
| Open | inset Delete R | ename Mai Create fr | on template | | | |
| | | | | | Print Preview | Cancel |
| | EX 32 axis® delor | mat 2020 DPP (Local) | | | | |

10.2. Plain Paper P45 and P60 Print



Available to Software Assurance customers with axis payroll 2018

axis payroll now offers plain paper A4 printing for both P45 and P60 documents.

| HM Revenue & Customs | | yee leaving work | | | |
|--|--|--|--|--|--|
| Troplager PKH onlowerse Office number Reference number | Student Laur deductur Bodent Laur des | HM Revenue & Customs | | P45 Part 2 oyee leaving work | |
| i Engloyen National Insurance number | The code of loaving base Example 1 or recent 1 at | Completer IMM reference Office number | Basket Laur dokatar Basket Laur dokatar | MM Revenue & Customs | P45 Part 3 New employee details For completion by new employer |
| This - anise MM, MMS, MMS, MS or other title formance or family name | View 1/ward) 1 | 1. Implements National Insurance Inamilier | a farming having data | Use capital letters when campleting this form 1 Englique ROE observer CHSci ourbail: Behance subset | Station Loss deductions Radiat Loss deductions to continue |
| First name) | at has 5 there will be it Week number | * Time-wave ANI, ANIS, MISS, ANS or other Star | Paters 1/mands 1 | a Engloyee's fallonal inscarse number | The code of lawing day |
| Leaving date (D MM INTY | Transf pay to date | Surrante or Serily rante Rost rappoint | at bord there will be in Were number | 1. This error MR, MR, MD, M. or story the | Praces 1 or march 1 applies, online 12 in the loss below. Week Mospith 1 |
| | (0) | | Total pay to-date | Something to the second | Short, Complete only if has easle is comulative. If there is an X at late 5 there will be no orthon here. |

10.3. Additional Columns added to HR and Employee Monitors



Available to Software Assurance customers with axis payroll 2018

Two additional columns have been added to both the HR Monitor and the Employee Monitor:

- Address Postcode
- Driving Licence Next Check Due Date

| Reference | Title | Initials | Forenames | Sumame | Gender | NI Number | Date of Birth | Age | Start Date | Job Title | Line Manager | Length of Service | Address Postcode | Driving Licence Next Check Due Date |
|-----------|-------|----------|--------------|----------|-------------------|-----------|----------------------|--------------------|---------------|--|--------------|-----------------------|---------------------|--|
| 1001 | Mr | JH | John Harry | Smith | Male | SA123456A | 12/09/1981 | 37 yrs 6 mths | 21/03/1999 | Stores Manager | Anne Hama | 19 yrs 11 mths 28 dys | CS5 4SD | 01/05/2019 |
| 1002 | Mrs | в | Betty | Jones | Female | SA654321C | 12/08/1958 | 60 yrs 7 mths | 23/04/1995 | Warehouse Operative | John Smith | 25 dys | CS2 9GA | 16/06/2019 |
| 1005 | Ma | CL | Clare Louise | Anderson | Female | JC298484D | 25/06/1956 | | 01/04/2013 | | | 11 mths 17 dys | | 08/08/2019 |
| 1008 | Mas | AD | Anne Dawn | Harris | Female | BA227367A | 10/08/1991 | 27 yrs 7 mths | 03/04/2013 | Sales Account Manager Warehouse Operative | | 5 yrs 11 mths 15 dys | CS4 SRT | 20/09/2019 |
| | | | | re | ddress ostcode | | Driving L d Check | icence Due Date | 1 | | | | | |
| | | | | s CS | 5 4SD | | 01/06/2 | 2019 | 1 | | | | | |
| | | | | 1 00 | 2 9GA | | 16/06/2 | 010 | | | | | | |
| | | | | s CS | ostcode 65 4SD | | t Check 01/06/2 | Due Date 2019 |) | | | | | |

Section 11 Upgrade Options and Pricing

11.1. Upgrade Pricing

| | axis | axis |
|--|----------|----------|
| | diplomat | diplomat |
| Product | 2016 | 2018 |
| axis diplomat 2020 Express Client | £445 | £795 |
| axis diplomat 2020 Small Business Edition Client | £745 | £1295 |

11.2. Transition Pricing

| Transition To | Transition From | | |
|--|----------------------------|--|--|
| | axis diplomat 2020 Express | | |
| axis diplomat 2020 Small Business Edition Client | £395 | | |

11.3. Software Assurance Pricing

From January 2021, 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. Future upgrades to axis diplomat 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.

11.4. Additional Services

| Product | |
|---|------|
| Time Unit Based Implementation Services | |
| (40x15 minutes) | £995 |
| Time Unit Based Implementation Services | |
| (30x15 minutes) | £795 |
| Time Unit Based Implementation Services | |
| (20x15 minutes) | £545 |
| Time Unit Based Implementation Services | |
| (20x15 minutes) | £295 |

Time Unit Based Implementation Services can be used for online remote upgrade of an axis diplomat system to axis diplomat 2020.

Training is strongly recommended for all upgrades to axis diplomat 2020 in order to maximize the return on investment and can be provided on-site or remotely using Microsoft Teams.

Remote training can be provided using Time Unit Based Implementation Services or in whole day or half day sessions, invoiced at our standard rates.

11.5. Software Assurance Upgrades

For customers subscribing to Software Assurance only

A number of the new developments within axis diplomat 2020 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 2020 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 2020, please go to our web site at

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

and click on the link to request your upgrade.

Section 12 Policies

12.1. Supported Environments

For the latest information on **axis diplomat 2020**'s supported environments, including additional information such as approved Thin Client software and Microsoft Office versions, please visit our website at:

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

12.2. Product Lifecycle

For details on the support period for each major release of axis diplomat, including the dates when each release leaves mainstream or extended support, and the differences between those two support phases, please visit our website at:

www.axisfirst.co.uk/software/axisdiplomat/lifecycle/

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

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