

BUSINESS SOFTWARE

axis diplomat 2024

New Features Overview

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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 2024**, available to all



A facility within **axis diplomat 2024** that has already been pre-released to those axis diplomat 2022 customers with Software Assurance



A new facility within **axis diplomat 2024** that requires one or more existing optional modules



An optional extra, available as an add-on to **axis diplomat 2024** but not available at previous versions

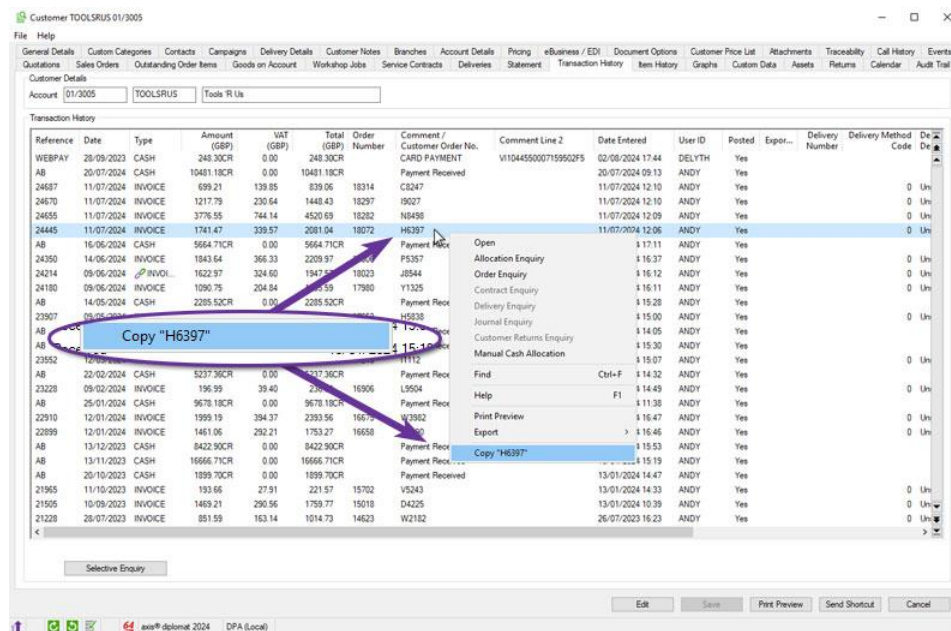
Section 1 Kernel (Core) Software

1.1. Copy Cell Contents from Scrolling Data Lists

Available with axis diplomat 2024



Within any scrolling data list in axis diplomat, it is now possible to copy the contents of a single cell (a column and row intersection) as plain text to the clipboard. To use, simply right-click on the required content; copy to clipboard is always the last option in the context menu:



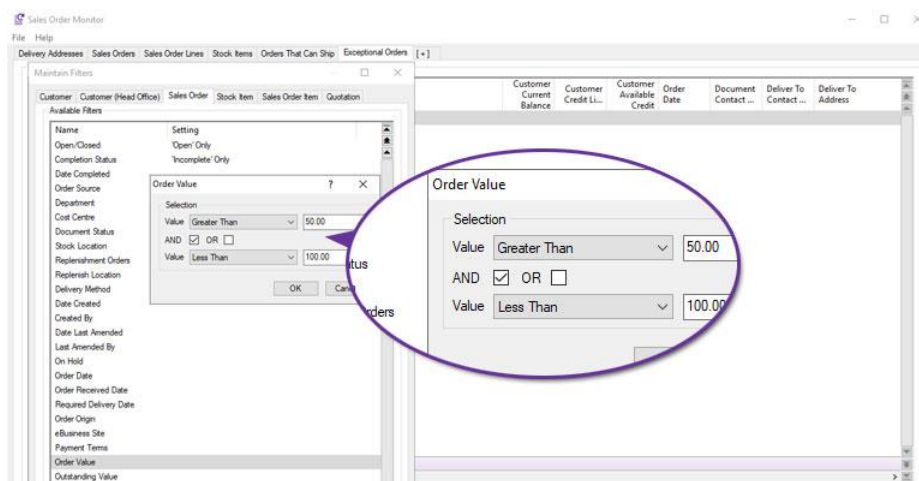
This time-saving development has many uses, for example, copying document references into emails or spreadsheets, financial amounts from Sales Business Intelligence into a management report document - in fact, any situation where a single piece of information is needed rather than the entire list.

1.2. Numeric Range Filters

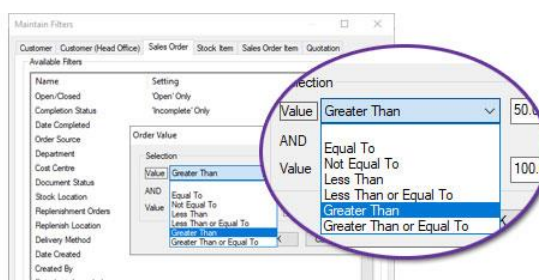
Available with axis diplomat 2024



Monitor tab filters that relate to fields holding general numeric values (for example, Order Value on Sales Order monitor tabs) now allow the use of Numeric Range filters:



These filters can be configured to identify values that sit above, below or match certain values by specifying Equal To, Not Equal To, Less Than, Less Than or Equal To, Greater Than or Greater Than or Equal To:



The ability to specify two numbers, linked with AND or OR, means that you can configure filters for numeric ranges of items that fit within a particular range, for example: Order Value is Greater Than £50.00 AND Less Than £100.00.

The OR operator makes it possible to create a monitor looking for outlying situations, such as orders that fall outside of expected parameters, for example: Order Value is Less Than £20.00 OR Greater Than £9999.99.

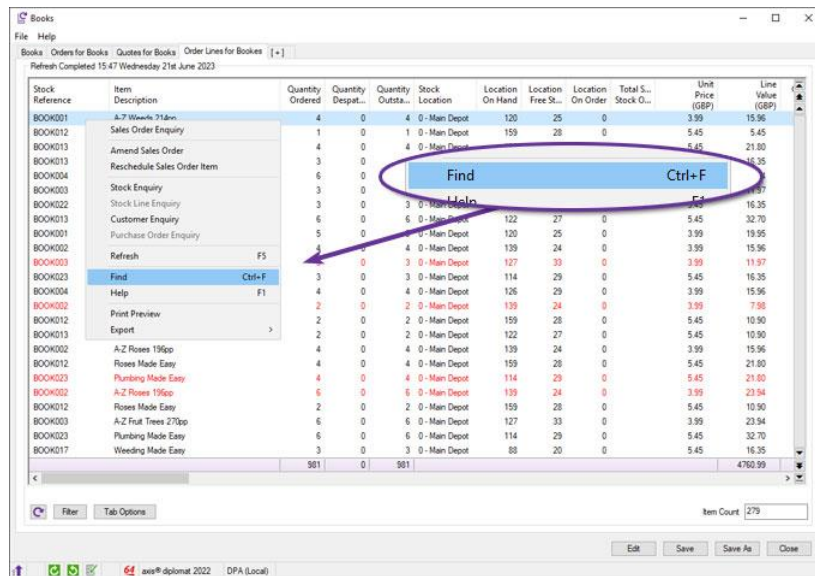
1.3. Find All in Scrolling Data Lists

Pre-Released to Software Assurance customers

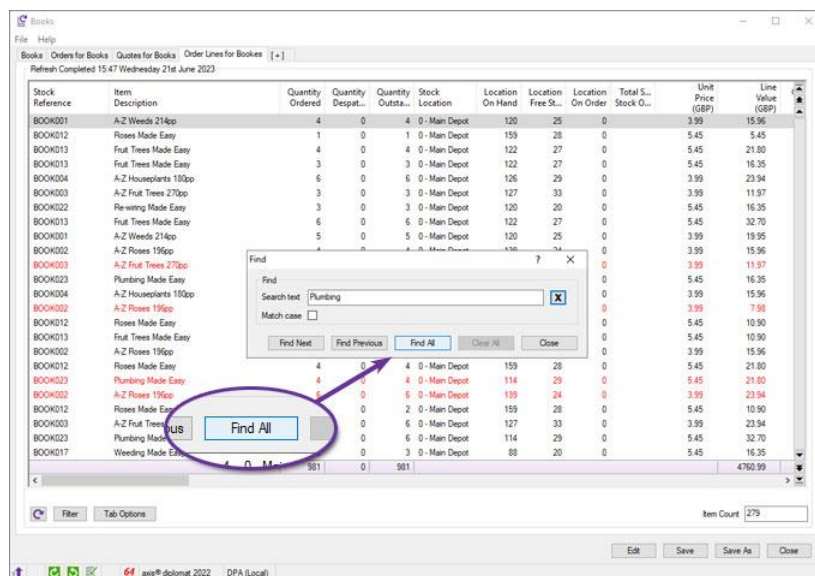


Two new options have been added to Scrolling Data Lists to allow lists to be filtered to specific keywords.

The first option is to right-click on any row in the list and select Find (or use the keyboard shortcut Ctrl F):



In addition to the Find Next and Find Previous options, a new button has been added for Find All:



Clicking the Find All button filters the list down to just those rows that contain the search term:

Books

File Help

Books Orders for Books Quotes for Books Order Lines for Books [+]

Refresh Completed 16:25 Wednesday 21st June 2023

Stock Reference	Item Description	Quantity Ordered	Quantity Despatched	Quantity Outstanding	Stock Location	Location On Hand	Location Free St...	Location On Order	Total S...	Unit Price (GBP)	Line Value (GBP)
BOOK023	Plumbing Made Easy	5	0	5	0 - Main Depot	114	29	0	5.45	32.70	
BOOK023	Plumbing Made Easy	5	0	5	0 - Main Depot	114	29	0	5.45	27.25	
BOOK023	Plumbing Made Easy	4	0	4	0 - Main Depot	114	29	0	5.45	21.80	
BOOK023	Plumbing Made Easy	3	0	3	0 - Main Depot	114	29	0	5.45	16.35	
BOOK023	Plumbing Made Easy	4	0	4	0 - Main Depot	114	29	0	5.45	21.80	
BOOK023	Plumbing Made Easy	6	0	6	0 - Main Depot	114	29	0	5.45	32.70	
BOOK023	Plumbing Made Easy	2	0	2	0 - Main Depot	114	29	0	5.45	10.90	
BOOK023	Plumbing Made Easy	6	0	6	0 - Main Depot	114	29	0	5.45	32.70	
BOOK023	Plumbing Made Easy	5	0	5	0 - Main Depot	114	29	0	5.45	27.25	
BOOK023	Plumbing Made Easy	6	0	6	0 - Main Depot	114	29	0	5.45	32.70	
BOOK023	Plumbing Made Easy	3	0	3	0 - Main Depot	114	29	0	5.45	16.35	
BOOK023	Plumbing Made Easy	4	0	4	0 - Main Depot	114	29	0	5.45	21.80	
BOOK023	Plumbing Made Easy	2	0	2	0 - Main Depot	114	29	0	5.45	10.90	
BOOK023	Plumbing Made Easy	1	0	1	0 - Main Depot	114	29	0	5.45	5.45	
BOOK023	Plumbing Made Easy	1	0	1	0 - Main Depot	114	29	0	5.45	5.45	
BOOK023	Plumbing Made Easy	2	0	2	0 - Main Depot	114	29	0	5.45	10.90	
BOOK023	Plumbing Made Easy	6	0	6	0 - Main Depot	114	29	0	5.45	32.70	
BOOK023	Plumbing Made Easy	2	0	2	0 - Main Depot	114	29	0	5.45	10.90	
BOOK023	Plumbing Made Easy	6	0	6	0 - Main Depot	114	29	0	5.45	32.70	
BOOK023	Plumbing Made Easy	3	0	3	0 - Main Depot	114	29	0	5.45	16.35	
BOOK023	Plumbing Made Easy	1	0	1	0 - Main Depot	114	29	0	5.45	5.45	
BOOK023	Plumbing Made Easy	1	0	1	0 - Main Depot	114	29	0	5.45	5.45	
BOOK023	Plumbing Made Easy	6	0	6	0 - Main Depot	114	29	0	5.45	32.70	

< 85 0 85 463.25 >

Filter Tab Options

Item Count 279

Edit Save Save As Close

www.dicomat 2022 DPA (Local)

This option will include any rows that have the search term anywhere, in any column.

To assist with filtering data from a single column containing a common word, use the following method:

Right-click on the column heading for the column that you want to search and select Set Filters:

Books

File Help

Books Orders for Books Quotes for Books Order Lines for Books [+]

Refresh Completed 16:26 Wednesday 21st June 2023

Stock Reference	Item Description	View	Quantity	Quantity Despatched	Quantity Outstanding	Stock Location	Location On Hand	Location Free Stock	Location On Order	Total Stock	Unit Price (GBP)	Line Value (GBP)
BOOK023	Plumbing		0	0	6	0 - Main Depot	114	29	0	5.45	32.70	
BOOK002	A-Z Roses	Status	0	0	5	0 - Main Depot	139	24	0	3.99	19.95	
BOOK002	A-Z Roses	Stock Reference	0	0	3	0 - Main Depot	139	24	0	3.99	11.97	
BOOK023	Plumbing	Alternative Reference	0	0	5	0 - Main Depot	114	29	0	5.45	27.25	
BOOK001	A-Z Weed	Buying Reference	0	0	6	0 - Main Depot	120	25	0	3.99	23.94	
BOOK022	Re-ewing	Stock Line	0	0	3	0 - Main Depot	120	20	0	5.45	16.35	
BOOK012	Roses Ma	Stock Description	0	0	5	0 - Main Depot	159	28	0	5.45	5.45	
BOOK013	Fruit Trees	Item Description	0	0	5	0 - Main Depot	122	27	0	5.45	27.25	
BOOK001	A-Z Weed	Case Quantity	0	0	2	0 - Main Depot	120	25	0	3.99	7.98	
BOOK004	A-Z House	Quantity Ordered	0	0	1	0 - Main Depot	126	29	0	3.99	3.99	
BOOK021	Decorating	Quantity Despatched	0	0	3	0 - Main Depot	128	27	0	5.45	16.35	
BOOK022	Re-ewing	Quantity Outstanding	0	0	3	0 - Main Depot	120	20	0	5.45	16.35	
BOOK004	A-Z House	Stock Location	0	0	6	0 - Main Depot	126	29	0	3.99	23.94	
BOOK021	Decorating	Location On Hand	0	0	5	0 - Main Depot	128	27	0	5.45	27.25	
BOOK022	Re-ewing	Location On Hand	0	0	4	0 - Main Depot	120	20	0	5.45	21.80	
BOOK001	A-Z Weed	Location Free Stock	0	0	6	0 - Main Depot	120	25	0	3.99	23.94	
BOOK003	A-Z Fruit T	Location On Order	0	0	1	0 - Main Depot	127	33	0	3.99	3.99	
BOOK012	Roses Ma	Total Supplier Stock On Hand	0	0	6	0 - Main Depot	159	28	0	5.45	27.25	
BOOK013	Fruit Trees	Unit Price (GBP)	0	0	5	0 - Main Depot	122	27	0	5.45	32.70	
BOOK022	Re-ewing	Line Value (GBP)	0	0	3	0 - Main Depot	120	20	0	5.45	10.90	
BOOK017	Weeding	Clear Filters	0	0	1	0 - Main Depot	129	24	0	5.45	5.45	
BOOK022	Re-ewing	More...	0	0	1	0 - Main Depot	120	20	0	5.45	5.45	
BOOK003	A-Z Fruit T	Reset Columns	0	0	2	0 - Main Depot	127	33	0	3.99	7.98	
BOOK021	Decorating	Sort Options	0	0	5	0 - Main Depot	128	27	0	5.45	27.25	
											4760.99	

Set Filters

Clear Filters

Filter

Tab Options

Freeze Columns

Item Count 279

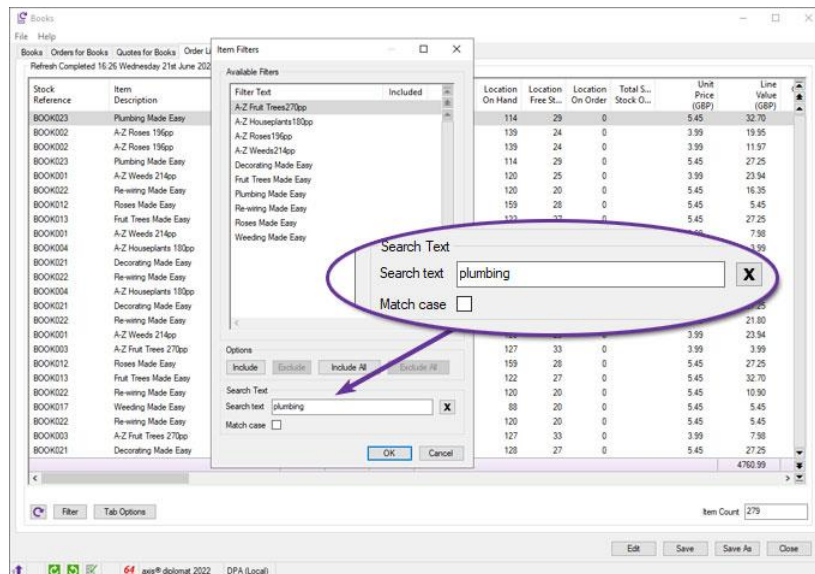
Edit

Save

Save As

Close

You can now enter the search word(s) in the field at the bottom of the dialog and select OK:



This will now filter the list down to only those rows that contain the search term in the specific column.

1.4. User Defined Date & Time Formats in Scrolling Data Lists

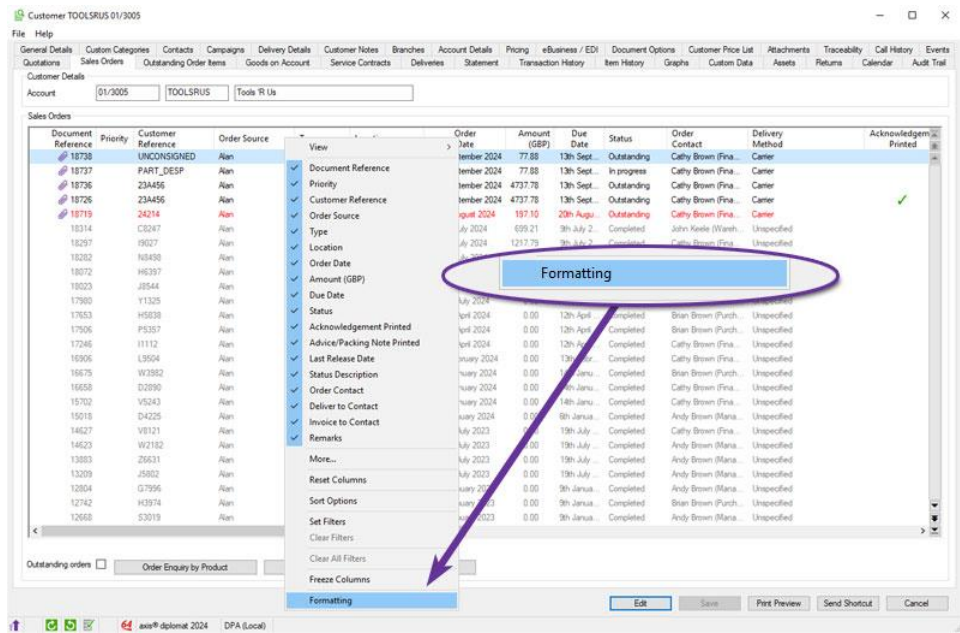
Available with axis diplomat 2024



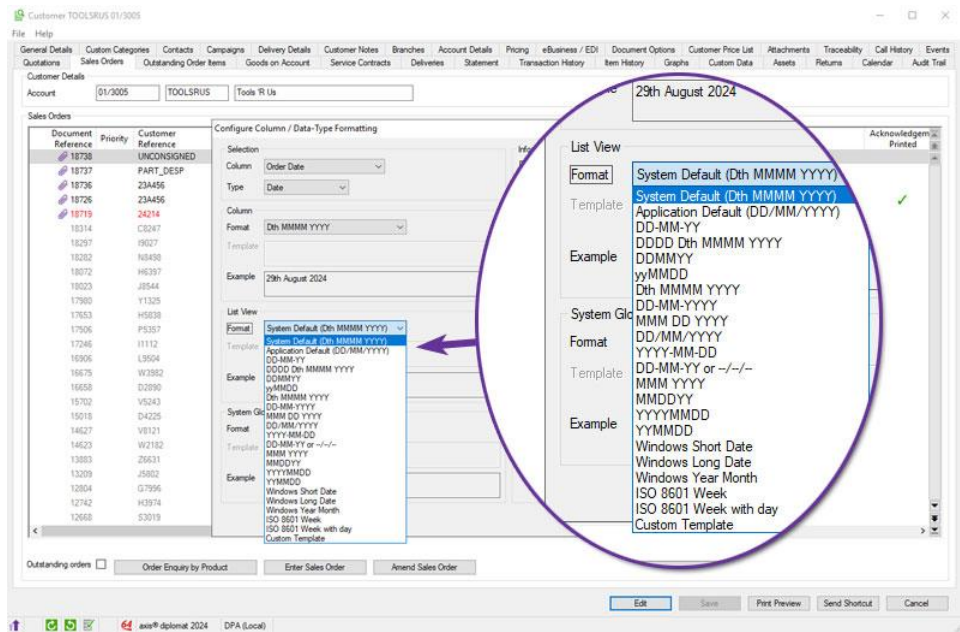
Users are now able to customise the formats of dates and time shown in scrolling data lists. This enhancement allows the user to configure the format of 'date', 'date and time' and 'time' columns.

An individual user can choose their own date and/or time format for a specific column in a specific scrolling data list, for all columns of that type in a specific scrolling data list or for all scrolling data lists.

The configuration is done by simply right-clicking on the column heading within the scrolling data list and selecting 'Formatting':



The format can then be chosen separately for this column, for this list and for all lists:



Customer TOOLSRSUS 01/3005

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 Events

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

Customer Details

Account 01/3005 TOOLSRSUS Tools R Us

Sales Orders

Document Reference	Priority	Customer Reference	Order Source	Type	Location	Order Date	Amount (GBP)	Due Date	Status	Order Contact	Delivery Method	Acknowledgement Printed
18738		UNCONSIGNED	Alan	Sales Order	Main Depot	13th September 2024	77.88	13th Sept.	Outstanding	Cathy Brown (Fina...	Carier	
18737		PART_DISP	Alan	Sales Order	Main Depot	13th September 2024	77.88	13th Sept.	In progress	Cathy Brown (Fina...	Carier	
18736		23A456	Alan	Sales Order	Main Depot	13th September 2024	4737.78	13th Sept.	Outstanding	Cathy Brown (Fina...	Carier	
18726		23A456	Alan	Sales Order	Main Depot	13th September 2024	4737.78	13th Sept.	Outstanding	Cathy Brown (Fina...	Carier	
18719		24214	Alan	Sales Order	Main Depot	20th August 2024	197.10	20th Aug.	Outstanding	Cathy Brown (Fina...	Carier	
18114		C2027	Alan	Sales Order	Main Depot	8th July 2024	659.21	8th July 2.	Completed	John Keele (Wareh...	Unspecified	
18297		H6217	Alan	Sales Order	Main Depot	8th July 2024	1217.79	8th July 2.	Completed	Cathy Brown (Fina...	Unspecified	
18202		H0488	Alan	Sales Order	Main Depot	8th July 2024	3776.55	8th July 2.	Completed	Andy Brown (Mana...	Unspecified	
18072		H6397	Alan	Sales Order	Main Depot	8th July 2024	1741.47	8th July 2.	Completed	Andy Brown (Mana...	Unspecified	
18023		H8544	Alan	Sales Order	Main Depot	23rd July 2024	0.00	28th July	Completed	Brian Brown (Purch...	Unspecified	
17900		Y1325	Alan	Sales Order	Main Depot	23rd July 2024	0.00	28th July	Completed	John Keele (Wareh...	Unspecified	
17653		H5038	Alan	Sales Order	Main Depot	11th April 2024	0.00	12th April	Completed	Brian Brown (Purch...	Unspecified	
17506		PS357	Alan	Sales Order	Main Depot	11th April 2024	0.00	12th April	Completed	Brian Brown (Purch...	Unspecified	
17246		11112	Alan	Sales Order	Main Depot	11th April 2024	0.00	12th April	Completed	Cathy Brown (Fina...	Unspecified	
16996		L3924	Alan	Sales Order	Main Depot	12th February 2024	0.00	13th Feb.	Completed	Cathy Brown (Fina...	Unspecified	
16878		W3362	Alan	Sales Order	Main Depot	13th January 2024	0.00	14th Jan.	Completed	Brian Brown (Purch...	Unspecified	
16658		D2090	Alan	Sales Order	Main Depot	13th January 2024	0.00	14th Jan.	Completed	Cathy Brown (Fina...	Unspecified	
16702		V5243	Alan	Sales Order	Main Depot	13th January 2024	0.00	14th Jan.	Completed	Cathy Brown (Fina...	Unspecified	
15018		D4225	Alan	Sales Order	Main Depot	9th January 2024	0.00	8th Janus.	Completed	Andy Brown (Mana...	Unspecified	
14627		V0121	Alan	Sales Order	Main Depot	18th July 2023	0.00	19th July	Completed	Cathy Brown (Fina...	Unspecified	
14623		W2182	Alan	Sales Order	Main Depot	18th July 2023	0.00	19th July	Completed	Andy Brown (Mana...	Unspecified	
13883		26631	Alan	Sales Order	Main Depot	18th July 2023	0.00	19th July	Completed	Andy Brown (Mana...	Unspecified	
13209		J5802	Alan	Sales Order	Main Depot	18th July 2023	0.00	19th July	Completed	Andy Brown (Mana...	Unspecified	
12804		G7596	Alan	Sales Order	Main Depot	8th January 2023	0.00	8th Janus.	Completed	Andy Brown (Mana...	Unspecified	
12742		H3974	Alan	Sales Order	Main Depot	8th January 2023	0.00	8th Janus.	Completed	Brian Brown (Purch...	Unspecified	
12658		S3019	Alan	Sales Order	Main Depot	8th January 2023	0.00	8th Janus.	Completed	Andy Brown (Mana...	Unspecified	

Outstanding orders: ☐ Order Enquiry by Product Enter Sales Order Amend Sales Order

Edit Save Print Preview Send Shortcut Cancel

axis diplomat 2024 DPA (Local)

When sorting by a reformatted date or time column, the sort will still be in chronological or reverse chronological order, irrespective of the format chosen.

