



NEW FEATURES OVERVIEW

17th October 2022

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Details of Enhancements

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



A standard facility within **axis diplomat 2022**, available to all



A facility within **axis diplomat 2022** that has already been pre-released to those axis diplomat 2020 customers with Software Assurance



A new facility within **axis diplomat 2022** that requires one or more existing optional modules



An optional extra, available as an add-on to **axis diplomat 2022** but not available at previous versions

Section 1 Kernel (Core) Software

1.1. Increase to the Maximum Number of Concurrent Sessions

Pre-Released to Software Assurance customers



The number of concurrent sessions allowed to run axis diplomat at any one time has been doubled, from five times the number of licenced users to ten times the number.

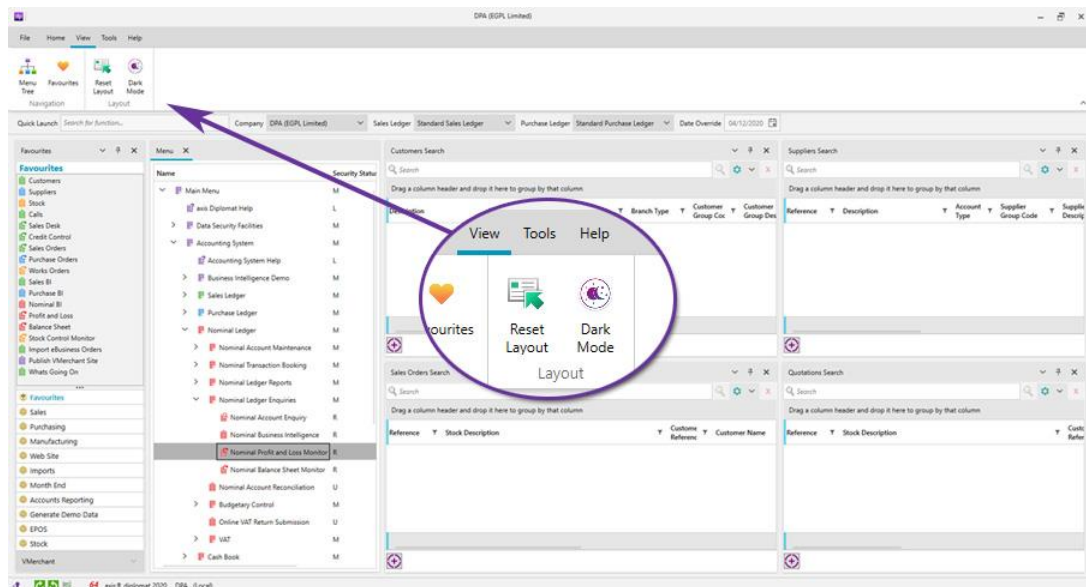
Each separate function (including the scheduler) is a separate session so, on average, each user can now run the scheduler plus nine other functions at the same time. This is a system-wide setting so typically, some users will be running more than ten functions concurrently whilst others run fewer functions at the same time.

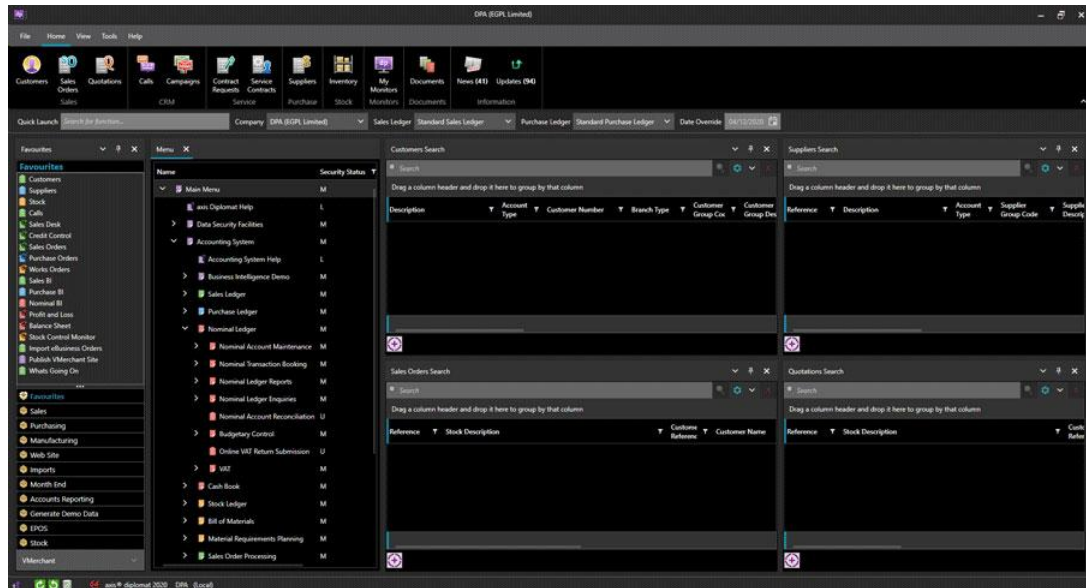
1.2. New Scheduler now offers Dark Mode

Pre-Released to Software Assurance customers



For those who prefer a software interface with more contrast, the new axis diplomat Scheduler now offers a Dark Mode.





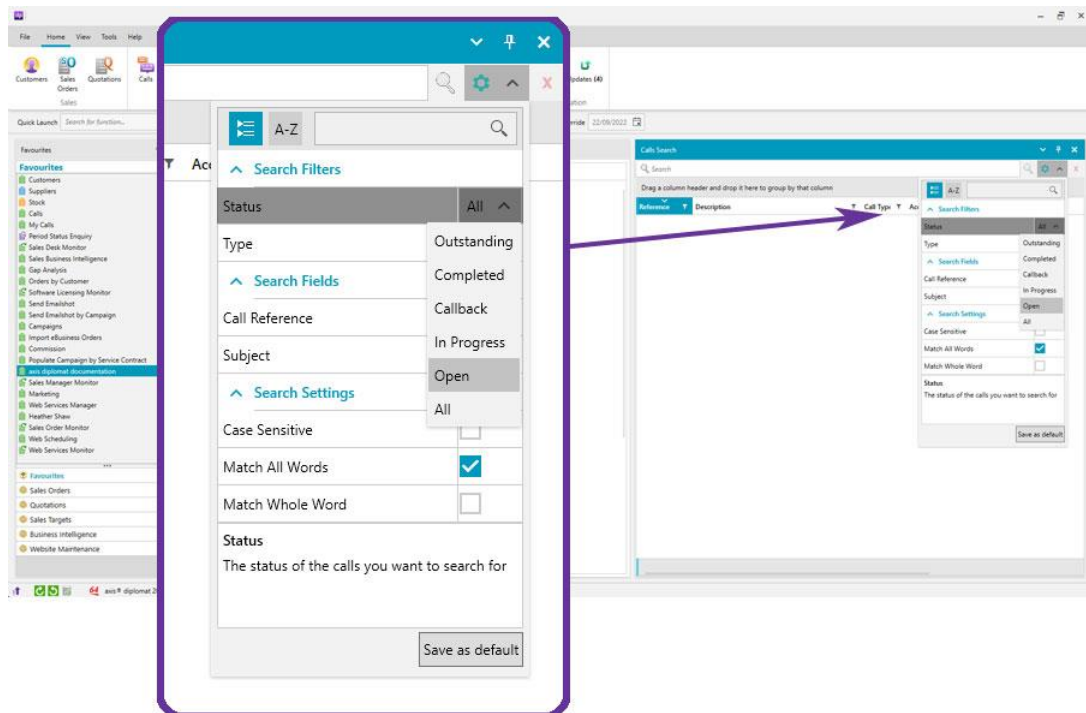
Enabling Dark Mode changes the Scheduler to use a colour scheme that is ostensibly white on grey/black rather than black on white

1.3. Open Call Search Filter

Pre-Released to Software Assurance customers



When using the Calls search within the 2020-style scheduler, it is now possible to choose a default search option of 'Open'. This then incorporates all calls that are not completed, including Call Back, In Progress and Outstanding.

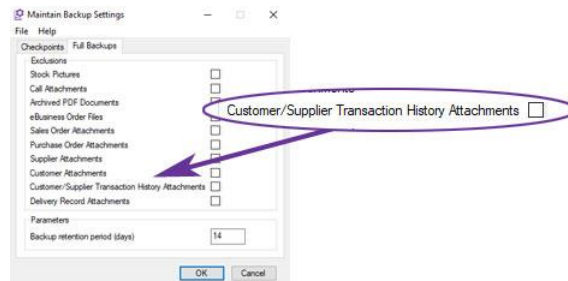


1.4. Excluding Customer and Supplier Transaction Attachments from Backup

Pre-Released to Software Assurance customers



A new configuration option has been added to the list of exclusions for full backups, allowing Customer and Supplier Transaction History attachments to be excluded.



On some systems, this can make a significant difference to the time taken, and space required, for scheduled backups and ad-hoc backups taken by functions prior to performing bulk updates. Backup exclusions should, of course, only be used where there is a separate backup regime in place for these supplemental files.

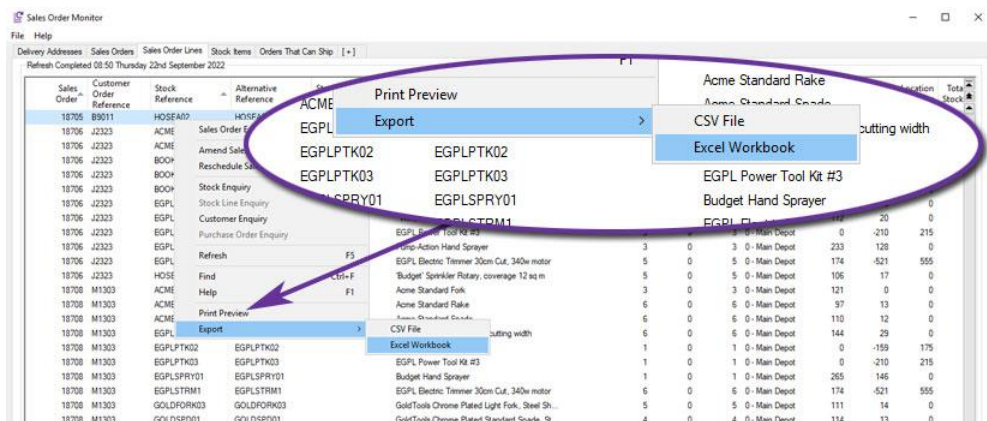
1.5. Export to XLSX

Pre-Released to Software Assurance customers



When exporting to a Microsoft Excel Workbook from a Scrolling Data List, the spreadsheet is now created in XLSX formatted rather than XLS.

This allows the user to use the latest features of Microsoft Excel within the spreadsheet.



1.6. New Text Formatting Options for Scrolling Data Lists

Available with axis diplomat 2022



It is now possible to configure your own personal preference on how individual text fields are displayed within Scrolling Data Lists.

This is particularly useful for those fields that often contain lengthy text entries, such as notes, stock specifications or Call History Events.

On a case-by-case basis, you can decide whether a column should be a single row and truncated or whether it should wrap onto multiple rows. For those columns that do allow wrapping, you can also specify the maximum number of lines before they are truncated.

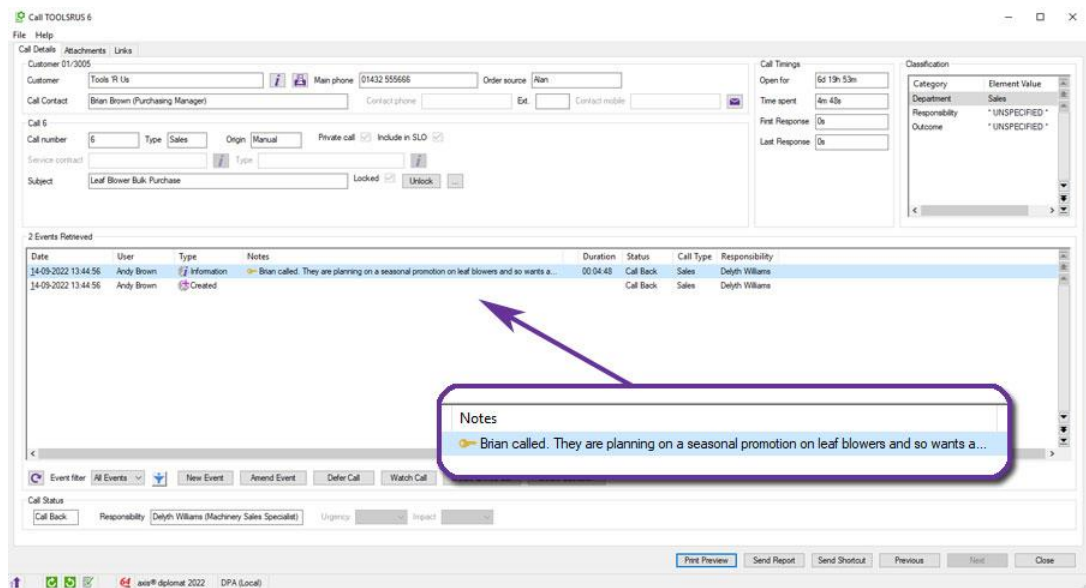


fig 1 - A CRM Call showing Event Notes that have been truncated

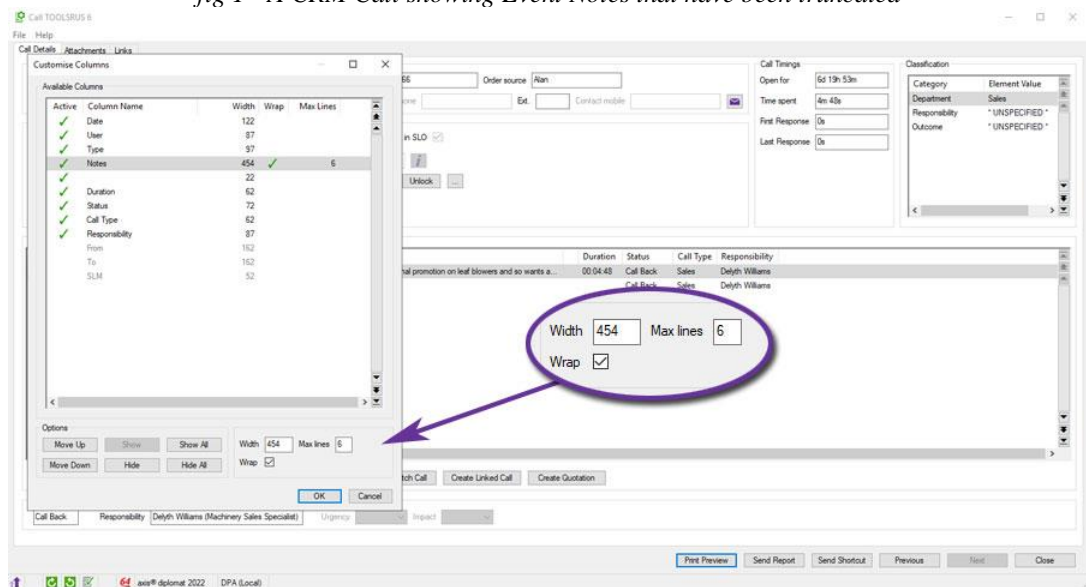


fig 2 - Changing the column settings to wrap text and show a maximum of 6 lines

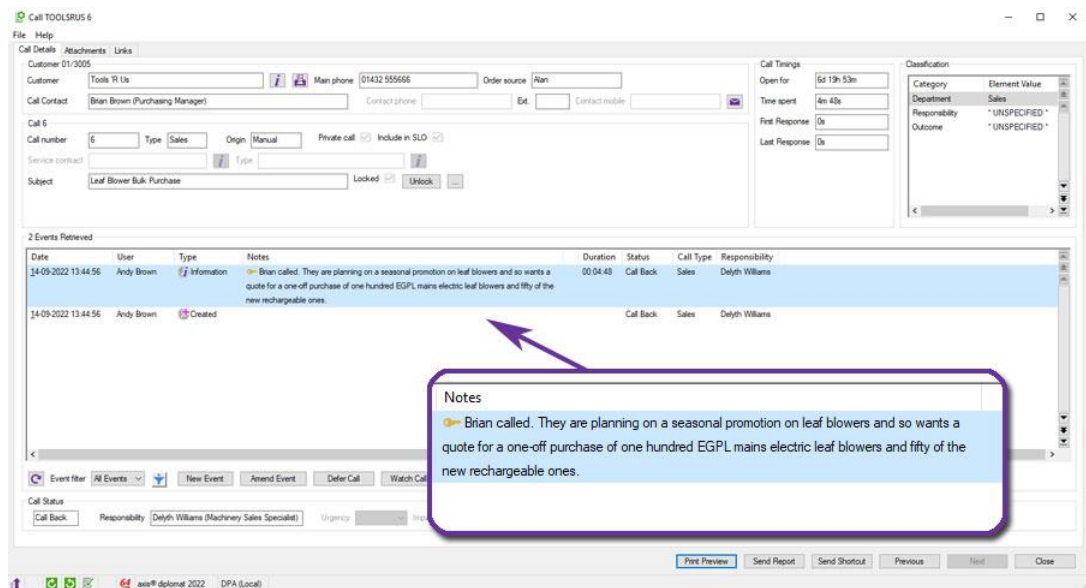


fig 3 - the same CRM Call Event notes now wrapped onto multiple lines

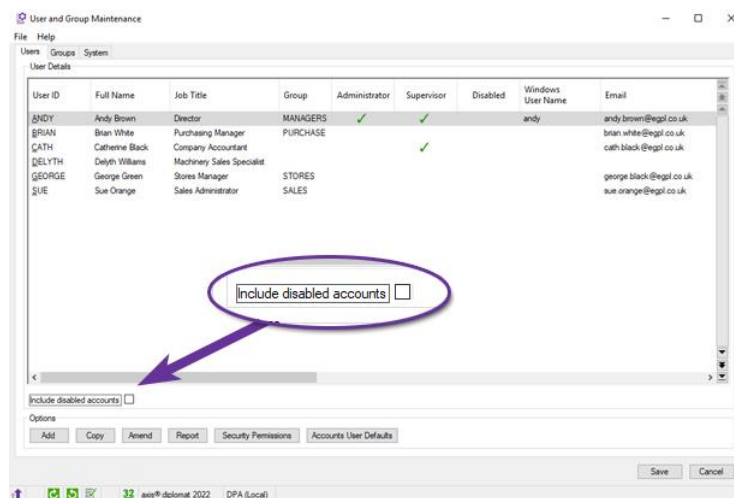
The settings are specific to a particular Scrolling Data List and apply just to the current user.

1.7. Hide Disabled User Accounts from User and Group Maintenance

Pre-Released to Software Assurance customers



Disabled user accounts are now hidden by default within the User and Group Maintenance function and a new checkbox has been added below the list of users if they need to be added back in.



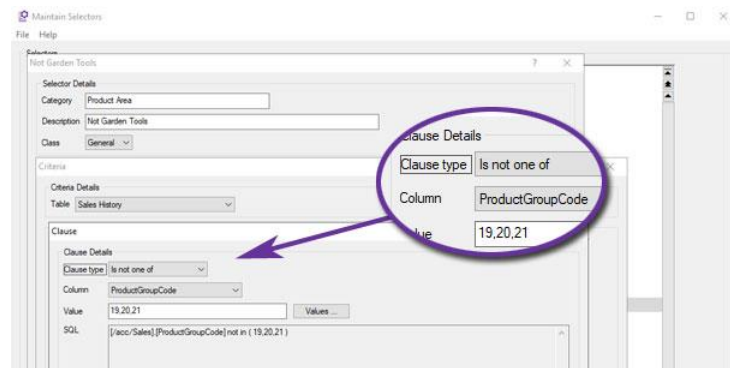
This change will be particularly welcome to those with a higher turnover of staff, such as those employing seasonal workers.

1.8. New Business Intelligence Selector Type - Is Not One Of...

Pre-Released to Software Assurance customers



When creating Business Intelligence Selectors, it is now possible to use a clause type of "is not one of...".



The screenshot above, for example, shows a selector that will include every product except those in product groups 19, 20 and 21.

Section 2 Nominal Ledger & General Accounts

2.1. More Nominal Accounts

Available with axis diplomat 2022



With the release of axis diplomat 2022, you are now able to benefit from a tenfold increase in the number of Nominal Accounts, with 10,000 accounts now available.

This also means that Nominal Account Codes have moved from being a three digit code to four digits.

Not only does this provide greater flexibility in structuring your accounts, allowing greater granularity, but also means that anyone wanting to transition from using Sage accounts can retain their existing account codes.

2.2. Deferred Income Provision

Available with axis diplomat 2022



Deferred Income Provision allows income which has been invoiced in advance to be accounted for in the relevant month for which the services invoiced are deliverable. It provides the following functionality for all customers using axis diplomat 2022 or above:

- The ability to define a default deferred income nominal account in Maintain Nominal Ledger Parameters. This allows selection from a list of Liability type nominal ledger accounts.
- A Deferred Income Provision function to manually enter income which is to be deferred.
- Release of deferred income to update the profit & loss and balance sheet using Release Standing Orders.
- Visibility of number of months of deferred income remaining to allow reconciliation to the relevant balance sheet nominal code.

Using the Deferred Income Provision function to manually enter details of income received in advance

2.3. Domestic Reverse Charge VAT

Available to purchase with axis diplomat 2022

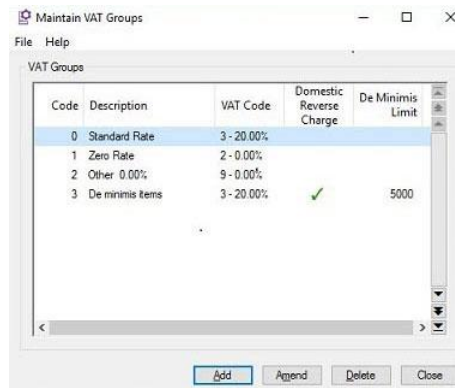


The domestic reverse charge VAT procedure is an anti-fraud measure designed to counter criminal attacks on the UK VAT system by means of sophisticated fraud.

It applies to the sale and purchase of specified goods and services:

Where it applies, it is the responsibility of the customer, rather than the supplier, to account to HM Revenue and Customs (HMRC) for VAT on supplies of the specified goods or services.

This additional module allows a VAT group to be flagged as subject to Domestic Reverse Charge VAT and for a de minimis limit to be specified where applicable.



The amount of Domestic Reverse Charge VAT applied to a sales order is visible from within the sales order and is automatically recalculated as sales order line quantities and values are updated and/or repriced. Sales orders imported from websites and third party systems via 'Import eBusiness Orders' may be passed through with Domestic Reverse Charge VAT values against the lines. Where an order is imported and the software determines that Domestic Reverse Charge VAT should be applied but has not been, the order will be placed on hold for manual review.

To handle suspected attempts to disaggregate purchases of items with de minimis values to avoid Domestic Reverse Charge VAT, a flag is available on 'Standard UK' customer accounts with a VAT registration number to disallow de minimis levels, applying Domestic Reverse Charge VAT to all sales of applicable items to that customer.

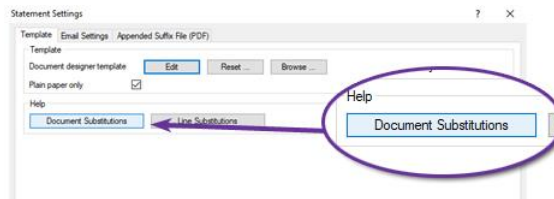
For purchase transactions where Domestic Reverse Charge VAT has been applied, Purchase Order Invoice Booking for suppliers classified as Standard UK Supplier offers an additional Treatment of VAT option for Domestic Reverse Charge. The VAT amount is not added to the invoice value but is recorded on the line. The use of Purchase Order Invoice Booking to calculate the tax implies that the items relate to the taxable supplies that the business makes and that therefore the tax should be reclaimed. Therefore, axis diplomat reports the VAT amount as Output Tax (Box 1) and Input Tax (Box 4), which cancel each other out. The net value is reported in Box 7 (Total Inputs) but not in Box 6 (Total Outputs).

2.4. Email Substitutions for Statements and Remittance Advices

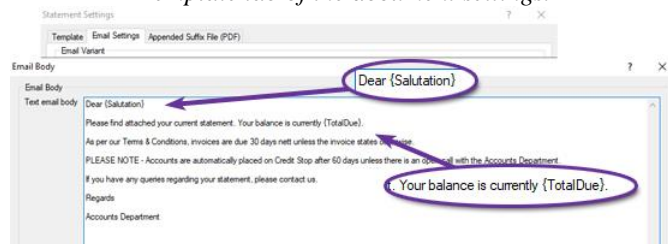
Pre-Released to Software Assurance customers



Email delivery of Sales Ledger Statements and Purchase Ledger Remittance Advices now supports substitution of any document field within the email body so that the emails being sent can be personalised to include, for example, balance or contact name.



A report of the full list of substitutions can be found by clicking on the Document Substitutions button on the Template tab of the document settings.



To use, simply use the appropriate column name from the report, wrapped in brace {...} characters.

Section 3 Sales Ledger, CRM & Sales Order Processing

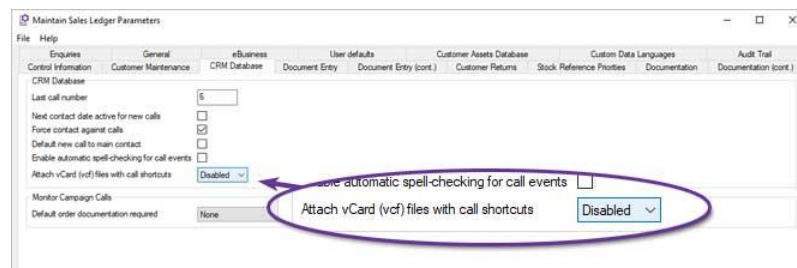
3.1. Disable VCF Attachments by Default

Available with axis diplomat 2022



axis diplomat has been modified to default to not attaching vCard (.vcf) contact files when sending shortcuts. This is to ensure that personal data is not replicated in this way unless you have specifically chosen to do so.

A new system parameter on the 'CRM Database' tab in Maintain Sales Ledger Parameters allows the setting of "Attach vCard (vcf) files with call shortcuts" to be changed to Enabled.



3.2. Shipping to Freight Forwarding Addresses

Available with axis diplomat 2022



axis diplomat users and their customers who ship goods outside of the UK may use a UK freight forwarder to export goods on their behalf. Prior to axis diplomat 2022, users needed to amend the delivery address on sales orders between that of the freight forwarder to produce delivery documentation, and that of the end customer to ensure the correct application of VAT.

axis diplomat 2022 introduces the ability to have an additional 'interim delivery address' on sales orders and delivery records which is the address to which the goods need to be shipped, prior to their export by the forwarder, to the end customer.

The option to enable the use of interim delivery addresses is set in Maintain SOP Parameters on the Delivery Details group of the Document Maintenance (cont.) tab. If this parameter is set, an additional 'Interim delivery address' section is available on the Terms and Addresses tab of sales orders.

To set a document to use an interim delivery address, select the 'Delivery via interim address' drop down and choose the appropriate address type. axis first recommend that a customer account record is created for each freight forwarder with its own set of contact records. The freight forwarder account is then selected using the 'Account address' option.

'Best' delivery method calculation will identify the best delivery methods by which the order can be delivered to the interim delivery address.