Customer TOOLSRSUS 01/3005

File Help

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

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 Events

Customer Details

Account 01/3005 TOOLSRSUS Tools R Us

Calls: 5 retrieved

Call Number	Account Number	Short Name	Created	Status	Call Type	Priority	Private	Subject	Level	Responsibility	Call Contact	Last Updated	Sales Orders / Quotations	Sup
6	3005	TOOLS	Wed 14-09-24 13:44	Call back	Sales			Leaf Bower Bulk Purchase	1	Delyth Williams	Brian Brown	Thu 22-08-24 15:25	18023	
5	3005	TOOLS	Mon 05-08-24 14:37	Call back	Accounts			Credit Note Request	1	Andy Brown	John Keele	Mon 05-08-24 14:37		
4	3005	TOOLS	Thu 26-11-22 10:23	Call back	Sales			Joint Promotion on EGPL Product Range	1	Andy Brown	Cathy Brown	Tue 10-09-24 17:19		
3	3005	TOOLS	Sat 09-05-21 10:35	Call back	Sales			Special Christmas Promotion	1	Andy Brown	Brian Brown	Fri 01-04-22 13:50	3378	01/1
2	3005	TOOLS	Sun 17-03-19 10:46	Call back	Sales			Equity Churnaw	1	Andy Brown	Brian Brown	Fri 01-04-22 13:49		

One particular situation where this is useful is when changing the format to include the day of the week. Knowing, for example, that a particular date is a Friday can be particularly helpful in understanding why something that should have happened on the following day didn't happen for three days because it spanned a weekend.

1.5. Freeze Columns in Scrolling Data Lists

Pre-Released to Software Assurance customers



Scrolling data lists, used throughout axis diplomat 2024 in functions such as monitors and enquiries, now offer the ability to freeze any number of columns at the left-hand side of the data list, allowing the remaining columns to be scrolled left and right in the usual manner.

This is particularly useful with scrolling data lists containing an extensive amount of columns since it allows you to freeze key data columns and keep those on-screen and in context while you scroll right through the various columns.

To use, simply right-click on the heading of the rightmost column that you want to freeze:

Sales Order Monitor

File Help

Delivery Addresses Sales Orders Sales Order Lines Stock Items Orders That Can Ship [+]

Refresh Completed 14:33 Wednesday 22nd March 2023

Customer Name	Sales Order	Order Value (Excl. Delivery) (GBP)	Outstanding	Outstanding Value (GBP)	T.L.	Available Stock Value (GBP)	Customer Credit Limit Exceeded	Order On Hold	Insufficient Stock	Customer Terms Exceeded	Customer Account
A. Reed Logistics	18499	221.22	2	0.00	221.22	178.71			Insufficient stock for total release	Maximum Credit Peri...	3897
Africa & Africa Engineering In	18439	1008.69	10	0.00	1008.69	787.49			Insufficient stock for total release	Maximum Credit Peri...	3562
Africa & Africa Engineering In	18563	957.04	9	0.00	957.04	191.35			Insufficient stock for total release	Maximum Credit Peri...	3562
Africa & Sons International Li	18689	1853.56	18	0.00	1853.56	1726.03			Insufficient stock for total release	Maximum Credit Peri...	3871
AGI Worldwide Inc.	18418	1001.09	10	9.00	1010.09	1010.09			Insufficient stock for total release	Credit Terms Exceed...	3039
Apollo & Sons Logistics Partne	18381	155.36	1	9.00	164.36	164.36			Insufficient stock for total release	Credit Terms Exceed...	3512
Apollo & Sons Technology.com	18426	2545.24	25	0.00	2545.24	1133.04			Insufficient stock for total release	Credit Terms Exceed...	3232
Apollo & Sons Technology.com	18704	1429.36	14	0.00	1429.36	1234.30			Insufficient stock for total release	Credit Terms Exceed...	3232
ARP Europe	18542	1044.06	10	0.00	1044.06	380.45			Insufficient stock for total release	Maximum Credit Peri...	3297
Asia & Asia Property Inc.	18595	1595.51	15	0.00	1595.51	114.89			Insufficient stock for total release	Maximum Credit Peri...	3779
Black & Black Manufacturing ...	18636	2250.79	22	0.00	2250.79	1059.50			Insufficient stock for total release	Maximum Credit Peri...	3715
Black Tools Limited	18444	1746.91	17	0.00	1746.91	1636.31			Insufficient stock for total release	Maximum Credit Peri...	3766
Black Tools Limited	18508	552.31	5	0.00	552.31	424.78			Insufficient stock for total release	Maximum Credit Peri...	3766
Brook & Sons Imports.com	18473	351.53	3	0.00	351.53	249.44			Insufficient stock for total release	Maximum Credit Peri...	3033
Brook White Partners	18476	1178.92	11	0.00	1178.92	662.47			Insufficient stock for total release	Maximum Credit Peri...	3818
C. Mandalay Services Partners	18659	1444.12	14	0.00	1444.12	967.81			Insufficient stock for total release	Maximum Credit Peri...	3682
Cayman & Sons Imports Patn...	18532	1111.59	11	0.00	1111.59	702.23			Insufficient stock for total release	Maximum Credit Peri...	3733
Cheddar & Cheddar Distribution	18496	2779.29	27	0.00	2779.29	1023.08			Insufficient stock for total release	Maximum Credit Peri...	3495
Comwell Europe	18488	2056.50	20	0.00	2056.50	1169.19			Insufficient stock for total release	Maximum Credit Peri...	3455
Comwell Garden	18661	440.69	4	0.00	440.69	330.71			Insufficient stock for total release	Maximum Credit Peri...	3136
Comwell Wholesale Co.	18635	958.09	9	0.00	958.09	651.82			Insufficient stock for total release	Maximum Credit Peri...	3639
Dale Retail Partners	18427	1006.73	10	0.00	1006.73	496.28			Insufficient stock for total release	Maximum Credit Peri...	3492
Dale Retail Partners	18541	787.42	7	0.00	787.42	481.15			Insufficient stock for total release	Maximum Credit Peri...	3492
Discount 4 You	18646	2017.94	20	0.00	2017.94	1258.79			Insufficient stock for total release	Credit Terms Exceed...	3221
Discount Equipment Limited	18523	949.20	9	0.00	949.20	455.66			Insufficient stock for total release	Credit Terms Exceed...	3404
Discount Imports Limited	18602	868.09	8	0.00	868.09	536.29			Insufficient stock for total release	Maximum Credit Peri...	3699
Dixon & Sons Marketing.com	18408	917.94	9	0.00	917.94	254.34			Insufficient stock for total release	Maximum Credit Peri...	3334
Dixon & Sons Marketing Inc.	18454	1760.05	17	0.00	1760.05	959.74			Insufficient stock for total release	Maximum Credit Peri...	3752
Dixon Glen Co.	18683	1763.24	17	0.00	1763.24	1023.08			Insufficient stock for total release	Maximum Credit Peri...	3458
Dixon Mann Co.	18691	1339.23	13	0.00	1339.23	1169.19			Insufficient stock for total release	Maximum Credit Peri...	3890
DLK Worldwide Partners	18684	1180.47	11	0.00	1180.47	746.67			Insufficient stock for total release	Maximum Credit Peri...	3725
DWP Retail Limited	18425	721.00	7	0.00	721.00	730.00			Insufficient stock for total release	Maximum Credit Peri...	3812
EAH Holdings Limited	18623	2144.88	21	0.00	2144.88	1258.79			Insufficient stock for total release	Maximum Credit Peri...	3841
Eve Engineering Limited	18507	953.47	9	0.00	953.47	545.11			Insufficient stock for total release	Maximum Credit Peri...	3678
Eve Technology Inc.	18429	478.56	4	0.00	478.56	172.29			Insufficient stock for total release	Maximum Credit Peri...	3462
G. Dickens Logistics Limited	18529	1983.44	19	0.00	1983.44	749.59			Insufficient stock for total release	Maximum Credit Peri...	3665
G. Thames Research Inc.	18486	1875.78	18	0.00	1875.78	582.43			Insufficient stock for total release	Maximum Credit Peri...	3777
		219602.73	216235.17	62.10	62.10	216297.27	132662.54				

Freeze Columns

Filter Tab Options

All columns up to that point are then frozen and the remaining columns can be scrolled:

Sales Order Monitor

File Help

Delivery Addresses Sales Orders Sales Order Lines Stock Items Orders That Can Ship [+]

Refresh Completed 14:33 Wednesday 22nd March 2023

Customer Name	Sales Order	Order Value (Excluding Delivery) (GBP)	Customer Credit Limit Exceeded	Customer Credit Limit	Customer Available Credit	Order Date	Document Contact	Deliver To Address	Deliver To Address	Deliver To Address	Deliver To Address
A. Reed Logistics	18499	221.22	Maximum Credit Peri...	1000.00	591.17	04/03/2023	Mr Steve	A. Reed Logistics Unit 15n Bridge Estate Pk...	Riverside	Countyshire	United Kin...
Africa & Africa Engineering In	18439	1008.69	Maximum Credit Peri...	1000.00	995.81	04/03/2023	Max Mary	Africa & Africa Engineering In 4 Nelson Lane	Coppe	Countyshire	United Kin...
Africa & Africa Engineering In	18563	957.04	Maximum Credit Peri...	1000.00	995.81	04/03/2023	Max Mary	Africa & Africa Engineering In 4 Nelson Lane	Coppe	Countyshire	United Kin...
Africa & Sons International Li	18689	1853.56	Maximum Credit Peri...	1000.00	1000.00	04/03/2023	Max Mary	Africa & Sons International Li Unit 30c Victo...	Stockland	Countyshire	United Kin...
AGI Worldwide Inc.	18418	1001.09	Credit Terms Exceed...	5000.00	4566.93	04/03/2023	Charlotte	AGI Worldwide Inc. Green House 274 West...	Stockland	Countyshire	United Kin...
Apollo & Sons Logistics Partne	18381	155.36	Maximum Credit Peri...	5000.00	5000.00	05/02/2023	Mr Alan H.	Apollo & Sons Logistics Partne Feed House T...	Riverside	Countyshire	United Kin...
Apollo & Sons Technology.com	18426	2545.24	Credit Terms Exceed...	1000.00	8745.95	04/03/2023	Rachel W.	Apollo & Sons Technology.com Unit 17n Riv...	Litteton	Countyshire	United Kin...
Apollo & Sons Technology.com	18704	1429.36	Credit Terms Exceed...	1000.00	8745.95	04/03/2023	Rachel W.	Apollo & Sons Technology.com Unit 17n Riv...	Litteton	Countyshire	United Kin...
ARP Europe	18542	1044.06	Maximum Credit Peri...	1000.00	3314.12	04/03/2023	Tom Platt L.	ARP Europe Jersey House 758 High Bouslev...	Northton	Countyshire	United Kin...
Asia & Asia Property Inc.	18595	1595.51	Maximum Credit Peri...	5000.00	3572.87	04/03/2023	Mr Ben Ga.	Asia & Asia Property Inc. Unit 58 Churchl Est...	Eastvale	Countyshire	United Kin...
Black & Black Manufacturing ...	18636	2250.79	Maximum Credit Peri...	5000.00	4981.77	04/03/2023	Mr Sheph	Black & Black Manufacturing Co Ward House T...	Riverside	Countyshire	United Kin...
Black Tools Limited	18444	1746.91	Maximum Credit Peri...	1000.00	685.54	04/03/2023	Mr Matt W.	Black Tools Limited Unit 52 Riverside Park ...	Woodside	Countyshire	United Kin...
Black Tools Limited	18508	552.31	Credit Terms Exceed...	1000.00	685.54	04/03/2023	Mr Matt W.	Black Tools Limited Unit 52 Riverside Park ...	Woodside	Countyshire	United Kin...
Brook & Sons Imports.com	18473	351.53	Maximum Credit Peri...	1000.00	8797.52	04/03/2023	Charlotte	Brook & Sons Imports.com Unit 42 Victoria C...	Coppe	Countyshire	United Kin...
Brook White Partners	18476	1178.92	Maximum Credit Peri...	1000.00	991.97	04/03/2023	Mrs Tracy	Brook White Partners Unit 7 Victoria Indus...	Stockland	Countyshire	United Kin...
C. Mandalay Services Partners	18659	1444.12	Maximum Credit Peri...	1000.00	9180.09	04/03/2023	Rev Sino	C. Mandalay Services Partners Kent House T...	Litteton	Countyshire	United Kin...
Cayman & Sons Imports Patn...	18532	1111.59	Maximum Credit Peri...	1000.00	784.40	04/03/2023	Mr Andre	Cayman & Sons Imports Partners Peacock Ho...	Watside	Countyshire	United Kin...
Cheddar & Cheddar Distribution	18496	2779.29	Maximum Credit Peri...	1000.00	0.00	04/03/2023	Mr Chris D.	Cheddar & Cheddar Distribution Jersey House...	Upton	Countyshire	United Kin...
Comwell Europe	18488	2056.50	Maximum Credit Peri...	1000.00	4980.51	04/03/2023	Max Mary	Comwell Europe 306 North Road Eastvale Co...	Eastvale	Countyshire	United Kin...
Comwell Garden	18661	440.69	Maximum Credit Peri...	1000.00	9029.41	04/03/2023	Kath McD.	Comwell Garden Unit 82n East Park North L...	Riverton	Countyshire	United Kin...
Comwell Wholesale Co.	18635	958.09	Maximum Credit Peri...	1000.00	838.84	04/03/2023	Mr Jessic	Comwell Wholesale Co. 315 St Johns Street	Riverside	Countyshire	United Kin...
Dale Retail Partners	18427	1006.73	Maximum Credit Peri...	1000.00	105.93	04/03/2023	Mr Sid Da	Dale Retail Partners Smith House 846 Pince...	Stoke Phory	Countyshire	United Kin...
Dale Retail Partners	18541	787.42	Maximum Credit Peri...	1000.00	9894.07	04/03/2023	Mr Sid Da	Dale Retail Partners Smith House 846 Pince...	Stoke Phory	Countyshire	United Kin...
Discount 4 You	18646	2017.94	Credit Terms Exceed...	1000.00	669.70	04/03/2023	David W.D	Discount 4 You Kent House 270 Smiths Ave...	Coppe	Countyshire	United Kin...
Discount Equipment Limited	18523	949.20	Maximum Credit Peri...	1000.00	630.71	04/03/2023	David W.D	Discount Equipment Limited 270 Smiths Ave...	Watside	Countyshire	United Kin...
Discount Imports Limited	18602	868.09	Maximum Credit Peri...	1000.00	3777	04/03/2023	David W.D	Discount Imports Limited 270 Smiths Ave...	Watside	Countyshire	United Kin...
Dixon & Sons Marketing.com	18408	917.94	Maximum Credit Peri...	1000.00	3334	04/03/2023	David W.D	Dixon & Sons Marketing.com 270 Smiths Ave...	Watside	Countyshire	United Kin...
Dixon & Sons Marketing Inc.	18454	1760.05	Maximum Credit Peri...	1000.00	3752	04/03/2023	David W.D	Dixon & Sons Marketing Inc. 270 Smiths Ave...	Watside	Countyshire	United Kin...
Dixon Glen Co.	18683	1763.24	Maximum Credit Peri...	1000.00	3458	04/03/2023	David W.D	Dixon Glen Co. 270 Smiths Ave...	Watside	Countyshire	United Kin...
Dixon Mann Co.	18691	1339.23	Maximum Credit Peri...	1000.00	3890	04/03/2023	David W.D	Dixon Mann Co. 270 Smiths Ave...	Watside	Countyshire	United Kin...
DLK Worldwide Partners	18684	1180.47	Maximum Credit Peri...	1000.00	3725	04/03/2023	David W.D	DLK Worldwide Partners 270 Smiths Ave...	Watside	Countyshire	United Kin...
DWP Retail Limited	18425	721.00	Maximum Credit Peri...	1000.00	3812	04/03/2023	David W.D	DWP Retail Limited 270 Smiths Ave...	Watside	Countyshire	United Kin...
EAH Holdings Limited	18623	2144.88	Maximum Credit Peri...	1000.00	3841	04/03/2023	David W.D	EAH Holdings Limited Unit 54 Lower Commer...	Riverside	Countyshire	United Kin...
Eve Engineering Limited	18507	953.47	Maximum Credit Peri...	1000.00	3678	04/03/2023	David W.D	Eve Engineering Limited 520 High Lane North...	Northton	Countyshire	United Kin...
Eve Technology Inc.	18429	478.56	Maximum Credit Peri...	1000.00	3462	04/03/2023	David W.D	Eve Technology Inc. 175 Ocean Boulevard O...	Oakside	Countyshire	United Kin...
G. Dickens Logistics Limited	18529	1983.44	Maximum Credit Peri...	1000.00	3665	04/03/2023	David W.D	G. Dickens Logistics Limited Unit 40 Smith...	Southside	Countyshire	United Kin...
G. Thames Research Inc.	18486	1875.78	Maximum Credit Peri...	1000.00	3777	04/03/2023	David W.D	G. Thames Research Inc. 673 River Avenue	Stockland	Countyshire	United Kin...
		219602.73									

Filter Tab Options

Remember that if the column or columns that you want frozen are not already on the left-hand side of the scrolling data list, you can easily drag them there first and then freeze them.

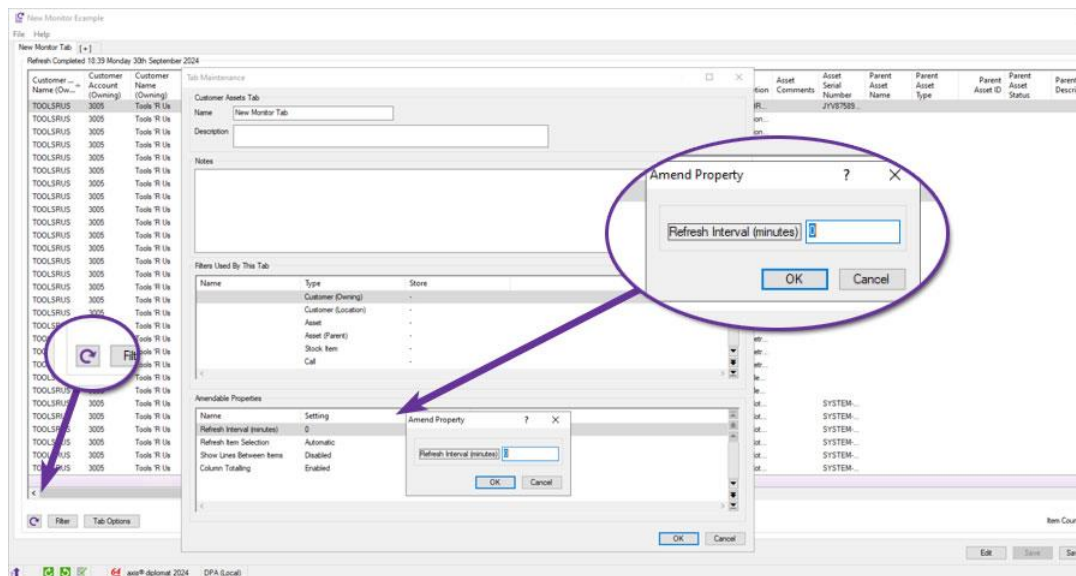
1.6. Default Refresh on Monitors

Available with axis diplomat 2024



Not all monitor tabs require frequent automatic refreshes. For example, a fixed-date tab (such as an Absolute Date filtered list for the first quarter of the previous year) can be refreshed manually when needed, rather than, for example, every five minutes, to help reduce the load on a multi-user system.

To optimise performance, the default refresh interval for new monitor tabs is now set to 0 minutes, encouraging users to be mindful when setting the refresh rate.



If the automatic refresh rate needs adjusting, this can be done via the Tab Options button: In the Amendable Properties section, simply modify the 'Refresh Interval (Minutes)' setting as required.

If you wish to manually refresh a monitor, you can either click the refresh button in the bottom left corner or hit F5 (the same function key used to refresh a web page in common web browsers).

1.7. UK Postcode Format Validation

Pre-Released to Software Assurance customers



There are many 3rd party services such as Delivery Service Providers (DSPs) that axis diplomat communicate with which require correctly formatted address information.

To help prevent situations where, for example, couriers are unable to consign a delivery due to an incorrect postcode, UK postcode format validation is now included as standard.

Postcode Format Validation is now provided within following functionality:

- Customer Account Maintenance
- Quotation, Sales Order, Service Contract, Contract Request and Workshop Job Maintenance
- Supplier Account Maintenance
- Purchase Order Maintenance
- Delivery Record Maintenance
- Import eBusiness Orders

Please note that this validates the address format only, it does not verify that an actual postcode exists. An additional axis diplomat Postcode Address Retrieval module is available which uses a 3rd party service to search and retrieve addresses from postcodes.

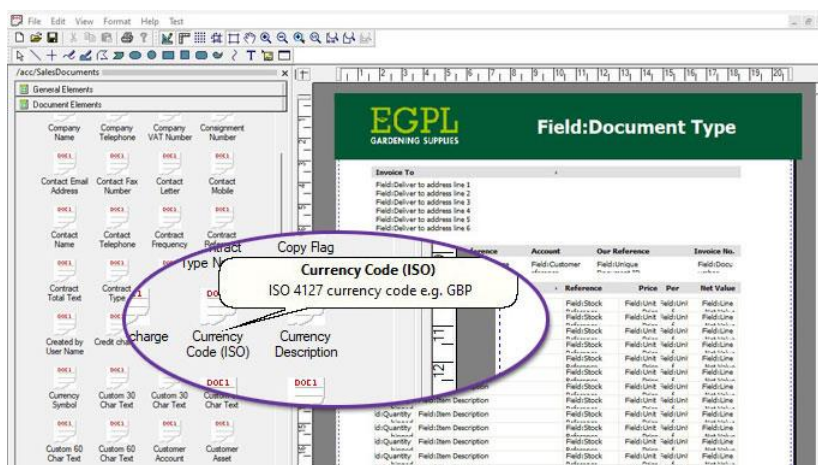
1.8. Document Designer Element Currency Code (ISO)

Pre-Released to Software Assurance customers



Alongside the existing currency symbol and description document elements, Document Designer now adds a new element, Currency Code (ISO), which equates to, for example, GBP, USD or EUR. This offers several benefits:

- The ISO currency code provides a globally recognised and standardised way to represent currencies. This is especially important for businesses that operate internationally or deal with clients and suppliers in different countries.
- Using ISO codes like GBP, USD, or EUR ensures clarity and avoids confusion, especially when dealing with multiple currencies that have the same symbol (e.g., "\$" for both USD and AUD).
- Many financial systems and software platforms use ISO currency codes for integration and automation. By using ISO codes in your documents, you can improve data exchange with other systems, reducing the risk of errors.