Delivery record creation and handheld order picking functions have been updated to prevent consolidation of orders for delivery to different interim delivery addresses in addition to not allowing consolidation of orders or deliveries to differing end delivery addresses.

Additional columns have been implemented in Sales Order and Deliveries monitor tabs for interim delivery address contact and address information. There are hidden by default and can be enabled on a user by user basis as per standard monitor functionality.

Interim delivery address contact details and address lines are available to document designer sales documents, including:

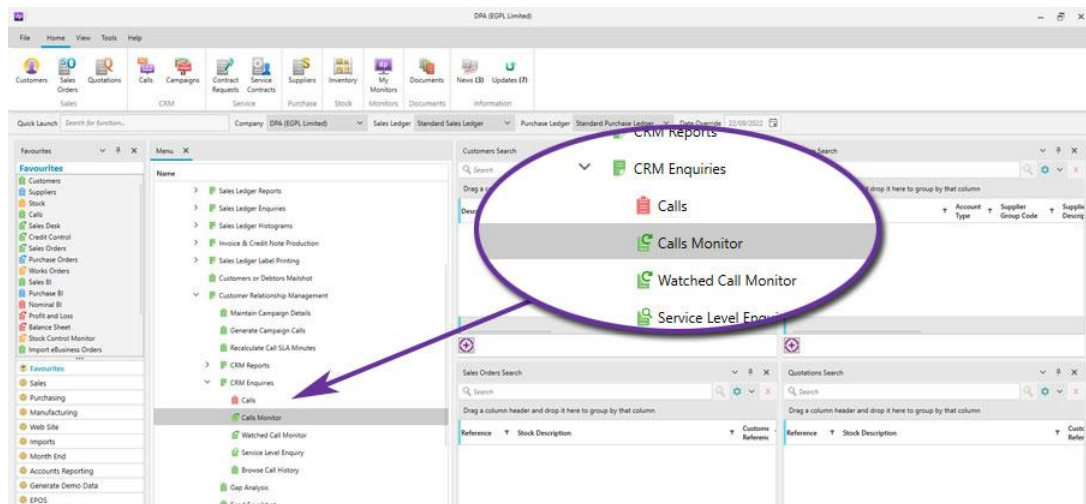
- Advice Packing Note
- Credit Note
- Customs Invoice
- Delivery Note (GOA, Invoice and Order variants)
- Invoice
- Order Acknowledgement
- Proforma Invoice (standard, Despatch and Quotation variants)
- Quotation and Quotation Order Form.

3.3. Calls Monitor

Available with axis diplomat 2022



A new Calls Monitor has been added, which can be found on the CRM Enquiries menu.



Whilst it has always been possible to add Call and Call Event tabs to custom monitors, this pre-configured monitor provides a great starting point for those beginning to use the CRM functionality of axis diplomat for the first time or for those who want a ready-to-go solution that lists their current calls as well as those for their group.

Calls Monitor

File Help

My Open Calls My Call Backs My In Progress Calls My Outstanding Calls My Events My Group's Open Calls My Group's Call Backs My Group's In Progress Calls My Group's C

Refresh Completed 10:57 Thursday 22nd September 2022

| Status | Call Type | Subject | Call Number | Account Type | Account Short Name | Account | Account Name | Contact Name | Last Updated |
|-----------|-----------|---------------------------------------|-------------|--------------|--------------------|---------|--------------|---------------|--------------|
| Call Back | Sales | Faulty Chainsaw | 2 | Customer | TOOLSRSUS | 3005 | Tools R Us | Brian Brow... | 01/05/20 |
| Call Back | Sales | Special Christmas Promotion | 3 | Customer | TOOLSRSUS | 3005 | Tools R Us | Brian Brow... | 01/05/20 |
| Call Back | Sales | Joint Promotion on EGPL Product Range | 4 | Customer | TOOLSRSUS | 3005 | Tools R Us | Cathy Bro... | 10/10/20 |
| Call Back | Accounts | Credit Note Request | 5 | Customer | TOOLSRSUS | 3005 | Tools R Us | John Keel... | 05/09/20 |

Tabs provided by the Calls Monitor include:

- My Open Calls and My Group's Open Calls, which list any call that is not complete for the current logged in user or their group, respectively.
- My Call Backs and My Group's Call Backs
- My In Progress Calls and My Group's In Progress Calls
- My Outstanding Calls and My Group's Outstanding Calls
- My Events and My Group's Events, which list any event added to any call, irrespective of that call's current responsibility, in the last week by the current logged in user or by anyone in the current logged in user's group, respectively.

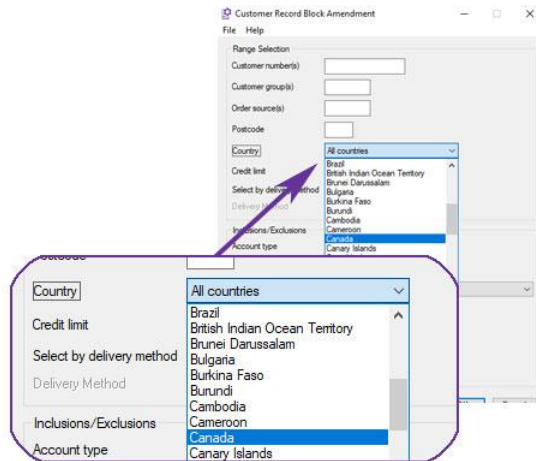
As with any pre-configured monitor on the system, you can of course change the filters and column layouts to suit your requirements and add your own additional tabs too.

3.4. Customer Block Amendment by Country

Pre-Released to Software Assurance customers



The Customer Record Block Amendment function has been extended to allow the range of customers to be modified to be selected by the country of their account address.



This is useful if, for example, you want to move all customers in a specific country to a different customer group, order source code or pricing tier.

3.5. Document Sub-Totalling

Available with axis diplomat 2022



Sub-Totalling for sales documents (sales orders, quotations and, for those with the Service Contract Management module, Service Contracts and Requests for Contract) was previously available as an optional module. This has now been enhanced and made standard on all systems.

'Sub-total' and 'Start Sub-total' lines can now be added to sales documents. All stock items between the Start Sub-total line and the Sub-total line then have their prices suppressed from documents. If no Start Sub-Total line is provided then the sub-totalling applies to all preceding items from the start of the document.

Sub-total columns on the Item Details tab then show the sub-totals for net and gross of the preceding items.

Amend Sales Order 18726

Customer reference: 01/3005 Tools 'R Us

Credit limit: 10000 GBP Current balance: 9904.30 GBP

Service contract type: Default contract type

Delivery: Carrier: 10.80 GBP (9.00 ex. VAT)

Delivery charge: Customer default (add charge at order entry)

Values:

| | | | | | | | | |
|-------|---------|-----|--------|---------|-----|--------|-------|-----------------|
| Net | 4010.10 | GBP | Cost | 2341.20 | GBP | Margin | 26.65 | % (1068.50 GBP) |
| VAT | 802.02 | GBP | Weight | | | | | |
| Total | 4812.12 | GBP | | | | | | |

Current Items:

| Item Number | Stock Reference | Description | Ordered Quantity | Delivered Quantity | Outstanding Quantity | Free Stock | Supplier Stock | Unit Price (GBP) |
|-------------|-----------------|---------------------|------------------|--------------------|----------------------|------------|----------------|------------------|
| 1 | EGPLMOW1 | EGPL Electric Mower | 10 | | | | | |
| 2 | EGPLMOW2 | EGPL Electric Mower | 10 | | | | | |
| 3 | EGPLMOW3 | EGPL Rotary Mower | 10 | | | | | |
| 4 | EGPLMOW4 | EGPL Hedge Trimmer | 10 | | | | | |

Sub-total Details:

Item number: 6

Sub-total text: Total for Lawnmowers: 3349.30

Options: Outstanding

Buttons: Sub-total, View, Move Up, Move Down, Review, Favourites, Options, Import, Reprice All, Print Label(s)

EGPL GARDENING SUPPLIES Order Acknowledgement

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

| Date | Your Reference | Account | Our Reference |
|----------|----------------|---------|---------------|
| 13-10-22 | 23A456 | 01/3005 | ORD18726 |

| Quantity | Description | Reference | Price | Per | Net Value |
|-----------------------|--------------------------------|-----------|-------|------|-----------|
| 10 | EGPL Electric Mower | EGPLMOW1 | | EACH | |
| | 12" plastic blades | | | | |
| 10 | EGPL Electric Mower | EGPLMOW2 | | EACH | |
| | 12" metal blades | | | | |
| 10 | EGPL Rotary Mower | EGPLMOW3 | | EACH | |
| | 38cm cutting width | | | | |
| 10 | Wimbledon Electric Mower | EGPLMOW4 | | EACH | |
| | 5-blade steel cutting cylinder | | | | |
| Total for Lawnmowers: | | | | | 3349.30 |
| 10 | EGPL Hedge Trimmer | EGPLTRIM1 | 43.46 | EACH | 434.60 |
| | 600mm Blade, 500w Motor | | | | |
| 10 | EGPL Electric Trimmer | EGPLSTRM1 | 21.72 | EACH | 217.20 |
| | 45cm Cut, 340w motor | | | | |
| 1 | Carrier | CARRIER | 9.00 | EACH | 9.00 |

Total Value (ex VAT) £4010.10

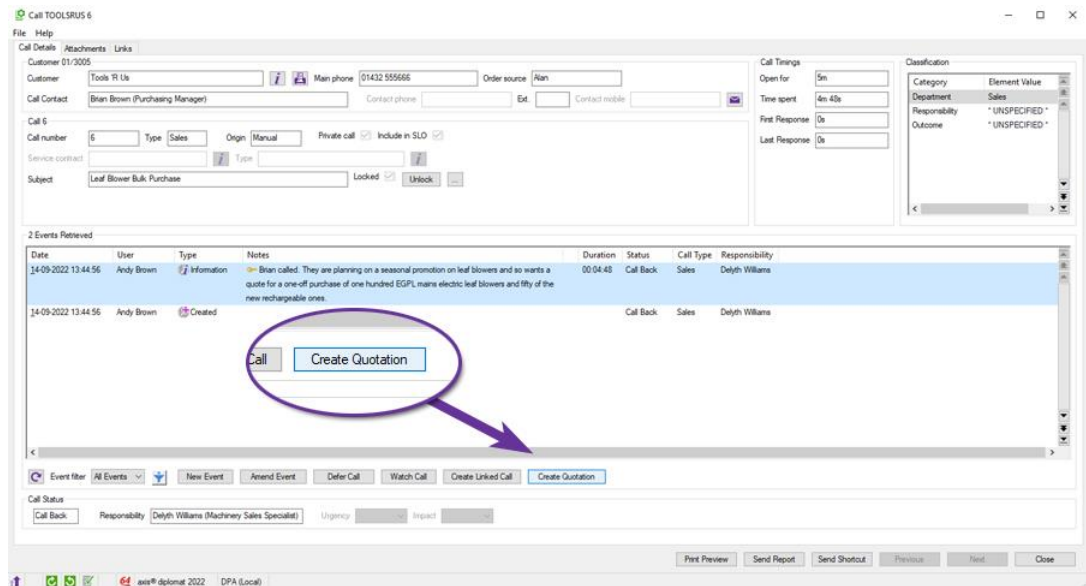
For and on behalf of the Company
Signed: _____
Date: _____ Page 1 of 1

3.6. Create Linked Quotation from CRM Calls

Pre-Released to Software Assurance customers



A new button has been added to the CRM Call dialog to allow a linked quotation to be created.



Previously, it was necessary to create a quotation separately, either by using the Enter Quotation function or via the Quotations tab in Customer Enquiry before returning to the CRM Call and linking the quotation via the Links tab.

In addition to saving valuable time in creating the quotation, this enhancement also helps ensure that quotes are linked to the appropriate CRM Calls as staff do not need to remember to carry out a separate stage.

3.7. Delivery Note Scanning and Sales Order Release

Available with axis diplomat 2022



A new 'Attach Documents' function is able to monitor the contents of a user-defined folder, checking for the presence of PDF files.

The scanned files are automatically associated with their relevant Sales Order using OCR technology and filed as an attachment to the Sales Order.

As each document is processed, it is added to an on-screen list of the related sales orders. Once all documents have been processed, the user is given the option to bulk release' all of the order that can be released. Any which are on hold or have already been released are, of course, excluded. Orders are either released to invoice or to Goods on Account, depending on the setting on the relevant customer account.



A Desktop Scanner with Automatic Document Feeder

In practice, this means that a collection of Delivery Notes (for example, returned from a delivery run by one of your own vans) can be placed in a desktop scanner fitted with an automatic document feeder (as shown above) where the scanning software is pre-configured to save the scanned documents as PDFs in the same folder as axis diplomat is configured to look at from within the 'Attach Documents' function.

3.8. Custom Data in Customer Monitor Tabs

Available with axis diplomat 2022



Customer monitor tabs now include columns for every Custom Data field.

Customers by Group

File Help

Garden Centre Customers All Customers [+]

| Customer Account | Customer Name | Sells On Own Website? | Sells On Amazon? | Sells On eBay? | Has Shop? | Has Garden Centre? | Main Business Type | Business Size | Customer Order Source | Account Status | Customer Address Post Code | Current Balance |
|------------------|------------------------------|-----------------------|------------------|----------------|-----------|--------------------|----------------------------------|---------------|-----------------------|----------------|----------------------------|-----------------|
| 3596 | Africa & Africa Developments | No | No | No | No | No | Landscape Gardener or Contractor | Sole Trader | 2 - Beth | Live | CS10 2FR | 564.42 |
| 3329 | Apollo Logistics | Yes | Yes | No | No | No | Retailer - Other | Sole Trader | 3 - Charles | Live | CS1 3FR | 20.63 |
| 3669 | Apollo 4 You Partners | Yes | Yes | Yes | Yes | Yes | Retailer - Other | Sole Trader | 5 - Eric | Live | CS14 7NI | 5263.46 |

| Sells On Own Website? | Sells On Amazon? | Sells On eBay? | Has Shop? | Has Garden Centre? | Main Business Type | Business Size |
|-----------------------|------------------|----------------|-----------|--------------------|----------------------------------|---------------|
| No | No | No | No | No | Landscape Gardener or Contractor | Sole Trader |
| Yes | Yes | No | No | No | Retailer - Other | Sole Trader |
| Yes | Yes | Yes | Yes | Yes | Retailer - Other | Sole Trader |

Customer APOLLO-003 01/3329

File Help

General Details Custom Categories Contacts Campaigns Delivery Details Custom

Events Quotations Sales Orders Outstanding Order Items Goods on Account

Custom Data

Schema Customers

| Positi... | Field | Data |
|-----------|-----------------------|------------------|
| 1 | Sells on Own Website? | Yes |
| 2 | Sells on Amazon? | Yes |
| 3 | Sells on eBay? | No |
| 4 | Has Garden Centre? | No |
| 5 | Has Shop? | No |
| 6 | Main Business Type | Retailer - Other |
| 7 | Business Size | Sole Trader |

These columns are enabled by default, if you have custom data fields defined for your customers, but, as with all monitor columns, you may turn off individual columns and so different monitors can include just the custom data fields that are relevant for your particular requirements.

3.9. EORI Column Added To Customers Monitor Tab

Pre-Released to Software Assurance customers



An additional column has been added to Customers monitor tabs to show the EORI number.

By using column filtering or sorting, this provides a simple method for checking which customers may need EORI numbers adding to their account where they are currently blank. This could be helped, for example, by filtering a Customers monitor tab to showing only export customers.

3.10. Additional Columns for Sales Item History Monitor Tabs

Pre-Released to Software Assurance customers



Sales Item History monitor tabs now have a number of additional columns:

- Unit price
- Price per
- Unit of measure
- Item discount %

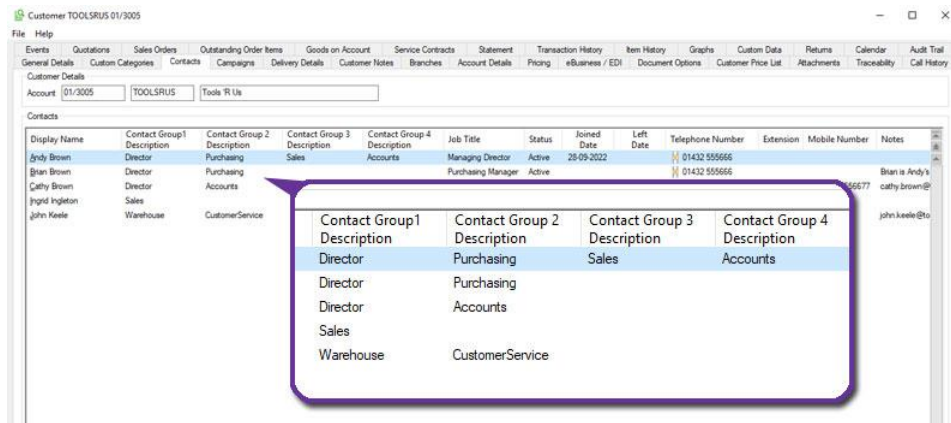
3.11. Contact Groups on Customer Enquiry Contacts Tab

Pre-Released to Software Assurance customers



The list of contacts shown on the Contacts tab of Customer Enquiry now includes columns for the contact groups that each contact belongs to.

You may define a number of contact groups, which typically are used to indicate the type of job role the person performs or the type of communication that they should be included in. Each contact can be in up to four different groups, reflecting the fact that in many organisations, individuals fulfill multiple roles.



In the screenshot above, a campaign or emailshot, for example, to Directors would include three of the contacts whereas one to Purchasing contacts would only include two of the contacts from this account.

3.12. Amend Status of Customer Return from Customer Enquiry

Pre-Released to Software Assurance customers



A new right click option has been added to the 'Returns' tab of Customer Enquiry to allow the document status code to be changed without needing to drill down into Customer Return document itself.

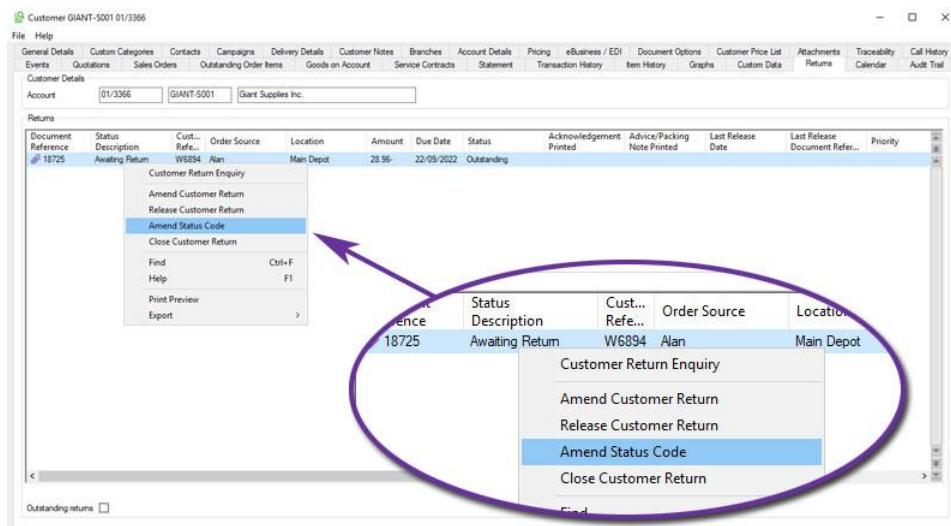


fig 1 - simply right-click on the particular Customer Return

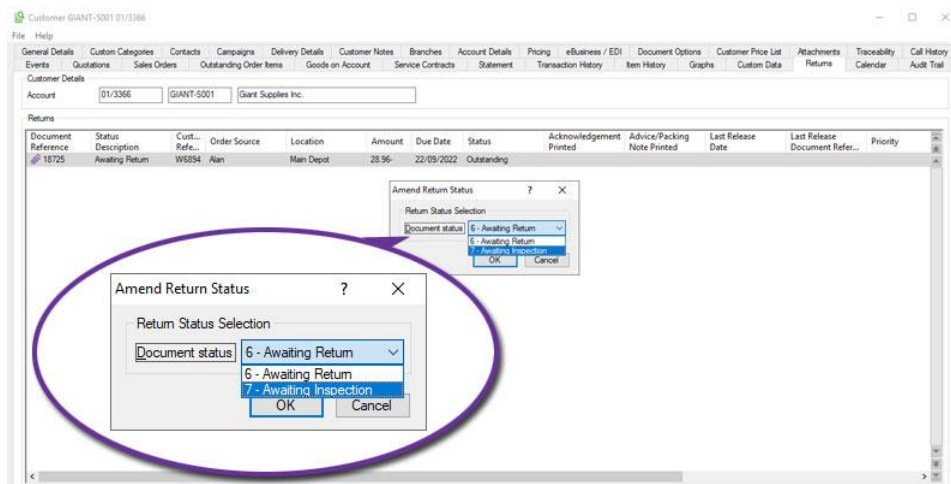


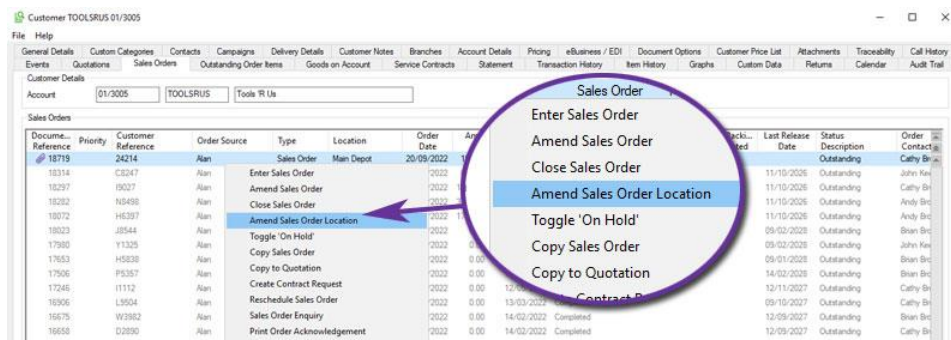
fig 2 - choose the new Document Status code there and then

3.13. Amend Sales Order Location from Customer Enquiry

Pre-Released to Software Assurance customers



A new right click option within the Sales Orders tab of Customer Enquiry allows a sales order's stock location to be amended. Previously, this was only available via a Sales Order Monitor or by using the dedicated function, Amend Sales Order Location.



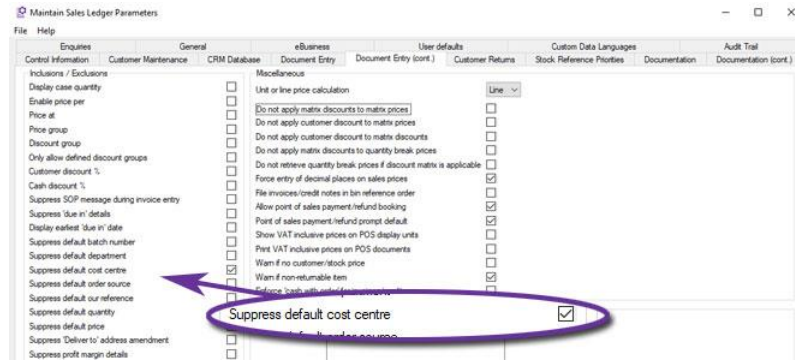
3.14. Force entry of Sales Order Cost Centre

Pre-Released to Software Assurance customers



A new system parameter allows systems to be configured to force entry of a valid Cost Centre when creating items, thereby ignoring any user or customer-specific defaults.

The parameter can be found on the 'Document Entry (cont)' tab of 'Maintain Sales Ledger Parameters'.

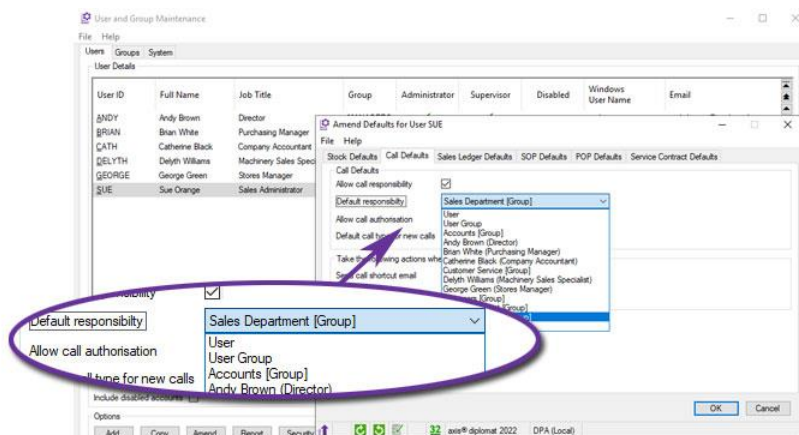


3.15. Default Call Responsibility by User

Pre-Released to Software Assurance customers



A new parameter has been added to the 'Accounts User Defaults' dialog within User and Group Maintenance. The default responsibility, found on the Call Defaults tab, defines the initial responsibility for any new CRM calls that the user creates. In addition to any current specific user or group, the default can also be set to the user themselves or to their group.

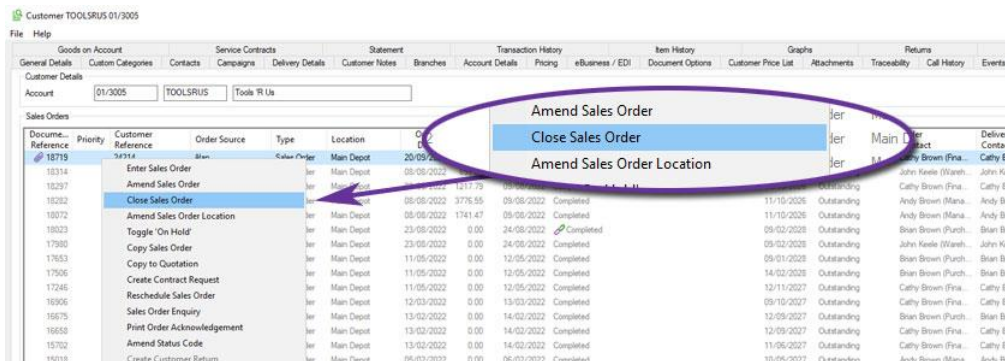


3.16. Close Sales Order option added to Customer Enquiry

Pre-Released to Software Assurance customers



An additional right-click option has been added to the Sales Orders tab within Customer Enquiry to allow an outstanding sales order to be closed.



3.17. Exclude completed lines in Order Maintenance

Pre-Released to Software Assurance customers



The Amend Sales Order function has been modified to add a tick box to show outstanding items only.

Amend Sales Order 18426

Customer Details: Customer Name: Apollo & Sons Technology.com, Credit limit: 10000 GBP, Current balance: 1254.05 GBP, Service contract type: Default contract type, Delivery: Unspecified, Delivery charge: Customer default (add charge at order entry).