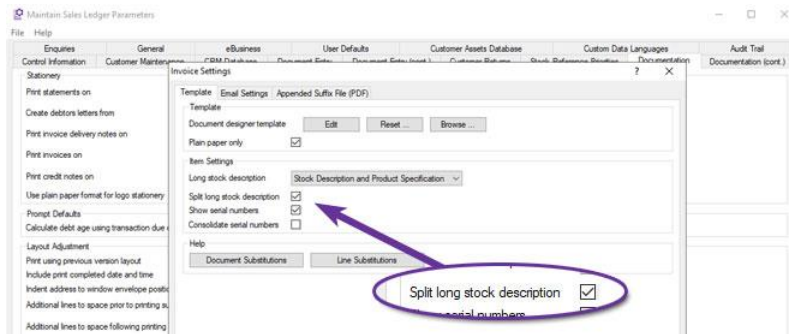


1.9. Retaining Line Breaks in Documents

Pre-Released to Software Assurance customers



A new document parameter allows Document Designer to preserve a stock item's original line breaks when including long descriptions in document lines. Previously, the two standard lines and/or up to six lines specification, would be merged into one long line, with breaks occurring wherever required to fit the column width. This parameter will force the lines to match the axis diplomat stock ledger.



The following example illustrates the difference that this parameter makes:

Stock EGLSTRM1

Item description: EGPL Electric Trimmer 30cm Cut, 340w motor

Overall Stock Levels: On hand 174, Inward 0, Allocated 715

Specification: Ideal for edging and tidying small areas of ground, such as around the base of trees set in your lawn.

Invoice Comparison:

Quantity	Description	Reference	Price	Per	Net Value
1	EGPL Electric Trimmer 30cm Cut, 340w motor Ideal for edging and tidying small areas of ground, such as around the base of trees set in your lawn.	EGLSTRM1	28.96	EACH	28.96

The invoice on the left is produced using the conventional long stock description whilst the one on the right is produced with the "Split long stock description" parameter set.

1.10. Maintain Background Printing Defaults

Pre-Released to Software Assurance customers



A new supervisor function, Maintain Background Printing Defaults, is now available to define which printers are used for printing from axis diplomat scheduled background tasks. For example, if documents such as Picking Notes are printed automatically at scheduled intervals rather than manually by a user.

The function must be run on the axis diplomat server, ensuring that only printers accessible to the server are offered for selection. These defaults will be applied for all users but it is only necessary to set defaults for those labels and documents that will be printed from background processes.

1.11. Update to Embedded Web Viewer

Available with axis diplomat 2024



There are a number of situations where axis diplomat uses embedded web browser technology to view web pages or HTML content - for example, when viewing or editing stock notes.

The embedded control has been updated to use Microsoft's viewer based on their Edge web browser.

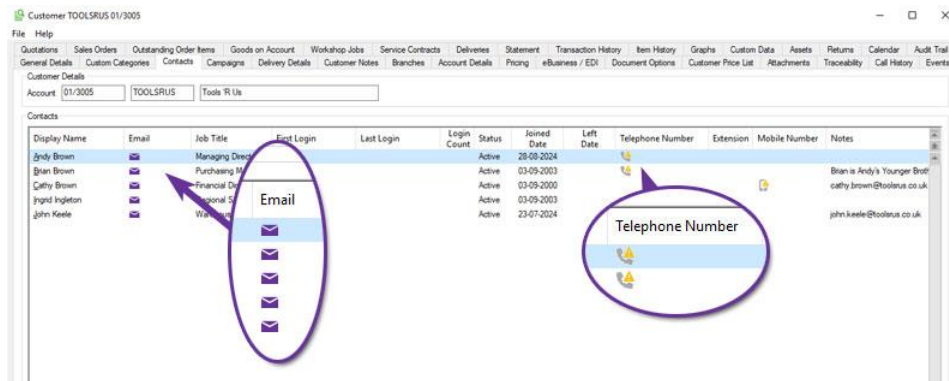
This update provides a smoother user experience with enhanced security whilst ensuring that the latest web content continues to be handled correctly when viewed within axis diplomat functions.

1.12. Hiding Sensitive Contact Information

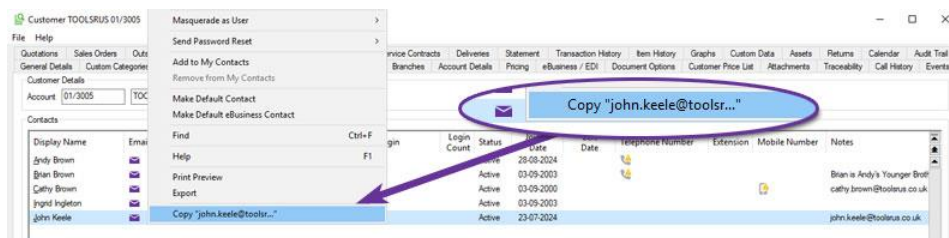
Available with axis diplomat 2024



Customer and Supplier contact list views have been enhanced as part of a broader initiative to protect Personal Identifiable Information (PII). Telephone and mobile numbers, along with email addresses, are replaced by icons in order to help prevent personal information from being captured by malware or by taking of unauthorised screen grabs/images.

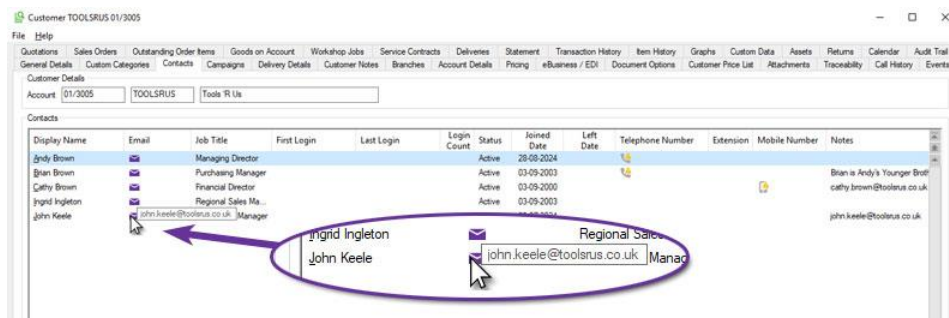


Context menu (right-click) options to email or call (for those with the axis diplomat Telephony Interface) a contact remain unchanged and details can be copied to the clipboard to, for example, paste into an email program:



Users with permission to export data from axis diplomat scrolling data lists are still able to do so and these exports will continue to include contact phone numbers and email addresses.

Hovering over the email address or telephone icons, also reveals the information in a tooltip:

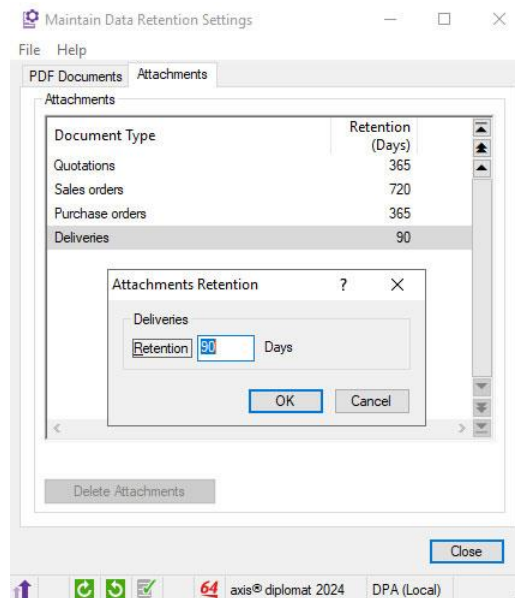


1.13. Remove Aged Document Attachments

Available with axis diplomat 2024



The Supervisor Function 'Maintain Data Retention Settings' has been extended to include a new tab for 'Attachments' which allows you to specify the retention period (in days) for attachments on various types of document held in the system, including Quotations, Sales Orders, Purchase Orders, and, for systems with the Despatch and Delivery Management module, Deliveries.



You can specify a different retention period for each type of document, ranging from 30 to 65,000 days.

Attachments that fall beyond the retention period can be removed automatically as part of a scheduled cleanup, configured using the function 'Scheduled Processing Settings'. Alternatively, they can be removed manually using the 'Delete Attachments' button within the Maintain Data Retention Settings function.

Ensuring that your system does not retain attachments longer than is necessary not only improves system efficiency (with smaller, quicker backups, for example) but can help maintain compliance with data protection legislation (e.g. the UK Data Protection Act and the EU GDPR) by not holding personal data when it is no longer required.

1.14. Uninstall axis diplomat includes SQL Server Database

Available with axis diplomat 2024



When uninstalling axis diplomat (typically following migration to a new server), the uninstall process now not only includes the axis diplomat software and core data but now also removes the associated Microsoft SQL Server database.

This helps in securing data by eliminating an opportunity for human error in leaving a database on a redundant server.

1.15. Logs Monitor

Available with axis diplomat 2024

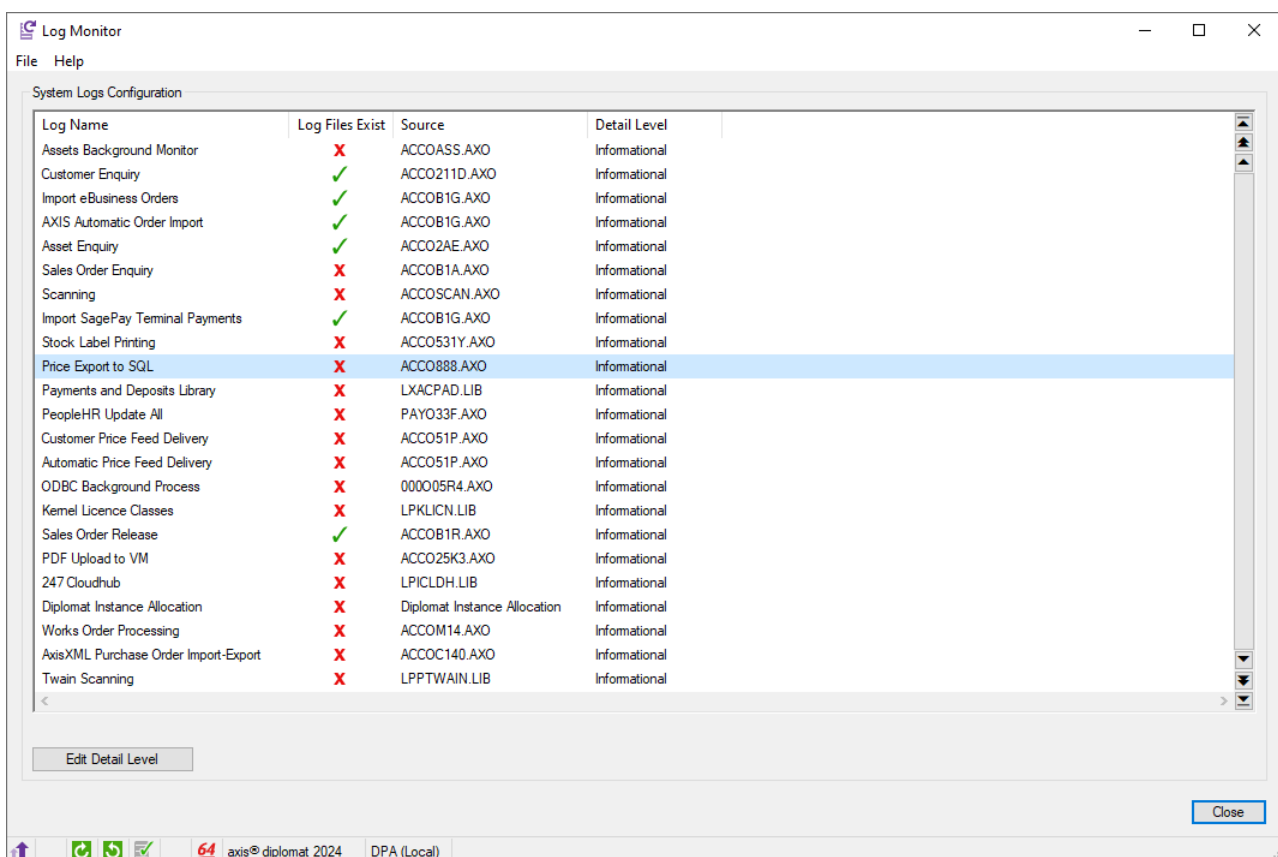


In any business-critical system, the ability to quickly diagnose processing issues is essential. The Log Monitor has been added to the Kernel Supervisor Functions to provide quick and convenient access to view the available system logs.

Users are presented with a list of available logs, which may vary depending on the system's configuration. An icon will indicate whether a log file exists for each entry. Additional details such as the Program Name and Detail Level of each log are also provided.

Via right-click (Context Menu) options, users can open the folder location of the log file or modify the detail level of a specific log for more in-depth diagnostics.

It's important to note that diagnostic logging does carry a performance overhead, so it should be used cautiously. For any adjustments to logging levels, it is recommended to consult the axis diplomat Customer Services team to ensure proper configuration without negatively impacting system performance.



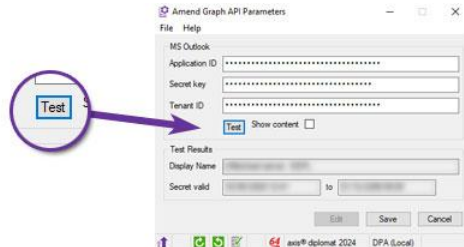
1.16. Verification of Microsoft Graph API Credentials

Pre-Released to Software Assurance customers



Microsoft Graph is the preferred technology for sending emails, both from axis diplomat and axis vMerchant. It is an authenticated mechanism for applications to talk directly to your Microsoft 365 account to securely send emails. One of the benefits of using the Microsoft Graph API to send emails is that, because of the strong authentication, delivery success levels are higher because emails are less likely to be treated as spam by the recipient system.

The function for configuring the Microsoft Graph API Parameters now includes a 'Test' button which will attempt to communicate with the Microsoft 365 account using the supplied credentials. If this is successful, the Display Name and Secret valid from and to dates are filled in, confirming that the credentials are valid. Note that no test email is sent - the test simply confirms that the Application ID, Secret key and Tenant ID are valid.



1.17. Digital Signing of Software Updates

Available with axis diplomat 2024



Each individual function within the axis diplomat software is now digitally signed to ensure its authenticity. This not only helps prevent malware going unnoticed should it try to attach itself to your application but also ensures that security software does not object to software updates, particularly the installation of individual patches.

1.18. Telephony Monitor

Pre-Released to Software Assurance customers with the Telephony Interface module



Available as part of the additional axis diplomat Telephony Interface module, the Telephony Monitor is designed to provide managers with a view of all phone calls and recordings in one place, supplementing similar functionality provided in the context of an individual customer/organisation within the Customer or Supplier Enquiry 'Events' tab. Call details include what number was called by who, when (date/time), and the call duration.

Accessible as a menu entry or as a tab type to be added to a new or existing monitor, this monitor includes a tab option whereby phone numbers are compared with those held in your axis diplomat customer and supplier accounts and this can be used to show appropriate organisation and contact details rather than just a sea of numbers!

Context menu options also provide links to the relevant Customer or Supplier account.

On axis diplomat systems which also have the Voice Recording Interface module, the monitor also indicates whether a recording is present for a call and (dependent on the user's security permissions) provides the ability to open/listen to the call recording.

Filters allow you to monitor by a date range, such as last 7 days or by source, as well as providing Customer and Supplier filters.

Telephony Monitor

File Help

Telephony Events [-]

Refresh Completed 11:35 Monday 23rd September 2024

Call Start	Call End	Source	Duration	Direction	Call ID	Continuation	Caller	Number Called	Number Dialed	Party 1 Name	Party 1 Device	Party 2 Name	Party 2 Device	Recording
20-09-2024 15:48	20-09-2024 15:55	Call Detail Record	00:06:54	Outgoing	26000344	No	225	236	236	Trade Counter	E204	E204	E204	2024-9-20-170847325
20-09-2024 15:39	20-09-2024 15:39	Call Detail Record	00:00:10	Incoming	26000342	No	07123 12233	261	261	Brian White	T9017	214	E204	2024-9-20-170846758
20-09-2024 15:39	20-09-2024 15:39	Call Detail Record	00:00:04	Outgoing	26000343	No	225	236	236	Andy Black	E204	300	E204	2024-9-20-170846758
20-09-2024 15:39	20-09-2024 15:39	Call Detail Record	00:00:08	Outgoing	26000343	No	225	236	236	Andy Black	E204	300	E204	2024-9-20-170846758
20-09-2024 15:39	20-09-2024 15:39	Call Detail Record	00:00:05	Incoming	26000342	No	225	236	236	Goods In	E204	300	E204	2024-9-20-170846758
20-09-2024 15:48	20-09-2024 15:48	Call Detail Record	00:03:13	Incoming	26000342	No	225	236	236	George Johnson	T9017	304	E204	2024-9-20-170846550
20-09-2024 15:48	20-09-2024 15:48	Call Detail Record	00:03:13	Incoming	26000342	No	225	236	236	George Johnson	E204	304	E204	2024-9-20-170846550
20-09-2024 15:34	20-09-2024 15:34	Call Detail Record	00:00:05	Outgoing	26000335	No	225	236	236	Trade Counter	E204	304	E204	2024-9-20-170846398
20-09-2024 15:34	20-09-2024 15:34	Call Detail Record	00:00:05	Outgoing	26000335	No	225	236	236	Trade Counter	E204	304	E204	2024-9-20-170846398
20-09-2024 15:33	20-09-2024 15:34	Call Detail Record	00:01:01	Outgoing	26000332	Yes	07777 123123	01234 646644	01234 646644	Party 1 Name	E204	261	E204	2024-9-20-170846398
20-09-2024 15:33	20-09-2024 15:42	Call Detail Record	00:06:54	Outgoing	26000332	Yes	07777 123123	01234 112233	01234 112233	Trade Counter	E204	304	E204	2024-9-20-170846398
20-09-2024 15:30	20-09-2024 15:34	Call Detail Record	00:04:04	Outgoing	26000332	No	225	214	214	Trade Counter	E204	304	E204	2024-9-20-170846398
20-09-2024 15:28	20-09-2024 15:29	Call Detail Record	00:01:04	Outgoing	26000331	No	01222 98767	01222 98767	01222 98767	Trade Counter	E204	304	E204	2024-9-20-170846318
20-09-2024 15:18	20-09-2024 15:27	Call Detail Record	00:08:57	Incoming	26000330	No	07777 123123	07777 123123	07777 123123	Warehouse 1	T9017	314	E204	2024-9-20-170846430
20-09-2024 15:14	20-09-2024 15:24	Call Detail Record	00:09:47	Incoming	26000329	No	07123 112233	01258 258258	01258 258258	Brian White	E204	314	E204	2024-9-20-170846320
20-09-2024 15:11	20-09-2024 15:18	Call Detail Record	00:07:08	Incoming	26000328	No	225	236	236	Trade Counter	E204	304	E204	2024-9-20-170846360
20-09-2024 14:58	20-09-2024 14:55	Call Detail Record	00:00:01	Outgoing	26000327	No	304	236	236	Reaction	E204	304	E204	2024-9-20-170846410
20-09-2024 14:49	20-09-2024 14:49	Call Detail Record	00:00:10	Incoming	26000326	No	07123 112233	01258 258258	01258 258258	Brian White	E204	214	T9017	2024-9-20-170846370
20-09-2024 14:33	20-09-2024 14:33	Call Detail Record	00:00:38	Outgoing	26000325	No	236	07123 112233	07123 112233	Warehouse 1	E204	304	E204	2024-9-20-170846270
20-09-2024 14:32	20-09-2024 14:34	Call Detail Record	00:01:56	Outgoing	26000324	No	236	01258 258258	01258 258258	Warehouse 1	T9017	304	E204	2024-9-20-170846270
20-09-2024 14:26	20-09-2024 14:33	Call Detail Record	00:06:46	Incoming	26000323	No	236	01258 258258	01258 258258	Warehouse 1	T9017	304	E204	2024-9-20-170846210
20-09-2024 14:17	20-09-2024 14:24	Call Detail Record	00:07:00	Incoming	26000322	No	31945	225	225	New Adams	E204	219	E204	2024-9-20-170846181
20-09-2024 14:15	20-09-2024 14:19	Call Detail Record	00:03:18	Outgoing	26000321	No	236	261	261	Warehouse 1	E204	204	E204	2024-9-20-170846174
20-09-2024 13:59	20-09-2024 14:03	Call Detail Record	00:03:06	Incoming	26000320	No	261	261	261	Goods In	E204	304	E204	2024-9-20-170846193
20-09-2024 13:54	20-09-2024 13:56	Call Detail Record	00:01:45	Outgoing	26000319	No	01234 646644	07123 112233	07123 112233	Andy Black	E204	304	E204	2024-9-20-1708460470
20-09-2024 13:54	20-09-2024 14:04	Call Detail Record	00:10:52	Incoming	26000318	No	236	01258 258258	01258 258258	Warehouse 1	E204	304	E204	2024-9-20-1708460450

Section 2 Nominal Ledger & General Accounts

2.1. Integrated Stock Ledger Support for 3rd Party Stock

Pre-Released to Software Assurance customers with the Integrated Stock Ledger module

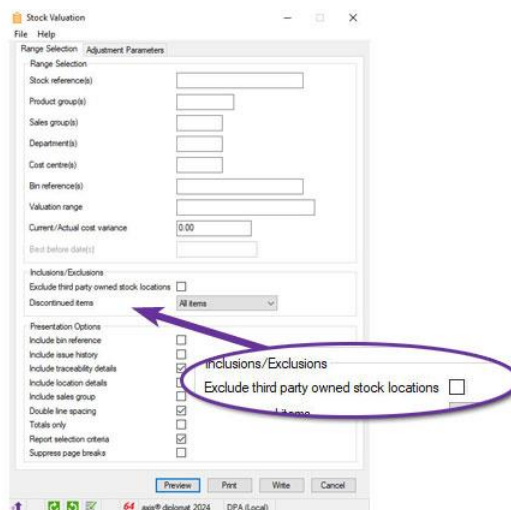


Implementation of the optional Integrated Stock Ledger module has not, until now, been an option for those axis diplomat systems holding supplier consignment stock or other stock owned by third parties. This has been due to the inclusion in the Nominal Ledger of the values of stock movements related to all stock locations and, whilst third party owned stock could be recorded in the system at a zero cost, it is more desirable to record a value for this stock in the Stock Ledger for insurance and reporting purposes and to exclude these values from the financial valuations for the company.

The implementation of the Integrated Stock Ledger module for systems with third party owned stock is now possible with the ability to flag specific stock locations as holding third party owned stock. Once set, this flag indicates that the value of stock and any stock movement transactions at this location are not to be included in the accounting records as the stock is not to be considered a financial asset of the company. Upon transfer of this stock into a company owned stock location, the transferred stock cost value is then held in the Stock Control nominal asset account with a balancing transaction in the Goods Received not Invoiced nominal liability account.

The screenshot shows the 'Location Details' window with the 'Location Parameters' section expanded. A red circle highlights the 'Third party owned stock' checkbox, which is checked. An arrow points from this checkbox to the text 'Additional selection criteria has also been added to Stock Valuation reports to allow these locations to be excluded.' in the following paragraph.

Additional selection criteria has also been added to Stock Valuation reports to allow these locations to be excluded.



2.2. Transaction Auditing Enhancements

Available with axis diplomat 2024



Financial auditing of customer, supplier and nominal transactions has been enhanced with the addition of the posted date and time to the Posted column in Transaction History tabs for customer and supplier account enquiries and to the Transactions tab for nominal account enquiries.

Reference	Date	Type	Amount (GBP)	VAT (GBP)	Total (GBP)	Purchase Order	Date Entered	User ID	Posted	Att.	Notes
AB	27/12/2023	PAYMENT	35314.560R	0.00	35314.560R		06-03-2024 14:12	ANDY	✓		11-03-2024 12:03
357811	07/01/2024	INVOICE	23055.60	4611.12	27666.72	357	06-03-2024 14:51	ANDY	✓		02-04-2024 14:11
AB	21/01/2024	PAYMENT	27666.720R	0.00	27666.720R		06-03-2024 15:44	ANDY	✓		20-09-2024 11:20
360511	07/02/2024	INVOICE	21138.80	4227.76	25366.56	360	06-03-2024 16:01	ANDY	✓		20-09-2024 11:20
AB	20/02/2024	PAYMENT	25366.560R	0.00	25366.560R		06-03-2024 17:22	ANDY	✓		
364128	11/03/2024	INVOICE	36210.00	7642.00	43852.00	364	11-03-2024 12:02	ANDY	✓		11-03-2024 12:03
367165	02/04/2024	INVOICE	35001.55	7000.31	42001.86	367	02-04-2024 14:11	ANDY	✓		02-04-2024 14:11
1256725	01/08/2024	INVOICE	19142.75	3828.55	22971.30	379	19-09-2024 20:12	ANDY	✓		20-09-2024 11:20
1256727	14/08/2024	INVOICE	1398.37	279.68	1678.05	384	19-09-2024 20:15	ANDY	✓		20-09-2024 11:20

The posted date and time have also been added to Customer Transaction History, Supplier Transaction History and Nominal Transactions type monitor tabs.