Values: Net: 2511.91 GBP, Cost: 962.71 GBP, Margin: 60.88 %, VAT: 496.93 GBP, Weight: 33.0000 kg, Total: 3008.84 GBP.

| Item Number | Stock Reference | Description | Ordered Quantity | Delivered Quantity | Outstanding Quantity | Free Stock | Supplier Stock | Unit Price (GBP) | Unit Cost (GBP) | Item Discount | Net Value (GBP) | Print Value | Status | VAT Value (GBP) | Delivery Due Date | Total Value (GBP) | Unit of Measure |
|-------------|-----------------|--|------------------|--------------------|----------------------|------------|----------------|------------------|-----------------|---------------|-----------------|-------------|-------------|-----------------|-------------------|-------------------|-----------------|
| 1 | EGPLSPRY03 | Backpack Sprayer | 6 | 0 | 6 | 0 | | 33.33 | 15.50 | 0.00% | 166.65 | Yes | Outstanding | 33.33 | 19-10-22 | 199.98 | EACH |
| 4 | GOLDPORK03 | GoldTonic Chrome Plated Light Fork, Steel Shaft Gold's Light (Border) Fork, Guaranteed for life! | 1 | 0 | 1 | | | 12.74 | 0.00% | 0.00% | 12.74 | Yes | Outstanding | 4.25 | 19-10-22 | 25.48 | EACH |
| 5 | ACMERAKE02 | Acme Standard Grass Rake, Economical Grass Rake, suitable for domestic and light professional use. | 5 | 0 | 5 | | | 15.50 | 0.00% | 0.00% | 77.50 | Yes | Outstanding | 15.64 | 19-10-22 | 93.84 | EACH |
| 6 | BOOK021 | Decorating Made Easy Part of the Made Easy series, in soft cover. | 5 | 0 | 5 | 27 | | 5.45 | 3.57 | 0.00% | 27.25 | Yes | Outstanding | 0.00 | 19-10-22 | 27.25 | EACH |
| 7 | EGPLPTK01 | EGPL Power Tool Kit Accessory Pack includes extension lead, P.C.D. | 6 | 0 | 6 | 720 | | 42.51 | 0.00 | 0.00% | 255.06 | Yes | Outstanding | 51.01 | 19-10-22 | 306.07 | EACH |
| | | | 44 | 0 | 44 | | | | | | 2054.03 | | | 405.36 | | 2459.39 | |

Options: Outstanding ☒

Buttons: Insert, Amend, Close, Delete, View, Move Up, Move Down, Review, Favourites, Options, Import, Replace All, Print Label(s), Send Shortcut, File Amendments, Reject Amendments.

The initial setting for this can be saved using the 'File > Save current tab responses' option so it is easy for users to default to only showing outstanding items if they wish.

For those with the Service Contract Management module, this option is now also available in the equivalent Service Contract amendment function.

3.18. Sales Order Delivery Address Labels

Pre-Released to Software Assurance customers with the Bartender Bar Code Labels module



A new right-click option has been added to Sales Order monitor tabs to print delivery labels. The function prompts for the number of labels required before using BarTender to print the labels.

3.19. Customer Discount Percentage column on Customers monitor tabs

Pre-Released to Software Assurance customers



A new column has been added to Customers monitor tabs to show the discount percentage set against each account.

Customers by Group

File Help

Refresh Completed 13:49 Thursday 22nd September 2022

| Customer Short Name | Customer Account | Customer Name | Customer Discount (%) | Lead Source | Geographic Area | Size | Customer Discount (%) | Customer Address | Head Office Customer Name | Current Balance | Credit Limit | Available Credit | C. E... | Payment Terms |
|---------------------|------------------|---------------------------------|-----------------------|--------------|-----------------|--------|-----------------------|------------------|---------------------------|-----------------|--------------|------------------|------------|---------------|
| APOLLO-003 | 3329 | Apollo Logistics | 20.00% | Website | Wales | Large | 20.00% | CS1 3FR | | 20.63 | 1000.00 | 979.37 | On Account | |
| ASIA-4-001 | 3364 | Asia 4 You Inc. | 20.00% | Exhibition | Eire | Large | 20.00% | CS9 90T | | 2886.16 | 1000.00 | 0.00 | On Account | |
| ASIA-DE001 | 3324 | Asia Development Inc. | 20.00% | Exhibition | North West | Large | 20.00% | CS2 3IG | | 19.90 | 5000.00 | 4980.10 | On Account | |
| AZTEC-4001 | 3059 | Aztec & Aztec International In | 12.50% | Yellow Pages | Wales | Large | 12.50% | CS20 SMS | | 0.00 | 1000.00 | 1000.00 | On Account | |
| C-GAUL001 | 3117 | C. Gaul Distribution | 12.50% | Yellow Pages | South East | Large | 12.50% | CS5 7FN | | 1047.60 | 10000.00 | 8952.40 | On Account | |
| CAYMAN-001 | 3054 | Cayman Reed Inc. | 10.00% | Local Advert | Scotland | Small | 10.00% | CS20 TDW | | 520.51 | 10000.00 | 9479.49 | On Account | |
| CDW-IMP001 | 3093 | CDW imports .com | 12.50% | Cold Call | Islands | Small | 12.50% | CS18 1YB | | 323.06 | 5000.00 | 4676.94 | On Account | |
| CHEDDAR002 | 3292 | Cheddar Equipment Co. | 20.00% | Website | Scotland | Small | 12.50% | CS18 5P1 | | 142.35 | 10000.00 | 9857.65 | On Account | |
| CHEDDAR003 | 3368 | Cheddar Frost | 20.00% | Cold Call | Midlands | Large | 12.50% | HG9 8XA | | 3528.59 | 10000.00 | 6471.41 | On Account | |
| CLEEVES001 | 3024 | Cleaves Supplies Limited | 10.00% | Yellow Pages | Islands | Medi | 10.00% | CS11 3QG | | 6.93 | 1000.00 | 993.07 | On Account | |
| CLEEVES005 | 3245 | Cleaves & Sons Research Co. | 17.50% | Local Advert | Eire | Large | 10.00% | CS12 2ME | | 78.14 | 10000.00 | 9921.86 | On Account | |
| COLUMB002 | 3210 | Columbia & Columbia Retail Inc. | 17.50% | Website | Eire | Small | 12.50% | CS17 7QG | | 51.88 | 5000.00 | 4948.12 | On Account | |
| CORNWAL001 | 3234 | Cornwall International Partner | 17.50% | Local Advert | Eire | Small | 10.00% | CS10 SCJ | | 1612.14 | 10000.00 | 8387.86 | On Account | |
| CRT-LOG001 | 3280 | CRT Logistics .com | 20.00% | Local Advert | Scotland | Small | 20.00% | CS14 7W0 | | 135.80 | 1000.00 | 864.20 | On Account | |
| DALECA001 | 3321 | Dale Cayman Limited | 20.00% | Local Advert | South East | Small | 20.00% | CS6 4KE | | 563.65 | 5000.00 | 4436.35 | On Account | |
| DALE-CA001 | 3226 | Dale Langdale Limited | 20.00% | Exhibition | South West | Large | 20.00% | CF9 8YF | | 165.76 | 10000.00 | 9834.24 | On Account | |
| DISCOU001 | 3079 | Discount 4 You Limited | 17.50% | Yellow Pages | North East | Large | 10.00% | CS14 7Y1 | | 386.64 | 1000.00 | 613.36 | On Account | |
| DISCOU004 | 3315 | Discount Holdings Inc. | 20.00% | Exhibition | South West | Large | 10.00% | CS5 1NA | | 0.00 | 5000.00 | 5000.00 | On Account | |
| EDWARDS002 | 3085 | Edwards Marketing Co. | 17.50% | Exhibition | Wales | Medium | 17.50% | CS16 BRC | | 0.00 | 10000.00 | 10000.00 | On Account | |
| EXE-MAT001 | 3240 | Exe Materials Partners | 17.50% | Local Advert | NI | Large | 17.50% | HG9 6RN | | 3889.34 | 5000.00 | 1110.66 | On Account | |
| FROST-R001 | 3112 | Frost Retail Inc. | 17.50% | Cold Call | Islands | Medium | 17.50% | CS13 3BD | | 1340.93 | 1000.00 | 0.00 | On Account | |
| GIANT-002 | 3396 | Giant International Limited | 17.50% | Local Advert | NI | Large | 17.50% | CS11 4HV | | 183.92 | 10000.00 | 9816.08 | On Account | |
| GLEN-GR001 | 3097 | Glen Green Limited | 17.50% | Yellow Pages | NI | Large | 17.50% | HG9 4IT | | 52.34 | 10000.00 | 9947.66 | On Account | |

As with all monitor columns, this can also be used for sorting and filtering. In the screenshot above, for example, the list has been filtered to show just those accounts with customer discount. This can be particularly useful when reviewing discount levels and schemes.

3.20. Customer discount % column in Customer Transaction History monitor tabs

Pre-Released to Software Assurance customers



A new 'Customer Discount %' column has been added to Customer Transaction History monitor tabs to show the discount percentage set against a given transaction.

3.21. Right-Click Options for Goods on Account monitor tabs

Pre-Released to Software Assurance customers



Additional options have been added to Goods on Account monitor tabs to provide the following options:

- Amend Delivery Details
- Consign Delivery 1
- Print Proforma Invoice
- Create Invoice

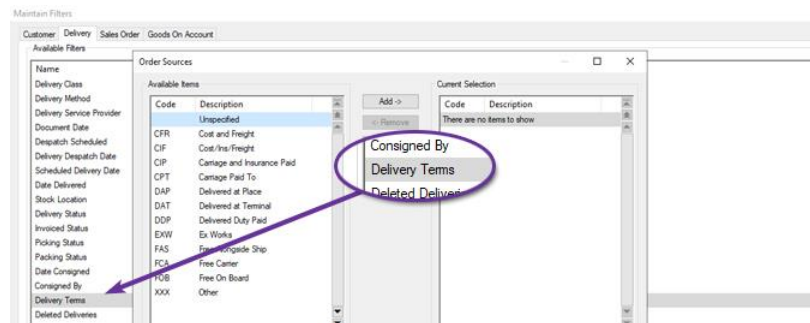
Note 1 - Consign Delivery is only available on systems with Despatch and Delivery Management.

3.22. Delivery Terms added to Sales Deliveries Monitors

Pre-Released to Software Assurance customers with the Despatch & Delivery Management module



Sales Deliveries monitor tabs now include an additional column for the Delivery Terms.



A corresponding filter has also been added

Delivery Terms refers to the International Commercial Terms (normally abbreviated to Incoterms) used to define which elements of costs are to be paid for by the seller (consignor) and which by the buyer (consignee).

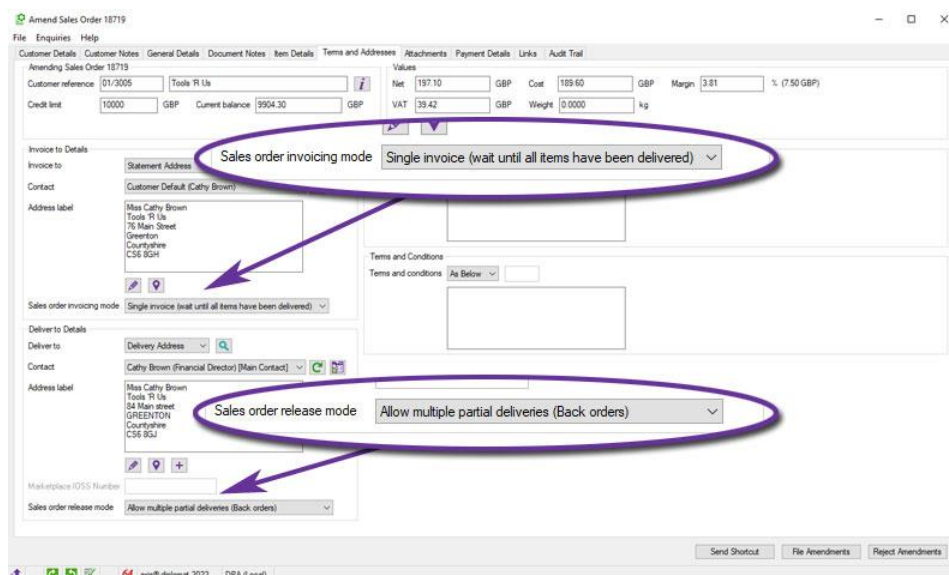
3.23. Sales Order Invoicing Mode

Pre-Released to Software Assurance customers with the Goods on Account module



Sales Orders now have a new Invoicing Mode, separate to the Release Mode.

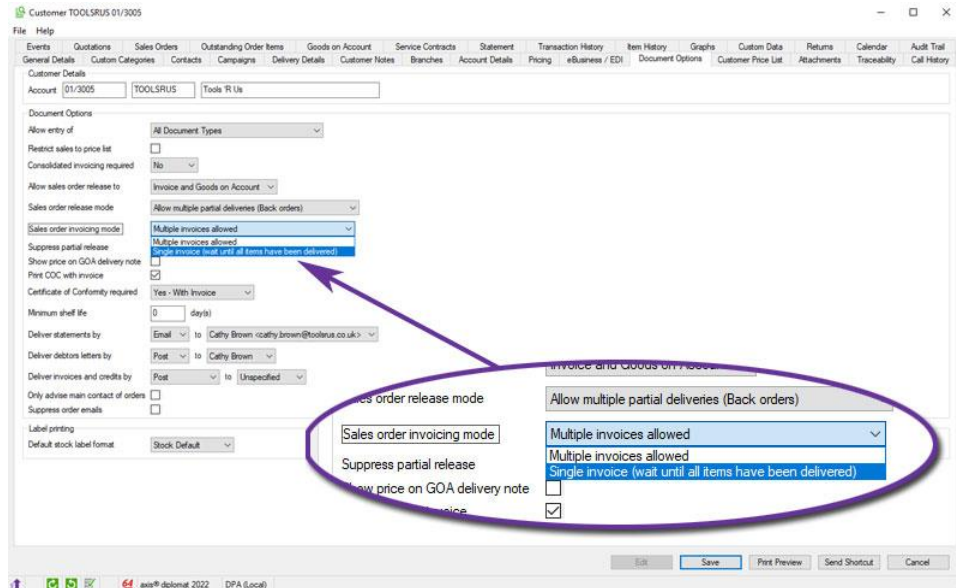
This allows an order to be flagged as allowing multiple releases but one a single invoice. This means that each part-shipment will create a Goods on Account booking and the invoice is only created after the final shipment.



A Sales Order that can be shipped in multiple installments but can only have a single consolidated invoice once all shipments have been made

Create Invoices for Goods on Account will not consolidate bookings from orders flagged as single invoice with other bookings, instead creating a separate invoice for each such order.

Customer accounts now hold a default invoicing mode which is used as the initial setting for both orders entered manually and imported from external sources such as websites.



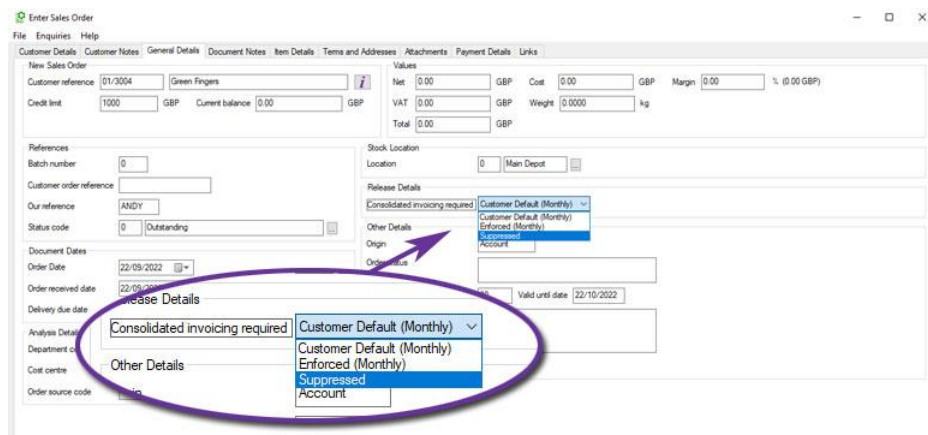
Customers, Sales Orders and Goods on Account monitor tabs have all been modified to show the Invoicing Mode where appropriate.

3.24. Override Consolidated Invoicing by Document

Available with axis diplomat 2022 and the Goods on Account module

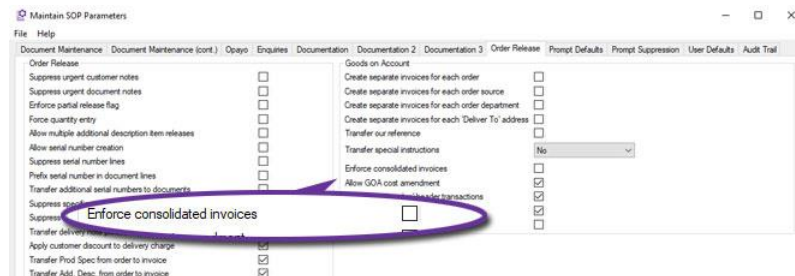


It is now possible, when raising a sales order for a customer marked as having consolidated invoices, to exclude that specific sales order from being consolidated.



In addition, Sales Order monitor tabs now also include an additional column to indicate the Consolidated Invoicing mode for each order.

This functionality is controlled by a system parameter. To be able to override the consolidated invoicing mode, you must ensure that the parameter "Enforce consolidated invoices" is NOT set. This is found on the 'Order Release' tab in 'Maintain SOP Parameters'.

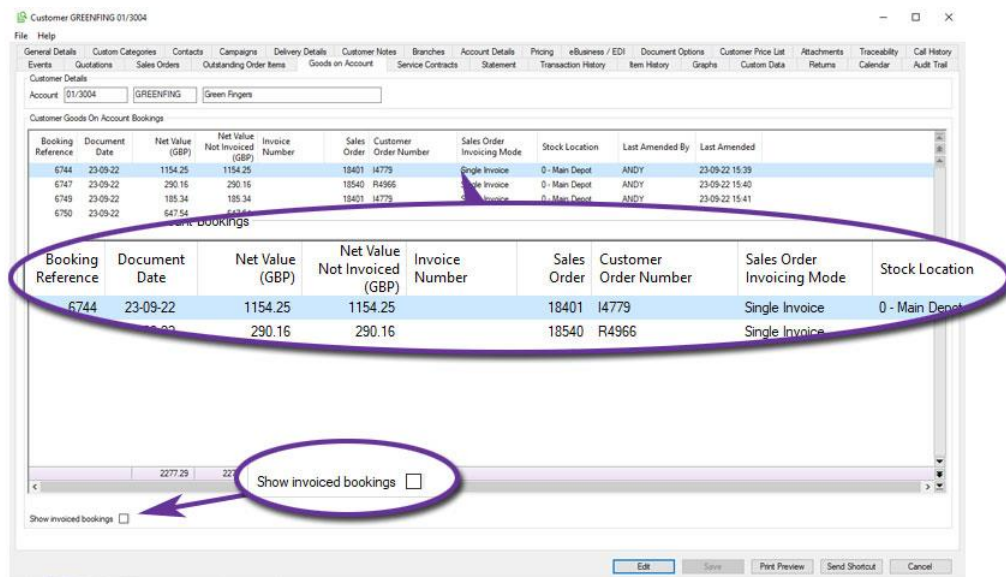


3.25. Customer Enquiry Goods on Account tab

Pre-Released to Software Assurance customers with the Goods on Account module



A new Goods on Account tab has been added to Customer Enquiry to show all Goods on Account bookings. By default only uninvoiced bookings are displayed but all bookings can be shown if the "Show invoiced bookings" option is checked.



Right-click options are provided to amend bookings, create invoices and print proforma invoices. It is also possible to drilldown to the original sales order.

3.26. JSON File Format Support for Customer Price Feeds

Pre-Released to Software Assurance customers with the Customer Price Feed Delivery module



The Customer Price Feed Delivery module has been extended to support delivery of price feed files to particular customers using a post to a web service (http/https) with the data in JSON format. The connection details are set within the eBusiness/EDI tab within Customer Enquiry.

A limit to the number of items being updated per post has also been provided as well as being able to send updates containing only items that have changed since the last update.

3.27. Supplier Stock In Custom Build Dialog

Pre-Released to Software Assurance customers with the Custom Build Assemblies module



An additional column has been added to the Custom Build dialog showing the supplier stock levels for each optional component in the configuration.

Select Assembly Options

| Overall Assembly Details | | Sub-assembly Details | | Build Values | | Item Values | |
|-----------------------------|--|----------------------|-------------|----------------|--------|----------------|--------|
| Stock reference | Description | Stock reference | Description | Net | VAT | Net | VAT |
| HHUC | Janam XM75+ handheld device configured as follows: | | | 3301.38 | 660.28 | 3301.38 | 660.28 |
| To make: 1 of 1 | | Minimum: 0 | Maximum: 0 | Total: 3961.66 | | Total: 3961.66 | |
| Assembly view: Options only | | Selected: | | | | | |

Assembly Expansion

- HHUC - Janam XM75+ handheld device configured as follows:
 - HLJXM75CHO - Janam XM75 handheld device options:
 - HLJXM75CHO - Janam XM75 charger / cradle options:
 - AKD1H1CLO - axis diplomat 2020 handheld user client license options:
 - AKD1H1CLO - axis diplomat 2018 handheld user client license options:
 - EPVISO22 - Microsoft Windows Server 2022 client licensing options:
 - EPTCSO22 - Windows Remote Desktop Service (RDS) 2022 licensing options:
 - EPTCSO15 - axis diplomat Windows RDS CAL 15V licensing options:
 - IS2019CLO - Microsoft SQL Server 2019 CAL Client Licensing Options:

Optional Components

| Assembly Type | Stock Reference | Description | Min. Qty | Max. Qty | Multiple Qty | Exclusive | Default Qty | Quantity Ordered | Unit Price | Item Discount | Net Value | Supplier Stock |
|---------------|-----------------|---|----------|----------|--------------|-----------|-------------|------------------|------------|---------------|-----------|----------------|
| | BAT-P1-075 | Janam Battery for XM75 series (4100mAh, 3.8V) | 0 | 0 | 1 | | 1 | 1 | 79.00 | 0.00% | 79.00 | 18 |
| | HLP-006F | Janam Nylon Holster (with rugged belt clip & strap) | 0 | 0 | 1 | | 1 | 1 | 26.00 | 0.00% | 26.00 | |
| | TRG-P1-001 | Janam XM75 Trigger Gun | 0 | 0 | 1 | | 1 | 0 | 145.00 | 0.00% | 0.00 | 2 |
| | JCPRXM75E | JanamCare Premium Service for XM75 handheld (3 years) | 0 | 0 | 1 | | 1 | 1 | 489.00 | 0.00% | 489.00 | |
| | INS-WMVWHH | Install and Configure Mobile WiFi Handheld | 0 | 0 | 1 | | 1.0 | 1.0 | 180.00 | 0.00% | 180.00 | |

3.28. Sage Account Number on Sales order Monitor

Pre-Released to Software Assurance customers with the Sage Line 50 Interface module



For those using the link to Sage Line 50, Sales Order and Customer monitor tabs now include columns for the Sage account number.

This makes it easier to see anomalies where Sage account numbers are missing, allowing issues to be dealt with before the invoicing stage.

3.29. Change History tab on Customer Asset Enquiry

Available with axis diplomat 2022 and the Customer Assets module



A new tab, Change History, has been added to Customer Assets. Showing much more detail than a simple audit trail, this shows, at a glance, every change that has been made to any field, including custom data.

View Asset - Ford Focus (100002)

File Help

General Children Stock Service Contracts Warranty Packs Call History Call Events Change History Notes Attachments Audit Trail

Change History

| Field | Date/Time | Change Source | Data Source | User | Data |
|-------------------|------------------|---------------|-------------|------|------|
| Stereo PIN Number | 21/09/2022 17:49 | Manual | Manual | AXIS | 9841 |
| Stereo PIN Number | 26/07/2022 09:37 | System | System | AXIS | 4561 |

3.30. Asset Servicing

Available to purchase with axis diplomat 2022 and the Customer Assets module



Asset Servicing is a new optional module available for axis diplomat 2022 users with the Customer Assets module.

This new module adds the ability to create CRM service calls based on assets that are due for servicing, routine testing, maintenance or any other regular scheduled activity, such as warranty renewal.

It extends the information held against each Asset Type to include default servicing information:

Amend Asset Type ID 1 - Ride On Mowers

General Children

Amend Asset Type ID 1 - Ride On Mowers

Asset Type ID: 1

Parent Type ID: 0

Name: Ride On Mower

Schema: Unspecified

Inherit Parent Schemas: ☐

Track Asset Changes: ☐

Icon:

Disposed Icon:

Asset Servicing

Servicable: ☒

Default Servicing Stock Reference: GMSERV

Default Service Interval Units: Years

Default Service Interval: 1

OK Cancel

Individual Customer Assets can then hold records of when they were last serviced:

The last service date, combined with the service interval, allows the system to calculate when each asset is next due for a service.

A separate function is provided to process all assets that are due to a service during a given time period and generate a CRM call for each one:

One possible use of this module would be to generate a CRM call for each asset that is due for servicing in a month's time and use those calls as triggers for the Customer Services department to contact customers and arrange services.

3.31. Customer Assets tab added to Stock Enquiry

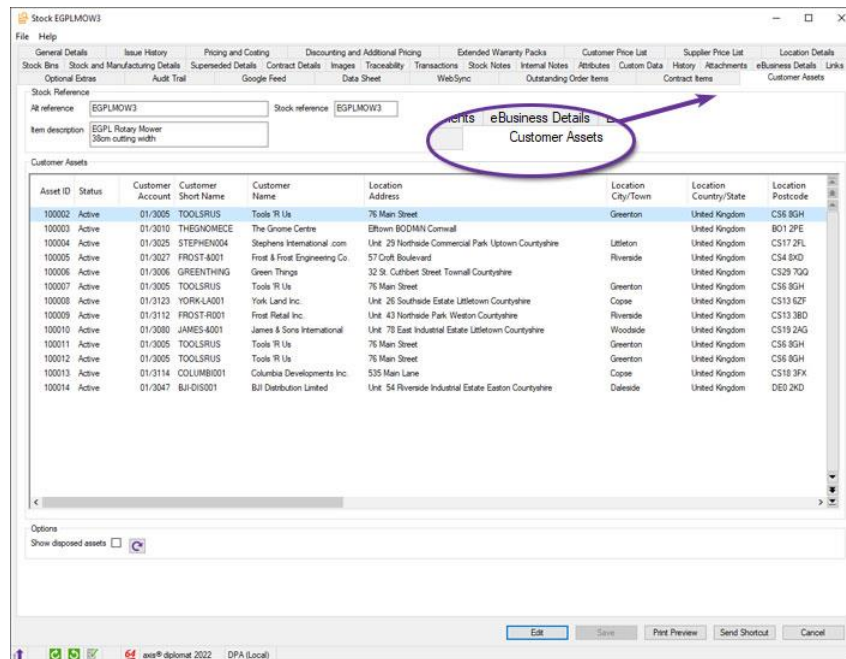
Available with axis diplomat 2022 and the Customer Assets module



A new Customer Assets tab has been added to Stock Enquiry / Stock Maintenance, listing the customer assets that are defined as being this stock item.

This provides a simple mechanism for users to locate assets of one particular SKU and would be useful, for example, when specific product recalls or updates are required.

By default, assets that are marked as disposed of are not listed but can, optionally, be included.



3.32. Klarna Integration

Available to purchase with axis diplomat 2022 and the Payment Service Provider (PSP) Foundation module



This feature provides an interface between axis diplomat and Klarna.

Klarna is a Payment Service Provider (PSP) providing secure online credit card and debit card payment solutions for eCommerce transactions allowing consumers to pay in installments.