Audit Monitor

File Help

Invoices and Credits [x]

Refresh: Completed 28/24 Friday 27th September 2024

Supplier Account	Supplier Name	Document Reference	Document Date	Transaction Period	Due Date	Transac. Type	Net Value (GBP)	VAT (GBP)	Total (GBP)	Unallocated (GBP)	Settled Date	Settled (GBP)	Purchase Order	Created By	Created By	Posted Status	Approval Status	Attachments	Notes	
8004	GoldTools Limited	1256727	14/08/2024	06/25	13/09/2024	INVOICE	1398.37	279.68	1678.05	1678.05			384	19-09-2024 20:15	Andy Brown	✓	20-09-2024 11:20	✓	2 Attachments	Please note that Invoice 1256727 is short some of the urgent items you needed. We are so sorry to have let you down and have popped a 10% discount on the rest of the order to show you are a valued customer. M Gold
8004	GoldTools Limited	1256725	01/08/2024	06/25	31/08/2024	INVOICE	19142.75	3828.55	22971.30				379	19-09-2024 20:12	Andy Brown	✓	20-09-2024 11:20	✓	1 Attachment	
8005	Buka's 'n'	360591	02/04/2024	02/25	02/05/2024	INVOICE	5279.80	0.00	5279.80				362	02-04-2024 14:11	Andy Brown	✓	02-04-2024 14:11	✓		
8004	GoldTools Limited	367165	02/04/2024	02/25	02/05/2024	INVOICE	35001.55	7000.31	42001.86				367	02-04-2024 14:11	Andy Brown	✓	02-04-2024 14:11	✓		
8003	Acme Garden Tools Limited	366970	02/04/2024	02/25	01/05/2024	INVOICE	113393.40	22678.68	136072.08				366	02-04-2024 14:10	Andy Brown	✓	02-04-2024 14:11	✓		
8005	Buka's 'n'	365812	11/03/2024	01/25	10/04/2024	INVOICE	7021.20	0.00	7021.20				363	11-03-2024 12:03	Andy Brown	✓	11-03-2024 12:03	✓		
8004	GoldTools Limited	364128	11/03/2024	01/25	10/04/2024	INVOICE	36210.00	7642.00	43852.00				364	11-03-2024 12:02	Andy Brown	✓	11-03-2024 12:03	✓		
8003	Acme Garden Tools Limited	363413	11/03/2024	01/25	10/05/2024	INVOICE	214902.65	40770.20	255672.85				363	11-03-2024 12:02	Andy Brown	✓	11-03-2024 12:03	✓		

These enhancements facilitate reconciliation by posted date and time for batch postings to control accounts such as the Debtors and Creditors nominal control accounts. This is particularly useful when reconciling sales and purchase transactions to nominal ledger postings when they been entered as a batch or have not posted in real time due to the ledgers being in a split period situation, resulting in those transactions posting to the Nominal Ledger as a single batch upon completion of the previous period Nominal Ledger Period End.

This information may also be exported from the monitor tabs in CSV or Microsoft Excel format for use by external auditors in third party accounts preparation and auditing software tools.

This is available as an additional option for axis diplomat 2024 but with no additional license or support costs. When set, existing customer, supplier and nominal transactions for the current and last financial year will be updated to show the posted date and time.

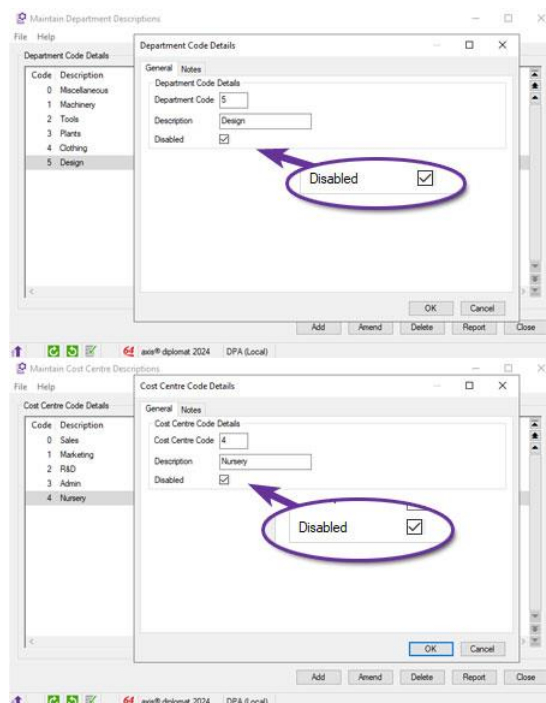
2.3. Disabling Department and Cost Centre Codes

Available with axis diplomat 2024



It is now possible to mark individual Department Codes and Cost Centres as Disabled within the functions 'Maintain Department Descriptions' or 'Maintain Cost Centre Descriptions'.

This will prevent these codes being reused for new assignments but allows for historical analysis.



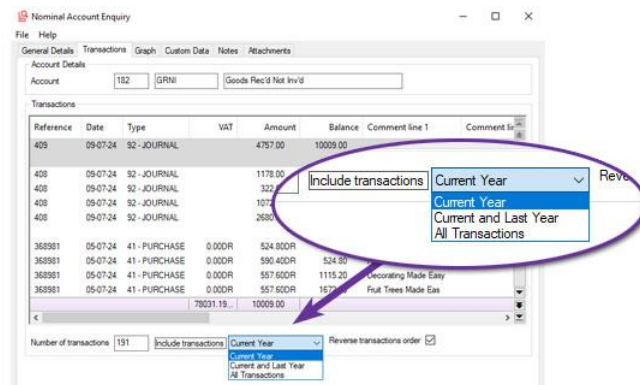
2.4. Improved Nominal Account Enquiry Loading

Pre-Released to Software Assurance customers



The functions Nominal Account Enquiry, Nominal Account Maintenance and Cash Account Enquiry have all been modified to replace the 'Include history' checkbox on the 'Transactions' tab with an 'Include transactions' drop-down with options for 'Current Year', 'Current and Last Year' and 'All Transactions'.

Furthermore, the preferred response to this prompt can be saved using the 'Save current tab responses' option.



The functions have also been modified to only read transactions once the tab is selected and then only read the applicable transactions. This makes the function much faster to load and makes it easier to find the desired transactions.

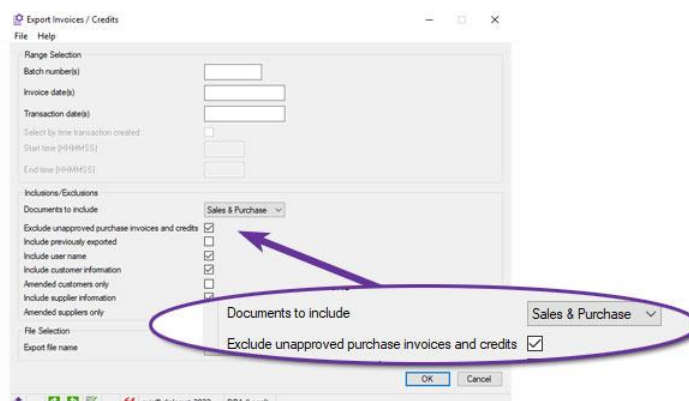
2.5. Sage Export Invoices / Credits Enhancements

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



For those exporting transactions to Sage Line 50, the 'Export Invoices/Credits' function has been enhanced with a new 'Documents to include' option. It is now possible to select

- Sales & Purchase
- Sales only
- Purchase only



An additional tickbox has also been added to 'Exclude unapproved purchase invoices and credits' which is available if the documents to include is set to 'Sales & Purchase' or 'Purchase only'.

You are able to use the 'Save Current Responses' from the File menu to change the default setting for both of these new options.

Section 3 Sales Ledger, CRM & Sales Order Processing

3.1. Multi-Select in Customer Price List monitor

Available with axis diplomat 2024



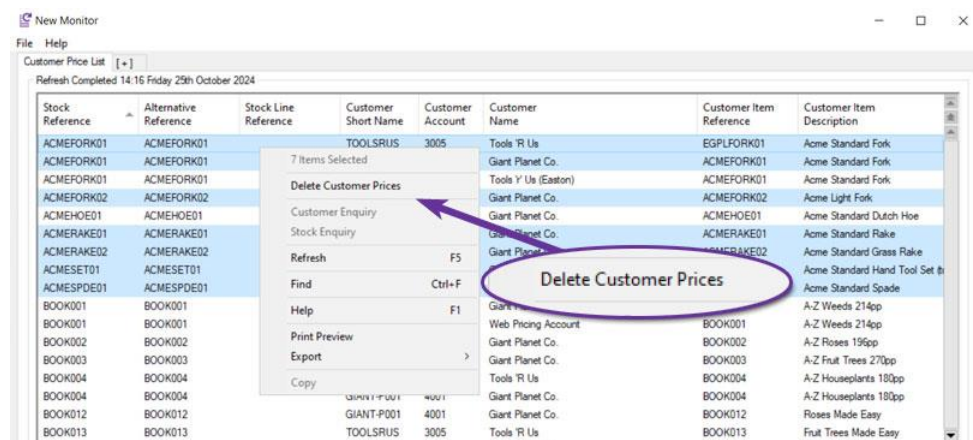
Managing Customer Price Lists can now be done more easily from within a Monitor tab.

Where security permissions allow, price list entries can be deleted and you can also select multiple entries for deletion.

You can select a contiguous range of entries by clicking on the first row and then clicking on the last row whilst holding down the Shift key. Alternatively, you can select non-contiguous rows by clicking on each individual entry whilst holding down the Ctrl key. You can also select all of the entries displayed by using Ctrl A.

In each case, a right-click will open the context menu offering the option to 'Delete Customer Prices'.

Each deletion generates an audit trail event on the customer record to provide a clear history of changes.



The traditional context-menu export options for CSV and Excel are also extended to allow just the highlighted selection to be exported:

Alternative Reference	Stock Line Reference	Customer Short Name	Customer Account	Customer Name	Customer Item Reference	Customer Item Description
ACMEFORK01		TOOLSRS	3005	Tools 'R Us	EGPLFORK01	Acme Standard Fork
ACMEFORK01		GIANT-P001	4001	Giant Planet Co.	ACMEFORK01	Acme Standard Fork
ACMEFORK01		TOOLSRS01	4003	Tools 'R Us (Easton)	ACMEFORK01	Acme Standard Fork
ACMEFORK02		GIANT-P001	4001	Giant Planet Co.	ACMEFORK02	Acme Light Fork
ACMEHOE01		GIANT-P001	4001	Giant Planet Co.	ACMEHOE01	Acme Standard Dutch Hoe
ACMERAKE01		GIANT-P001	4001	Giant Planet Co.	ACMERAKE01	Acme Standard Rake
ACMERAKE02		GIANT-P001	4001	Giant Planet Co.	ACMERAKE02	Acme Standard Grass Rake
ACMESET01		GIANT-P001	4001	Giant Planet Co.	ACMESET01	Acme Standard Hand Tool Set (trowel, fork, j
ACMESPDE01		TOOLSRS	3005	Tools 'R Us	ACMESPDE01	Acme Standard Spade
BOOK001		GIANT	14 Items Selected		BOOK001	A-Z Weeds 214pp
BOOK001		WEBF	Delete Customer Prices		BOOK001	A-Z Weeds 214pp
BOOK002		GIANT			BOOK002	A-Z Roses 196pp
BOOK003		GIANT	Customer Enquiry		BOOK003	A-Z Fruit Trees 270pp
BOOK004		TOOL	Stock Enquiry		BOOK004	A-Z Houseplants 180pp
BOOK004		GIANT	Refresh F5		BOOK004	A-Z Houseplants 180pp
BOOK012		GIANT			BOOK012	Roses Made Easy
BOOK013		TOOL	Find Ctrl+F		BOOK013	Fruit Trees Made Easy
BOOK013		GIANT	Help F1		BOOK013	Fruit Trees Made Easy
BOOK017		TOOL			BOOK017	Weeding Made Easy
BOOK017		GIANT	Print Preview		BOOK017	Weeding Made Easy
BOOK021		GIANT	Export		BOOK017	Weeding Made Easy
BOOK022		GIANT	Copy "GIANT-P001"		BOOK023	A-Z Weeds 214pp
BOOK023		GIANT			BOOK023	A-Z Weeds 214pp
EGPLCS1		TOOLSRS	3005	Tools 'R Us	EGPLCS1	EGPL Petrol Chainsaw 33cc, 16" bar
EGPLCS1		GIANT-P001	4001	Giant Planet Co.	EGPLCS1	EGPL Petrol Chainsaw 33cc, 16" bar

3.2. Anonymise Sales Ledger Accounts

Available with axis diplomat 2024



This new function provides facilities to anonymise and close a sales ledger (customer or prospect) account which has been dormant for greater than a specified number of days. It is designed to provide an easy to use tool to assist in meeting the requirements of data protection legislation such as the UK's Data Protection Act and the EU's General Data Protection Regulation (GDPR).

The function can be run either:

- Manually via the menu function with selection criteria, or
- Automatically via a scheduled background task based on predefined parameters.

The default dormancy period after which a sales ledger account will be anonymised and closed is configurable either system wide or separately for each customer group. By assigning different retention periods to different customer groups you may, for example, anonymise retail accounts originating from your own web site after one period of inactivity, retail accounts originating from a third party marketplace such as Amazon after a different period of inactivity and not anonymise trade accounts.

This function can be run as an automated scheduled task so that once your data retention period parameters have been defined and the task scheduled, adherence to your policy should not require further manual intervention although the function should still be run interactively from time to time if logging is enabled in order to archive/clear the log.

An audit trail event is created against the sales ledger account as it is anonymised.

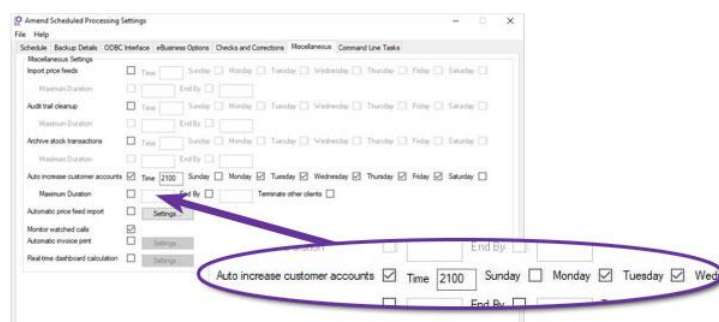
If anonymisation logging is enabled, a log file detailing each account which has been anonymised is created or appended to.

3.3. Automatically Increase Customer Accounts File

Available with axis diplomat 2024



A new overnight scheduled processing option has been added to automatically increase the size of the customer accounts file if required. The resizing of the customer accounts file is triggered when the number of free records drops below 5% of the total file size OR to less than the number of customer records created in the preceding six months, extending the file by the greater of these.



The customer accounts file is one of the few files on the system that have needed to be manually increased in size, a single user operation that is inconvenient to run during normal hours. This development means that, in normal use, this maintenance task is no longer a concern.

3.4. Customer Contacts Monitor

Available with axis diplomat 2024



A new monitor tab type allows you to view, manage, and organise customer contacts within a single list. A right-click (context) menu allows drilldown to the customer's account to modify settings or add any information that the monitor has highlighted as missing.

Customer Short Name	Customer Account	Customer Name	Contact Name	Job Title	Email Address	Telephone Number	Telephone Extension	Mobile Number	Fax Number	Full Name	Salutation	Letter Addressee	Notes	De
A.CAYM001	3967	A. Cayman Engineering Co.	Miss Paul...	Operations						Miss Paul...	Pauline	Miss P. Scott		
A.CHE001	3769	A. Cheddar Marketing Co.	Ms Jane E...	Financial						Ms Jane E...	Jane	Ms J Edm...		
A.DIX001	3367	A. Dixon Europe Co.	Jane Riet...	Operations						Dr. Jane R...	Jane	Dr. J Riet...		
A.REED001	3897	A. Reed Logistics	Mr Steve ...	Accounts						Mr Steve ...	Steve	Mr S Akon...		
AAM-RES001	3893	AAM Research.com	Mrs Paul...	Financial						Mrs Paul...	Pauline	Miss P. Wh...		
ADP-MAN001	3390	ADP Management Inc.	Steve White	Managing						Mr Steve ...		Mr S White		
AFRICA-001	3216	Africa Imports.com	James Da...	Customer						Mr James ...		Mr J Davies		
AFRICA-002	3352	Africa Online.com	Eve Dixon	Sales Man...						Miss Eve ...		Miss E Dix...		
AFRICA-003	3372	Africa & Africa Distribution C	Matt Bailey	Account						Mr Matt B...		Mr M Bailey		
AFRICA-004	3403	Africa & Africa International	Dr. Sue M...	Financial						Dr. Sue M...	Sue	Dr. S Moore		
AFRICA-005	3425	Africa Manufacturing	Miss Jean ...	Director						Miss Jean ...	Jean	Miss J Bro...		
AFRICA-006	3562	Africa & Africa Engineering In	Miss Mary ...	Managing						Miss Mary ...	Mary	Miss M Po...		
AFRICA-007	3596	Africa & Africa Developments	Ms Jessic...	Managing						Ms Jessic...	Jessica	Ms J Whit...		
AFRICA-008	3600	Africa & Africa Distribution I	Mr Matt D...	Accounts						Mr Matt D...	Matt	Mr M Dixon		
AFRICA-009	3871	Africa & Sons International Li	Mrs Mary ...	Logistics						Mrs Mary ...	Mary	Miss M Wh...		
AGI-WOR001	3039	AGI Worldwide Inc.	Charlotte ...	Director						Ms Charlot...		Ms C Davies		
AO-WHO001	3274	AO Wholesale Inc.	Eve Butcher	Operations						Miss Eve ...		Miss E But...		
APOLLO-001	3232	Apollo & Sons Technology.com	Rachel W...	Director						Ms Rachel ...		Ms R Wat...		
APOLLO-002	3282	Apollo & Sons Property Inc.	Mary Edm...	Operations						Ms Mary ...		Ms M Ed...		
APOLLO-003	3329	Apollo Logistics	Lucy Hug...	General M...						Miss Lucy ...		Miss L Hu...		
APOLLO-004	3512	Apollo & Sons Logistics Patne	Mr Alan H...	Purchas...						Mr Alan H...	Alan	Mr A Howell		
APOLLO-005	3543	Apollo Worldwide Partners	Mrs Kath ...	Financial						Mrs Kath ...	Kath	Mrs K Clarke		
APOLLO-006	3624	Apollo Manufacturing Limited	Mr Richar...	Operations						Mr Richar...	Richard	Mr R Howell		
APOLLO-007	3669	Apollo 4 You Partners	Prof Steve...	General M...						Prof Steve...	Steve	Prof S Hu...		
APOLLO-008	3772	Apollo Frost	Mr Jon Cal...	Sales Dire...						Mr Jon Cal...	Jon	Mr J Calla...		

The monitor can be filtered to show only certain types of contacts as well as limiting the range of customer accounts included.

Customer Short Name	Customer Account	Customer Name	Contact Name	Job Title	Email Address	Telephone Number	Telephone Extension	Mobile Number	Fax Number	Full Name	Salutation	Letter Addressee	Notes	De
A.CAYM001	3967	A. Cayman Engineering Co.	Miss Paul...	Operations						Miss Paul...	Pauline	Miss P. Scott		
A.CHE001	3769	A. Cheddar Marketing Co.	Ms Jane E...	Financial						Ms Jane E...	Jane	Ms J Edm...		
A.DIX001	3367	A. Dixon Europe Co.	Jane Riet...	Operations						Dr. Jane R...	Jane	Dr. J Riet...		
A.REED001	3897	A. Reed Logistics	Mr Steve ...	Accounts						Mr Steve ...	Steve	Mr S Akon...		
AAM-RES001	3893	AAM Research.com	Mrs Paul...	Financial						Mrs Paul...	Pauline	Miss P. Wh...		
ADP-MAN001	3390	ADP Management Inc.	Steve White	Managing						Mr Steve ...		Mr S White		
AFRICA-001	3216	Africa Imports.com	James Da...	Customer						Mr James ...		Mr J Davies		
AFRICA-002	3352	Africa Online.com	Eve Dixon	Sales Man...						Miss Eve ...		Miss E Dix...		
AFRICA-003	3372	Africa & Africa Distribution C	Matt Bailey	Account						Mr Matt B...		Mr M Bailey		
AFRICA-004	3403	Africa & Africa International	Dr. Sue M...	Financial						Dr. Sue M...	Sue	Dr. S Moore		
AFRICA-005	3425	Africa Manufacturing	Miss Jean ...	Director						Miss Jean ...	Jean	Miss J Bro...		
AFRICA-006	3562	Africa & Africa Engineering In	Miss Mary ...	Managing						Miss Mary ...	Mary	Miss M Po...		
AFRICA-007	3596	Africa & Africa Developments	Ms Jessic...	Managing						Ms Jessic...	Jessica	Ms J Whit...		
AFRICA-008	3600	Africa & Africa Distribution I	Mr Matt D...	Accounts						Mr Matt D...	Matt	Mr M Dixon		
AFRICA-009	3871	Africa & Sons International Li	Mrs Mary ...	Logistics						Mrs Mary ...	Mary	Miss M Wh...		
AGI-WOR001	3039	AGI Worldwide Inc.	Charlotte ...	Director						Ms Charlot...		Ms C Davies		
AO-WHO001	3274	AO Wholesale Inc.	Eve Butcher	Operations						Miss Eve ...		Miss E But...		
APOLLO-001	3232	Apollo & Sons Technology.com	Rachel W...	Director						Ms Rachel ...		Ms R Wat...		
APOLLO-002	3282	Apollo & Sons Property Inc.	Mary Edm...	Operations						Ms Mary ...		Ms M Ed...		
APOLLO-003	3329	Apollo Logistics	Lucy Hug...	General M...						Miss Lucy ...		Miss L Hu...		
APOLLO-004	3512	Apollo & Sons Logistics Patne	Mr Alan H...	Purchas...						Mr Alan H...	Alan	Mr A Howell		
APOLLO-005	3543	Apollo Worldwide Partners	Mrs Kath ...	Financial						Mrs Kath ...	Kath	Mrs K Clarke		
APOLLO-006	3624	Apollo Manufacturing Limited	Mr Richar...	Operations						Mr Richar...	Richard	Mr R Howell		
APOLLO-007	3669	Apollo 4 You Partners	Prof Steve...	General M...						Prof Steve...	Steve	Prof S Hu...		
APOLLO-008	3772	Apollo Frost	Mr Jon Cal...	Sales Dire...						Mr Jon Cal...	Jon	Mr J Calla...		

This monitor, for example, is filtered to show only those contacts that are the account main contact but do not have eBusiness Authority. This would be useful when rolling out a new trade website, for instance, to identify those customers to migrate to using the website.

For users of the eProcurement module, additional columns include, for example, spending limits and requisition limits.

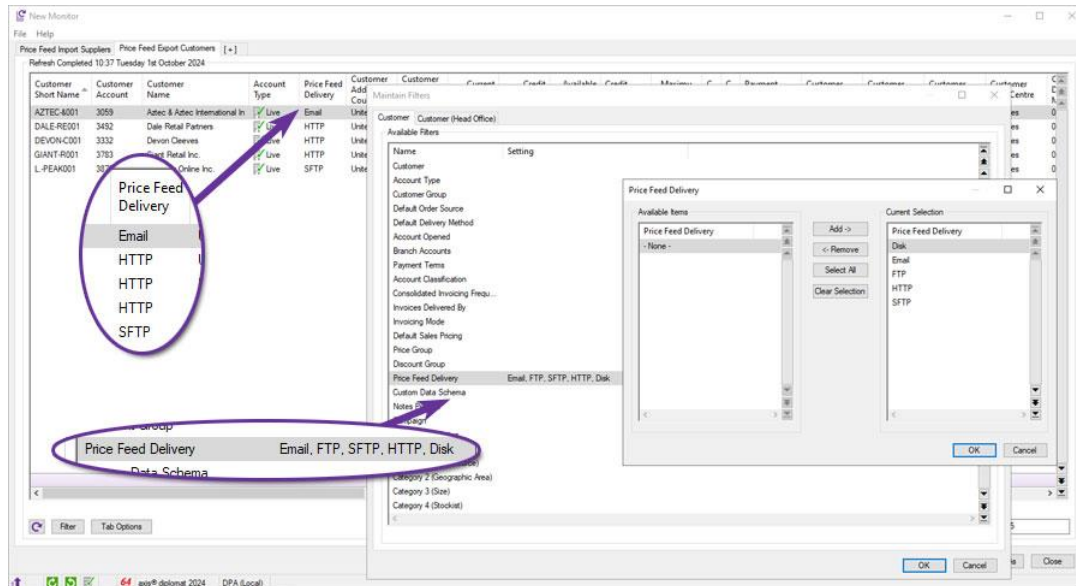
3.5. Additional Customers Monitor Filter and Column

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



For those using the Customer Price Feed Delivery module to provide daily price and/or stock level files to customers, information on the type of feed configured for a customer is now available as an additional column on Customer monitor tabs.

Furthermore, these monitors can be filtered to only show customers with particular feed types, for example, just those customers with FTP, SFTP and HTTP-based feeds.



3.6. Point of Sale Invoicing and Insufficient Stock

Pre-Released to Software Assurance customers with the Stock Transaction Traceability module



Point of Sales Invoice Entry now has improved capabilities for handling the sale of items for which there is insufficient system stock at the current location or where the serial number of a traceable item does not exist at the current location.

Stock discrepancies do happen from time to time, for example, due to human error when someone puts sample stock back on a shelf without updating the system. It is important that a Point of Sale system is able to cope with these scenarios since clearly the stock does physically exist.

For non-traceable items, the “missing” stock is automatically adjusted (received) prior to being issued on the invoice. A new system parameter allows a reason code to be defined for these adjustments, allowing them to be identified and the related discrepancies dealt with at a later point.

The screenshot shows the 'Maintain Sales Ledger Parameters' window. The 'General' tab is selected. In the 'Point of Sale Invoice Entry' section, the 'Reason code for Other Receipts' dropdown is set to 'Shop Discrepancy'. A purple oval highlights this section, and a purple arrow points to the 'Shop Discrepancy' option.

If the item is configured for serial number traceability and the item is in stock but at a different location, the item is transferred to the correct location before being issued.

3.7. Improving visibility of Delivery Charges in Document Maintenance

Available with axis diplomat 2024



The Values section at the top of Quotation and Sales Order maintenance functions now includes an additional field for Delivery. The Goods value excludes any lines marked as delivery and these are now itemised separately. The VAT figure is the total VAT covering both Goods and Delivery values.

Additionally, the Current Items scrolling data list now includes delivery charge items, making the column totals clearer.

Amend Sales Order 18751

File Enquiries Help

Customer Details Customer Notes General Details Document Notes Item Details Terms and Addresses Attachments Payment Details Links Deliveries Audit Trail Assets Transaction History

Amending Sales Order 18751

Customer reference 01/3005 Tools R Us

Asset

Credit limit 10000 GBP Current balance 4226.54 GBP

Service contract type Default contract type

Delivery Carrier 10.80 GBP (9.00 ex. VAT)

Delivery charge Customer default (add charge at order)

Values

Goods 2756.98 GBP Cost 2068.22 GBP Margin 25.23 % (697.76 GBP)

Delivery 9.00 GBP Gross Weight 78.0000 kg Net Weight 78.0000 kg

VAT 553.20 GBP Volume 0.360000 m³

Total 3319.18 GBP

Current Items

Item Number	Stock Reference	Description	Quantity	Unit Price (GBP)	Picked Quantity	Unit Cost (GBP)	Case Price (GBP)	Item Discount	Net Value (GBP)	Status	VAT Value (GBP)	Total Value (GBP)	Unit of Measure	Purchase Order	Invoice Number
1		To Restock Your EGPL Power Tools								Outstanding					
2	EGPLCS2	EGPL Electric Chainsaw 240v, 35cm bar	12	60.64	0	48.51		0.00%	727.68	Outstanding	145.54	873.22	EACH		
3										Outstanding					
4										Outstanding					
5	EGPLMOW1	EGPL Electric Mower 12" plastic blades	10	0	10	52.1		0.00%	521.70	Outstanding	104.34	626.04	EACH		
6	EGPLMOW2	EGPL Electric Mower 12" metal blades	10	0	10	70.7		0.00%	707.60	Outstanding	141.52	849.12	EACH		
7	EGPLMOW3	EGPL Rotary Mower 38cm cutting width	10	0	10	80.00		0.00%	800.00	Outstanding	160.00	960.00	EACH		
8	CARRIER	Carrier	1	0	1	9.00	0	6.00	9.00	Outstanding	1.80	10.80	EACH		
			43	0	43				2765.98		553.20	3319.18			

Options

Outstanding ☐ Insert Amend Close Delete Sub-total View Move Up Move Down Review Favourites Options Import Reprice All Print Labels

Send Shortcut File Amendments Reject Amendments

axis® diplomat 2024 DPA (Local)

3.8. Credit Control Monitor Enhancements

Available with axis diplomat 2024



The Credit Control Monitor now features two additional columns to provide further account information: Credit Terms and Maximum Credit Period.

The Credit Terms column presents the customer's credit terms in plain language, combining the credit terms and days from the customer record. It is populated with combinations such as:

- No credit terms
- 30 Days
- End of current month
- End of next month
- 1st of next month
- etc.

The Maximum Credit Period column comes from the equivalent field from the customer record.

Credit Control Monitor

Customer Short Name	Customer Account	Customer Name	Account Type	Credit Terms	Maximum Credit Period (Days)	Credit Limit	Current Balance	Payment Terms	Head Office Customer Short Name	Head Office Customer Name
A-CAYM001	3967	A Cayman Engineering Co.	Live	21st of Next Month +1	90	1000.00	1405.51	On Account		
A-CHE001	3769	A Cheddar Marketing Co.	Live	1st of Next Month +2	75	1000.00	1129.92	On Account		
A-DIX001	3367	A Dixon Europe Co.	Live	30 Days	90	5000.00	222.44	On Account		
A-REED001	3897	A Reed Logistics	Live	60 Days	0	10000.00	3408.83	On Account		
AAM-RES001	3893	AAM Research.com	Live	60 Days			43.07	On Account		
AFRICA-001	3216	Africa Imports.com	Live	30 Days				On Account		
AFRICA-002	3352	Africa Online.com	Live	60 Days				On Account		
AFRICA-003	3372	Africa & Africa Distribution C	Live					On Account		
AFRICA-004	3403	Africa & Africa International	Live					On Account		
AFRICA-005	3425	Africa Manufacturing	Live					On Account		
AFRICA-006	3542	Africa & Africa Engineering In	Live					On Account		
AFRICA-007	3596	Africa & Africa Developments	Live					On Account		
AFRICA-008	3600	Africa & Africa Distribution I	Live					On Account		
AGI-WOR001	3039	AGI Worldwide Inc.	Live					On Account		
AO-WHOL001	3274	AO Wholesale Inc.	Live					On Account		
APOLLO-001	3232	Apollo & Sons Technology.com	Live					On Account		
APOLLO-002	3282	Apollo & Sons Property Inc.	Live	60 Days				On Account		
APOLLO-003	3329	Apollo Logistics	Live	30 Days				On Account		
APOLLO-005	3543	Apollo Worldwide Partners	Live	30 Days				On Account		
APOLLO-006	3624	Apollo Manufacturing Limited	Live	60 Days		5000.00	2058.22	On Account		

Customer Enquiry - A-CAYM001

Account: 01/3967 Short name: A-CAYM001

Account type: Live Suppress TPS checks: ☐

Name and address: A Cayman Engineering Co., 588 Seaview Road, Oshana, St. John's, Barbados, BB110001

Telephone number: 01235 999999

Fax number: 01235 999999

Contact: Miss Pauline Scott

Contact email: scott@acaymanengineeringco.net

Customer web URL: www.acaymanengineeringco.net

Date created: 01/05/20 Last amended: 23/07/24

Analysis Codes: Customer group: 4 Public Sector Order source: 3 Charles

Enforce use of default order source: ☐ Exclude from commission calculations: ☐

Turnover year to date: 0 GBP Last year: 1700 GBP

Balance Breakdown: Suppress balance breakdown: ☐ Current balance: 1405.51 GBP

Payment due day: 21 Payment due month: Next Month+1

Maximum credit period: 90 day(s)

Include: ☐ Exclude: ☐

Payment terms: On Account

Credit terms: Day of month

Payment due day: 21 Payment due month: Next Month+1

Maximum credit period: 90 day(s)

Debtors' letters: Include: ☐ Exclude: ☐

3.9. Sales Invoice & Credit Note Enquiry

Available with axis diplomat 2024



Sales Invoice and Credit Note Enquiries have been extended to include two additional tabs; Notes and Allocation Details.

The Notes tab allows the entry of notes against the transaction when in Edit mode.

Supplementing existing Credit Control tools, this is particularly useful for recording information relating to a disputed transaction or extended details as to why a credit note has been issued.

Sales Invoice Enquiry

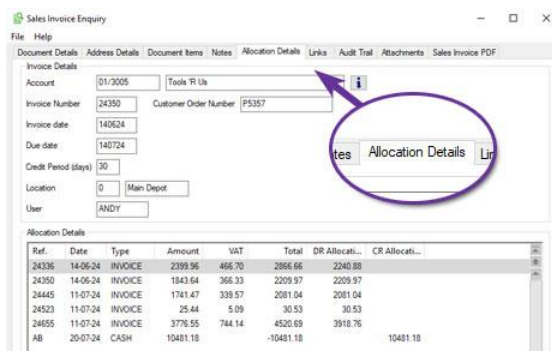
Document Details Address Details Document Items Notes Allocation Details Links Audit Trail Attachments Sales Invoice PDF

Invoice Details: Account: 01/3005 Tools RI Ltd Invoice Number: 24350 Customer Order Number: P5357 Invoice date: 14/06/24 Due date: 14/07/24 Credit Period (days): 30 Location: 0 Main Depot User: ANDY

Notes: This invoice is being disputed because they are claiming that they had agreed special delivery on this order because it was urgently required for an exhibition. They say that although we sent it out on time, our courier failed to deliver it on the correct day. Just one of those unfortunate things because the delivery van broke down en route. Whatever the reason, they claim they were without the items to put on their exhibition stand and so we should recompense them somehow.

A Notes column has also been added to the Statement and Transaction History tabs of Customer Enquiry and to the Customer Transaction History type monitor tab.

The Allocation Details tab displays any allocation history for the transaction, assisting the accounts team in dealing with a customer's payment queries:



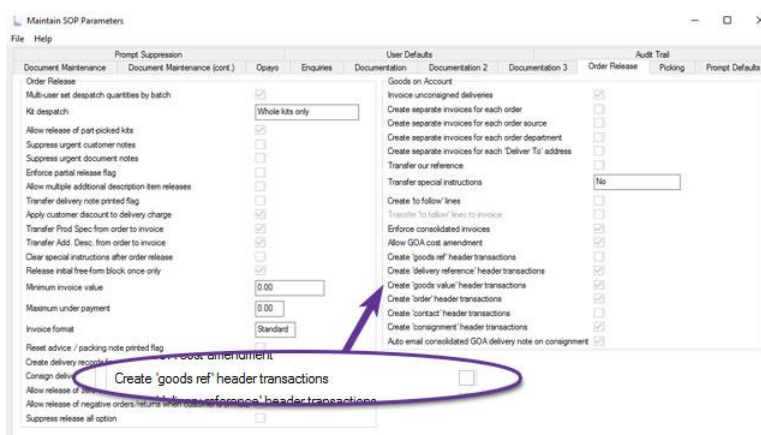
3.10. Suppress GOA Reference and Date from Documents

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



A new system parameter has been added to allow suppression of the header information that is normally filed as description lines on invoices generated for Goods on Account bookings.

These headers, of the format "Goods DD-MM-YY Ref: XXXXXX", are normally filed as additional invoice lines and so cannot be suppressed by changes to the document template.



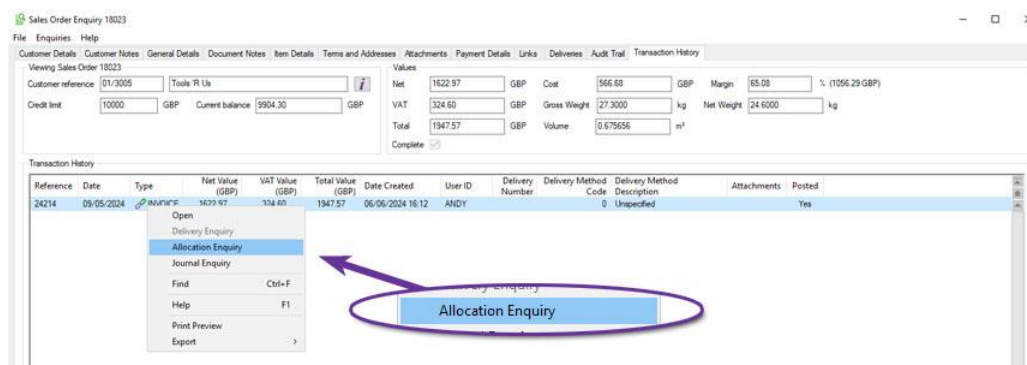
This will be of particular interest to those who do not produce Goods on Account Delivery Notes since their customers will then not have the Goods on Account Booking Reference and suppressing the header information from invoices can reduce confusion.

3.11. Sales Order Enquiry Transaction History Tab

Pre-Released to Software Assurance customers



The Sales Order Enquiry function now includes an additional tab for the Transaction History, which lists the invoices (and credit notes if they exist) generated from the Sales Order.



This makes it easier to handle invoice enquiries, particularly where orders have been part-shipped in a number of instalments. In addition to providing a drilldown to the individual invoices, it is also possible to see the allocation of payments against those invoices, further helping to handle queries from customers and saving time.

3.12. Type-Specific Filenames for Sales Document Attachments

Pre-Released to Software Assurance customers



When editing sales documents (Sales Orders, Quotations and, for those with the Service Contract Management module, Service Contracts and Requests for Service Contract), you are able to create Word document attachments from templates.

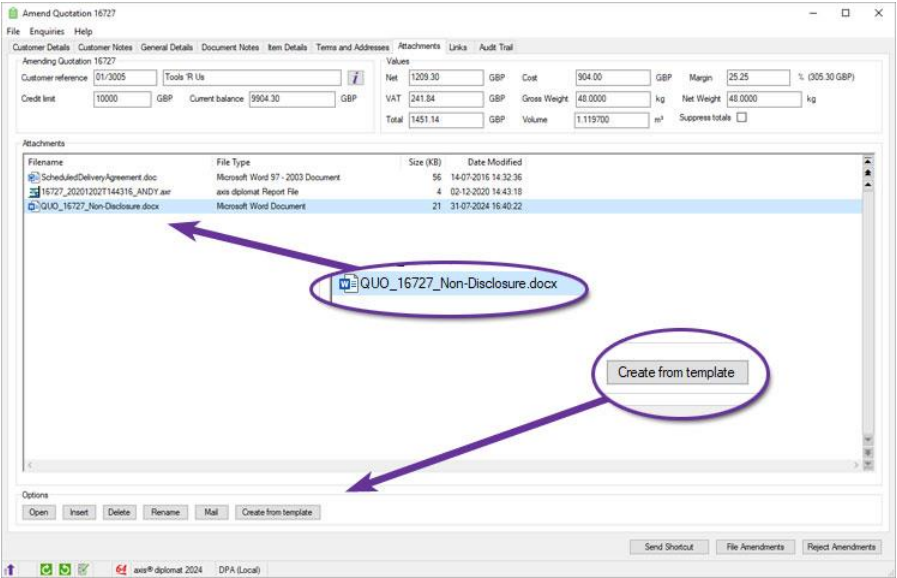
These documents are now automatically created with a prefix indicating the document type and reference.

The filename format is:

{document type}_{document reference}_{template filename}

Where {document type} is ORD (for sales orders), QUO (for quotations), SCO (for service contracts) or RSC (for service contract requests).

For example, creating an attachment from a template called "Non-Disclosure.dotx" for quotation 16727 will create a document called "QUO_16727_Non-Disclosure.docx".



3.13. Head Office Consolidated Invoicing

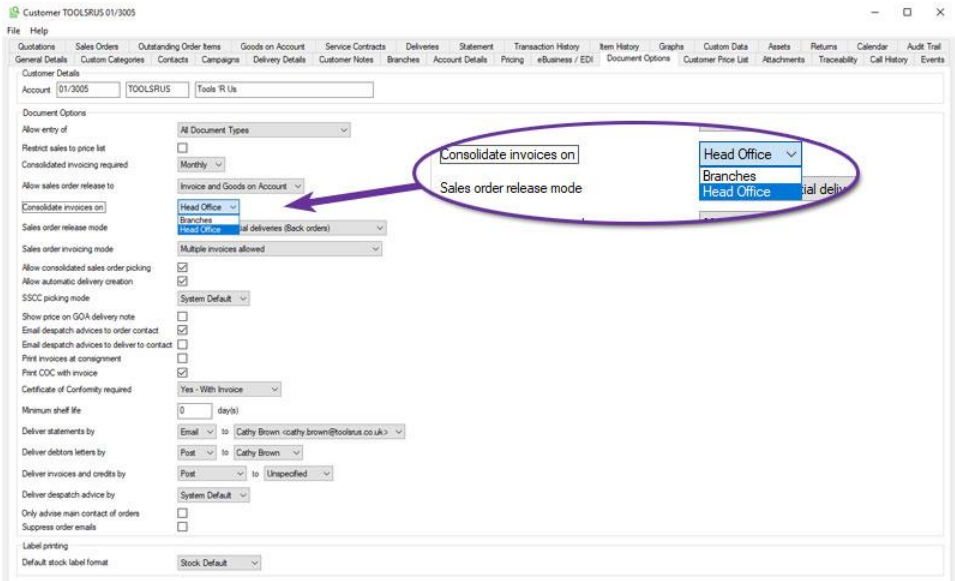
Pre-Released to Software Assurance customers



Consolidated invoicing enables items from a number of deliveries to the same customer to be consolidated into one invoice (typically weekly or monthly).

This has now been extended to support consolidation of multiple branch account deliveries onto a single head office invoice.

This behaviour is controlled via settings on the Document Options tab for a given head office account:



3.14. Account Type Column on Customer Enquiry Branches Tab

Available with axis diplomat 2024



The Customer Enquiry function's 'Branches' tab has been extended to include an additional column for the Account Type, showing whether each branch is 'Live' or 'Closed':

Branch Type	Account Type	Account Number	Customer Name	Short Name	Invoice To	Customer Group Code	Customer Order Source Code	Customer Order Source Description	Last Posted Transaction Date	Telephone Number	Fax Number	Default Contact
Head Office	Live	3005	Tools R Us	TOOLSRS			1	Alan	28/06/2023	01432 555666	01432 666555	Cathy Brown
Branch	Live	4003	Tools Y Us (Easton)	TOOLSRS01	HD		1	Alan	11/06/2024	01234 914402	01234 914403	Christine Cook
Branch	Closed		Tools Y Us (Easton)	TOOLSRS02	HD		1	Alan	06/07/2024	01236 464362	01236 464363	Eric Easty
Branch	Live	4005	Tools Y Us (Stockland)	TOOLSRS03	HD		1	Alan	06/07/2024	01236 164307	01236 164308	Harry Harrington

3.15. Disable Sales Groups

Pre-Released to Software Assurance customers



In situations where a Sales Group cannot be deleted (because it has been used in the past and so exists on archived transactions, for example), it is now possible to flag it as 'Disabled'.

If a group is disabled, it will no longer appear in lists of available sales groups although it is still selected for analysis and historical reporting.

Add Sales Group

Sales Group Selection
Sales group: 9

Sales Group Details
Description: Pet Supplies

Disabled: ☒ Disabled

Analysis Details
Nominal sales account: 10 Sales
Cost of sales account: 21 Purchases for resale

OK Cancel

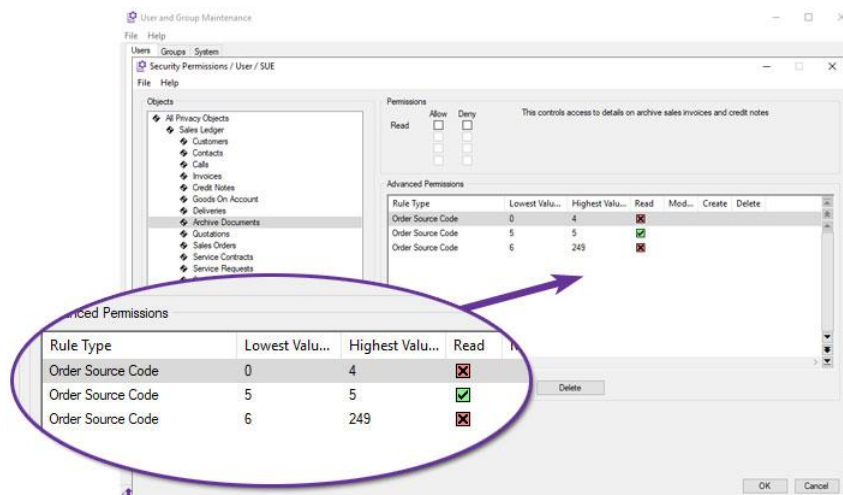
3.16. Security Permissions on Sales Transactions

Pre-Released to Software Assurance customers



New advanced security permissions have been added to allow users to be limited on the range of customer's historical transactions that they can view, based on the account's order source code.

This restriction will then, for instance, prevent them from seeing some customer's transactions within a Sales Item History monitor tab.



This user, for example, is limited to only be able to see transactions for customers whose Order Source Code is 5.

3.17. Date-Specific Customer Price List Monitor

Available with axis diplomat 2024 and the Date Specific Prices and Discounts module



For those using the Date Specific Prices and Discounts module, Customer Price List monitor tabs can now show information as at a specific date in the future.

This is particularly useful in conjunction with the recent modifications to allow the recording of future costs since it provides oversight of the expected changes to margins and so protecting profitability.

The functionality is controlled via a Tab Option, which then enables the additional columns of information.

3.18. Margin Information in Customer Price List Monitors

Available with axis diplomat 2024



Customer Price List monitor tab types now include additional margin information.

Columns have been added for the calculated margin against standard cost, expressed as both currency and percentages. This is particularly useful in helping to identify issues where profits have been lost because contracted price lists have not kept pace with increasing costs.

Sales Desk Monitor

File Help

Customers Quotations Sales Orders Calls Campaigns Calls Call Events Customer Price Lists [+]

Refresh Completed 14:29 Wednesday 9th October 2024

Alternative Reference	Stock Description	Customer Account	Customer Name	Customer Item Reference	Price	Standard Cost (GBP)	Margin On Standard Cost (%)	Margin On Standard Cost (GBP)	Price Per	Type
ACMEFORK01	Acme Standard Fork	3005	Tools 'R' Us	EGPLFORK01	4.00	7.65	91.25%	-3.65		1 Fixed
ACMEFORK01	Acme Standard Fork	4001	Giant Planet Co.	ACMEFORK01	10.85	7.65	29.49%		3.20	1 Fixed
ACMEFORK01	Acme Standard Fork	4003	Tools 'R' Us (Easton)	ACMEFORK01	4.50		70.00%	-3.15		1 Fixed
ACMEFORK02	Acme Light Fork	4001	Giant Planet Co.	ACMEFORK02	9.40	6.63	29.47%		2.77	1 Fixed
ACMEHOE01	Acme Standard Dutch Hoe	4001	Giant Planet Co.	ACMEHOE01	13.01	9.19	29.36%		3.82	1 Fixed
ACMERAKE01	Acme Standard Rake			ACMERAKE01	13.01	9.19	29.36%		3.82	1 Fixed
ACMERAKE02	Acme Standard Grass Rake				14.46	10.21	29.39%		4.25	1 Fixed
ACMESET01	Acme Standard Hand Tool Set				18.08	12.76	29.42%		5.32	1 Fixed
ACMEH0E01	Acme Standard Spade				12.76	7.65	40.05%		5.11	1 Fixed
BOOK001	A-Z Weeds 214pp				7.96	7.30	8.29%		0.66	1 Fixed
BOOK001	A-Z Weeds 214pp				8.50	7.30	14.12%		1.20	1 Trade Pr...
BOOK002	A-Z Roses 196pp				7.96	7.30	8.29%		0.66	1 Fixed
BOOK003	A-Z Fruit Trees 270pp				7.96	7.30	8.29%		0.66	1 Fixed
BOOK004	A-Z Houseplants 180pp				4.50	7.30	62.22%		-2.80	1 Fixed
BOOK004	A-Z Houseplants 180pp	4001	Giant Planet Co.	BOOK004	7.96	7.30	8.29%		0.66	1 Fixed
BOOK012	Roses Made Easy	4001	Giant Planet Co.	BOOK012	4.76	3.57	25.00%		1.19	1 Fixed
BOOK013	Fruit Trees Made Easy	3005	Tools 'R' Us	BOOK013	5.45	3.57	34.50%		1.88	1 Fixed
BOOK013	Fruit Trees Made Easy	4001	Giant Planet Co.	BOOK013	4.76	3.57	25.00%		1.19	1 Fixed
BOOK017	Weeding Made Easy	3005	Tools 'R' Us	BOOK017	5.45	3.57	34.50%		1.88	1 Fixed

3.19. Support added for Excel Call Templates

Pre-Released to Software Assurance customers



CRM Calls in axis diplomat have long had the ability to create document attachments from pre-defined Word templates. This capability has now been extended to include Excel templates.