When a consumer places an order using Klarna, Klarna will register the payment value and make this available to the vendor. The vendor can draw down against the payment only after the order is shipped.

Klarna does allow for partial drawdown against orders that have been part shipped.

axis diplomat communicates directly with Klarna to import reconciliation transactions, allowing the relevant control account to be reconciled efficiently.

3.33. Stripe Integration

Available to purchase with axis diplomat 2022 and the Payment Service Provider (PSP) Foundation module



This feature provides an interface between axis diplomat and Stripe.

Stripe is a Payment Service Provider (PSP) providing secure online credit card and debit card payment solutions for eCommerce transactions from online businesses.

The integration to axis diplomat also allows a payment request to be emailed to the customer from within the Stripe dashboard. Subsequently, the payment can then be imported into axis diplomat using the payment reference.

Consumer's payments by either taking the payment upfront or by taking a deferred payment and Stripe allows partial capture against an order for orders that have been part shipped.

A remittance report can be downloaded from Stripe and then imported into axis diplomat, which allows the Stripe control account to be reconciled efficiently.

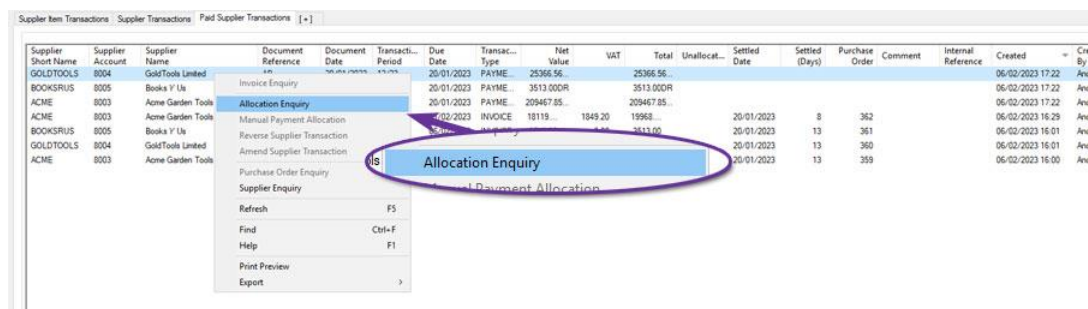
Section 4 Purchase Ledger & Purchase Order Processing

4.1. Reverse Supplier Allocations

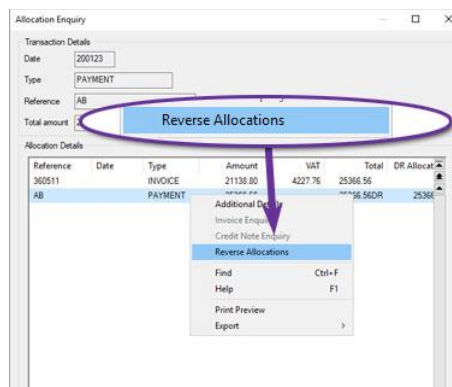
Available with axis diplomat 2022



A new right-click context menu option has been added to the Allocation Enquiry, accessed from Supplier Enquiry's transaction list and Supplier Transaction History monitor tabs.



When selecting Reverse Allocations, following a confirmation dialog, all allocations displayed are reversed. Partial allocation amendments must be carried out using Manual Payment Allocation.



4.2. Easier Supplier Transaction Allocation

Available with axis diplomat 2022



New right-click context menu options now provide the ability to perform allocations from a list of purchase transactions in Supplier Enquiry or from a monitor.

| Supplier Item Transactions Supplier Transactions [+] | | | | | | | | | | |
|--|------------------|---------------|------------------------------|---------------|---------------------|------------|-----------------|-----------|-----------|-----------|
| Supplier Short Name | Supplier Account | Supplier Name | Document Reference | Document Date | Transacti... Period | Due Date | Transac... Type | Net Value | VAT | Tr |
| BOOKSRUS | 8005 | Books 'r' Us | 368981 | 02/03/2023 | 02/24 | 01/04/2023 | INVOICE | 5259.80 | 0.00 | 5259.80 |
| GOLDTOOLS | 8004 | Go | Invoice Enquiry | 2023 | 02/24 | 01/04/2023 | INVOICE | 35001.... | 7000.31 | 42001.... |
| ACME | 8003 | Ac | Allocation Enquiry | 2023 | 02/24 | 01/05/2023 | INVOICE | 11339... | 22678.... | 13607... |
| BOOKSRUS | 8005 | Bc | Manual Payment Allocation | 2023 | 01/24 | 13/03/2023 | INVOICE | 7021.20 | 0.00 | 7021.20 |
| GOLDTOOLS | 8004 | G | Reverse Supplier transaction | 2023 | 01/24 | 13/03/2023 | INVOICE | 38210.... | 7642.00 | 45852.... |
| ACME | 8003 | Ac | Amend Supplier Transaction | 2023 | 01/24 | 12/04/2023 | INVOICE | 21490... | 40710.... | 25561... |
| | | | Purchase Order Enquiry | | | | | | | |
| | | | Supplier Enquiry | | | | | | | |
| | | | Refresh | F5 | | | | | | |
| | | | Find | Ctrl+F | | | | | | |
| | | | Help | F1 | | | | | | |
| | | | Print Preview | | | | | | | |
| | | | Export | > | | | | | | |

4.3. Amend Supplier Transaction

Available with axis diplomat 2022



A new Amend Supplier Transaction function allows amendment of all fields on invoices and credit notes except for the ledger and supplier account.

If the document's total values are amended, target vales are updated to reflect this with the analysed values showing as carried through from the original document.

The document lines may be fully amended with the exception of the Nominal Ledger account for stock purchase order items if Integrated Stock Ledger is in use as this must be left set to the defined Goods Received Not Invoiced (GRNI) account.

For documents derived from purchase orders where line items' quantities have been amended from those on the original document, the invoiced quantities for the purchase order lines are updated.

Saving the amended document will file a reversal transaction which will be automatically allocated against against the original document and file a new document with the same reference. Both the amended document and the reversal transaction are filed in the current open Purchase Ledger period. For foreign currency transactions, the original document exchange rate will be used.

The same functionality is also available via right-click context menu options within Supplier Enquiry and monitor tabs listing supplier transactions or supplier transaction lines.

Supplier Item Transactions Supplier Transactions [+]

Refresh Completed 11:39 Wednesday 22nd March 2023

| Supplier Short Name | Supplier Account | Supplier Name | Document Reference | Document Date | Transac... Period | Due Date | Transac... Type | Net Value | VAT | Total | Unallocat... | Settled Date | Settled (Days) | Purchase Order | Comment | Internal Reference | Created | By |
|---------------------|------------------|---------------|------------------------------|---------------|-------------------|------------|-----------------|-----------|---------|---------|--------------|--------------|----------------|----------------|---------|--------------------|------------------|-----|
| BOOKSRUS | 8005 | Boo | Invoice Enquiry | 12/03/23 | 02/24 | 01/04/2023 | INVOICE | 5259.80 | 0.00 | 5259.80 | 5259.80 | | | 368 | | | 02/03/2023 14:11 | And |
| GOLDTOOLS | 8004 | Gol | Allocation Enquiry | 12/03/23 | 02/24 | 01/04/2023 | INVOICE | 35001 | 7000.31 | 42001 | 42001 | | | 367 | | | 02/03/2023 14:11 | And |
| ACME | 8003 | Acme | Manual Payment Allocation | 12/03/23 | 02/24 | 01/05/2023 | INVOICE | 11395 | 22678 | 13607 | 13607 | | | 366 | | | 02/03/2023 14:10 | And |
| BOOKSRUS | 8005 | Boo | Reverse Supplier Transaction | 12/03/23 | 02/24 | 13/03/2023 | INVOICE | 7021.20 | 0.00 | 7021.20 | 7021.20 | | | 365 | | | 11/02/2023 12:03 | And |
| GOLDTOOLS | 8004 | Gol | Reverse Supplier Transaction | 12/03/23 | 02/24 | 13/03/2023 | INVOICE | 38210 | 7642.00 | 45852 | 45852 | | | 364 | | | 11/02/2023 12:02 | And |
| ACME | 8003 | Acme | Amend Supplier Transaction | 12/03/23 | 02/24 | 12/04/2023 | INVOICE | 21490 | 40710 | 25561 | 25561 | | | 363 | | | 11/02/2023 12:02 | And |

Amend Supplier Transaction

Amend Supplier Transaction

File Help

Document Details Attachments

Supplier Selection

Supplier number: 8005

VAT treatment: UK

Country:

VAT Registration number:

Check

Supplier Details

Supplier reference: 01/8005 BOOKSRUS

Name and Address: Books 'r' Us
Unit 19
Townall Industrial Estate
Townall
Countyshire
CS32 9JP

Contact name: Mr Shakespeare

Telephone: 01234 181910

Account number: JH-88767

Supplier discount source: Purchase Order

Supplier discount:

Document Details

Batch number: 0

Invoice number: 368981

Invoice date: 020323

Internal reference:

Department code: 0 Miscellaneous

Cost centre code: 0 Sales

Comment:

Goods value: 5259.80 GBP

VAT: 0.00 GBP

Total: 5259.80 GBP

OK Cancel

axis® diplomat 2022 DPA (Local)

4.4. Reverse Supplier Transaction

Available with axis diplomat 2022



A new Reverse Supplier Transaction function allows users to remove transactions entered in error by entering an opposite transaction which is automatically populated with dates, lines, values, VAT and nominal analysis, automatically allocating the reversal transaction against the original document and creating an audit trail event against both documents. The reversal transaction is filed in the current open Purchase Ledger period.

The same functionality is also available via right-click context menu options within Supplier Enquiry and monitor tabs listing supplier transactions or supplier transaction lines.

Supplier Selection

Supplier number: 8004

VAT treatment: UK

Country:

VAT Registration number:

Document Details

Batch number: 0

Credit note number: 367165

Credit note date: 020323

Internal reference:

Department code: 0 Miscellaneous

Cost centre code: 0 Sales

Comment:

Goods value: 35001.55 GBP

VAT: 7000.31 GBP

Total: 42001.86 GBP

Supplier Details

Supplier reference: 01/8004 GOLDTOOLS

Name and Address: GoldTools Limited
Unit 1
Uptown Industrial Estate
Countysire
CS1 7YT

Contact name: Mr Gold

Telephone: 01234 987123

Account number: 3004

OK Cancel

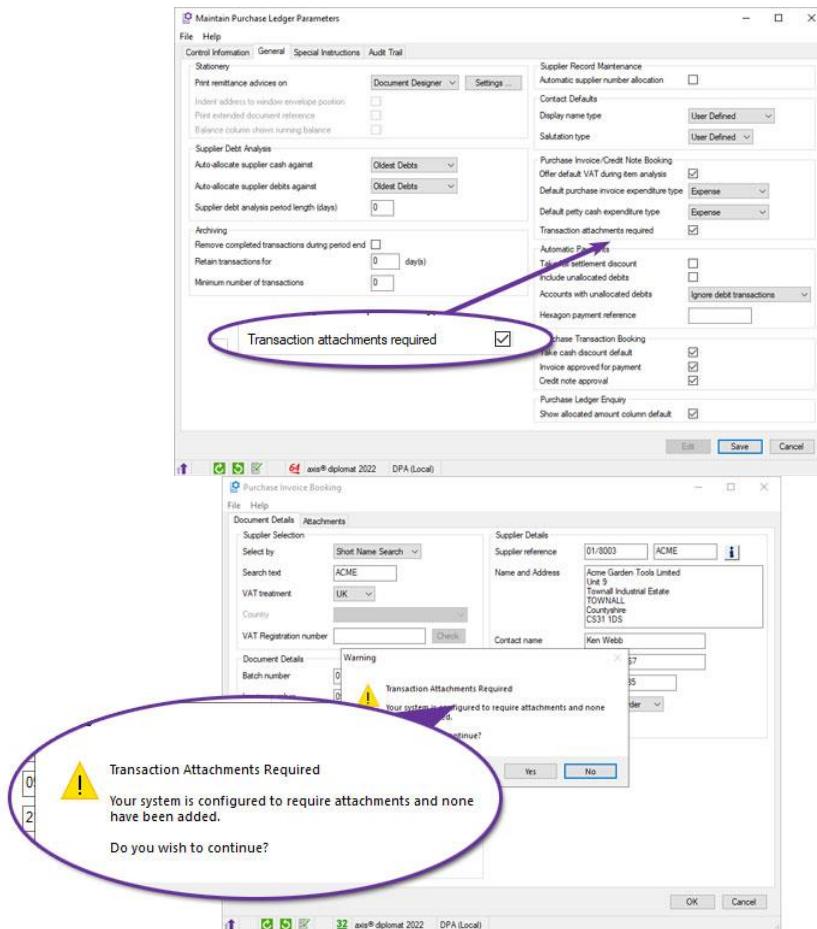
4.5. Purchase Invoice Attachment Warning

Available with axis diplomat 2022



A new system parameter has been added to instruct the Purchase Invoice Booking function to issue a warning if no attachment is present when selecting OK to proceed to the analysis stage.

The parameter is accessed via the General tab of the function Maintain Purchase Ledger Parameters.



This is particularly useful for those moving towards systems with less paper, reminding everyone to ensure that copies of supplier's invoices are attached in the system.

4.6. Formatted Supplier Addresses

Available with axis diplomat 2022



Formatted addresses are those where there are specific fields for town, county, country, etc. as opposed to, for example, six lines of freeform text. Formatted addresses are required, particularly when interfacing with a range of third party solutions such as delivery service providers.

Formatted customer addresses have been standard within axis diplomat for a number of years and axis diplomat 2022 now extends this functionality to supplier accounts.

Supplier ACME 01/0003

General Details
 Account: 01/0003 Short name: ACME
 Account type: Business
 Name and address: Acme Garden Tools Limited, Unit 9, Townall Industrial Estate, TOWNALL, Countyshire, CS31 1DS, United Kingdom
 Telephone number: 76423-GH/05
 Fax number: 76423-GH/05
 Contact: Ken Webb
 Contact email: Ken Webb
 Supplier Web URL: Ken Webb
 Deliver remittance advices by: Ken Webb
 Force emailed purchase orders to above: Ken Webb
 Date account opened: Ken Webb
 Supplier group: Ken Webb
 Default department: Ken Webb
 Default cost centre: Ken Webb
 Account number: 76423-GH/05

Address Details
 Address type: Business
 Organisation: Acme Garden Tools Limited
 Additional address lines: Unit 9, Townall Industrial Estate
 Country: United Kingdom
 City/Town: TOWNALL
 County/State: Countyshire
 Postal/Zip code: CS31 1DS
 Global Location Number (GS1-GLN): 76423-GH/05

fig 1 - supplier account address maintenance.

4.7. Supplier Deliver From Addresses

Available with axis diplomat 2022



An additional Delivery Addresses tab on Supplier accounts allows a number of 'Deliver From' addresses to be recorded for use when maintaining purchase orders.

Supplier ACME 01/0003

General Details
 Supplier reference: 01/0003 ACME Acme Garden Tools Limited

Delivery Addresses

| Reference | Contact | Address |
|-----------|-------------|---|
| MAINDEPOT | Ken Webb | Ken Webb, Acme Garden Tools Limited, Unit 47, Riverside Park, Littleton, NI |
| NI | Fergal Hume | Fergal Hume, Acme Garden Tools (NI), Units 6-7, Antrim Tower Business Park |

Address Details
 Address type: Business
 Organisation: Acme Garden Tools (NI)
 Additional address lines: Units 6-7, Antrim Tower Business Park
 Country: United Kingdom
 City/Town: ANTRIM
 County/State: County Antrim
 Postal/Zip code: BT41 1BL

Figure 1: Adding supplier delivery address

An additional Deliver From Address area has been added to the Addresses tab on purchase orders, allowing selection of the supplier address from which the goods are to be shipped.

Figure 2: Purchase Order Addresses tab.

The Deliver From address information has also been added as additional columns to Purchase Order monitor tabs and as fields within Document Designer for addition to purchase order documents.

4.8. Purchase Order Release Modes

Pre-Released to Software Assurance customers



Two new prompts have been added to the Ordering Details tab on Supplier accounts to control the default release mode to be set on purchase orders for that supplier.

Separate settings are provided for stock orders (those being delivered to a stock location) and drop-ship orders (those being delivered to another delivery address).

The options for each are:

- Allow multiple partial deliveries (back orders)
- Single delivery (wait until all stock available)
- Supply or cancel (single delivery, unfulfilled lines closed)

These settings can be overridden on individual purchase orders. Online Order Processing also sends this information via EDI where suppliers support this within their protocols.

4.9. Deliveries tab in Purchase Order Maintenance

Available with axis diplomat 2022



The Purchase Order Enquiry and Purchase Order Maintenance functions now feature an additional tab listing any deliveries that include one or more items from the Purchase Order.

| Delivery Reference | Arrival Due Date | Weight (kg) (Estimated) | Weight (kg) (Advised) | Delivery Method | Delivery Terms | Number Of Packages |
|--------------------|------------------|-------------------------|-----------------------|-----------------|--------------------------|--------------------|
| 207962612220908 | 09/09/2022 | 0.00 | 0.00 | Next Day | DAP - Delivered at Place | 1 |
| 207962611220902 | 05/09/2022 | 0.00 | 0.00 | Next Day | DAP - Delivered at Place | 2 |

As with the similar Deliveries tab in Supplier Enquiry, a right click option is provided to drill down into the details of a specific delivery.

4.10. All-New Delivery Enquiry

Available with axis diplomat 2022 and the Despatch & Delivery Management module



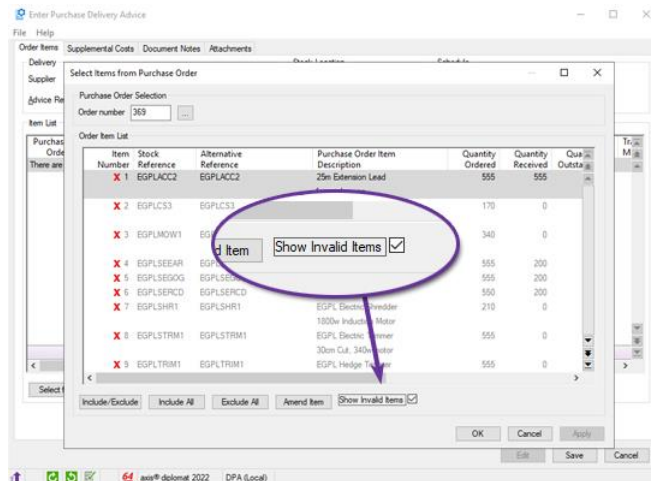
The new delivery enquiry function gives a revised layout for improved visibility and clarity. It also includes support for the new interim delivery addresses functionality.

4.11. Invalid Items on Purchase Delivery Advice

Pre-Released to Software Assurance customers with the Purchase Delivery Advice module



A new system parameter allows the default setting to be defined for the 'Show Invalid Items' tick box when using the 'Enter Purchase Delivery Advice' function.

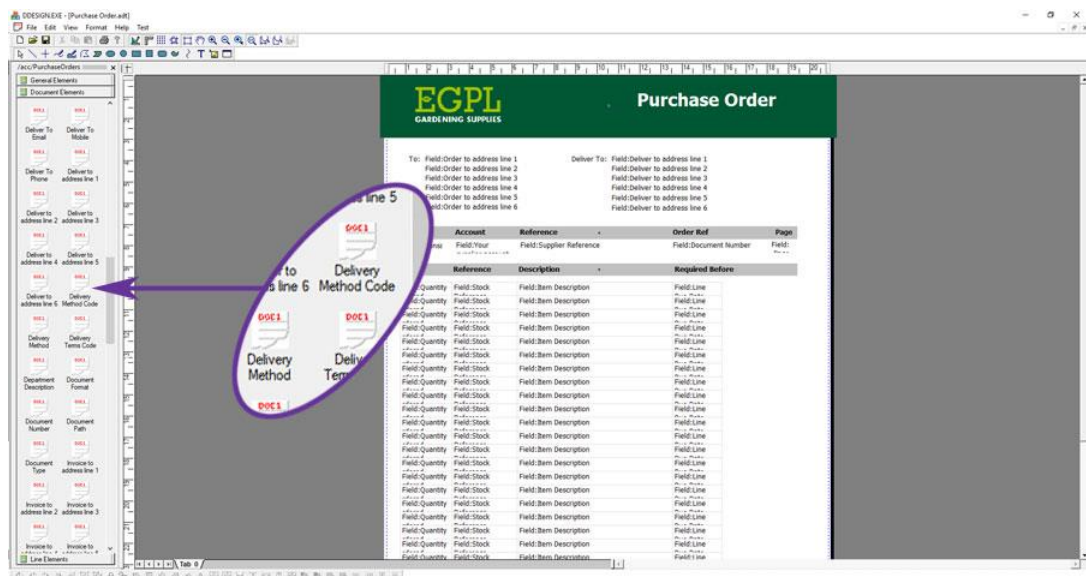


4.12. Delivery Method in Purchase Order Document Templates

Pre-Released to Software Assurance customers



Support has been added for printing the delivery method code and/or delivery method description on document designer -based purchase orders.



4.13. Import Supplier Prices

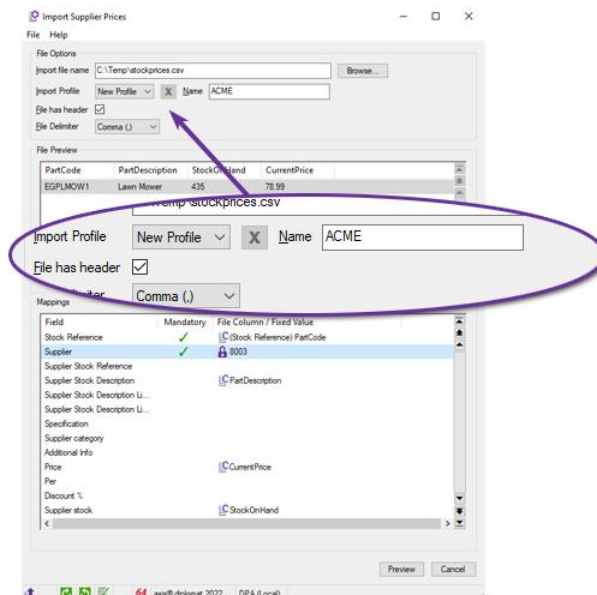
Pre-Released to Software Assurance customers



An all-new multi-user 'Import Supplier Prices' replaces the previous single-user function. This new import function allows multiple profiles to be saved. Each profile records the mapping of columns in the file to possible fields within axis diplomat.

This is particularly useful when a number of suppliers provide price list and/or stock availability files, each with their own standard format because the function then allows a profile to be created for each supplier.

In addition to comma-separated (CSV) files, the function also supports files with columns separated by tab, pipe, semicolon or tilde characters.



4.14. Live Supplier Prices

Available with axis diplomat 2022



When entering or amending a purchase order for a supplier that supports realtime online lookups for pricing and stock levels, these will now be displayed for all items on the order (open and closed). The applicable supplier price list entries are also updated at the same time.

As well as displaying the recalculated values, additional columns show the variance, both as a monetary amount and as a percentage variance.

4.15. Consolidation of Purchase Invoice Booking Functions

Available with axis diplomat 2022



A single pair of Purchase Invoice Booking and Purchase Credit Note Booking functions now replaces the twin sets of functions previously found in the Purchase Ledger and Purchase Order Processing modules.

In addition to simplifying processes by only having a single function for each type of transaction, the functions handle the more advanced VAT requirements following Brexit. They allow selection, by line, between Reverse Charge and Import for lines flagged as Goods and Directly Related Services (for non UK supplier transactions, defaulting to Reverse Charge if the net invoice value is £135.00 or below).

4.16. Additional Columns in Goods Received Dialog

Pre-Released to Software Assurance customers



When running the "Goods Received from Supplier" function, the following columns have been added to the Item Details tab:

- Received Value
- Outstanding Value
- Unit Cost

4.17. Cost Information added to Supplier Price List Tab

Pre-Released to Software Assurance customers



When looking at the Supplier Price List tab within Supplier Enquiry, additional columns now show the Standard Cost, Current Cost and Cost Per from the stock item.

| Stock Reference | Stock Description | Supplier Stock Reference | Supplier Description | Standard Cost (GBP) | Current Cost (GBP) | Cost Per | Category | Currency Price (GBP) | Per | Discount (%) | Currency Net Price (GBP) | Supplier Case Quantity |
|-----------------|---------------------------------------|--------------------------|---------------------------------------|---------------------|--------------------|----------|----------|----------------------|-----|--------------|--------------------------|------------------------|
| ACMEFORK01 | Acme Standard Fork | | Acme Standard Fork | 7.65 | 7.65 | 1 | A | 8.93 | 1 | 10.00% | 8.04 | 1 |
| ACMEFORK02 | Acme Light Fork | | Acme Light Fork | 6.63 | 6.63 | 1 | A | 7.73 | 1 | 10.00% | 6.96 | |
| ACMEH0E01 | Acme Standard Dutch Hoe | | Acme Standard Dutch Hoe | 9.19 | 9.19 | 1 | A | 10.71 | 1 | 10.00% | 9.64 | |
| ACMERAKE01 | Acme Standard Rake | | Acme Standard Rake | 9.19 | 9.19 | 1 | A | 10.71 | 1 | 10.00% | 9.64 | |
| ACMERAKE02 | Acme Standard Rake | | Acme Standard Rake | 10.21 | 10.21 | 1 | A | 11.91 | 1 | 10.00% | 10.72 | |
| ACMES0T01 | Acme Standard Tool Set | | Acme Standard Tool Set | 12.76 | 12.76 | 1 | A | 14.89 | 1 | 10.00% | 13.40 | |
| ACMESPD001 | Acme Standard Tool Set | | Acme Standard Tool Set | 7.65 | 7.65 | 1 | A | 8.50 | 1 | 10.00% | 7.65 | |
| EGPLACC1 | EGPL Acc 1 | | EGPL Acc 1 | 15.31 | 15.31 | 1 | A | 17.07 | 1 | 10.00% | 16.08 | |
| EGPLACC2 | EGPL Acc 2 | | EGPL Acc 2 | 12.76 | 12.76 | 1 | A | 14.89 | 1 | 10.00% | 13.40 | |
| EGPLACC3 | EGPL Acc 3 | | EGPL Acc 3 | 2.55 | 2.55 | 1 | A | 2.98 | 1 | 10.00% | 2.68 | |
| EGPLCS1 | EGPL Petrol Chainsaw 33cc, 16" bar | | EGPL Petrol Chainsaw 33cc, 16" bar | 58.72 | 58.72 | 1 | A | 68.51 | 1 | 10.00% | 61.66 | |
| EGPLCS2 | EGPL Electric Chainsaw 240v, 35cm bar | | EGPL Electric Chainsaw 240v, 35cm bar | 48.51 | 48.51 | 1 | A | 56.60 | 1 | 10.00% | 50.94 | |
| EGPLCS3 | EGPL Electric Chainsaw 240v, 30cm bar | | EGPL Electric Chainsaw 240v, 30cm bar | 43.40 | 43.40 | 1 | A | 50.64 | 1 | 10.00% | 45.58 | |
| EGPLGB1 | Deluxe Gardening Boots Size 5 | EGPLGB1 | Deluxe Gardening Boots Size 5 | 10.21 | 10.21 | 1 | A | 11.91 | 1 | 10.00% | 10.72 | |
| EGPLGB2 | Deluxe Gardening Boots Size 6 | EGPLGB2 | Deluxe Gardening Boots Size 6 | 10.21 | 10.21 | 1 | A | 11.91 | 1 | 10.00% | 10.72 | |

This can help when comparing supplier prices against the costs currently held on the stock ledger, particularly when looking to see if updates are required or when exporting the list to a spreadsheet.