Call TOOLSRUS 6

File Help

Call Details Attachments Links

Customer 01/3005

Customer Tools 'R' Us Main phone 01432 555666 Order source Alan

Call Contact Brian Brown (Purchasing Manager) Contact phone Ext. Contact mobile

User Contact Unspecified Contact phone Ext. Contact mobile

Asset

Call 6

Call number 6 Type Sales Origin Manual Private call Include in SLO

Service contract Type

Subject Leaf Blower Bulk Purchase Locked Unlock

Attachments

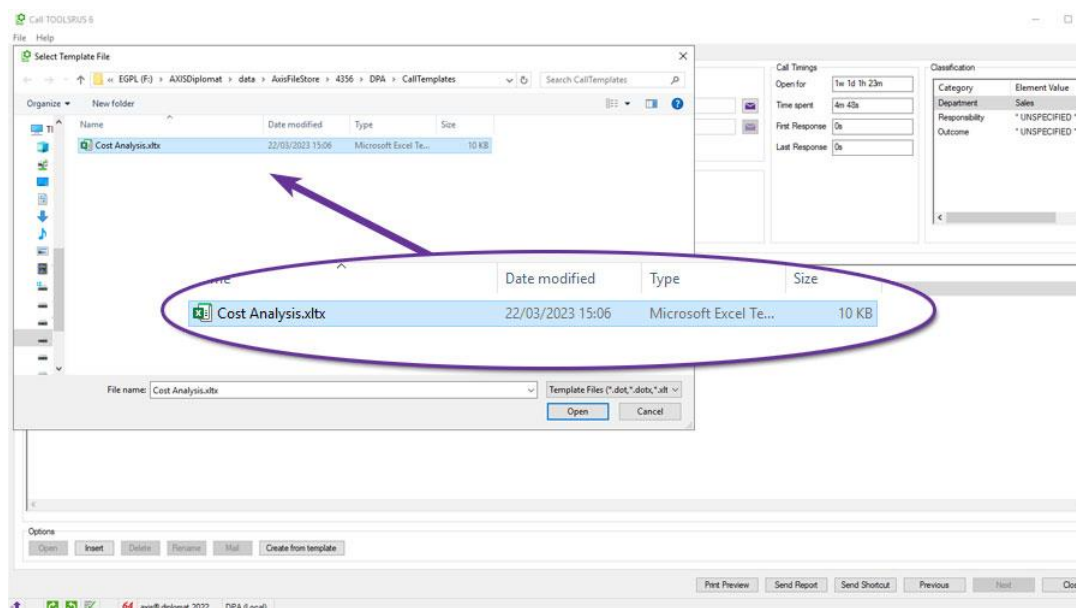
Filename File Type Size (KB) Date Modified

There are no items to show

Create from template

Options Open Insert Delete Rename Mail Create from template

Print Preview Send Report Send Shortcut Previous Next Close



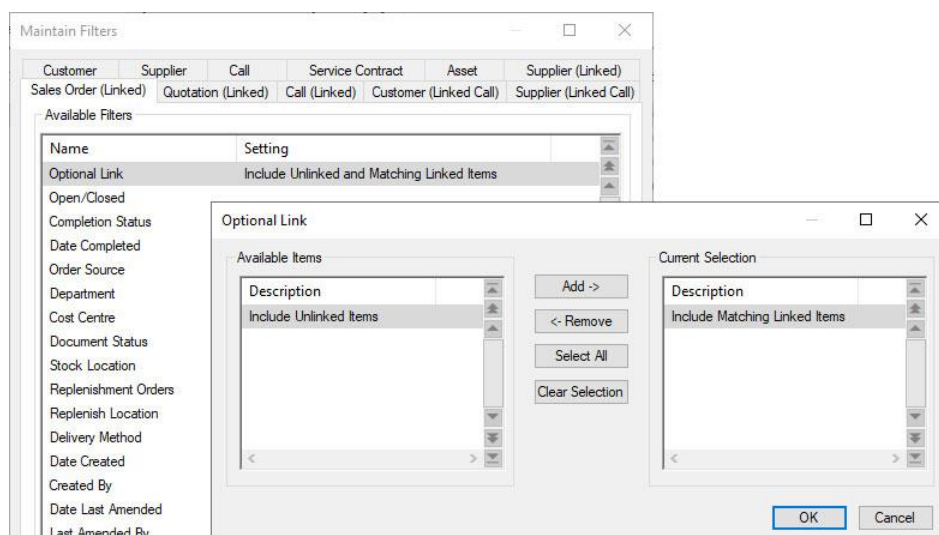
Excel templates are simply normal Excel files that have been saved as a template (.xltx) instead of a worksheet (.xlsx). They do, however, support all of the same text replacements that Word documents allow, such as {Email} for the email address of the CRM Call Contact.

3.20. Filter Monitor to Calls Linked to Sales Orders or Quotations

Pre-Released to Software Assurance customers



When setting up a monitor tab showing Calls, it is now possible to filter the list of calls shown to only those that are linked to a sales order and/or quotation, or only those that are not linked to a sales order or quotation.



This would allow, for example, the creation of a monitor showing open sales calls that are linked to quotations to encourage sales agents to follow up old quotes and update or close the enquiries as appropriate.

3.21. User Preferences for Showing Specifications in Order Maintenance

Pre-Released to Software Assurance customers



When entering or amending sales documents, each operator can now decide for themselves whether the Item Details' Description column should include the product specification as well as the main description.

Item Number	Stock Reference	Description	Ordered Quantity	Delivered Quantity	Outstanding Quantity	Unit Cost (GBP)	Unit Price (GBP)	Case Price (GBP)	Item Discount	Net Value (GBP)	VAT Value (GBP)	Total Value (GBP)
1		To Restock Your EGPL Power Tools										
2	EGPLCS2	EGPL Electric Chainsaw 240v, 35cm bar	12			60.64			0.00%	727.68	145.54	873.22
3												
4												
5	EGPLMOW1	EGPL Electric Mower 12" plastic blades	10			35.72	52.17		0.00%	521.70	104.34	626.04
6	EGPLMOW2	EGPL Electric Mower 12" metal blades	10			45.93	70.76		0.00%	707.60	141.52	849.12
7	EGPLMOW1	EGPL Electric Mower	10			66.96	80.00		0.00%	800.00	160.00	960.00

The setting is accessed by clicking on the Options button:

Options

Outstanding ☐ Insert Amend Close Delete Sub-total View Move Up Move Down Review Favourites Options Import Reprice All Print Labels

Options

Send Shortcut File Amendments Reject Amendments

Item Options

Current Items List ☒ Show product specifications ☒

New Item Defaults - Purchase Ordering and Delivery

Order this item ☐

Delivery address

Default delivery date

Amend Existing Items

Apply Order this item setting ☐

Apply Delivery address setting ☐

OK Cancel

Amend Sales Order 18736

Customer reference: 01/2005 Tools R Us

Asset: To Restock Your EGPL Power Tools

Credit limit: 10000 GBP Current balance: 9904.30 GBP

Service contract type: Default contract type

Delivery: Carter 10.90 GBP (9.00 ex. VAT)

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

Item Number	Stock Reference	Description	Ordered Quantity	Delivered Quantity	Unit Cost (GBP)	Unit Price (GBP)	Case Price (GBP)	Item Discount	Net Value (GBP)	VAT Value (GBP)	Total Value (GBP)
1		To Restock Your EGPL Power Tools									
2	EGPLCS2	EGPL Electric Chainsaw 240v, 35cm bar Our own brand Long Bar Electric Chainsaw, suitable for domestic and light professional use.	12		48.51	60.64		0.00%	727.68	145.54	873.22
3											
4											
5	EGPLMOW1	EGPL Electric Mower 12" plastic blades	10	0	35.72	52.17		0.00%	521.70	104.34	626.04

This setting can be accessed from all types of sales document, including invoices, credit notes, orders, quotations and, for those with the appropriate additional modules, workshop jobs and service contracts.

3.22. Additional Columns in Sales Order/Quotation Maintenance

Pre-Released to Software Assurance customers



Additional columns for "Commodity code" and "Country of Origin" have been made available within the Item Details tab when entering, amending or enquiring on sales orders and quotations:

Amend Sales Order 18736

Customer reference: 01/2005 Tools R Us

Asset: To Restock Your EGPL Power Tools

Credit limit: 10000 GBP Current balance: 9904.30 GBP

Service contract type: Default contract type

Delivery: Carter 10.90 GBP (9.00 ex. VAT)

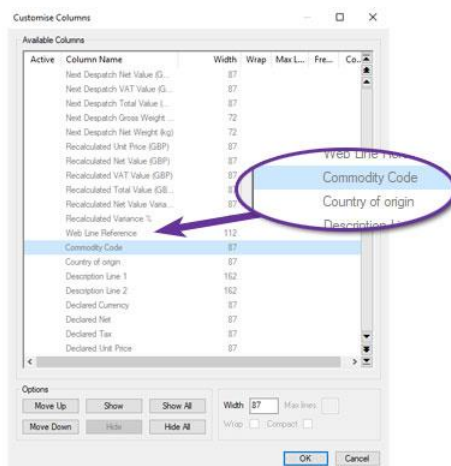
Delivery charge: Customer default (add charge at order entry)

Item Number	Stock Reference	Description	Commodity Code	Country of origin	Ordered Quantity	Delivered Quantity	Outstanding Quantity	Free Stock	Unit Cost (GBP)	Unit Price (GBP)	Case Price (GBP)	Item Discount	Net Value (GBP)	VAT Value (GBP)	Total Value (GBP)
5	EGPLMOW1	EGPL Electric Mower 12" plastic blades	84331110	CN	10	0	10	333	35.72			0.00%	357.20		357.20
6	EGPLMOW2	EGPL Electric Mower 12" metal blades	84331110	CN	10	0	10	1	45.93			0.00%	459.30		459.30
7	EGPLMOW3	EGPL Rotary Mower 38cm cutting width	84331110	VN	10	0	10	9	66.36			0.00%	663.60		663.60
8	EGPLMOW4	Wendelton Electric Mower Sblade steel cutting cylinder	84331110	CN	10	0	10	0	102.10			0.00%	1021.00		1021.00
9															
10															
11															
12	EGPLTRM1	EGPL Hedge Trimmer 600mm Blade, 500w Motor	84672980	KR	10	0	10	538	0	43.46	26.07	0.00%	434.60	260.70	695.30
13	EGPLSTRM1	EGPL Electric Trimmer 45cm Cut, 340w motor	84672980	TR	10	0	10	541	0	21.72	17.38	0.00%	217.20	173.80	391.00
					72	0	72	0		72					

Options: Outstanding ☐ Insert Amend Close Delete Sub-total View Move Up Move Down Review Favourites Options Import Reprice All Print Labels

axis® diplomat 2024 DFA (Local)

These new columns are not enabled by default and so, to enable them, simply right-click on the headings and choose 'More...'. You will be able to select additional columns from here (and re-order the columns for your convenience too).

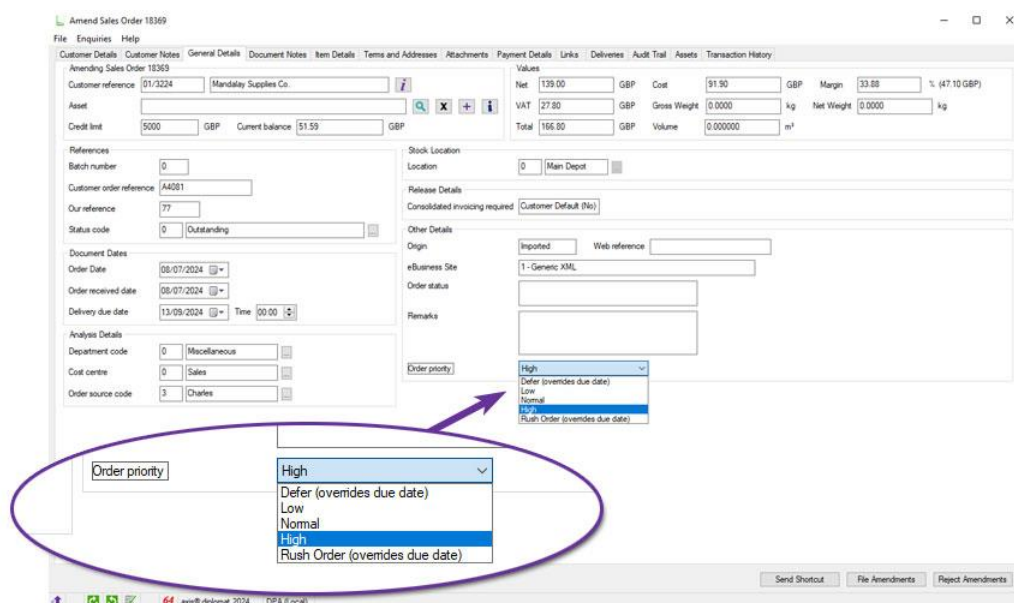


3.23. Sales Order Priority in Order Maintenance

Pre-Released to Software Assurance customers



The setting of a sales order's priority is now easier to see and change following the addition of the field to the General Details tab when entering or amending sales orders:



Previously, it was only visible when filing an order or from a right-click context menu from, for example, a Sales Order monitor.

3.24. Sales Order Monitors & Additional Stock Locations

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



Additional Stock Locations act as backup stock locations for order picking, typically in situations where a warehouse is split into picking and bulk locations.

Enhancements to monitor tabs now make this information easier to see, helping to identify when orders could be fulfilled by replenishing from the bulk location.

Sales Order monitor tabs now show a new status of "All stock available using additional locations" when there is insufficient stock available at the order's location but there is sufficient stock if the additional bulk location's stock is also taken into account:

Refresh Completed 14:49 Thursday 12th September 2024

Customer Name	Sales Order	Insufficient Stock	Order Value (Excluding Delivery) (GBP)	Outstanding Value (Excluding Delivery) (GBP)	Delivery Charge (GBP)	Outstanding Delivery Charge (GBP)	Outstanding Value (GBP)	T.L.	Available Stock Value (GBP)	Custom Limit Ex.
Mandaley Supplies Co.	18369	All stock available using additional locations	139.00	139.00	0.00	0.00	139.00		139.00	
Apollo & Sons Logistics Partner	18381	All stock available at order location	155.36	155.36	9.00	9.00	164.36		164.36	
Green Fingers	18401	Insufficient stock for total release	2602.80	1263.21	0.00	0.00	1263.21		522.90	
Giant Developments Limited	18402	Insufficient stock for total release	1915.77	1625.44	0.00	0.00	1625.44		961.84	
Green Supplies	18403	Insufficient stock for total release	1486.65	1486.65	0.00	0.00	1486.65		1265.45	Credit
Dixon & Sons Marketing.com	18408	Insufficient stock for total release	917.94	917.94	0.00	0.00	917.94		254.34	
NCB Agency Partners	18410	Insufficient stock for total release	1869.35	1869.35	0.00	0.00	1869.35		1333.30	
GIL Engineering Inc.	18417	All stock available at order location	942.37	942.37	9.00	9.00	951.37		951.37	
AGI Worldwide Inc.	18418	All stock available at order location	1001.09	1001.09	9.00	9.00	1010.09		1010.09	
Mandaley Red	18424	Insufficient stock for total release			0.00	0.00	2323.53		1489.95	
DWP Retail Limited	18425	All stock available at order location			0.00	0.00	730.00		730.00	
Apollo & Sons Technology.com	18426	Insufficient stock for total release			0.00	0.00	2545.34		1133.04	
Dale Retail Partners	18427	Insufficient stock for total release			0.00	0.00	1006.73		496.28	
Exe Technology Inc.	18429	Insufficient stock for total release			0.00	0.00	478.56		172.29	
Mega Trading Co.	18431	Insufficient stock for total release			0.00	0.00	1124.29		511.75	
JD Developments	18433	Insufficient stock for total release			0.00	0.00	592.75		507.73	Credit
Ward Red Inc.	18437	Insufficient stock for total release			0.00	0.00	2049.86		816.01	

Sales Order Line monitor tabs now also show further information, with separate columns to show the On Hand, Free, Available and On Order stock figures with and without the additional location included:

Refresh Completed 14:50 Thursday 12th September 2024

Sales Order Reference	Customer Order Reference	Stock Reference	Alternative Stock Reference	Stock Line Reference	Item Description	Location On Hand (Ex. Additional)	Location On Hand (Inc. Additional)	Case Quantity	Quantity Ordered	Quantity Despatched	Quantity Outstanding
18369	A4081	ACMEHOE01	ACMEHOE01		Acme Standard Dutch Hoe	6	116	10	0		
18381	C3105	ACMESPOE01	ACMESPOE01		Acme Standard Spade	110	110	2	0		
18381	C3105	CARRIER	CARRIER		Carrier			1	0		
18381	C3105	EGPLSPRY01	EGPLSPRY01		Budget Hand Sprayer	265	265	10	0		
18381	C3105	GOLDAXE01	GOLDAXE01		Gold Felling Axe 3lb	96	96	3	0		
18381	C3105	HOSEA02	HOSEA02		'Budget' Sprinkler Rotary, coverage 12 sq m	106	106	2	0		
18401	14779	BOOK002	BOOK002		A-Z Roses 196p	139	139	2	0		
18401	14779	EGPLKOW02	EGPLKOW02			110	110	4	0		
18401	14779	EGPLPTH01	EGPLPTH01			0	0	3	0		
18401	14779	EGPLSPRY01	EGPLSPRY01			265	265	3	0		
18401	14779	GOLDFOK02	GOLDFOK02			117	117	2	0		
18401	14779	GOLDHTC01	GOLDHTC01			117	117	5	0		
18401	14779	GOLDSPO01	GOLDSPO01			114	114	6	0		
18402	X2022	ACMERAKE02	ACMERAKE02			108	108	1	0		
18402	X2022	ACMESPOE01	ACMESPOE01			110	110	5	3		
18402	X2022	BOOK001	BOOK001			116	116	4	0		
18402	X2022	BOOK002	BOOK002			139	139	5	0		
18402	X2022	EGPLCS1	EGPLCS1			153	153	2	1		
18402	X2022	EGPLPTH03	EGPLPTH03		EGPLTH Power Tool Saw	0	0	6	0		
18402	X2022	EGPLSPRY03	EGPLSPRY03		Backpack Sprayer	163	163	1	0		

3.25. Close Quotations by Order Source Code

Pre-Released to Software Assurance customers



The Supervisor Function 'Close Quotations' has been extended to provide an additional selection criterion by Order Source code(s).

The function allows all quotations prior to a specific date, or prior to a specific quotation number, to be closed. This additional selection criterion now also allows the selection of quotations to be closed to be further filtered to just those for a specific order source code, or a range of order source codes.

Close Quotations

Adjustment Parameters

Quotations to remove Prior to quotation number

Quotation number 65411

Quotation number(s)

Order source(s) 3,7

OK Cancel

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This makes it much easier to close a block of quotations when, for example, a sales agent leaves or changes their area of responsibility.

3.26. Suppress Data Sheets from Quotations

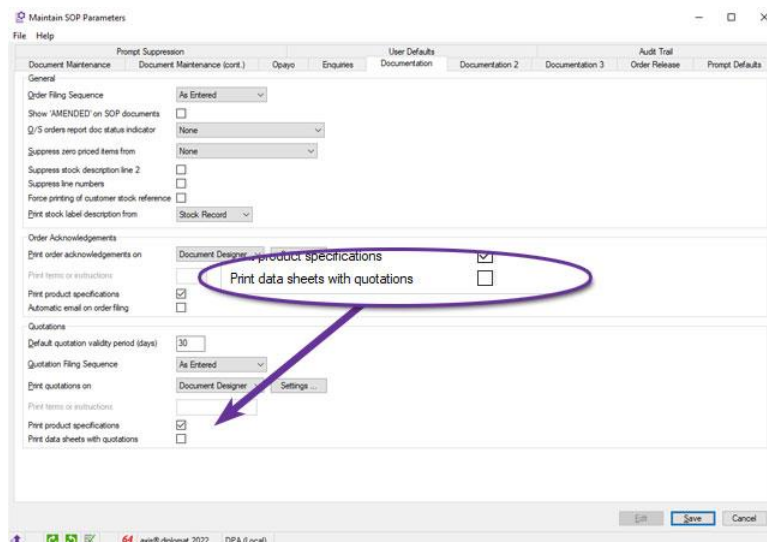
Pre-Released to Software Assurance customers



The standard behaviour of the system is to automatically append to printed quotations any data sheets attached to the stock items that appear on the quote.

A new system parameter has been added to allow these data sheets to be suppressed from quotations.

The parameter can be found on the Documentation tab of the Supervisor Function Maintain SOP Parameters:

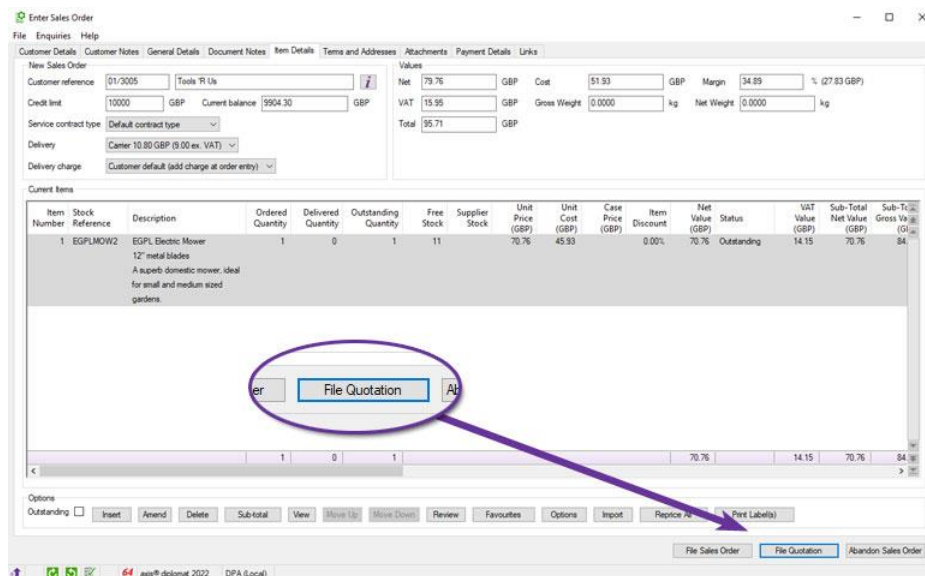


3.27. Prevent Filing as Quotation when entering Sales Orders

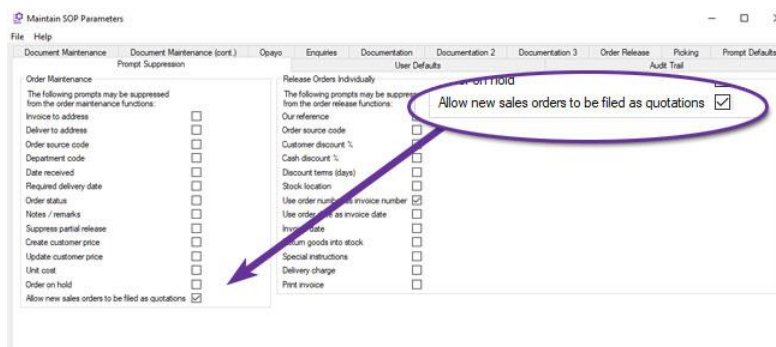
Pre-Released to Software Assurance customers



It is now possible to remove the option to file sales orders as quotes by suppressing the "File Quotation" button when entering sales orders:



A new option on the "Prompt Suppression" tab of "Maintain SOP Parameters" allows this to be removed:



This means that even operators who are allowed to enter quotes are prevented from starting to create a sales order but filing as a quote instead - they will need to use the Enter Quotation function.

This can help avoid errors where staff accidentally file a document as a quote when they meant to file it as a sales order.

3.28. Validation of Quotation Delivery Dates

Pre-Released to Software Assurance customers



A number of changes have been made to quotation maintenance to help ensure that planned delivery dates remain valid when quotation dates are changed:

- If a user changes the quotation date, a new delivery date is now calculated and updated based on the rules for default delivery lead time for the items on the quotation.
- If the delivery date is set to occur in the past, the software now offers to recalculate the delivery date based on the default delivery times.

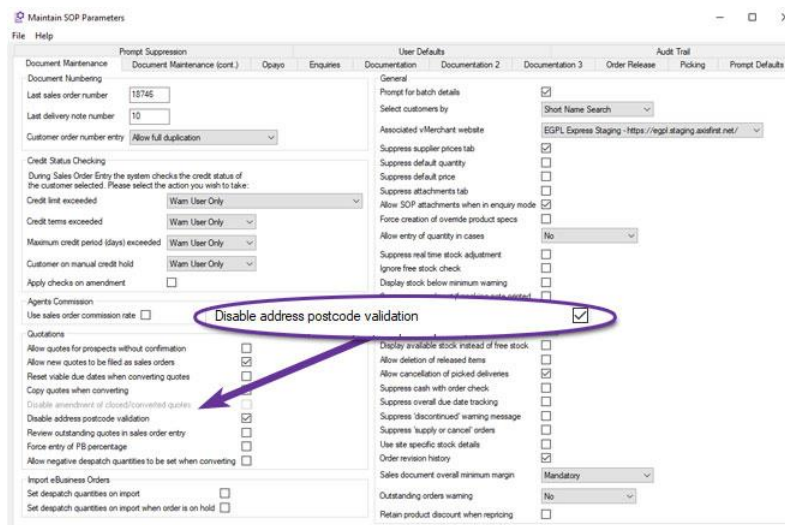
- Any line items which currently have a delivery date earlier than the overall quotation delivery date are updated to match the new quotation delivery date.

3.29. Disable Address Postcode Validation on Quotations

Pre-Released to Software Assurance customers



When entering a new sales opportunity as a quotation, you may not yet have the full billing or delivery address details. There is now a new system parameter to disable postcode validation for the addresses on quotation documents.



Please note that when a quotation is converted to a sales order, a valid postcode is then required.

3.30. Customer Mailing Labels (Bartender Format)

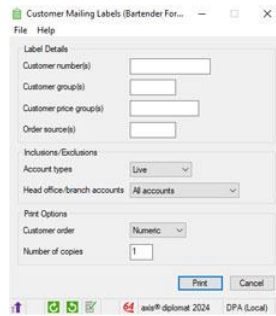
Pre-Released to Software Assurance customers with the Bartender Bar Code Labels module



Those using the link to the third party label printing solution, Bartender from Seagull Scientific, are now able to print customer mailing labels in addition to stock labels.

This provides a completely customisable label printing solution, allowing users to choose which customer fields are printed on the labels and to match the template to the desired label size.

The Customer Mailing Labels (Bartender Format) function allows you to print labels for a range of customers at once, by ranges of customer group, order source code and account type, for example:



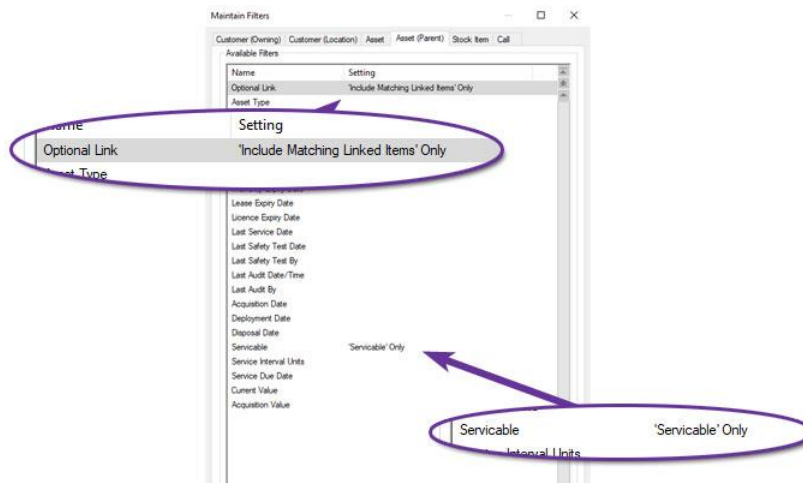
Note: Only the Bartender Automation Edition or higher provide an API for use by other software applications such as axis diplomat.

3.31. Additional Filters for Customer Assets Monitor Tabs

Pre-Released to Software Assurance customers with the Customer Assets module



Customer Asset monitor tabs now include the ability to filter assets based on the presence or absence of a parent asset. When filtering to include only assets with a parent asset, you can further restrict the monitor to listing only assets with parent assets that have particular features.



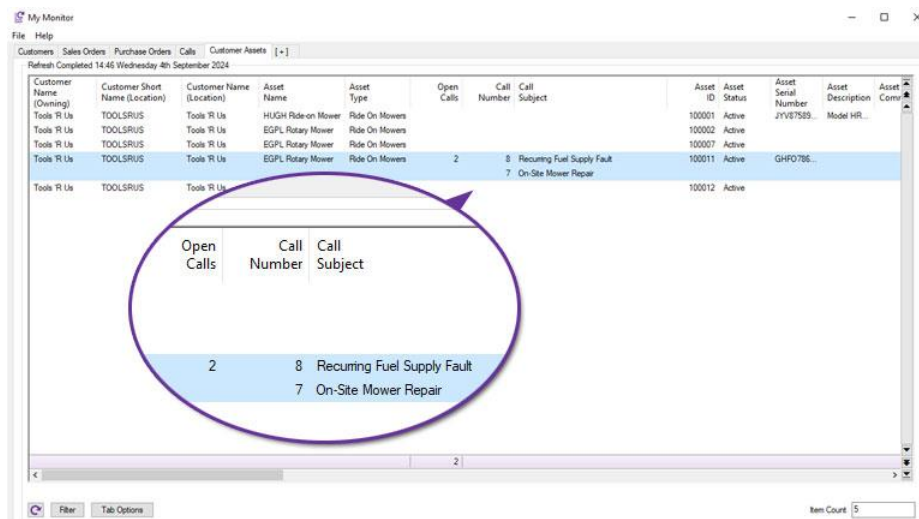
This screenshot, for example, shows a Customer Asset monitor tab that is filtered to only include assets with a serviceable parent asset.

3.32. Customer Assets Monitor Tab Enhancements

Pre-Released to Software Assurance customers with the Customer Assets module



Customer Asset monitor tabs now features additional columns showing linked call information.

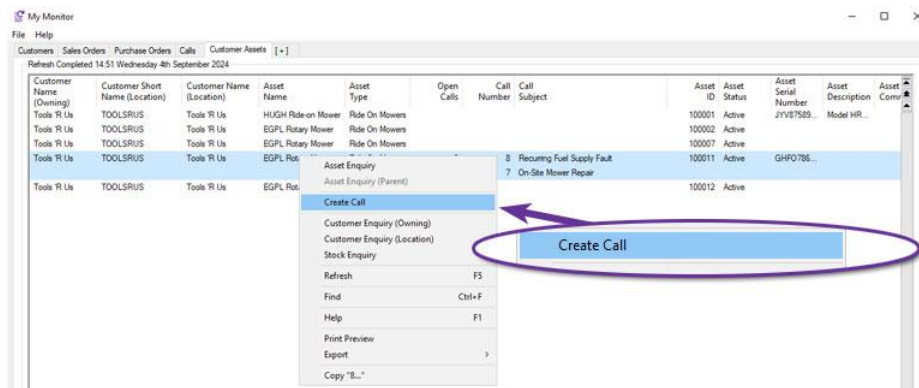


Customer Name (Owning)	Customer Short Name (Location)	Customer Name (Location)	Asset Name	Asset Type	Open Calls	Call Number	Call Subject	Asset ID	Asset Status	Asset Serial Number	Asset Description	Asset Conv.
Tools R Us	TOOLSRUS	Tools R Us	HUGH Ride-on Mower	Ride On Mowers				100001	Active	ZYVE7589	Model HR...	
Tools R Us	TOOLSRUS	Tools R Us	EGPL Rotary Mower	Ride On Mowers				100002	Active			
Tools R Us	TOOLSRUS	Tools R Us	EGPL Rotary Mower	Ride On Mowers				100007	Active			
Tools R Us	TOOLSRUS	Tools R Us	EGPL Rotary Mower	Ride On Mowers	2	8	Recurring Fuel Supply Fault	100011	Active		GHPO786...	
Tools R Us	TOOLSRUS	Tools R Us				7	On-Site Mower Repair					
Tools R Us	TOOLSRUS	Tools R Us						100012	Active			

The following columns have been added to show open calls linked to each asset:

- Open Calls is the number of open calls linked to this asset; more detailed information can be found by opening the individual asset and referring to the 'Calls' tab.
- Call Number lists each call number for the open calls linked to this asset.
- Call Subject displays the call subject for each open call linked to this asset.

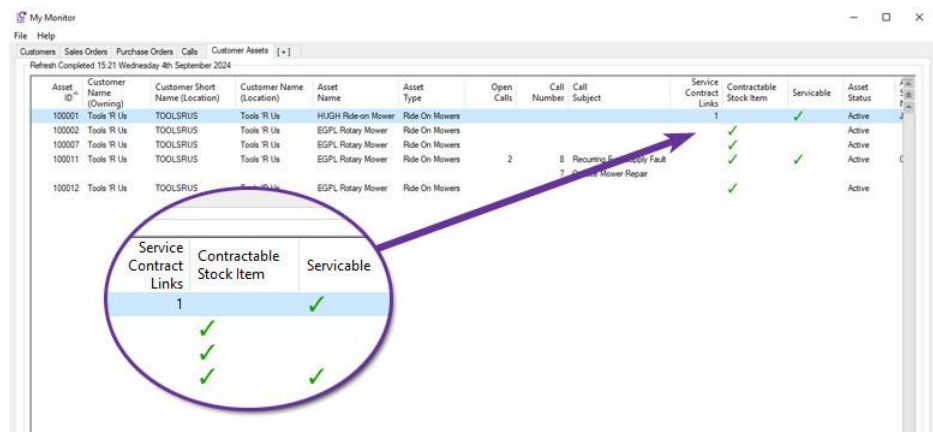
A right-click option has also been added to allow a new linked call to be created:



Customer Name (Owning)	Customer Short Name (Location)	Customer Name (Location)	Asset Name	Asset Type	Open Calls	Call Number	Call Subject	Asset ID	Asset Status	Asset Serial Number	Asset Description	Asset Conv.
Tools R Us	TOOLSRUS	Tools R Us	HUGH Ride-on Mower	Ride On Mowers				100001	Active	ZYVE7589	Model HR...	
Tools R Us	TOOLSRUS	Tools R Us	EGPL Rotary Mower	Ride On Mowers				100002	Active			
Tools R Us	TOOLSRUS	Tools R Us	EGPL Rotary Mower	Ride On Mowers				100007	Active			
Tools R Us	TOOLSRUS	Tools R Us	EGPL Rot...			8	Recurring Fuel Supply Fault	100011	Active		GHPO786...	
Tools R Us	TOOLSRUS	Tools R Us	EGPL Rot...			7	On-Site Mower Repair					
Tools R Us	TOOLSRUS	Tools R Us	EGPL Rot...					100012	Active			

For customers who also have the Service Contract Management module, further columns have also been added:

- Contractable Stock Item indicates that the asset is linked to a stock item that can be added to a service contract.
- Service Contract Links displays the number of open contracts linked to this asset.



The screenshot shows the 'My Monitor' application window with the 'Customer Assets' tab selected. The table lists assets with columns: Asset ID, Customer Name (Location), Customer Short Name (Location), Asset Name, Asset Type, Open Calls, Call Number, Call Subject, Service Contract Links, Contractable Stock Item, Serviceable, and Asset Status. A callout box highlights the 'Service Contract Links' column, showing a value of '1' for the first asset. The table data is as follows:

Asset ID	Customer Name (Location)	Customer Short Name (Location)	Asset Name	Asset Type	Open Calls	Call Number	Call Subject	Service Contract Links	Contractable Stock Item	Serviceable	Asset Status
100001	Tools R Us	TOOLSRIUS	Tools R Us	HUGH Ride-on Mower	Ride On Mowers			1	✓	✓	Active
100002	Tools R Us	TOOLSRIUS	Tools R Us	EGPL Rotary Mower	Ride On Mowers				✓		Active
100007	Tools R Us	TOOLSRIUS	Tools R Us	EGPL Rotary Mower	Ride On Mowers				✓		Active
100011	Tools R Us	TOOLSRIUS	Tools R Us	EGPL Rotary Mower	Ride On Mowers	2	8 Recurring Fault		✓	✓	Active
100012	Tools R Us	TOOLSRIUS	Tools R Us	EGPL Rotary Mower	Ride On Mowers		7 Recurring Fault		✓		Active

In conjunction with the existing Serviceable column, which indicates whether the asset itself is serviceable, the Customer Assets monitor tab can be a useful aid to identifying potential opportunities for new service contracts.

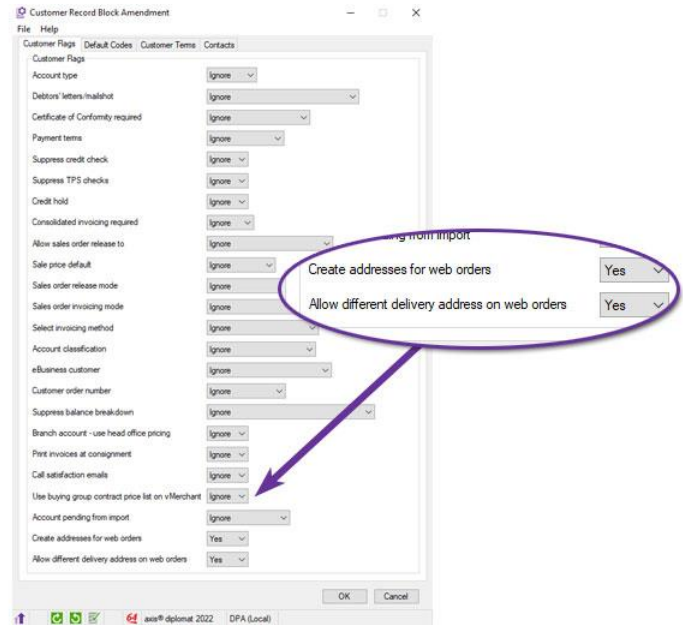
3.33. Additional eBusiness Settings in Customer Record Block Amendment

Pre-Released to Software Assurance customers with the eBusiness module



The Customer Record Block Amendment function has been extended to allow setting of the following flags on systems with the eBusiness module:

- Create addresses for web orders
- Allow different delivery address on web orders



The screenshot shows the 'Customer Record Block Amendment' dialog box. It has tabs for 'Customer Flags', 'Default Codes', 'Customer Terms', and 'Contacts'. The 'Customer Flags' tab is active, showing a list of flags with dropdown menus. Two flags are highlighted with callouts: 'Create addresses for web orders' and 'Allow different delivery address on web orders', both set to 'Yes'.

Flag	Value
Account type	Ignore
Debtors' letters/reminder	Ignore
Certificate of Conformity required	Ignore
Payment terms	Ignore
Suppress credit check	Ignore
Suppress TPS checks	Ignore
Credit hold	Ignore
Consolidated invoicing required	Ignore
Allow sales order release to	Ignore
Sale price default	Ignore
Sales order release mode	Ignore
Sales order invoicing mode	Ignore
Select invoicing method	Ignore
Account classification	Ignore
eBusiness customer	Ignore
Customer order number	Ignore
Suppress balance breakdown	Ignore
Branch account - use head office pricing	Ignore
Print invoices at consignment	Ignore
Call satisfaction emails	Ignore
Use buying group contract price list on vMerchant	Ignore
Account pending from import	Ignore
Create addresses for web orders	Yes
Allow different delivery address on web orders	Yes

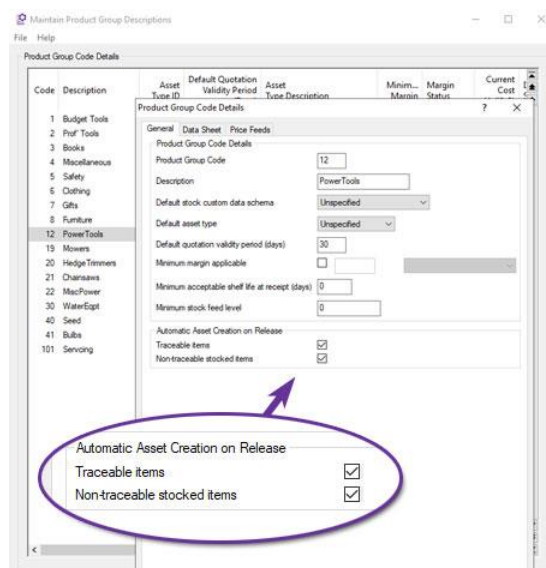
3.34. Automatically Create Assets from Stock

Pre-Released to Software Assurance customers with the Customer Assets module



Previously, axis diplomat was only able to automatically create Customer Assets on the sale of traceable stock items (meaning that this facility was only available to those who also had the Stock Transaction Traceability module).

This facility has now been extended to also allow automatic creation of customer assets for non-traceable items as well. This is controlled at the Product Group level:



3.35. Direct Debit with SmarterPay Cloud

Available to purchase with axis diplomat 2024



The axis diplomat Direct Debits module works in conjunction with the Sales Ledger and, optionally, the Service Contract Management module to allow collection of sales and service contract invoice payments by Direct Debit.

The software is designed to interface with SmarterPay Cloud from SmarterPay Limited however limited functionality can also be used to provide payment files to some other BACS solutions that utilise "Standard 18" format payment files.

It is assumed that an active Direct Debit originator agreement with a sponsoring bank is in place together with with a BACS user number which must be configured in both SmarterPay and in axis diplomat.

The axis diplomat Direct Debit module is capable of managing AUDDIS when used in conjunction with the SmarterPay software package. If using another BACS software solution then AUDDIS messages must be processed manually using that package.

Direct debit processing supports automated background operation to:

- Upload new DDI setup requests.
- Check the status of new DDI requests and existing DDI's.
- Check the status of collections and process any collection failures.

The axis diplomat "Direct Debit Processing" function is used to initiate collections. Each set of payments collected are given a submission number which is stamped on the payments.

Direct Debit Processing

File Help

Customers Invoices Contracts Submissions

Invoices

Invoice Number	Invoice Date	Creation Date	Gross Value	Collection Amount	Collectable Amount	DD Status	SmarterPay Cloud Payment Reference	Customer Number	DDI Status
586855	02-09-24	04-09-24	1074.00	1074.00	1074.00	DD Collection Pending	WLR35100Q...	01/66995	DDI Active
586865	09-09-24	09-09-24	6.30	6.30	6.30	DD Collection Pending	50QNM0W0...	01/29290	DDI Active
587212	20-09-24	20-09-24	1462.80	1462.80	6.30	Waiting till 03-10-24 (Advance Notice Period)		01/321010	DDI Active
586860	05-09-24	05-09-24	6.30	6.30	6.30	DD Collection Pending	YJ61Z3K1Q8...	01/60571	DDI Active
586858	05-09-24	05-09-24	269.94	269.94	269.94	DD Collection Pending	50QNM0W0...	01/3900	DDI Active
586857	05-09-24	05-09-24	161.94	161.94	161.94	DD Collection Pending	6K8KZ2WV1N...	01/4057	DDI Active
586866	11-09-24	11-09-24	1074.00	1074.00	1074.00	DD Collection Pending	50QNM0W0...	01/4000	DDI Active
586849	30-08-24	30-08-24	1577.98	1577.98	1577.98	DD Collection Pending	RDJZ6V75LMJ...	01/23261	DDI Active
587208	19-09-24	19-09-24	720.00	720.00	720.00	Waiting till 02-10-24 (Advance Notice Period)		01/23261	DDI Active
586867	11-09-24	11-09-24	207.12	207.12	207.12	DD Collection Pending	6K8KZ2WV7N...	01/29308	DDI Active
586856	05-09-24	05-09-24	1074.00	1074.00	1074.00	DD Collection Pending	WLR3510WD...	01/43462	DDI Active
586844	12-08-24	29-08-24	900.00	900.00	900.00	DD Collection Pending	KN8XQLZWG7...	01/321186	DDI Active
586845	29-08-24	29-08-24	484.13	484.13	484.13	DD Collection Pending	6K8KZ2WVGN...	01/3121	DDI Active
					6835.71				

Status

DD Status DD collection pending

Options

axis diplomat 2024 DPA (Local)

Section 4 Purchase Ledger & Purchase Order Processing

4.1. Purchase Invoice/Credit Note Attachment Pane

Available with axis diplomat 2024



With the increasing use of email and electronic data interchange (EDI) for the delivery of documents, very few purchase invoices and credit notes received are paper-based. Those which do arrive by paper are often scanned and added as attachments to the document in axis diplomat.

Enhancements for paperless purchase ledger processes in axis diplomat 2024 have significantly streamlined purchase invoice and credit note booking including extensions to the previous attachments functionality for purchase invoices and credit notes.

To increase the efficiency of booking these transactions, users are now able to add attachments on the initial tab in Purchase Invoice/Credit Note Booking before entering any document details and a 'Show Pane' button has been added, providing the ability to view the attachment in a pane whilst booking the transaction into the system. This pane remains visible throughout the booking and analysis stages, avoiding the need to either use two screens or print documents to enter them.

This pane is also available in the Purchase Invoice/Credit Note Enquiry functions.

Purchase Invoice Enquiry

File Help

General Details Items Attachments Notes Allocation Details Links Audit Trail

Invoice number: 1256727
 Invoice date: 14/08/2024
 Purchase order: 384
 Period / year: 06/25
 Batch number: 0
 Internal reference: TG
 Comment:

Supplier Details
 Supplier reference: 01/8004 GOLDTOOLS
 Supplier name: Gold Tools Limited
 Supplier group: 1 (Stock Suppliers)

Discount and Payment Details
 Supplier discount: 0.00 %
 Cash discount: 0.00 %
 Discount period: 0 day(s)
 Payment due by: 13/09/2024

Approval Status
 Status: Approved

Document Values
 Goods value: 1390.37 GBP
 VAT value: 279.68 GBP
 Invoice total: 1670.05 GBP
 Discount: 0.00 GBP
 Amount due: 1670.05 GBP

Attachments
 Filename: M Gold - Message regarding Invoice 1256727...
 File Type: Adobe Acrobat D
 Purchase Invoice 1256727 for PO384 - Gold T...
 File Type: Adobe Acrobat D

Attachment Preview
Gold tools Limited
 For all your Garden Needs
 Unit 1, Tynewydd Industrial Estate, Tynewydd, Gwynedd, LL57 7TT
 sales@goldtoolsuk.com
 01234 987123

Invoice 1256727

Date: 14-08-24
 Reference: 1256727
 Year Ref: 2024

Ref	Reference	Qty	Description	Unit	Per	Net
1	GOLDPOW001	12	GoldTools Chrome Plated Standard Fork, Steel Shaft		13.96	167.52
2	GOLDHPT01	24	Gold Hand Axe		7.52	180.48
3	GOLDSP003	12	GoldTools Chrome Plated Light Spade, Steel Shaft		12.55	150.54
4	HCH0001	24	Professional Iron Shovel + 2.25m, yellow		39.18	940.32
5	HCH0002	12	Shovel + 2.25m, green		15.88	190.56
6	DEL_PNL	1	Deliveries by Public with Tail Lift		13.00	13.00
				Sub Total		1390.37
				VAT		279.68
				Total		1670.05

Unit 1
 Tynewydd Industrial Estate
 Tynewydd
 Gwynedd
 LL57 7TT

Rotate Left Rotate Right

Hide Pane Edit Save Report Send Shortcut Close

Electronic storage of purchase invoices and credit notes in axis diplomat brings many benefits:

- Compliance with HMRC requirements - many tax inspections are now conducted remotely via electronic copy document requests.

- Remote audits - allow auditors direct read-only access to the system, enabling them to view required documents without the need for physical copies.
- All attachment data is secured by axis diplomat and Windows security policies, ensuring sensitive information is well-protected.
- Paperless business processes encourage clear desk policies, promoting a safer and more secure working environment.

4.2. Purchase Invoice and Credit Note Enquiry

Available with axis diplomat 2024



Purchase Invoice and Credit Note enquiry functions have been extended to include two additional tabs; Notes and Allocation Details.

The Notes tab allows the entry of notes against the transaction both when booking a new transaction and when in Edit mode on an existing invoice or credit note.

Purchase Invoice Enquiry

General Details Items Attachments Notes Allocation Details Links Audit Trail

Invoice Details
Invoice number: 1256727
Invoice date: 14/08/2024

Supplier Details
Supplier reference: 01/0004
Supplier name: GoldTools Limited

Notes
Please note that Invoice 1256727 is short some of the urgent items you needed. We are so sorry to have let you down and have popped a 10% discount on the rest of the order to show you are a valued customer.

Attachment Preview
Midass Gold
From: Midass Gold
To: GoldTools Limited
Subject: Purchase Invoice 1256727 for 01/0004 - Gold Tools Ltd
Information: Purchase Invoice 1256727 for 01/0004 - Gold Tools Ltd
Hi Andy,
No sorry you did not receive your earlier emails. A type on our system. I have attached all the outstanding invoices for your convenience.