4.18. Open Purchase Orders from within Spreadsheets

Pre-Released to Software Assurance customers



Axislink.exe is a utility that allows Excel (or other 3rd-party applications) to load axis diplomat object enquiries.

It has now been extended to support opening purchase orders. The syntax is:

- axislink.exe xxx POM "nnnnnn"

where xxx is the Company ID and nnnnnn is the Purchase Order Number.

For example, to open purchase order number 123456 on CO1, use

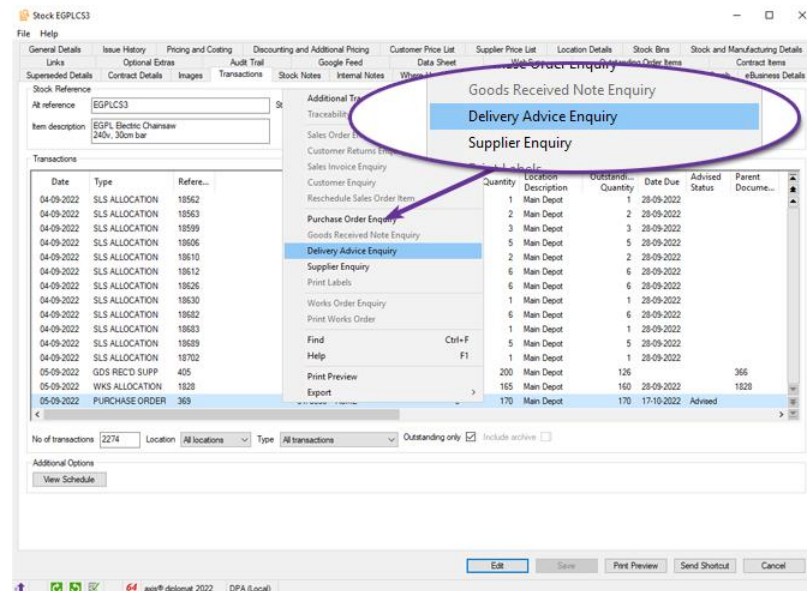
- axislink.exe co1 POM "123456"

4.19. Purchase Delivery Advice Enquiry

Pre-Released to Software Assurance customers with the Purchase Delivery Advice module



A right-click option has been added to Stock Enquiry's Transactions tab to drilldown to a Delivery Advice from purchase order and goods received transactions.



4.20. Additional Columns for Outstanding Items

Available with axis diplomat 2022 and the Purchase Delivery Advice module



For customers using Purchase Delivery Advices, the Outstanding Order Items tab in Customer Enquiry now shows two additional columns:

- Next Expected Stock Quantity

- Next Expected Arrival Date

Customer NINE-AG001 01/3896

File Help

General Details Custom Categories Contacts Campaigns Delivery Details Customer Notes Branches Account Details Pricing eBusiness / EDI Document Options Customer Price List Attachments Traceability Call History Audit Trail

Events Quotations Sales Orders Outstanding Order Items Goods on Account Service Contracts Statement Transaction History Item History Graphs Custom Data Returns Calendar

Customer Details

Account 01/3896 NINE-AG001 Nine Agency Co.

Outstanding Order Items

| Order Number | Order Date | Order Age (Days) | Stock Reference | Description | Stock Line | Customer Order Number | Ordered Quantity | Unit Price (GBP) | Outstand... Net Value (GBP) | Delivered Quantity | Outstand... Quantity | Next Expected Stock Quantity | Next Expected Arrival Date | Week |
|--------------|------------|------------------|-----------------|------------------------|------------|-----------------------|------------------|------------------|-----------------------------|--------------------|----------------------|------------------------------|----------------------------|------|
| 18562 | 04/09/2022 | 17 | EGPLPTK02 | EGPL Power Tool K2 #2 | | Y3494 | 1 | 102.09 | 102.09 | 0 | 1 | | | 0.0 |
| 18562 | 04/09/2022 | 17 | EGPLPTK03 | EGPL Power Tool K2 #3 | | Y3494 | 6 | 110.60 | 663.60 | 0 | 6 | | | 0.0 |
| 18562 | 04/09/2022 | 17 | EGPLSHR1 | EGPL Electric Shredder | | Y3494 | 1 | 72.43 | 72.43 | 0 | 1 | 210 | 08/10/2022 | 0.0 |
| | | | | 1800w Induction Motor | | | | | | | | | | |
| 18562 | 04/09/2022 | 17 | EGPLCS3 | EGPL Electric Chainsaw | | Y3494 | 1 | 60.86 | 60.86 | 0 | 1 | 170 | 04/01/2019 | 0.0 |
| | | | | 240v, 30cm bar | | | | | | | | | | |
| | | | | | | | 9 | | 898.98 | 0 | 9 | | | 0.0 |

Next Expected Stock Quantity

Next Expected Arrival Date

210 08/10/2022

170 17/10/2022

Edit Save Print Preview Send Shortcut Cancel

axis diplomat 2022 DPA (Local)

4.21. Purchase Order Amendments and Cancellation via EDI

Available with axis diplomat 2022 and the Ingram Price Feed module



Enhancements to axis diplomat's Supplier EDI module now support the ability to make changes to a purchase order (increase or decrease an order line item quantity; close or delete a line item; add a new line item) or cancel the order via EDI with the supplier.

This provides purchasers with the control to adjust or cancel orders after the supplier has acknowledged the order and confirmed the quantity of stock allocated.

Purchase orders can be amended and re-sent to the supplier as many times as is desired. Once the user is satisfied with their order, the instruction to release and process the order is then sent to the supplier electronically.

These facilities are dependent on the EDI capabilities of any given supplier and EDI implementation.

Full implementation of this functionality is available with the axis diplomat interface to Ingram Micro's EDI facilities (IM-XML). Support may be added for additional suppliers at any time so please check the axisfirst website for the current status of facilities supported for a variety of suppliers.

4.22. Purchase Orders & Supplier Allocated Stock via EDI

Available with axis diplomat 2022 and the Ingram Price Feed module



Where a supplier confirms the quantity of stock allocated for despatch against your purchase order via EDI, axis diplomat 2022 now reflects this information within the Purchase Order line.

In addition to the 'Quantity acknowledged' (the order quantity accepted by the supplier) axis diplomat 2022 an additional 'Supplier Quantity Next Despatch' is shown, which is the quantity of stock which has been allocated by the supplier to your order. Both are shown within Purchase Order Enquiry.

| Order Items | | | | | | | | | |
|-------------|-----------------|--------------------|--|------------------|------------------|-----------------------|-----------------|---------------------------------|-------------------|
| Item | Stock Reference | Supplier Reference | Item Description | Quantity Ordered | Quantity Advised | Quantity Acknowledged | Quantity Inward | Quantity Supplier Next Despatch | Quantity Received |
| 1 | DEP3223DE | CE22156 | DELL 32" USB-C HUB MONITOR- P3223DE-80 1CM 31 5IN | 2 | 0 | 2 | 0 | 2 | 2 |
| 2 | DELL1F2RX | CD60913 | OPTIPLEX 3090 SFF/CORE I5-10505 8GB/256GB SSD/W10P | 4 | 0 | 4 | 0 | 4 | 4 |

This facility is dependent on the capabilities of the supplier's EDI systems and is currently implemented in conjunction with Ingram Micro EDI (IM-XML).

Support may be added for additional suppliers at any time so please check the axisfirst website for the current status of facilities supported for a variety of suppliers.

4.23. Trade Supply EDI

Available to purchase with axis diplomat 2022 and the Supplier Price Feed Foundation module



An additional EDI option is now available for those operating within the EOS (Electronic Office Supplies) marketplace with the addition of Trade Supply to the supported list of distributors and suppliers.

With the addition of the Trade Supply EDI module, an axis diplomat 2022 system is able to collect stock and price feeds, place orders and receive acknowledgements, invoices and credit notes.

Section 5 Stock Ledger, Bill of Materials & MRP

5.1. Landed and Supplemental Costs and Integrated Stock Ledger

Available with axis diplomat 2022



The Landed and Supplemental Costs module introduced with axis diplomat 2020 has now been extended to function in conjunction with the Integrated Stock Ledger.

Both the Landed and Supplemental Costs module and the Integrated Stock Ledger module are no-cost options. This means that, whilst they are not included as standard, they do not have a purchase price or an-going support cost. Anyone wanting to implement Landed and Supplemental Costs (or Integrated Stock Ledger) only needs to factor in any deployment costs associated with consultancy and training.

5.2. Stock Forecasting

Available with axis diplomat 2022



This module, previously available as an optional additional item, is now provided as standard in axis diplomat 2022.

It provides functions to calculate and report recommended minimum (re-order) and maximum stock levels based on the average demand over the past three months and the number of months-worth of stock to hold. It is then able to update stock records accordingly.

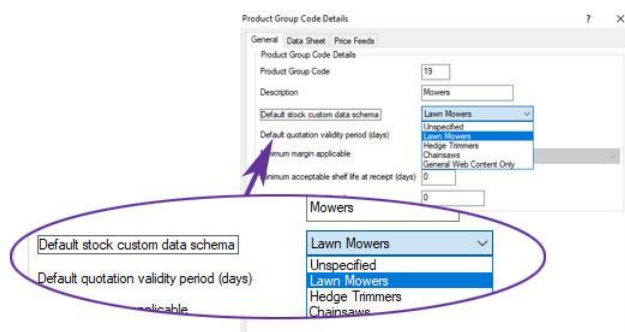
The Stock Control Monitor is also used to show the current stock position (over/under-stocked) based on the past three months demand.

5.3. Default Stock Custom Data Schema by Product Group

Pre-Released to Software Assurance customers



It is now possible to define a default for each product group to specify which Custom Data Schema is generally used when creating new items in that group. Since it is often the case that products in a given product group are similar and likely to share the same schema, this helps to ensure that custom stock data is added correctly.



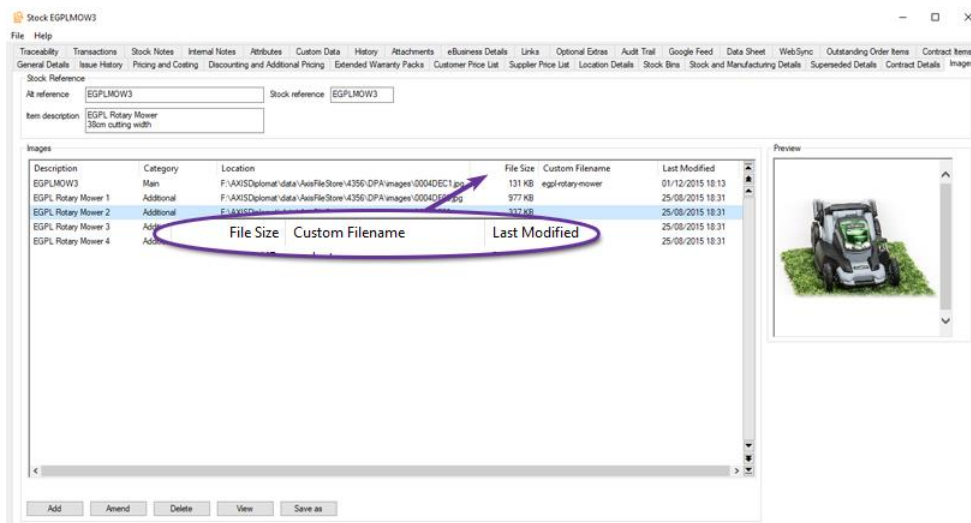
5.4. Image Management Enhancements

Available with axis diplomat 2022

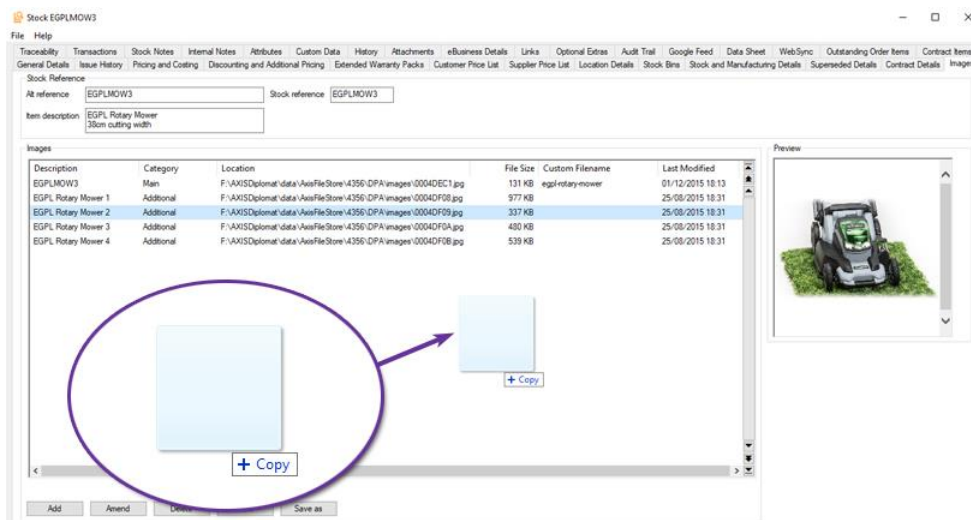


A number of general enhancements have been incorporated into Image Management with axis diplomat 2022. These enhancements apply equally to stock images and, for those using the eBusiness module, eBusiness Group images.

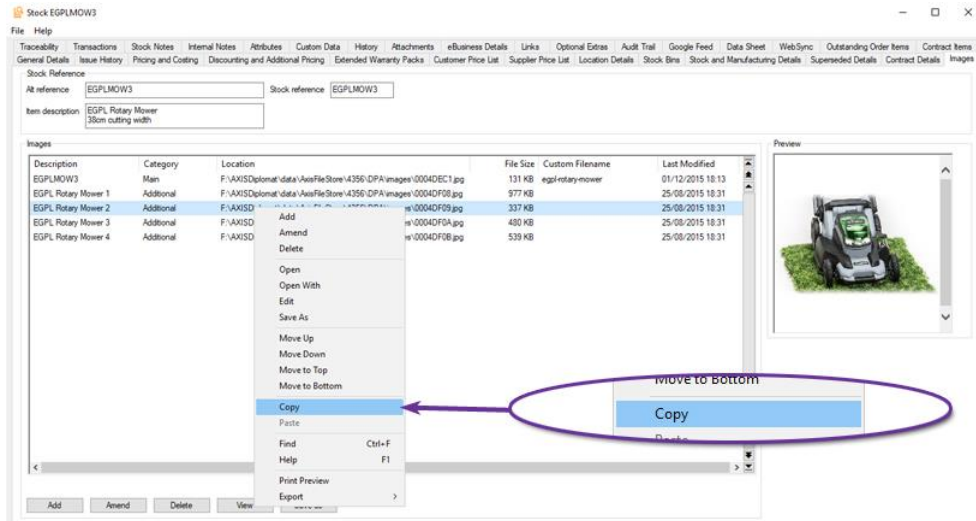
These enhancements include additional columns within the scrolling list of images to now include all of the relevant fields for each image.



It is now possible to drag-and-drop images onto the image list.



It is also now possible to copy images out of axis diplomat via the clipboard.



5.5. Enhanced Stock Take is now standard

Available with axis diplomat 2022



Previously an optional additional module but now standard with axis diplomat 2022, the Enhanced Stock Take module provides the ability to create a location stock take file and carry out a stock take either by Stock Item or Bin.

Stock counts are updated using either handheld devices (for those with the additional Warehouse Management module) or keyed from stock take sheets.

The Stock Take Monitor is used to show details of all stock takes and previous closed stock take records can also be viewed using this function. It is also used to approve stock take counts before adjustments are filed.

Within the monitor, status icons for Counted, Approval, Closed and Adjustment Filed provide an overview of the progress of the Stock Take. Additional columns provide an indication of the value of any discrepancies.

Stock Take Monitor \ OCT22 \ Location 0 - Main Depot

File Help

Bins Stock Items

Bin Selection

Bin

Bins

| Bin Referen... | Bin Status | C. S. | Counted By User | Appro... Status | Closed Status | Adjustment ... Status | System Value | System Value (Approved) | Counted Value (Approved) | Adjustment Value | Discrepancy Under Counted Value | Discrepancy Over Counted Value | Discrepancy Under Counted Item |
|----------------|--------------|----------------------------------|-----------------|--|----------------------------|----------------------------------|--------------|-------------------------|--------------------------|------------------|---------------------------------|--------------------------------|--------------------------------|
| 0 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 850.00 | | | | | | |
| A1 | Counting ... | <input checked="" type="radio"/> | Andy Brown | <input checked="" type="radio"/> All ... | <input type="radio"/> N... | <input type="radio"/> None Filed | 259.70 | 259.70 | 259.70 | 0.00 | | | |
| A2 | Counting ... | <input checked="" type="radio"/> | Andy Brown | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 803.85 | | | | | | |
| A3 | Counting ... | <input checked="" type="radio"/> | Andy Brown | <input checked="" type="radio"/> All ... | <input type="radio"/> N... | <input type="radio"/> None Filed | 242.25 | 242.25 | 226.95 | -15.30 | -15.30 | | |
| A4 | Counting ... | <input checked="" type="radio"/> | Andy Brown | <input checked="" type="radio"/> All ... | <input type="radio"/> N... | <input type="radio"/> None Filed | 22.95 | 22.95 | 30.60 | 7.65 | | | 7.65 |
| A5 | Counting ... | <input checked="" type="radio"/> | Andy Brown | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 3964.94 | | | | | | |
| A6 | Counting ... | <input checked="" type="radio"/> | Andy Brown | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 5563.08 | | | | | | |
| A7 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 7301.28 | | | | | | |
| A8 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 3076.26 | | | | | | |
| B1 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 4145.13 | | | | | | |
| B2 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 2302.32 | | | | | | |
| B3 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 876.00 | | | | | | |
| B4 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 1014.70 | | | | | | |
| B5 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 927.10 | | | | | | |
| B6 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 963.60 | | | | | | |
| B7 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 335.58 | | | | | | |
| B8 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 574.77 | | | | | | |
| C1 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 435.54 | | | | | | |
| C2 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 467.67 | | | | | | |
| C3 | Not Started | <input type="radio"/> | | <input type="radio"/> No... | <input type="radio"/> N... | <input type="radio"/> None Filed | 428.40 | | | | | | |

The Enhanced Stock Take feature also adds a Bins tab to stock locations where a master list of bins for each location is held and maintained.

Location Details

Locations Details Bins

Bins

| Bin Reference | Category | Last Stock Take Date Extracted | Last Stock Take Reference | Last Stock Take Status | Status | Depth (mm) | Width (mm) | Height (mm) |
|---------------|----------|--------------------------------|---------------------------|------------------------|---------|------------|------------|-------------|
| 0 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| A1 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| A2 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| A3 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| A4 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| A5 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| A6 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| A7 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| A8 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| B1 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| B2 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| B3 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| B4 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| B5 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| B6 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| B7 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| B8 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| C1 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| C2 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |
| C3 | A | 03/10/2022 | OCT22 | In Progress | Enabled | 0 | 0 | 0 |

5.6. Cost Prices in Stock Search Results

Pre-Released to Software Assurance customers



The list of search results shown in Stock, Stock Enquiry and Document Maintenance functions will now, subject to the user having appropriate security permissions, show standard and current costs.

Key Word Search: CHAINS at Main Depot (all records)

| Alternative Reference | Price (AT) | Standard Cost | Current Cost | Buying Per | Trade Price (inc VAT) | Trade Price (ex VAT) | Retail Price (inc VAT) | Retail Price (ex VAT) | Standard Cost | Current Cost | Buying Per | Allocate |
|-----------------------|------------|---------------|--------------|------------|-----------------------|----------------------|------------------------|-----------------------|---------------|--------------|------------|----------|
| BOOK051 | | | | | 15.50 | 15.50 | 15.50 | 10.70 | 10.70 | | 1 | |
| EGPLCS1 | | | | | 72.77 | 73.40 | 143.00 | 124.17 | 58.72 | 58.72 | 1 | 14 |
| EGPLCS3 | | | | | 65.11 | 54.26 | 89.00 | 74.17 | 43.40 | 43.40 | 1 | 27 |
| EGPLTX01 | | | | | 222.10 | 185.08 | 299.00 | 249.17 | 147.57 | 147.57 | 1 | 15 |
| 95 | | 10.70 | 10.70 | 1 | | | | | | | | |
| | | 58.72 | 58.72 | 1 | | | | | | | | |
| | | 48.51 | 48.51 | 1 | | | | | | | | |

A Stock Keyword Search within Enter Sales Order

5.7. Supplier Reference Columns in Stock Control Monitor

Pre-Released to Software Assurance customers



When showing price and availability information for specific a supplier within the Stock Control Monitor, an additional column now shows that supplier's own part number for the item. The column is headed with the short name from the supplier's account plus 'Reference'.

Stock Control Monitor

| Stock Reference | Description | Stock on Hand | Allocated | Free Stock | Free Stock % > Min | On Order | Despatch Quantity | WESTCOAST Reference | WESTCOAST Price | WESTCOAST Count | WESTCOAST Origin |
|-----------------|--|---------------|-----------|------------|--------------------|----------|-------------------|---------------------|-----------------|-----------------|------------------|
| /INSC5150 | Intel SC5100/SC5200 (Hudson) | 1 | 0 | 1 | | 0 | 0 | /INSC5150 | | | |
| 321-BCXN | Hot Swap Drive Upgrade, 16 x 16 2.5" SFF rack chassis for Dell PowerEdge T640 Server | 0 | 0 | 0 | | 0 | 0 | 321-BCXN | | | W |
| 329-BOMT | Motherboard | 0 | 0 | 0 | | 0 | 0 | 329-BOMT | | | |

Stock Control Monitor showing Supplier References for supplier 'WESTCOAST'

5.8. Additional Columns for Stock Items Monitor

Pre-Released to Software Assurance customers



A number of columns have been added to Stock Items monitor tabs, particularly to enhance the visibility of information that is particularly pertinent for international shipments post-Brexit.

Columns added include:

- Depth / Length
- Width
- Height
- Volume (calculated from the dimensions above)
- Gross unit weight
- Net unit weight
- Net unit volume
- Sold by Weight/Volume
- Is a package

5.9. Date Created for Supplier Price List Entries

Pre-Released to Software Assurance customers

Supplier price list entries can now hold a creation time and date. This is automatically filled in when creating a price list entry manually, when an entry is created from a price feed import or from a stock import using Import Stock Details from CSV.

| Supplier Price Details | | Supplier Stock Description | | Alternative Reference | | Currency Price (USD) | | Discount | | Currency Price (USD) | | Net Price (USD) | | Trade Price (USD) | | Supplier Price Quantity | | Lead Time (Days) | | Price Updated On | | On Hand Allocation | | Free | |
|------------------------|---|----------------------------|---|-----------------------|---|----------------------|----------|----------------------|-----------------|----------------------|-------------------------|------------------|------------------|--------------------|------|-------------------------|--|------------------|--|------------------|--|--------------------|--|------|--|
| Stock Reference | Stock Description | Supplier Stock Reference | Supplier Stock Description | Alternative Reference | Created | Currency Price (USD) | Discount | Currency Price (USD) | Net Price (USD) | Trade Price (USD) | Supplier Price Quantity | Lead Time (Days) | Price Updated On | On Hand Allocation | Free | | | | | | | | | | |
| 400-AURG | 60608 35G SFF 35G 156 25G S15A Host Drive | 400-AURG | 60608 35G SFF 35G 156 25G S15A Host Drive | 400-AURG | 60608 35G SFF 35G 156 25G S15A Host Drive | 204.74 | 1.00% | 198.09 | 198.09 | 198.09 | 198.09 | 1 | 1/19/2022 | 0 | 0 | | | | | | | | | | |
| 400-AE02 | Del UK 600 AC Mx3 Adapter (Power Cable) | 400-AE02 | Del UK 600 AC Mx3 Adapter (Power Cable) | 400-AE02 | Del UK 600 AC Mx3 Adapter (Power Cable) | 30.33 | 1.00% | 29.05 | 29.05 | 29.05 | 29.05 | 1 | 1/19/2022 | 0 | 0 | | | | | | | | | | |
| 401-A0EN | Del T99 2 16 2 | 401-A0EN | Del T99 2 16 2 | 401-A0EN | Del T99 2 16 2 | 14.87 | 1.00% | 21.86 | 21.86 | 21.86 | 21.86 | 1 | 1/19/2022 | 0 | 0 | | | | | | | | | | |
| 401-A0EN | Del T99 2 16 2 | 401-A0EN | Del T99 2 16 2 | 401-A0EN | Del T99 2 16 2 | 14.87 | 1.00% | 21.86 | 21.86 | 21.86 | 21.86 | 1 | 1/19/2022 | 0 | 0 | | | | | | | | | | |
| 402-0M2676 | Replacement Laptop USB Type C Standard Master Adapter | 402-0M2676 | Replacement Laptop USB Type C Standard Master Adapter | 402-0M2676 | Replacement Laptop USB Type C Standard Master Adapter | 5.11 | 1.00% | 31.14 | 31.14 | 31.14 | 31.14 | 1 | 02/04/2022 | 0 | 0 | | | | | | | | | | |
| 60240-021 | Del 360 FPU 214 100 Ethernet 4 x Network Adapter | 60240-021 | Del 360 FPU 214 100 Ethernet 4 x Network Adapter | 60240-021 | Del 360 FPU 214 100 Ethernet 4 x Network Adapter | 136.19 | 1.00% | 114.14 | 114.14 | 114.14 | 114.14 | 1 | 02/04/2022 | 0 | 0 | | | | | | | | | | |
| 60240-021 | Del 360 FPU 214 100 Ethernet 4 x Network Adapter | 60240-021 | Del 360 FPU 214 100 Ethernet 4 x Network Adapter | 60240-021 | Del 360 FPU 214 100 Ethernet 4 x Network Adapter | 136.19 | 1.00% | 114.14 | 114.14 | 114.14 | 114.14 | 1 | 02/04/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 176.76 | 1.00% | 260.86 | 260.86 | 260.86 | 260.86 | 1 | 03/01/2022 | 0 | 0 | | | | | | | | | | |
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| 60C-0115 | Windows Remote Desktop Service DEVICEL CAL SA, GAGLA, OPL, NJ | 60C-0115 | Windows Remote | | | | | | | | | | | | | | | | | | | | | | |

The new field appears as an additional column and as a filter for Supplier Price Lists monitor tabs and as an additional column in both Supplier Enquiry and Stock Enquiry.

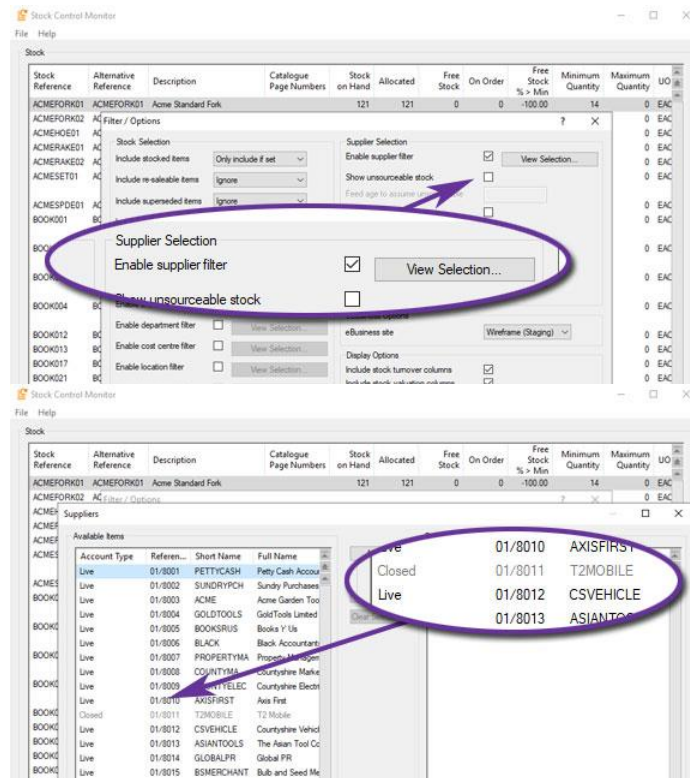
The ability to use date range filters on a Supplier Price Lists monitor is particularly useful since it easily allows for the creation of a monitor listing supplier price list entries created this week, this month, etc., making it easier to keep track of new products offered by suppliers.

The screenshot shows the 'Maintain Filters' dialog box. The 'Date Created' filter is highlighted with a purple circle. The 'Date Selection' dropdown is open, showing options like 'Single date', 'Date range', 'Last week', 'This week', 'Next week', etc. The 'This week' option is selected.

5.10. Identifying Closed Supplier Accounts When Filtering Stock Control Monitor

Pre-Released to Software Assurance customers

When filtering a Stock Control Monitor by Suppliers, it is now easier to identify closed supplier accounts. An additional Account Type column in the supplier list identifies whether the account is Live or Closed. Furthermore, closed accounts are shown in grey.

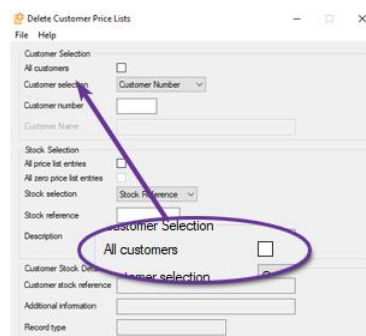


5.11. Deleting Customer Price List Entries

Pre-Released to Software Assurance customers



The Stock Price Maintenance function 'Delete Customer Price Lists' has been extended to add an 'All customers' tick box. This means that it is now very easy to remove price lists entries for all customers for a specific stock item in one operation.

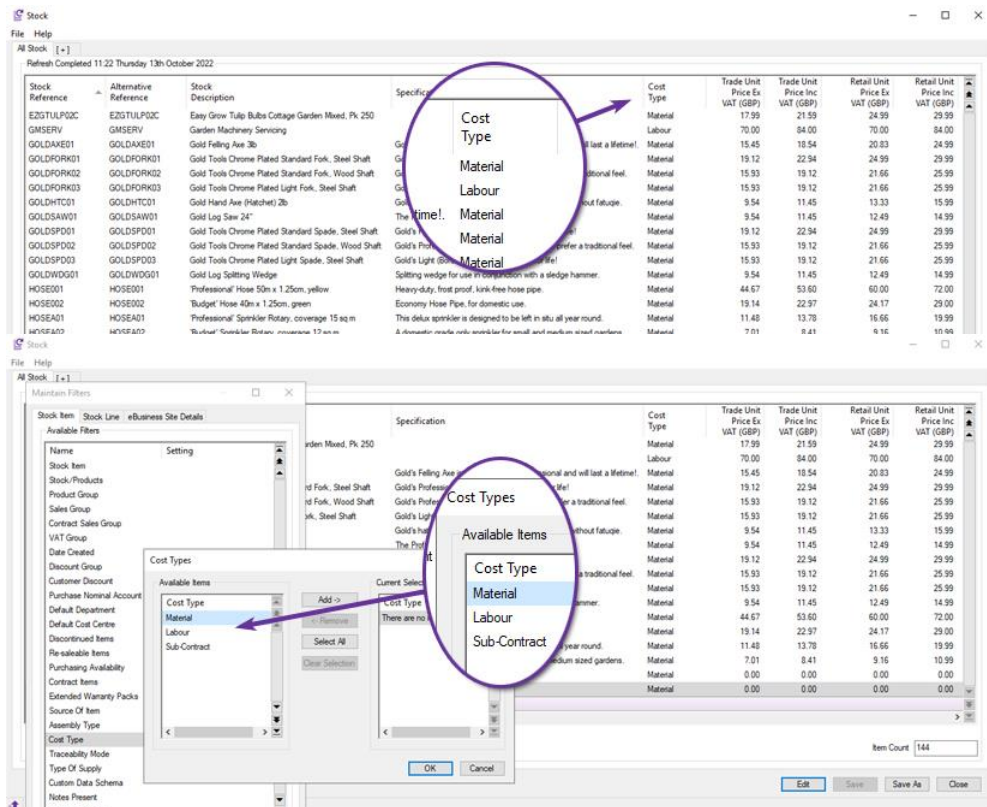


5.12. Cost Type Columns and Filters added to Monitors

Pre-Released to Software Assurance customers



An additional column along with a corresponding filter has been added to Stock monitor tabs to show the Cost Type associated with each item listed.



The same information is now also shown on Sales Order Items and Quotation Items monitor tabs.

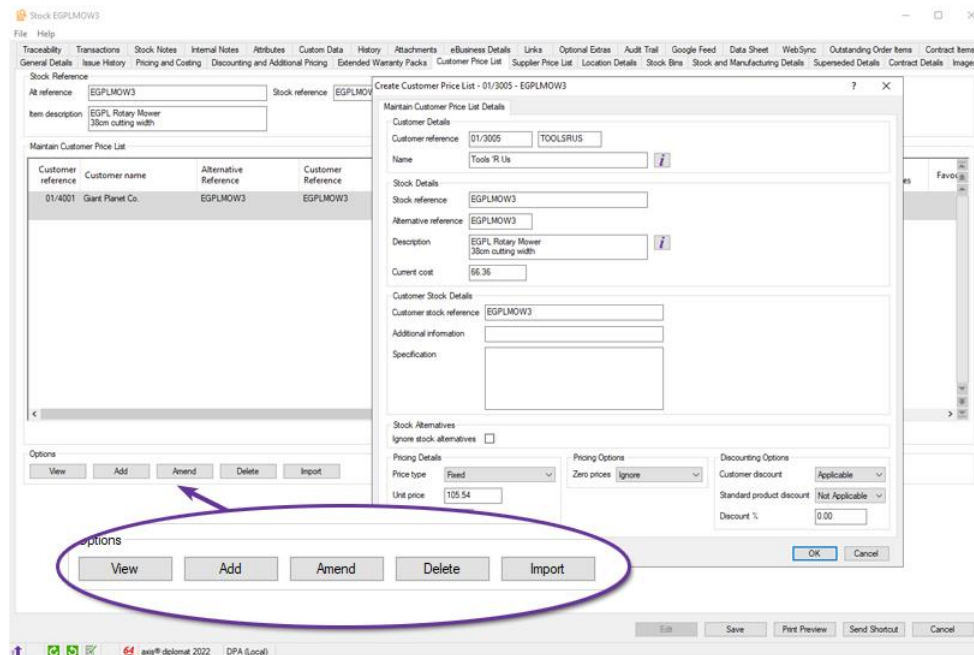
5.13. Customer Price List Maintenance

Available with axis diplomat 2022 and the Date Specific Prices and Discounts module



It is now possible to maintain customer-specific pricing and discounting from with both Stock Enquiry and Customer Enquiry.

This means that it is equally convenient to maintain pricing, whether you have a single product where you need to apply a change for a number of different customers or a single customer with a number of agreed prices to configure.



When maintaining customer price lists through either Stock Enquiry or Customer Enquiry, bulk updates can be achieved by importing a text file (typically from a CSV file but a range of other delimiters are also supported).

5.14. Delivery item flag on Stock Records

Available with axis diplomat 2022

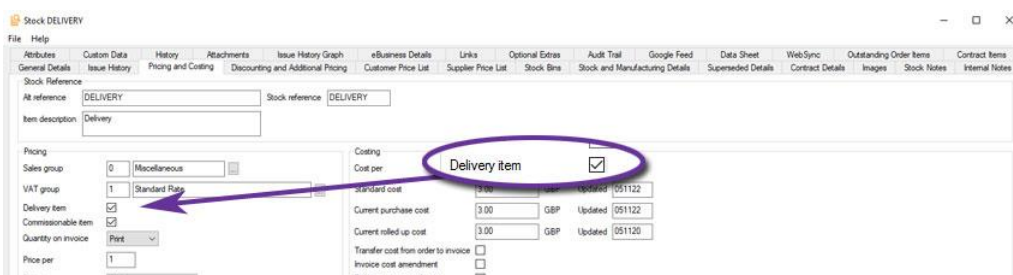


A new flag is available on the Pricing and Costing tab of a stock enquiry to allow a user to flag a stock record as a delivery item.

When an item is flagged as a delivery item, the VAT applied to that item is set based on the other items on the sales order.

If all items on an order are zero-rated, the delivery item will also be zero rated. If, however, any or all of the other items are subject to VAT then VAT is applied to the delivery item at the rate of the highest VAT rate on any item in an order.

Within the Sales Order and Sales Deliveries monitor tabs, it is also possible to see the value of the delivery charge that has been applied to orders/deliveries separated from the value of goods.



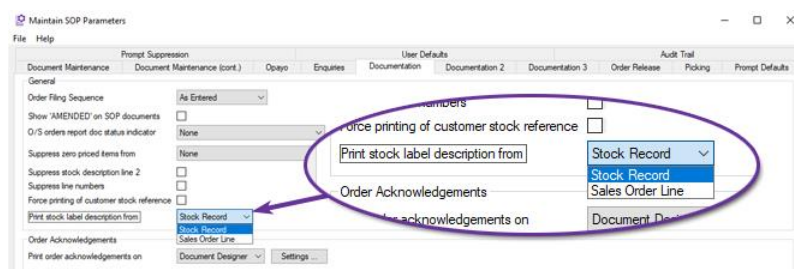
Please note that, since this flag changes the treatment of VAT in line with HMRC regulations, it is important that the flag is only set on items that are delivery charges and for which those rules apply. Setting this flag on other items, such as packaging or handling charges, may result in incorrect VAT being applied.

5.15. Print Stock Label Description from Stock or Order

Pre-Released to Software Assurance customers



A new parameter, configured on Documentation tab within Maintain SOP Parameters, provides configuration of which description to print on stock labels. Labels can now use either the standard description from the stock ledger or the description from the sales order, which may have been amended for this specific order.



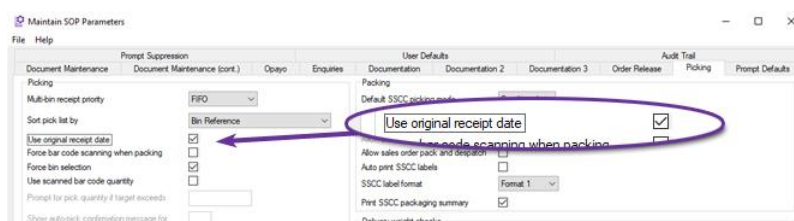
5.16. Age Date added to Stock Transaction Monitors

Pre-Released to Software Assurance customers with the Warehouse Handheld Sales Order Picking module



On systems with the "Use original receipt date" parameter set, an additional "Aged Date" column is now provided on Stock Transactions monitor tabs. This parameter can be found in on the Picking tab of Maintain SOP Parameters.

This column has also been added to the Transactions tab of Stock Enquiry.



5.17. Quantity Break Price Applies in Stock Record Block Amendment

Pre-Released to Software Assurance customers with the Quantity Break Pricing module



The Stock Record Block Amendment function has been updated to allow a selection of stock items to be flagged as no longer qualifying for Quantity Break Pricing.

Stock Record Block Amendment

File Help

Range Selection Field Settings 1 Field Settings 2 Attribute Settings

New Field Settings

Product group

Sales group

VAT group

Nominal purchase account

Force nominal department

Department

Force nominal cost centre

Cost centre

Sell in multiples of sales per

Customer discount

Settlement discount

Type of supply

Unit weight

Default price

Allow price amendment

Discount group

Contract discount group

Contract discount group

Cost amendment on invoices

Cost amendment on credit notes

Presentation Options

Force stock description to upper case

New Field Settings

Commissionable item

Include in POP threshold valuation

Delivery lead time (days)

Default delivery to customer (days)

Source of item

Re-salable item

Best before date

Shelf life

Traceable item selection in picking

Transfer cost from order to invoice

Retail price VAT status

Trade price VAT status

Assembly type

Cost type

Discontinued item

Quantity break pricing

Set to not applicable

OK Cancel

5.18. CN Taric Codes in Stock Record Block Amendment

Pre-Released to Software Assurance customers with the Intra EC Trade Statistics (Intrastat) module



For those using CN/TARIC Commodity Codes, Stock Record Block Amendment now allows you to assign a specific code to a range of stock records.

Stock Record Block Amendment

File Help

Range Selection Field Settings 1 Field Settings 2 Attribute Settings

New Field Settings

Product group

Sales group

VAT group

Nominal purchase account

Force nominal department

Department

Force nominal cost centre

Cost centre

Sell in multiples of sales per

Customer discount

Settlement discount

Type of supply

Commodity code (CN/TARIC)

Report supplementary units

Unit weight

New Field Settings

Commissionable item

Include in POP threshold valuation

Delivery lead time (days)

Source of item

Re-salable item

Best before date

Shelf life

Traceable item selection in picking

Transfer cost from order to invoice

Retail price VAT status

Trade price VAT status

Assembly type

Cost type

Discontinued item

Commodity code (CN/TARIC)

1806101500

OK Cancel

This provides a simple and quick way of assigning a specific Commodity Code across a selection of stock items if those items can be identified by, for example, a range of Product Groups or Sales Groups.

5.19. Works Order Reservations

Available to purchase with axis diplomat 2022 and the Stock Transaction Traceability module



For those using Compact MRP along with Stock Transaction Traceability, this new additional module allows traceable components to be reserved against current Works Orders prior to them being issued.

Components are reserved through the Works Order Enquiry function.

Section 6 Warehouse Management

6.1. Despatch Advice Email Templates by Delivery Method

Pre-Released to Software Assurance customers with Warehouse Management



Maintain Delivery Methods has been extended to make it possible to specify a different Email Template for each Delivery Method.

When modifying a Delivery Method, if an email template has not been explicitly associated with the Delivery Method but there is an associated Delivery Service Provider whose configuration specifies an email variant then this will be displayed. This means there is no need to navigate to the configuration file separately to see or edit this information.

The screenshot shows the 'Delivery Method Code Details' window. The 'Despatch advice email template' dropdown is highlighted with a purple oval and an arrow pointing to it. The dropdown shows 'Variant 6'. Other fields visible include 'Delivery Method Code Details' (20), 'Description' (FedEx Next Day), 'Status' (Enable for Despatches only), 'Mode of transport' (Unspecified), 'Address types' (All types), 'Locations' (Bridgewater), 'Delivery Service Provider Details' (Unspecified), 'Delivery service' (Unspecified), 'Request extended liability' (unchecked), 'Request notifications' (unchecked), 'Consignment Options' (Automatic), 'Print package/pallet labels' (unchecked), 'Number of labels per package/pallet' (1), 'Delivery weight checking' (System Default), and 'Despatch advice email template' (Variant 6).

6.2. Picking of non-tangible stock

Pre-Released to Software Assurance customers with Warehouse Management



An additional setting has been added to stock items that have a traceability mode of 'Serial Number' and a Stock take and picking mode of 'Intangible'.

When this new field, 'Traceable item selection in picking' is set to Auto, the system will automatically select serial numbers for the quantity picked on a FIFO basis, without user intervention. The user's experience will therefore be the same as when picking a non-traceable item.

6.3. Pack and Despatch - Pack Tab

Pre-Released to Software Assurance customers with Warehouse Management



For systems using both Shipping Containers and Paper-Based Sales Order Picking, a new Pack tab has been added to the Pack and Despatch function. This provides the user with a secondary check mechanism as they pack goods into a container.

Once a packaging item has been added to the delivery, the user then scans or selects each line on the Pack tab to add the item to the shipping container.

This is particularly useful when shipping goods internationally because international shipments all need container information for customs purposes.

6.4. Delivery Enquiry from Outstanding Items Tab

Available with axis diplomat 2022 and the Warehouse Paper-based Sales Order Picking module



For those using either the Scheduled Deliveries or Warehouse Paper-Based Picking modules, there is a new right-click option on the Outstanding Order Items tab of 'Customer Enquiry' to drilldown to the Delivery Enquiry if the item is on an outstanding delivery.

6.5. Enhancements to Handheld Bin Enquiry

Pre-Released to Software Assurance customers with Warehouse Management



The settings tab within HandHeld Bin Enquiry has been extended to include additional fields showing the bin's category, it's status and any remarks.

Bin - C4

Stock Items

Current Stock Settings Properties

Category: A

Status: Enabled

Single/Multiple: Single

Stock Ref: EGPLACC2

Stock Des: 25m Extension Lead

Item cap: 8 (8)

Remarks: ms horizontally not vertically

Cancel

6.6. Stock bin management reporting - Enhancements

Pre-Released to Software Assurance customers with Warehouse Management



On systems using Multi-Bin Stock Locations, additional information can now be recorded against each bin, including:

- Depth/length (mm)
- Width (mm)
- Height (mm)

An additional flag can indicate whether the bin is used for a single SKU or multiple different items, For single SKU bins, you can also record the stock reference and capacity of the item that the bin can hold.

The dimensions are used on the Stock Bins monitor to show the volume and amount of free space within each bin and is available for both single and multi-SKU bins. This information is also shown within the function Handheld Bin Enquiry.

The suggested bin algorithm used by Goods Inwards, Goods Received and Stock Movement function now also includes every single-SKU bin associated which that SKU although there is no attempt to enforce transactions to only use those specific bins.

6.7. Goods Inwards and Inward All Items

Pre-Released to Software Assurance customers with the Purchase Delivery Advice module



A new option has been added to the Goods Inwards function to Inward All Items.

Goods Inwards is used to receive items from a supplier into a holding area prior to transfer to the warehouse.

6.8. Barcode labels for stock items & shelves

Pre-Released to Software Assurance customers with Warehouse Management



An additional pre-configured barcode label format (format 36) has been added. The label has a size of 38mm x 25mm and includes the following fields:

- Retail Price (Incl. VAT)
- Item Description Line 1
- Primary Reference (as a barcode)
- Primary Reference (as text)

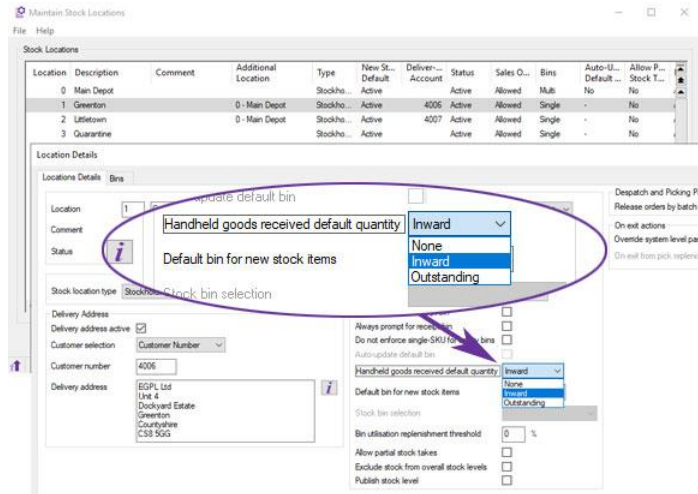
6.9. Handheld Goods Received Default Quantity

Pre-Released to Software Assurance customers with Warehouse Management





A new parameter has been added against each Stock Location to control the default quantity presented when receiving an item via the handheld Goods Received function. For each location, this can be set to None, Outstanding Quantity or Inward.

None forces a quantity to be entered for the receipt. Outstanding Quantity defaults to the consolidated quantity for all purchase order lines containing the item and Inwards is the quantity on the delivery note.



6.10. Goods inwards process



Pre-Released to Software Assurance customers with the Warehouse Handheld Stock Control module  

The Handheld Goods Inwards function now presents a list of current/recently used bins as each item is inwarded in a similar manner to that seen using the function Handheld Goods Received.

Note that this is purely for informational purposes and can be used to allow a sort of the goods for the goods received process.

The Goods Inwards function provides an optional checking-off process for goods prior to them being Goods Received and may be used to record quantities against items on a purchase delivery advice.

6.11. Importing and Updating Barcode Label Printing Details

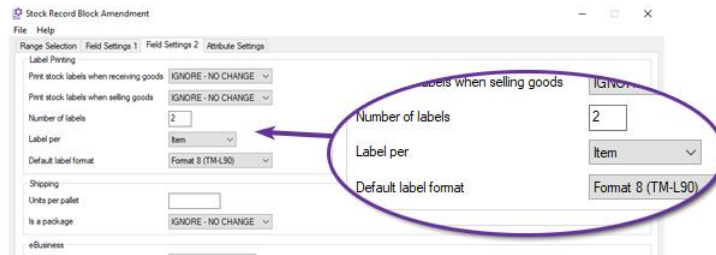
Pre-Released to Software Assurance customers with the Bar Coding module  

Import Stock Details from CSV has been extended to allow more label printing information for stock records to be imported.

This now includes the label format, number of labels and the per option.

Export Stock Details has also been modified to export this information to allow the information to be amended before being imported back in.

Alternatively, the Stock Record Block Amendment function can be used for bulk updates as this has also been modified to allow these fields to be updated..



6.12. Additional columns added to Sales Deliveries monitor tabs

Pre-Released to Software Assurance customers with the Delivery Records module



Sales Deliveries monitor tabs now include two additional columns.

- Date Consigned
- Consigned By

6.13. SQL monitors - New Stock Bins and Stock Bin Items tabs

Pre-Released to Software Assurance customers with the Multi Location Multi Bin Stock module



On systems with Multi-Bin Stock Locations, two new monitor tab types have been added:

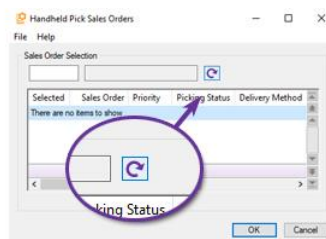
- Stock Bins - this tab type shows a list of bins, detailing their location, contents, last stock check dates and more.
- Stock Bin Items - this tab type shows a list of the stock contained in each bin. including the last date of receipt, quantity on hand and the quantity picked.

6.14. Refresh option - Handheld Sales Order Picking

Pre-Released to Software Assurance customers with the Warehouse Handheld Sales Order Picking module





Within Handheld Pick Sales Orders a new refresh button has been added:





This was added to assist users with auto feed picking enabled to more easily retrieve the next order if one was not present at the time the function was loaded.

6.15. Deliver To information for pickers

Pre-Released to Software Assurance customers with the Warehouse Handheld Sales Order Picking module  

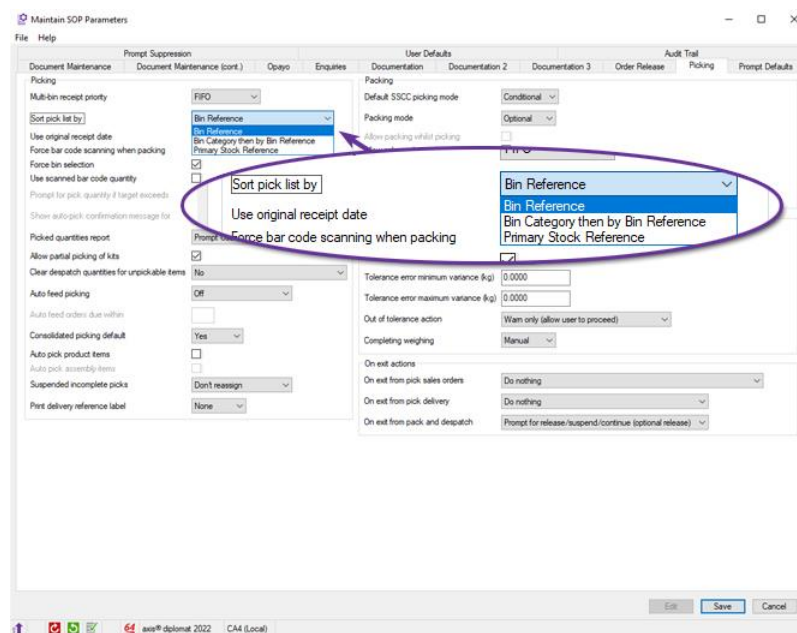
A new 'Deliver To' tab has been added to the function Handheld Pick Sales Orders. This tab shows the delivery address and the delivery method as specified on the sales order.

6.16. Picking and Bin Categorisation



Pre-Released to Software Assurance customers with the Warehouse Handheld Sales Order Picking module  

A new parameter, configured on the Picking tab of Maintain SOP Parameters, has been added to offer a variety of options to sort pick lists:

- By Bin Reference
- By Bin Category and then by Bin Reference
- By Primary Stock Reference



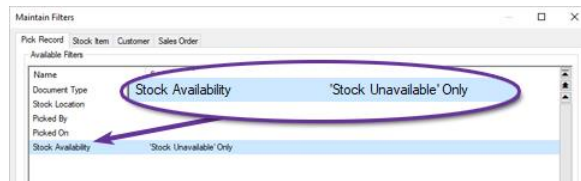
6.17. Picking Monitor and Stock Availability

Pre-Released to Software Assurance customers with the Warehouse Handheld Sales Order Picking module  



A new column and matching filter has been added to Picking monitor tabs to show stock availability.

This indicates where a user has marked an item as unavailable.

This will be particularly useful for warehouse managers and supervisors who wish to monitor such items to, for example, instigate additional stock checks.





6.18. Picked Quantities in Customer Enquiry

Pre-Released to Software Assurance customers with the Warehouse Handheld Sales Order Picking module  

A new 'Picked Quantity' column has been added to the Outstanding Order Items tab in Customer Enquiry to show how many of an item have been picked so far for each item.

6.19. Merging Deliveries at end of Sales Order Pick

Pre-Released to Software Assurance customers with the Warehouse Paper-based Sales Order Picking module  

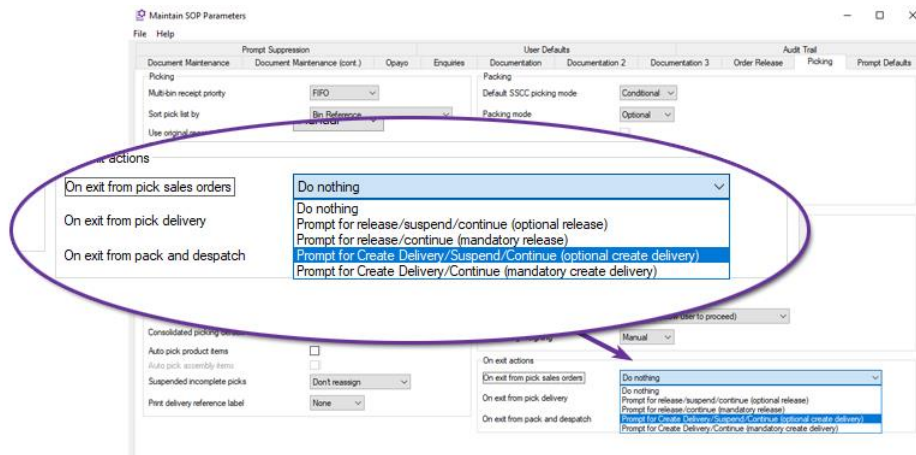
Two new options have been added to the system for what happens at the end of picking a sales order.

The options, configured via the 'Picking' tab of 'Maintain SOP Parameters' both cause the system to prompt for delivery creation.

- Prompt for Create Delivery/Suspend/Continue (optional create delivery)
- Prompt for Create Delivery/Continue (mandatory create delivery)

If either of these options is selected then, when exiting handheld Pick Sales Orders, the user will be prompted to create a delivery. If a delivery already exists for that customer going to the same customer delivery address, then the user will be presented with a message asking if they wish to merge the items they have picked with the existing delivery.

This allows a consolidated delivery to be created from multiple sales orders with a single consignment and delivery note.



6.20. Create Deliveries by SKU

Pre-Released to Software Assurance customers with the Warehouse Paper-based Sales Order

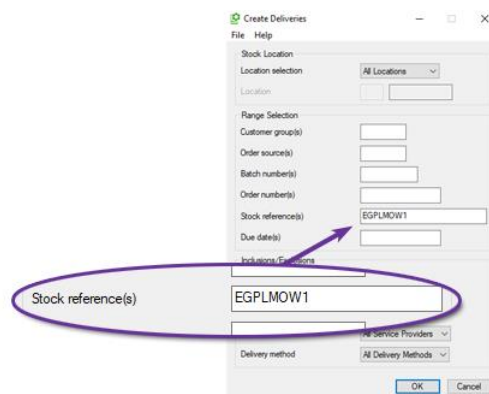
Picking module



The function Create Deliveries has been extended to include additional selection criteria for a stock reference or range of stock references.

When specified, deliveries will only be created for any items containing one of the stock items specified.

One useful application for this enhancement is where a large delivery of a specific item has been received from a supplier that was on back order. This ensures that anything containing that item is treated as a priority.



6.21. Allow Pack and Despatch for SOs

Pre-Released to Software Assurance customers with the Warehouse Paper-based Sales Order

Picking module



For those customers using paper-based Sales Order Picking, the Pack and Despatch function now allows the user to select either a delivery (previously, the only option) or a sales order.

This allows the user to pick from an Advice/Packing Note and then use Pack and Despatch from a workstation fitted with a barcode scanner to positively identify an item and pack in to a shipping container.

This is particularly useful on systems that run a single bin location as there is no need to identify which bin an item was picked from.

Section 7 eBusiness

7.1. Stock Location in XML Orders

Available with axis diplomat 2022 and the XML eBusiness Interface module



The XML eBusiness Interface now supports importing sales orders with a `<StockLocation>` tag inside the `<OrderDetails>` section.

```
<OrderDetails>
  <OrderNumber>671941</OrderNumber>
  <CustomerOrderNumber>KJH9807</CustomerOrderNumber>
  <WebReference>9561</WebReference>
  <OrderDateTime>311022 12:51:00</OrderDateTime>
  <SpecialInstructions>Please leave with neighbour at No. 22 if no one home.</SpecialInstructions>
  <Currency>GBP</Currency>
  <TotalNet>100.00</TotalNet>
  <TotalVAT>20.00</TotalVAT>
  <DeliveryMethod>99</DeliveryMethod>
  <StockLocation>3</StockLocation>
</OrderDetails>
```

This tag determines against which Stock Location a sales order is imported.

If it is not present, Import eBusiness Orders either falls back to the site's default location, the customer's default location (if enabled), the appropriate FBA (Fulfilled by Amazon) location for the locale (if it is an FBA order) or the location specified by the operator (for a manual import) for sales orders and the default returns location for customer returns.

7.2. Animated Banners

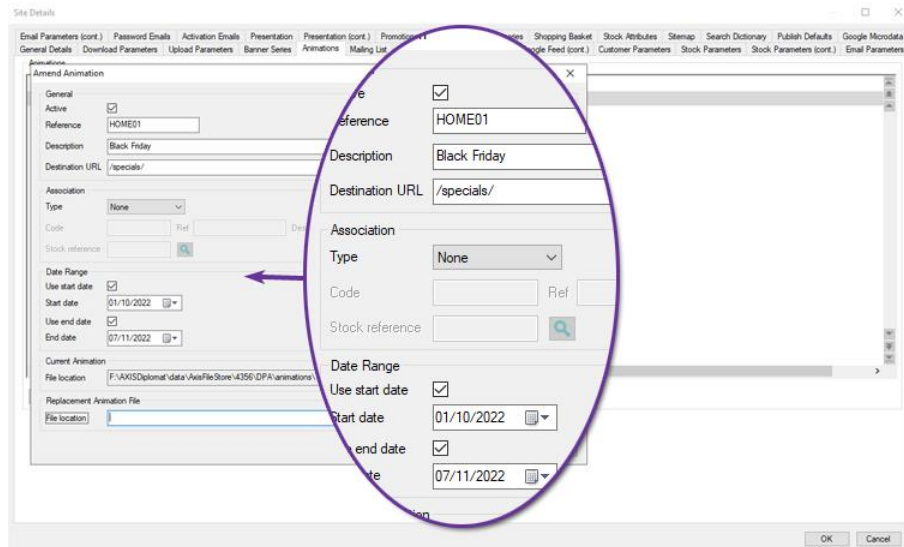
Available with axis diplomat 2022 and the axis vMerchant module



For those with websites built on axis vMerchant Express, axis diplomat 2022 provides the ability to add animated banners.

Banners built using Adobe Animate can use sophisticated animation techniques to add additional visual appeal and impact when used in place of traditional static images.

In a similar way to traditional static banners, animated banners can optionally link to a particular page on your website and they can be specific to a product or product category. They can also have start and end times which is useful, for example, when pre-loading seasonal banners.



The axisfirst Web Services team also offers a banner design and creation service, for both static and animated banners; please discuss your requirements with us or visit the website for more information.

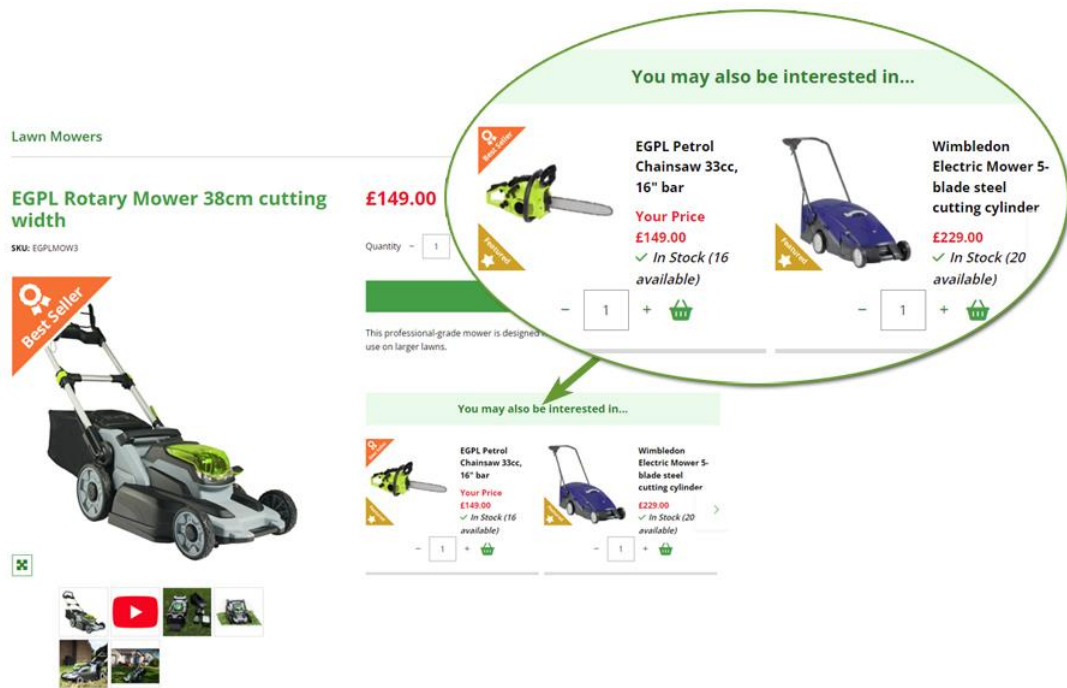
To see an animated banner in place on an axis vMerchant Express website, please take a look at the home page of our demonstration EGL website.

7.3. Auto-Populate Cross Sells

Available with axis diplomat 2022 and the axis vMerchant module



Cross Sells (typically under a "You may also be interested in..." section on a product page) are a great way of bringing alternatives to your customer's attention and up-selling more expensive (or more profitable) alternatives.



Maintaining specific links between products has long been possible with axis diplomat and axis vMerchant but identifying alternatives for every product can be time consuming.

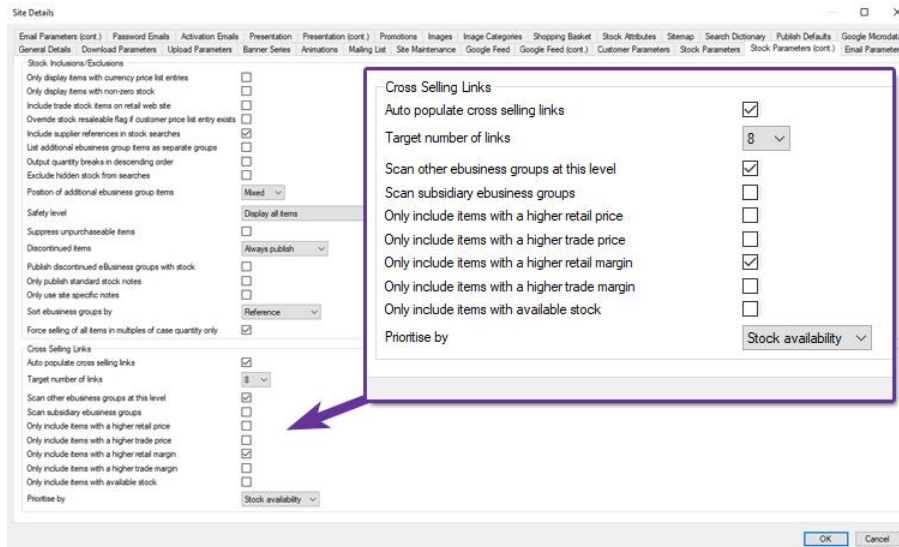
axis diplomat 2022 can now automatically generate cross sells to supplement those that you have manually chosen.

Cross sells that have been explicitly configured are given priority but the number of linked products can now be padded out to a target number of links (subject to suitable products being available).

Links can be based on the other products in the same group or from across other sibling groups (i.e. those groups that have the same parent group as this product's primary eBusiness group). These auto-generated links can be limited to only those products that have a higher price, a higher margin and/or have available stock.

It is also possible to prioritise which products are selected for linking based on which are the most expensive, the most profitable or have the most stock available.

This is all configured via a single set of parameters within the Maintain eBusiness Sites function (on the Stock Parameters Continued tab):



With this development, it is now possible to focus on setting up up-sell links on the most strategically important products whilst knowing that the broader product catalogue will suggest appropriate up-sells where possible.

7.4. eBusiness Attachments

Available with axis diplomat 2022 and the axis vMerchant module



This module, previously available as an additional cost module, is now included as standard on all axis diplomat 2022 systems with links to axis vMerchant websites.

With this module, PDF manuals, COSHH sheets, specification sheets and a host of other documentation can be added to individual stock items or to groups of items.

In order to allow your website to differentiate between various types of attachment, you can define a number of eBusiness Attachment Types via a Stock Ledger maintenance function (just as you would maintain Product Groups, for example).

If your website is built on axis vMerchant Express website then no changes to the site are required - the site will automatically respond to the presence of the attached files. If, however, you have a bespoke website, please contact us to discuss how and where you wish the download links to appear on your site.

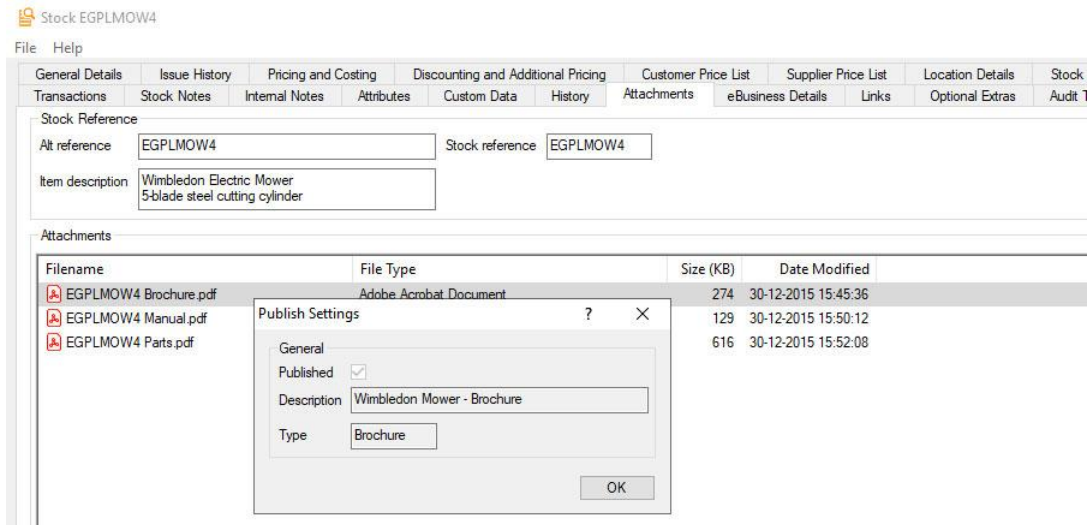


fig 1 - marking a Stock attachment as published and of type Brochure

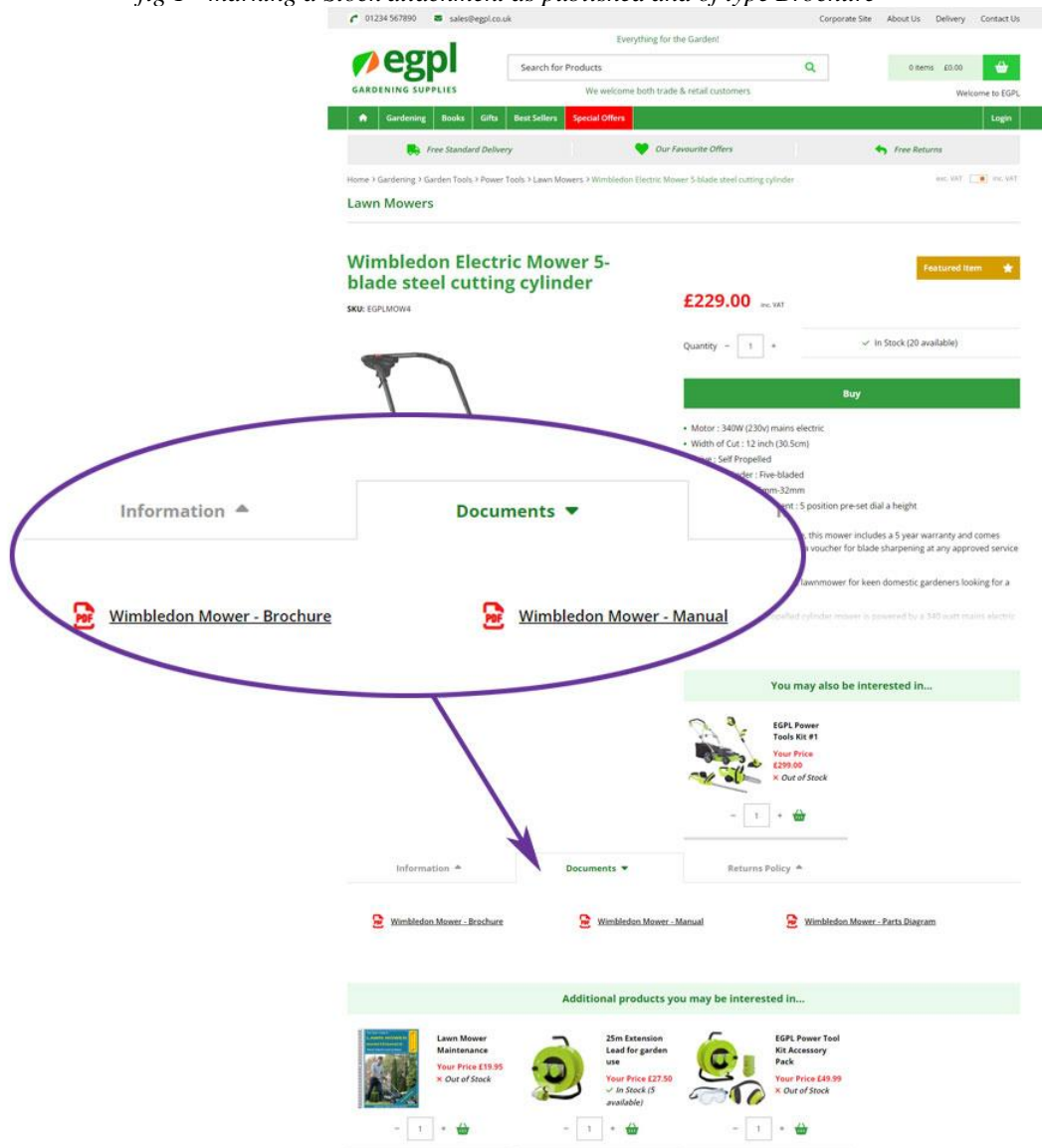


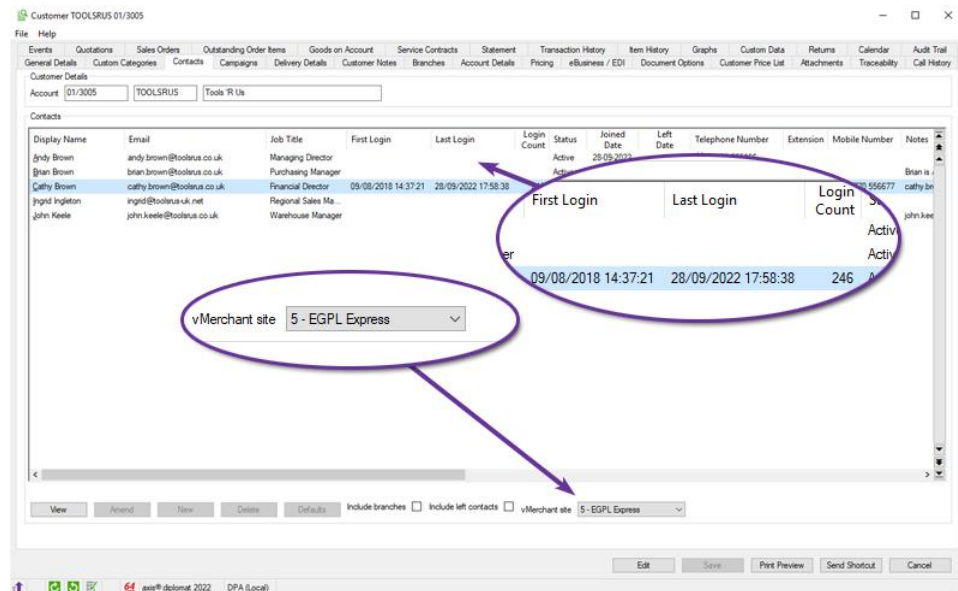
fig 2 - stock item's attachments automatically appearing in a 'Documents' tab on the web page

7.5. Login Statistics

Available with axis diplomat 2022 and the axis vMerchant module



For those with one or more axis vMerchant websites linked to their axis diplomat system, it is now possible to see login statistics on the Contacts tab of Customer Enquiry.



Once a specific website has been selected, the list of contacts is updated to show the dates for the first login and the most recent login, as well as the total number of times that they have logged in to the particular site.

This can be particularly useful for account managers in a B2B environment, as it provides a simple overview of how much a particular contact engages with their account online.

7.6. Notification of Online Statement Payments

Pre-Released to Software Assurance customers with eBusiness



It is now possible to configure a website to send you a notification whenever an 'On Account' customer makes a payment against outstanding invoices on their account via the Statement page of your axis vMerchant website.

This is configured on the 'Email Parameters' tab within the Supervisor Function 'Maintain eBusiness Sites'.

Site Details

Email Parameters (cont.) Password Emails Activation Emails Presentation Presentation (cont.) Promotions Images Image Categories Shopping Basket Stock Alerts

General Details Download Parameters Upload Parameters Banner Setup Mailing List Site Maintenance Google Feed Google Feed (cont.) Customer Parameters

Notifications

Send order notification ☒

Send full confirmation as notification ☒

Send registration notification ☒

Send statement payment notification ☒ **Send statement payment notification**

Recipient email address

Order Confirmation

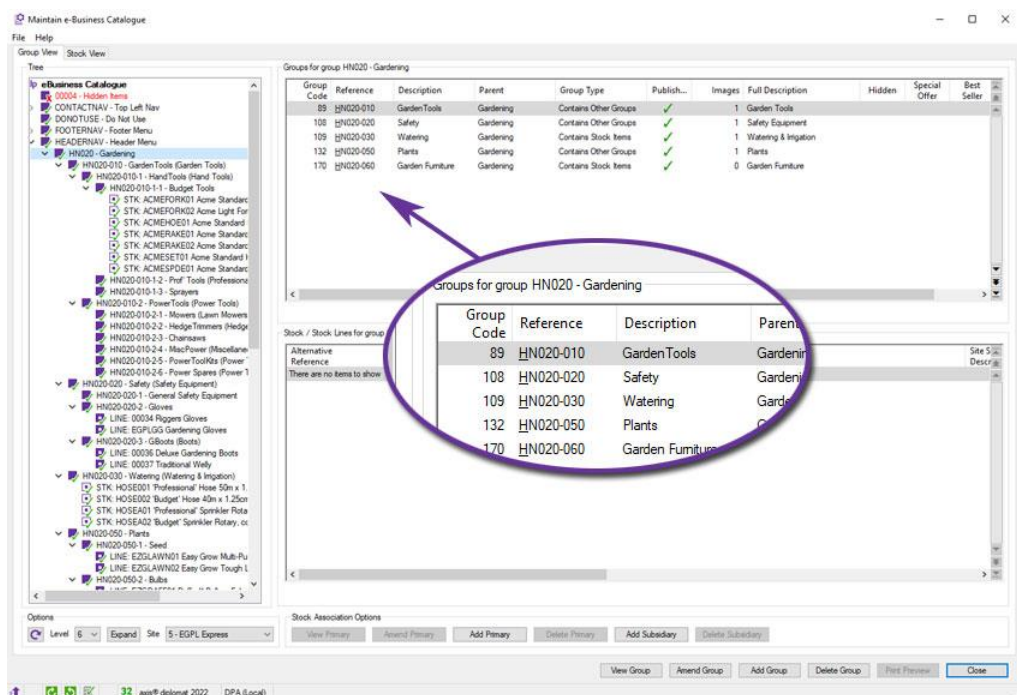
Send order confirmation ☒

Sender email address

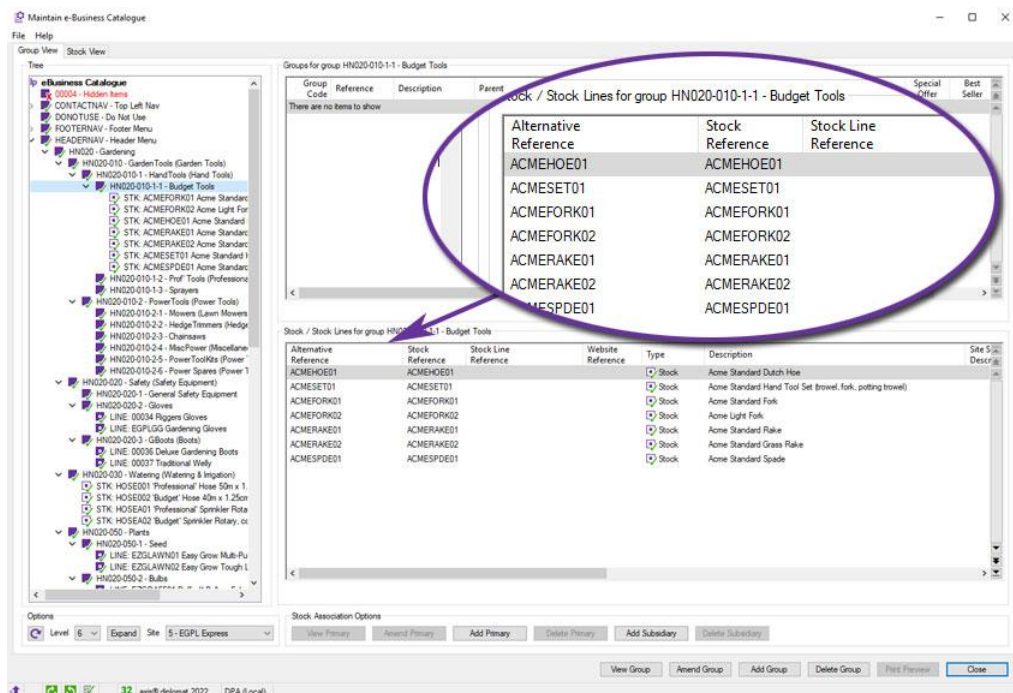
7.7. All-New eBusiness Catalogue Maintenance

Available with axis diplomat 2022 with eBusiness

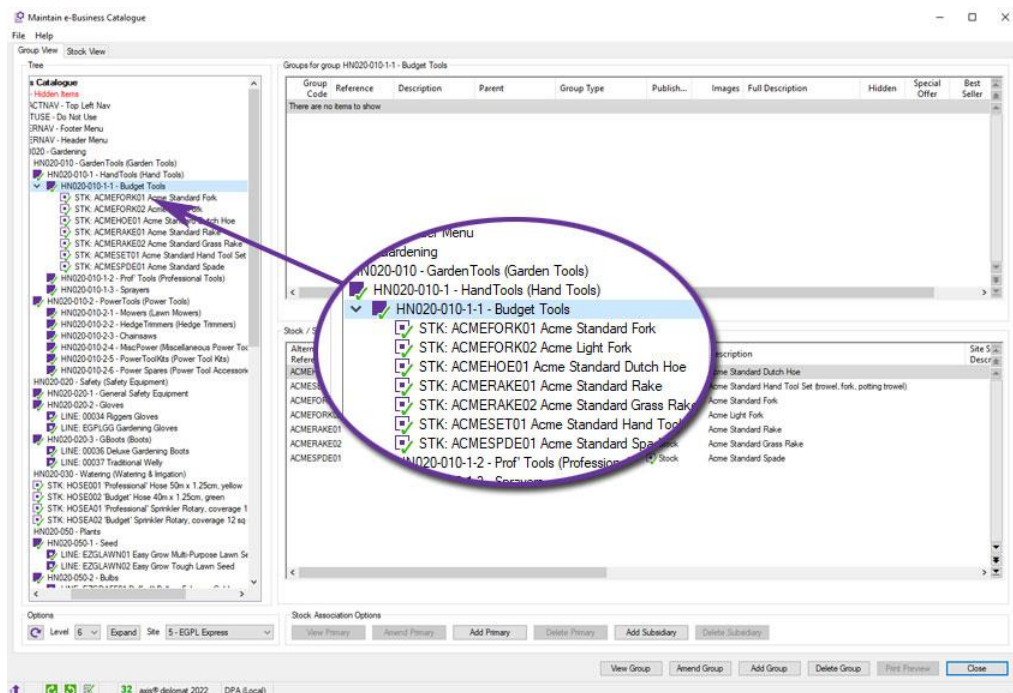
The existing Maintain eBusiness Catalogue function has been replaced. The new function eliminates the need for separate tree and list view tabs and makes both views available on-screen at the same time.



If the group selected in the tree on the left contains subsidiary groups, these are listed in the top-right pane.

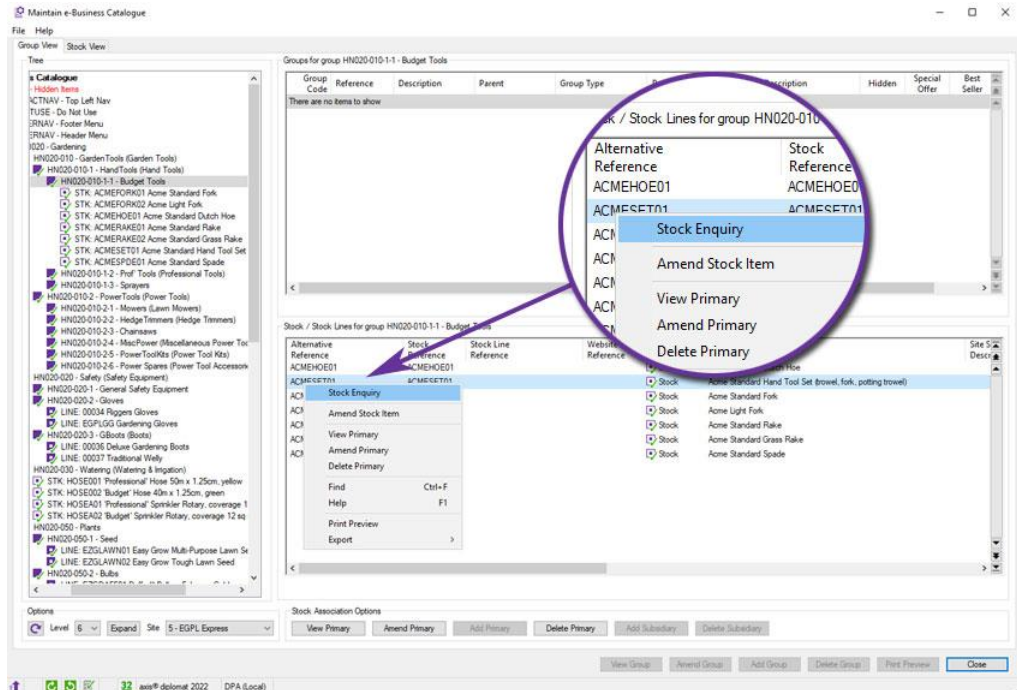


If the group selected in the tree on the left contains products, these are listed in the bottom-right pane.



The left-hand tree view will also show assigned stock and, for those with the Stock Lines module, Stock Lines.

This new function makes it easier to work with eBusiness Catalogues, especially those with larger and more complex structures. It also makes it easier to drilldown into items - for example, by right-clicking on a stock item as shown below:



7.8. Export Stock Details and Site-Specific Notes

Pre-Released to Software Assurance customers with the eBusiness module



The Export Stock Details function has been modified to include a new output option to include site-specific stock notes.

If selected, this will export the site-specific notes for the site selected (in the prompt above). These notes are included in a separate column specifically for site-specific notes. A second additional column shows the setting of the 'use site specific notes' flag.

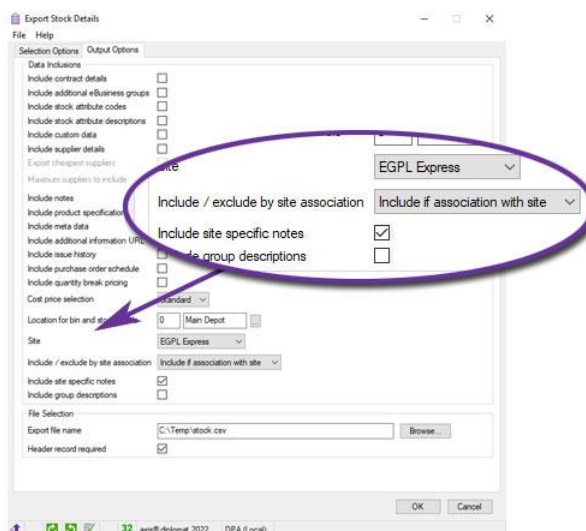


fig 1 - choosing the 'Include site specific notes' option

| Book reference | Description1 | Description2 | Site Specific Notes | Use site specific desc. | Use site specific spec. | Use site specific notes | Decimal places on quantity | Default Label Format | Number of Labels | Label Per | Commissionable item |
|----------------|------------------------|--------------|---------------------------------------|-------------------------|-------------------------|-------------------------|----------------------------|----------------------|------------------|-----------|---------------------|
| BOOK002 | A-2 Roses | 390pp | <p>[Ifcr]Roses are often seen as b | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK003 | A-2 Fruit Trees | 270pp | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK004 | A-2 Houseplants | 180pp | <p>[Ifcr]This is the ideal book for t | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK012 | Roses Made Easy | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK013 | Fruit Trees Made Easy | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK014 | Hostas Made Easy | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK015 | Clematis Made Easy | | <p>[Ifcr]The lush, sculptural hosta | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK016 | Vegetables Made Easy | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK017 | Weeding Made Easy | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK021 | Decorating Made Easy | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK022 | Re-sawing Made Easy | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK023 | Plumbing Made Easy | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK031 | Chairmans | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK032 | Lawn Mow | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK033 | Trimmer | | | N | Y | | 0 | 0 | 1 | Item | Y |
| BOOK034 | Ride-On M | | | N | Y | | 0 | 0 | 1 | Item | Y |
| CAR008 | Delivery S | | | N | Y | | 0 | 0 | 1 | Item | Y |
| DELIVER-SA | Delivery S | | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLAC01 | Replacement | | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLAC02 | 25m Extension | | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLAC03 | Trimmer Cord | | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLC01 | ESPL Petrol Cha | | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLC02 | ESPL Electric Cha | | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLC03 | ESPL Electric Cha | | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLD03 | ESPL Nitrite | | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLG01 | Deluxe Gardening Boots | | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLG02 | Deluxe Gardening Boots | Size 6 | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLG03 | Deluxe Gardening Boots | Size 7 | | N | Y | | 0 | 0 | 1 | Item | Y |
| ESPLG04 | Deluxe Gardening Boots | Size 8 | | N | Y | | 0 | 0 | 1 | Item | Y |

fig 2 - the resultant file loaded in Microsoft Excel, showing the two additional columns

7.9. Default Cost Centres by Site

Pre-Released to Software Assurance customers with eBusiness



The Maintain eBusiness Sites function now allows specification of a default Cost Centre code to be used when creating retail customer accounts as a result of importing eBusiness orders.

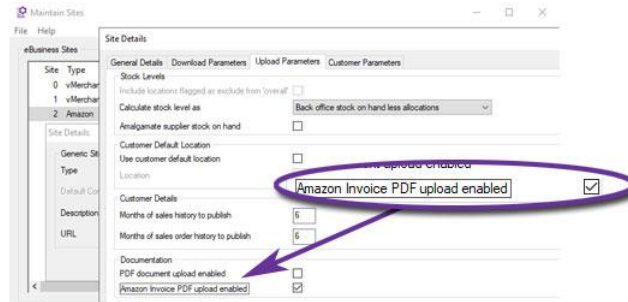
7.10. Amazon Invoice Upload

Pre-Released to Software Assurance customers with the Amazon Seller Central Interface module



A new parameter, called "Amazon Invoice PDF upload enabled", has been added on the Upload Parameters tab within "Maintain eBusiness Sites" when configuring an Amazon eBusiness site.

When this parameter is set, the system will, during invoice delivery (for example, when running the Print Invoices function) automatically upload any invoices for orders from this site directly to Amazon.



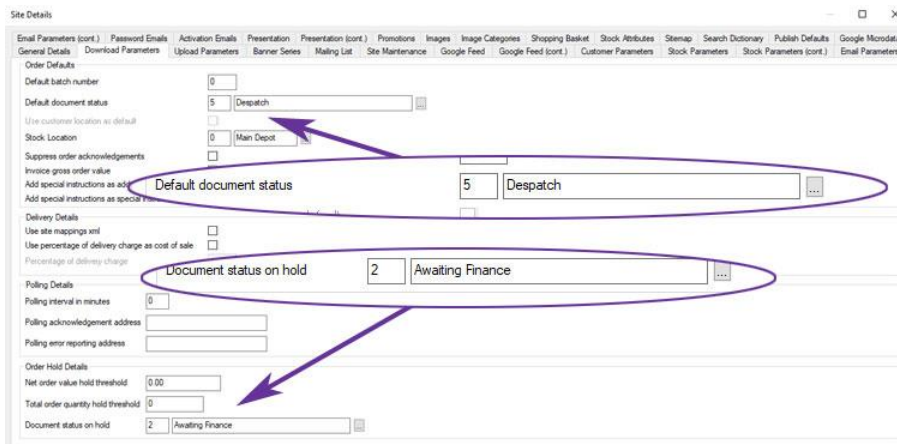
This can be particularly beneficial when selling to Amazon Business customers who can filter goods to sellers that are able to provide invoices.

7.11. Default Document Status Codes by Site

Pre-Released to Software Assurance customers with eBusiness



It is now possible to define two default Document Status Codes to be used on orders imported from a website. One code is used for orders that are able to be processed normally whilst the second code is reserved for orders that are placed on hold (using whatever criteria has been configured for orders that are automatically placed on hold).



The default Document Status Codes are configured on the 'Download Parameters' tab of 'Maintain eBusiness Sites' and may therefore vary from one site to another.

7.12. Import Customer Returns from 3rd Party Sites

Available with axis diplomat 2022 and the XML eBusiness Interface module



The API for the XML eBusiness interface has been extended to allow Customer Returns to be imported via the same interface that is used to import sales orders.

```

1 <?xml version="1.0" encoding="UTF-8"?>
2 <AXISEnvelope type="WebReturn"
3   version="1">
4   <ReturnCount>1</ReturnCount>
5   <CustomerDetails>
6     <CustomerNumber>01/1321027</CustomerNumber>
7   </CustomerDetails>
8   <ReturnDetails>
9     <ReturnNumber>WebReturnNo1</ReturnNumber>
10    <CustomerReturnNumber>000000043</CustomerReturnNumber>
11    <OriginalOrderNumber>ZBHYW6</OriginalOrderNumber>
12    <ReturnDateTime>270122 15:18:28</ReturnDateTime>
13    <SpecialInstructions/>
14    <Total>25.51</Total>
15    <TotalNet>21.26</TotalNet>
16    <TotalVAT>4.25</TotalVAT>
17  </ReturnDetails>
18  <ReturnItems>
19    <ReturnItem sequence="1">
20      <Reference>T0715-CPT</Reference>
21      <Quantity>1.0000</Quantity>
22      <UnitPrice>25.51</UnitPrice>
23      <NetPrice>21.26</NetPrice>
24      <VAT>4.25</VAT>
25      <Trusted>1</Trusted>
26      <ReturnReasonCode>3</ReturnReasonCode>
27      <ReturnStock>0</ReturnStock>
28    </ReturnItem>
29  </ReturnItems>
30 </AXISEnvelope>

```

an example XML file featuring a customer return

Once a return has been downloaded by axis diplomat, an update is made to the site to indicate that the return has been imported.

7.13. Import Refunds from 3rd Party Sites

Available with axis diplomat 2022 and the XML eBusiness Interface module



The API for the XML eBusiness interface has been extended to allow payment refunds to be imported via the same interface that is used to import sales orders.

```

1 <?xml version="1.0" encoding="iso-8859-1"?>
2 <AXISEnvelope type="ReturnRefund"
3   version="1">
4   <Return reference="123456">
5     <Invoice>345900</Invoice>
6     <PaymentDetails>
7       <Amount>2.86</Amount>
8       <SecurityKey/>
9       <Status>20</Status>
10      <TxAuthNo/>
11      <UID>123xyz</UID>
12      <VPSTxId/>
13    </PaymentDetails>
14  </Return>
15 </AXISEnvelope>

```

an example XML file featuring a customer refund

7.14. Stock Details Option added to XML eBusiness

Available with axis diplomat 2022 and the XML eBusiness Interface module



This functionality provides XML eBusiness sites with the facility to publish stock detail information to the external website.

This can cover a range of information for each item, including:

- Description
- Pricing
- Resalable status

- Discontinued status
- Sales Group
- Product Group
- Stock levels

7.15. eBay Managed Payments

Available to purchase with axis diplomat 2022 and eBusiness



eBay now require all sellers to register for eBay to manage their payments, providing sellers with one place to sell and get paid, and buyers with more payment options.

An additional axis diplomat module allows payment methods to be flagged with a Payment Service Provider of eBay which in turn enables the import of payment settlement details for eBay orders which have been paid for using eBay Managed Payments and allows reconciliation of cashbook transactions using a Payout file downloaded from eBay Seller Hub.

The Import eBay Managed Payment Report function will flag all matched transactions as reconciled in the Cash Book and optionally create journals for the costs of transaction fees deducted by eBay.

The module is included as standard with the eBay Interface but is now also available as a stand-alone module for those who want to work with eBay Managed Payments through their axis diplomat system but without the additional functionality to import orders.

Section 8 Service Contract Management

8.1. Service Contract Price on Stock

Available with axis diplomat 2022 with Service Contract Management



Previously available as an optional feature, Service Contract Price on Stock is now standard as part of the Service Contract Management module.

It enables the addition of service contract pricing to a stock record so that a service contract can be built using pre-defined pricing for each element covered by that contract.

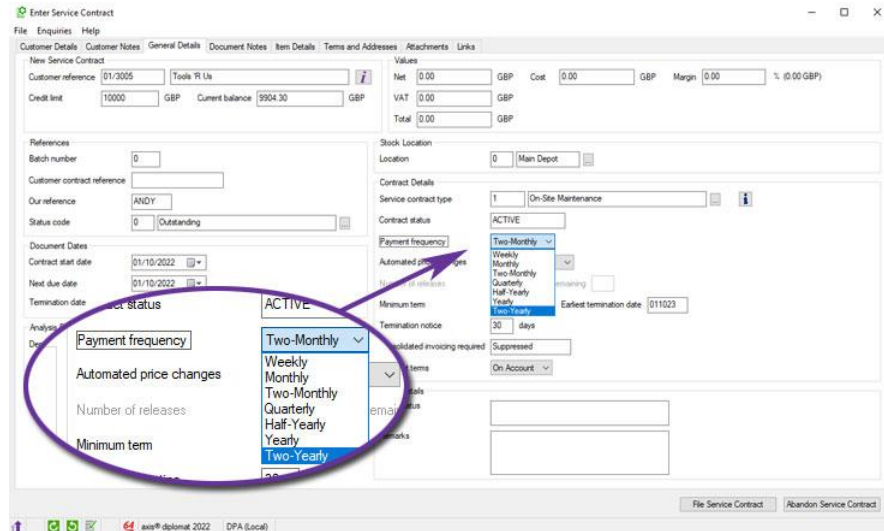
In addition to contract price and cost, you are also able to specify a range of parameters, such as a different sales group for contract revenue from the sales group used for sales revenue.

8.2. Additional Contract Payment Frequencies

Pre-Released to Software Assurance customers with Service Contract Management



Two new options have been added for Service Contract payment frequencies. These are Two-Monthly and Two-Yearly.



8.3. Further Additional Contract Payment Frequencies

Available with axis diplomat 2022 with Service Contract Management



With the release of axis diplomat 2022, three additional options have been added for Service Contract payment frequencies.

These are:

- Three Yearly (36 Months)
- Four Yearly (48 Months)
- Five Yearly (60 Months)

8.4. Consolidated Invoicing of Service Contracts

Available with axis diplomat 2022 and the Goods on Account module



For those using both the Goods on Account and Service Contract Management modules, contract invoices can now be consolidated.

This means that, where customers have multiple contracts, they can now receive one invoice covering multiple contracts. Only contracts with the same payment frequency are consolidated onto one invoice and each contract's document lines are kept separate. This means that if the same item appears on two contracts then the resultant invoice will still have two separate lines as opposed to one line with a higher quantity.

8.5. Service Contract Revenue Deferred Income Provision

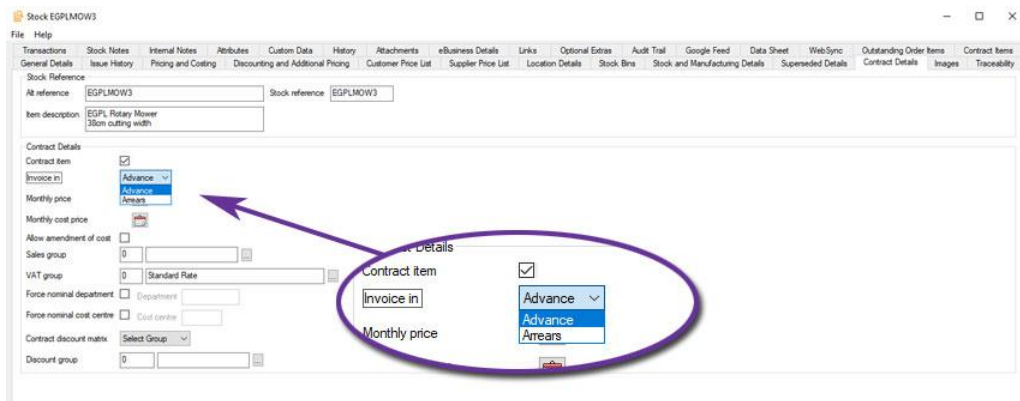
Available with axis diplomat 2022 with Service Contract Management



For those systems with the additional Service Contract Management module, Deferred Income Provision will also:

- Allow income generated from quarterly, six monthly and annual service contracts to automatically be accounted for in the relevant months for which the services are deliverable if the nominal ledger parameter to 'Defer service contract revenue' is set.
- Remove the requirement for manual adjustments to provide for deferred income relating to service contracts by creating the relevant transactions at the point of raising a service contract invoice.
- Provide a single function (Release Standing Orders) to transfer that month's revenue from the 'Deferred Income' account to the relevant trading nominal account for all deferred income transactions.
- Allow service contract items to be flagged as invoiced in advance or arrears. Those items flagged as 'Arrears' will not have deferred income provisions for invoices generated even if the contract frequency is greater than one month. For example, a customer has a service contract for a photocopier where the machine rental is charged quarterly in advance however a 'per copy' charge is made in arrears. By flagging the 'per copy' stock record as 'Arrears', only the machine rental contract line will create a deferred income provision.

All service contract items will default to invoiced in advance. This may be amended from the Contract Details tab of the stock record or imported using Import Stock Details from CSV File.



Using Stock Record Maintenance to indicate that an item is invoiced in advance

8.6. Completed Contract Lines

Pre-Released to Software Assurance customers with Service Contract Management



When viewing or amending a contract in Service Contract Enquiry and Maintenance functions, completed lines are now shown in grey. This is also the case with Service Contract Lines monitor tabs.

8.7. Additional Columns for Service Contract Monitor Tabs

Pre-Released to Software Assurance customers with Service Contract Management



A number of additional columns have been added to Service Contract monitor tabs:

An "Automated price changes" column shows whether a contract allows automated price changes, with options of either allow, disallow or after minimum term.

The related "Automatic repricing allowed from date" column shows for first date from which automatic repricing is allowed on a service contract.

An "Earliest termination date" column shows the soonest data that a contract can be terminated, taking into account the minimum contract term and its start date.

| Service Contract | Earliest Termination Date | Automated Price Changes | Automatic Repricing Allowed From Date | Contract Type | Customer Name | Customer Short Name |
|------------------|---------------------------|-------------------------|---------------------------------------|------------------------------------|---------------------------|---------------------|
| 502238 | 13/12/2022 | Disallowed | | 75 - On-Site Equipment Maintenance | CGS Systems Co. | CGSSYSTEMS |
| 520645 | 13/12/2022 | After Minimum Term | 01/01/2012 | 75 - On-Site Equipment Maintenance | MJR Marketing Limited | MJRMARKETI |
| 540556 | 01/01/2023 | After Minimum Term | 01/01/2023 | 75 - On-Site Equipment Maintenance | VIM Manufacturing Company | VIMMANUFAC |
| 541833 | 01/01/2023 | Disallowed | | 74 - Extended Warranty | MV Transport Ltd | MVTRANSP |
| 504673 | 13/12/2022 | After Minimum Term | 01/01/2012 | 75 - On-Site Equipment Maintenance | MVW Logistics Co. | MVWLOGISTI |
| 507872 | 13/12/2022 | After Minimum Term | 01/01/2012 | 75 - On-Site Equipment Maintenance | BATMARKETI | BATMARKETI |
| 541648 | 13/12/2022 | Disallowed | | 75 - On-Site Equipment Maintenance | PYFENGINEE | PYFENGINEE |
| 542860 | 01/10/2023 | After Minimum Term | 01/01/2023 | 75 - On-Site Equipment Maintenance | PYFENGINEE | PYFENGINEE |
| 541413 | 13/12/2022 | Disallowed | | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 541649 | 15/12/2024 | Disallowed | | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 541930 | 13/12/2022 | Disallowed | | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 542008 | 01/01/2025 | After Minimum Term | 01/01/2025 | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 503491 | 13/12/2022 | After Minimum Term | 01/01/2023 | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 509046 | 13/12/2022 | After Minimum Term | 01/01/2023 | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 542429 | 01/07/2023 | Disallowed | | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 505070 | 13/12/2022 | After Minimum Term | 01/01/2022 | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 508252 | 13/12/2022 | After Minimum Term | 01/01/2022 | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 532897 | 13/12/2022 | After Minimum Term | 01/01/2021 | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 540654 | 13/12/2022 | After Minimum Term | 09/10/2021 | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 513805 | 13/12/2022 | After Minimum Term | 01/07/2009 | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |
| 528295 | 13/12/2022 | After Minimum Term | 01/01/2015 | 75 - On-Site Equipment Maintenance | AGENCY | AGENCY |

8.8. Additional Columns for Service Contract Items Monitor Tabs

Pre-Released to Software Assurance customers with the Date Specific Contract Pricing and Discounts module



A number of additional columns have been added to Service Contract Lines monitor tabs:

- Exclude from repricing
- Unit price
- Price per
- Unit of measure
- Item discount %

Section 9 axis payroll

9.1. Additional Columns for Employee and HR Monitors

Pre-Released to Software Assurance customers



The Employee Monitor and HR Monitor have both been extended to include the following additional columns:

- Annual Holiday Entitlement (days)
- Holiday Entitlement Brought Forward (days)
- Additional Holiday Entitlement This Year (days)

9.2. eDoc Deposit Interface

Available to purchase with axis payroll 2022



eDoc Deposit is an online document delivery portal for the delivery of electronic payslips and payroll documents.

The axis payroll eDoc Deposit feature allows you to:

- Create the new employee account in eDoc Deposit when filing a new employee record.
- Deliver password protected payslips to the employee eDoc Deposit account.
- Deliver password protected P60s to the employee eDoc Deposit account.

The screenshot displays the eDoc Deposit website interface. At the top, there's a navigation bar with links for EMPLOYEE, EMPLOYER, DEVELOPER, PAYROLL BUREAU, CONTACT US, and MORE. A prominent banner features a diverse group of people sitting on a bench, with the text "Access your electronic payslip, epayslip and payroll documents any time, anywhere". Below this, a circular graphic highlights four key benefits: "Accepted by banks", "Safe and secure", "Payslip access 24/7", and "View on Smart Devices". To the right, a section titled "Employee Benefits" lists: "Accepted by banks and building societies for mortgage purposes.", "Access to your payslip 24/7.", "Download our free app today! Available for Android, Apple and Windows phones.", and "Safe and secure.". At the bottom, a "Key Features" section lists: "Get your payslip delivered to you wherever you are.", "At least two years worth of payslips stored.", "Never lose your payslip again.", and "Can be viewed or printed from anywhere in the world.".

Find out more on the eDoc Deposit website

Section 10 Upgrade Options and Pricing

10.1. Upgrade Pricing

The price for upgrading an axis diplomat 2020 system is the equivalent of a 65% discount on the equivalent new axis diplomat 2022 software.

The price for upgrading an axis diplomat 2018 system is the equivalent of a 30% discount on the equivalent new axis diplomat 2022 software.

There is no upgrade path from versions of axis diplomat that are outside of mainstream support at the time of release of the new version. In the case of axis diplomat 2022, this means there is no upgrade path for those upgrading from axis diplomat 2016 or below.

10.2. Transition Pricing

| Transition To | Transition From |
|--|----------------------------|
| | axis diplomat 2022 Express |
| axis diplomat 2022 Small Business Edition Client | £395 |

10.3. Software Assurance Pricing

Software Assurance is now offered as a second tier of Software Support Contract, replacing the previous "per client" pricing. This allows pricing to scale more fairly as it is proportionate to the complexity of the particular system.

| Contract Tier | |
|---|-------|
| Software Support | 1.60% |
| Software Support, Software Assurance | 2.95% |
| Software Support, Software Assurance, Software Rental | 5.25% |

Whilst Software Assurance has a number of benefits it is also no more expensive overall than purchasing upgrades:

A new version of axis diplomat is released every twenty-four months.

Software Assurance is based on 1.35% of the software cost per month (2.95% - 1.6%).

This is equivalent to 32.4% of the software price over the course of two years or 65% over the course of four years.

Purchasing a new version after two years costs 35% of the software price whilst purchasing a new version after four years costs 70% of the software price (see "Upgrade Pricing" section above). In both cases, Software Assurance is therefore slightly cheaper.

10.4. 'Early Bird' Discounts

Anyone without Software Assurance ordering an upgrade to axis diplomat 2022 by 31st January 2023 is entitled to a discount of 30% on the cost of the licence upgrade.

Similarly, upgrades ordered by 31st March 2023 are entitled to a discount of 20% and upgrades ordered by 30th June 2023 qualify for 10% discount.

In each case, discounts only apply to the software licence itself and not to any deployment (consultancy, training or installation). To qualify, a subscription to Software Support with Software Assurance must be taken out at the same time for a minimum of 12 months.

10.5. 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) | £595 |
| Time Unit Based Implementation Services (10x15 minutes) | £345 |

Time Unit Based Implementation Services can be used for online remote upgrade of an axis diplomat system to axis diplomat 2022.

Training is strongly recommended for all upgrades to axis diplomat 2022 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.

10.6. Software Assurance Upgrades

For customers subscribing to Software Assurance only

A number of the new developments within axis diplomat 2022 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 2022 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 2022, please go to our web site at

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

and click on the link to request your upgrade.

Section 11 Policies

11.1. Supported Environments

For the latest information on **axis diplomat 2022**'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/

11.2. 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/

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

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