Notes
Please note that Invoice 1256727 is short some of the urgent items you needed. We are so sorry to have let you down and have popped a 10% discount on the rest of the order to show you are a valued customer.

Supplier name: GoldTools Limited
01234 56789

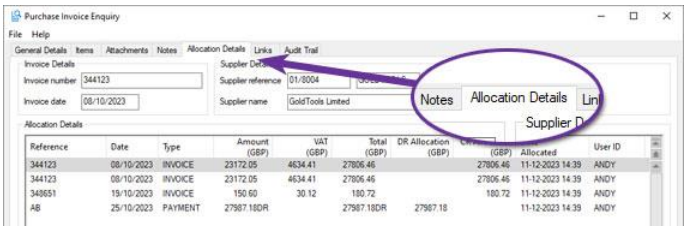
A Notes column has also been added to the Transactions and Transaction History tabs of Supplier Enquiry and to the Supplier Transaction History type monitor tab.

Suppliers & Purchase Ledger

Supplier Transactions

Supplier Short Name	Supplier Account	Supplier Name	Notes	Document Reference	Document Date	Transac. Type	Net Value (GBP)	VAT (GBP)	Total (GBP)	Unallocated (GBP)	Settled Date	Settled (Days)	Purchase Order	Comment	Internal Reference	Created
BOOKSRUS	8005	Books 'Y' Ltd		75255178	03/07/2024	INVOICE	290.40	0.00	290.40	290.40			362	TG		27-09-2024 21:57
BOOKSRUS	8005	Books 'Y' Ltd		75255178	03/07/2024	INVOICE	3648.60	0.00	3648.60	3648.60			381	TG		27-09-2024 21:56
ACME	8003	Acme Garden Tools Limited	Invoice missing	85230012	01/07/2024	INVOICE	2250.00	450.00	2700.00	2700.00			372	Ad. Tax Pmt.		27-09-2024 21:43
ACME	8003	Acme Garden Tools Limited		85230028	27/06/2024	INVOICE	750.00	150.00	900.00	900.00			373	TG		27-09-2024 21:41
ACME	8003	Acme Garden Tools Limited		85230123	31/07/2024	INVOICE	2250.00	450.00	2700.00	2700.00			374	TG		27-09-2024 21:41
ACME	8003	Acme Garden Tools Limited		85230205	26/06/2024	INVOICE	737.60	147.52	885.12	885.12			375	TG		27-09-2024 21:40
SUNSHINE	8017	Sunshine Churners		A050204	18/08/2024	INVOICE	52.50	0.00	52.50	52.50				TG		27-09-2024 21:36
GOLDTOOLS	8004	GoldTools Limited		1256999	11/07/2024	INVOICE	150.60	30.12	180.72	180.72			378	Windows		27-09-2024 20:52
GOLDTOOLS	8004	GoldTools Limited		1256990	01/07/2024	INVOICE	630.85	138.57	831.42	831.42			377	TG		27-09-2024 20:51
GOLDTOOLS	8004	GoldTools Limited		1256987	17/09/2024	INVOICE	42001.96	42001.96	42001.96	42001.96			376	TG		27-09-2024 20:47
GOLDTOOLS	8004	GoldTools Limited												TG		19-09-2024 20:15
GOLDTOOLS	8004	GoldTools Limited												TG		19-09-2024 20:12
BOOKSRUS	8005	Books 'Y' Ltd														02-04-2024 14:11
BOOKSRUS	8005	Books 'Y' Ltd														02-04-2024 14:10
BOOKSRUS	8005	Books 'Y' Ltd														11-03-2024 12:03
GOLDTOOLS	8004	GoldTools Limited														11-03-2024 12:02
ACME	8003	Acme Garden Tools Limited														11-03-2024 12:02
GOLDTOOLS	8004	GoldTools Limited														06-03-2024 17:22
ACME	8003	Acme Garden Tools Limited														06-03-2024 17:22

When enquiring on an existing transaction, the new Allocation Details tab displays any allocation history for the transaction, assisting the accounts team in dealing with supplier payment queries:

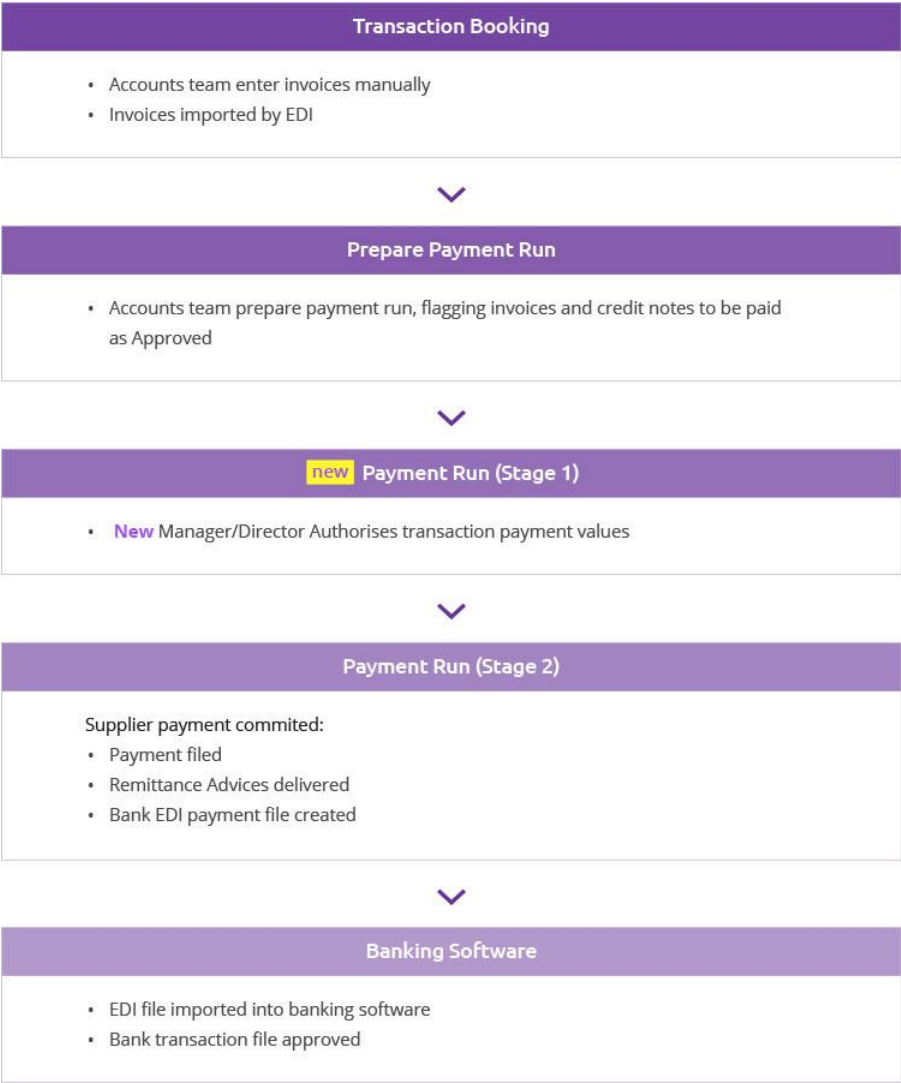


4.3. Supplier Payment Authorisation

Available with axis diplomat 2024



Supporting the financial processes of many businesses, axis diplomat Purchase Ledger has been extended to provide an optional authorisation stage in the suppliers transaction entry and payment run process:



Controlled by a new purchase ledger parameter, this functionality provides an additional level of supplier transaction payment authorisation, above approval status, by adding a new 'Authorised' value field on purchase invoices.

Maintain Purchase Ledger Parameters

File Help

Control Information: General Special Instructions Audit Trail

Stationery

Print remittance advice on: Document Designer Settings

Print address to window envelope position: ☐

Print extended document reference: ☐

Balance column shows running balance: ☐

Supplier Debt Analysis

Auto-allocate supplier cash against: Oldest Debts

Auto-allocate supplier debts against: Oldest Debts

Supplier debt analysis period length (days): 0

Archiving

Remove completed transactions during period end: ☐

Retain transactions for: 0 day(s)

Minimum number of transactions: 0

Supplier Record Maintenance

Automatic supplier number allocation: ☐

Contact Defaults

Display name type: User Defined

Salutation type: User Defined

Purchase Invoice/Credit Note Booking

Offer default VAT during item analysis: ☒

Default purchase invoice expenditure type: Expense

Default petty cash expenditure type: Expense

Transaction attachments required: ☒

Payment Run

Take full settlement discount: ☐

Include unallocated debts: ☐

Accounts with unallocated debts: Ignore debt transactions

Hexagon payment reference:

Auto allocate: Include unapproved transactions

Purchase Transaction Booking

Take cash discount default: ☒

Invoice approved for payment: ☒

Credit note approval: ☒

Authorised payment values: ☒

Purchase Ledger Enquiry

Show allocated amount column default: ☒

Automatic Price Feeds

Report pricing anomalies: Compare with standard cost

Purchase Invoice Enquiry

File Help

General Details Items Attachments Notes Allocation Details Links Audit Trail

Invoice number: 1256727

Invoice date: 14/09/2024

Purchase order: 384

Period / year: 06/25

Batch number: 0

Internal reference: TG

Comment:

Supplier Details

Supplier reference: 01/8004 GOLDTOOLS

Supplier name: GoldTools Limited

Supplier group: 1 Stock Suppliers

Discount and Payment Details

Supplier discount: 0.00 %

Cash discount: 0.00 %

Discount period: 0 day(s)

Payment due by: 13/09/2024

Approval Status

Status: Approved

Authorised: 1678.05 GBP

Document Values

Goods value: 1398.37 GBP

VAT value: 279.68 GBP

Invoice total: 1678.05 GBP

Discount: 0.00 GBP

Amount due: 1678.05 GBP

Attachment Preview

Approval Status

Status: Approved

Authorised: 1678.05 GBP

Attachments

Filename:

File Type:

There are no items to show

Open Insert Delete Rename Mail

Rotate Left Rotate Right

Hide Pane Edit Save Printout Send Snapshot Close

The 'Authorised' value on a purchase invoice also allows part payment of invoices and is amendable in transaction booking, Prepare Payment Run and Payment Run functions. Additional columns and filtering for the authorised amount are also activated in Document Designer Remittance Advice prints, the Supplier 'Transactions' tab and Supplier Transaction History monitor tabs.

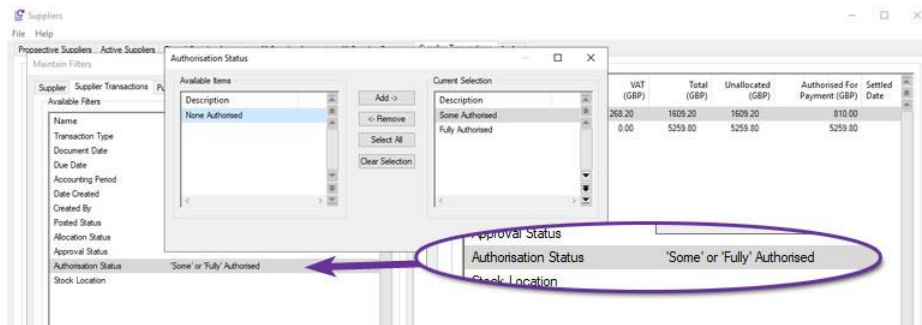
Suppliers

File Help

Prospective Suppliers Active Suppliers Closed Supplier Accounts All Supplier Accounts All Supplier Contacts Supplier Transactions [-]

Refresh Completed 15:27 Monday 7th October 2024

Supplier Short Name	Supplier Account	Supplier Name	Document Reference	Document Date	Transact... Period	Due Date	Transac... Type	Net Value (GBP)	VAT (GBP)	Total (GBP)	Unallocated (GBP)	Authorised For Payment (GBP)	Settled Date
ACME	8003	Acme Garden Tools Limited	76457663	12/09/2024	02/25	11/11/2024	INVOICE	1341.00	268.20	1609.20			
BOOKSRUS	8005	Books Y Us	369981	02/09/2024	02/25	01/09/2024	INVOICE	5259.80	0.00	5259.80			
GOLDTOOLS	8004	GoldTools Limited	367165	02/09/2024	02/25	01/09/2024	INVOICE	35001.55	7000.31	42001.86			
ACME	8003	Acme Garden Tools Limited	366978	02/09/2024	02/25	01/10/2024	INVOICE	113393.40	22678.68	136072.08			
BOOKSRUS	8005	Books Y Us	365812	11/07/2024	01/25	10/08/2024	INVOICE	7021.20	0.00	7021.20			
GOLDTOOLS	8004	GoldTools Limited	364128	11/07/2024	01/25	10/08/2024	INVOICE	38210.00	7642.00	45852.00			
ACME	8003	Acme Garden Tools Limited	363413	11/07/2024	01/25	09/09/2024	INVOICE	214902.65	40710.20	255612.85			
											Authorised For Payment (GBP)		Settled Date
											810.00		
											5259.80		



Read/write access to this field is controlled by user and group security permissions, allowing configuration of who is able to authorise the amount to be paid when running a supplier payment run in axis diplomat.

The new attachment viewing pane and transaction notes tab, combined with the authorised value on transactions, allow for ease of entry, enquiry, amendment and authorisation of supplier transactions for payment, wherever the user might be working.

4.4. Supplier Contacts Monitor

Available with axis diplomat 2024



As with the Customer Contacts monitor tab type added for the Sales Ledger, a new Supplier Contacts monitor tab type provides an overview list of the contacts on supplier accounts.

Supplier Short Name	Supplier Account	Supplier Name	Contact Name	Job Title	Email Address	Telephone Number	Telephone Extension	Mobile Number	Full Name	Salutation	Letter Addressee	Notes	Default Supplier Contact	My Contact
ACME	8003	Acme Garden Tools Limited	Ken Webb	Account Manager					Mr Ken W...	Mr Webb	Mr K Webb		✓	
ACME	8003	Acme Garden Tools Limited	Fergal Hume						Fergal Hume	Fergal	F Hume			
ASIANTOOLS	8013	The Asian Tool Co.	Jane Jiang						Jane Jiang	Jane	J Jiang			
BLACK	8006	Black Accountants	Mr I Black											
BOOKSRUS	8005	Books 'Y' Us	Mr Shakespeare											
BISMERCHANT	8015	Bulb and Seed Merchant	Bob Snow						Bob Snow	Bob	B Snow		✓	
COUNTYM...	8008	Countywide Marketing Ltd	Judy McDuff						Judy McDuff	Judy	J McDuff		✓	
GLOBALPR	8014	Global PR	Joe Dooz	Partner					Joe Dooz	Joe	J Dooz		✓	
GOLDTOOLS	8004	GoldTools Limited	Mr Gold						Mr Manyn...	Mr Gold	Mr M Gold		✓	
PETTYCASH	8001	Petty Cash Account												
PROPERTYMA	8007	Property Management Ltd	Giles Huntington						Giles Hunt...	Giles	G Hunting...		✓	
RAPIDA	8016	Rapida Delivery	Green						Mr Green	Mr Green	Mr Green		✓	
SUNDRYPCH	8002	Sundry Purchases												

Filtering is provided for both supplier contact and supplier account properties so, for example, when using the Multi-Currency module, a monitor tab could be added that lists all of the main default contacts on just the US Dollar ledger.

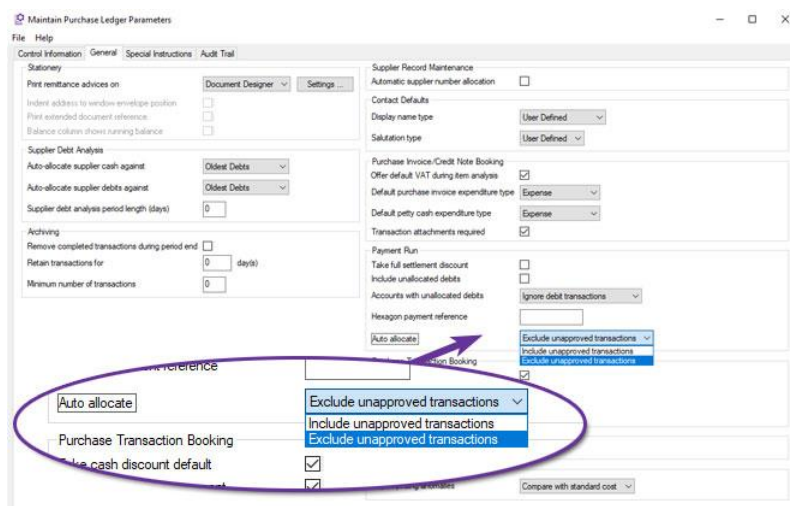
4.5. Automatic Allocations Include/Exclude Unapproved

Pre-Released to Software Assurance customers



When using the 'Auto Allocation' option for supplier payments, the system is now able to either include or exclude unapproved transactions.

This operation is controlled by new setting in Purchase Ledger Parameters:



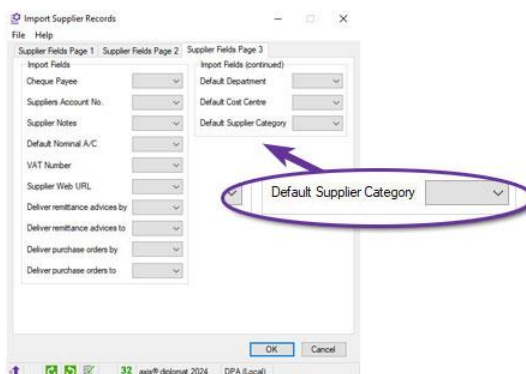
4.6. Import Supplier Default Category

Pre-Released to Software Assurance customers



The function Import Supplier Records has been extended to allow importing of the supplier's default category.

This is the supplier category used by both supplier price feeds and Office Products product file imports when automatically creating new supplier price lists. It is also the default used when manually adding new supplier price list entries.



4.7. Delete Purchase Delivery

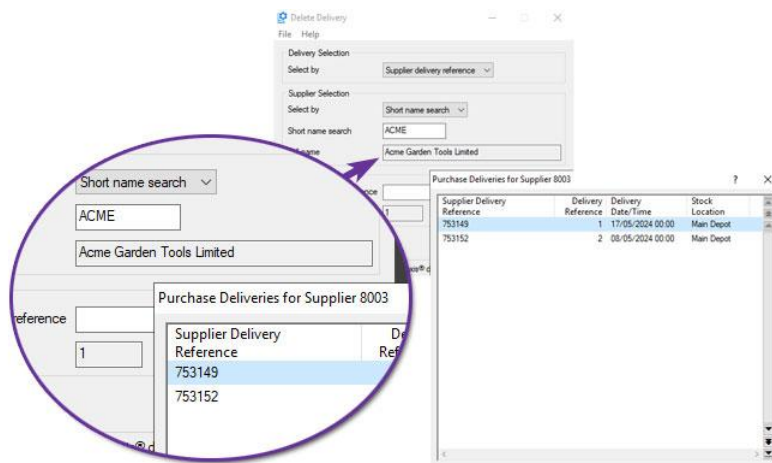
Pre-Released to Software Assurance customers with the Purchase Delivery Advice module



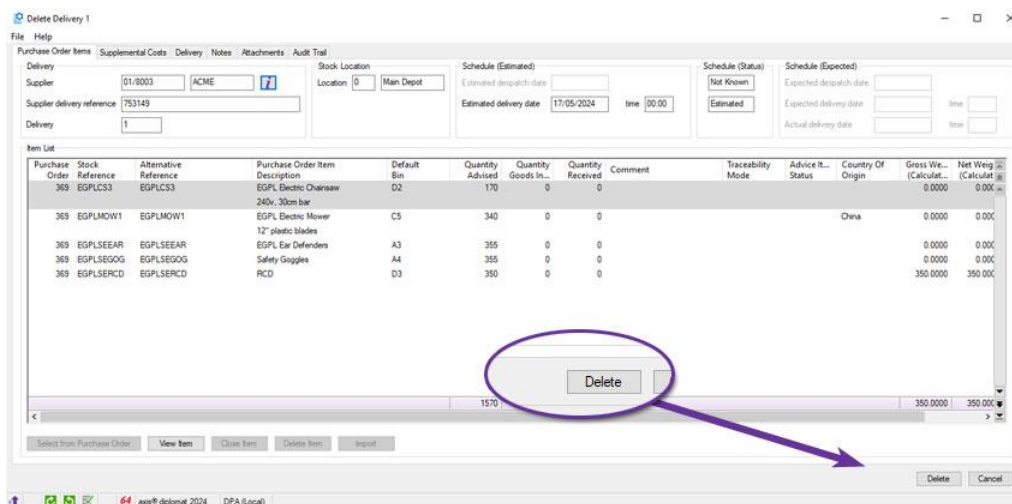
A new function has been added to allow deletion of a Purchase Delivery record provided that no receipts or dispatches (using online order processing) have been made.

You can select the delivery record to be deleted by specifying either the supplier's delivery reference or the internal delivery reference allocated when the record was created.

Alternatively, you can search through all relevant delivery records for a given supplier:



Once you have selected the delivery to be deleted, you are presented with the full details of the delivery before confirming deletion:



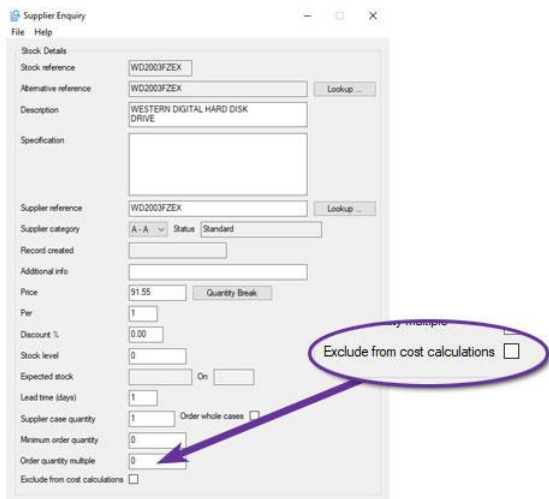
4.8. Exclude Supplier Price List Entries from Cost Calculations

Pre-Released to Software Assurance customers with the Supplier Price Feed Foundation module



It is now possible to exclude individual Supplier Price List entries from aggregated cost calculations. This is particularly useful where a supplier has issued a price list with a known error in it; including that entry would skew the cost calculations, leading to unreliable margin calculations.

A new 'Exclude from cost calculations' tickbox has been added to the supplier price list amendment dialog:



To assist with managing these exclusions, a new column has been added to the Supplier Price List in both Supplier Enquiry and Stock Enquiry to show when an item has been excluded from cost calculations:

A screenshot of the 'Supplier Price List' window for supplier 'WESTCOAST'. The table lists various hardware items with their stock references, descriptions, and prices. A new column, 'Include In Cost Calculations', has been added. This column contains green checkmarks for items included in calculations and red 'X' marks for items excluded. A purple oval highlights the 'Include In Cost Calculations' column header, and a purple arrow points from it to the text 'Include In Cost Calculations'.

Stock Reference	Stock Description	Supplier Item Reference	Supplier Item Description	Alternative Reference	Category	Include In Cost Calculations	Currency Price (GBP)	Per	Discou...	Currenc...
WD2003F...	Western Digital Black 2TB SATA 64MB Hard Drive (7200rpm)	WD2003FZEX	WESTERN DIGITAL HARD DISK DRIVE	WD2003FZEX	A	X Excluded (Price List Item)	91.55	1	0.00%	91.55
WD20EARS	Western Digital Caviar Green 2TB SATA 64MB Hard Drive	WD20EARS	WESTERN DIGITAL HARD DISK DRIVE	WD20EARS	A	✓	56.35	1	0.00%	56.35
WD2500B...	Western Digital 250GB SATA Hard Drive (2.5" 5400rpm)	WD2500BVT	2.5 250GB SATA HARD DRIVE	WD2500BVT	A	✓	31.70	1	0.00%	31.70
WD30EFRX	Western Digital Red 3TB SATA NAS 64MB Hard Drive	WD30EFRX	WESTERN DIGITAL RED 3TB SATA NAS 64MB HARD DRIVE	WD30EFRX	A	✓	74.21	1	0.00%	74.21
WD40EFRX	Western Digital Red 4TB SATA3 NAS 64MB Hard Drive	WD40EFRX	WESTERN DIGITAL RED 4TB SATA3 NAS 64MB HARD DRIVE	WD40EFRX	A	✓	87.71	1	0.00%	87.71
WD5000A...	Western Digital Caviar Blue 500GB SATA 16MB Hard Drive	WD5000AAX	WESTERN DIGITAL CAVIAR BLUE 500GB SATA 16MB HARD DRIVE	WD5000AAX	A	✓	45.89	1	0.00%	45.89
WD5002A...	Western Digital Caviar Black 500GB SATA 32MB Hard Drive	WD5002AALX	WESTERN DIGITAL CAVIAR BLACK 500GB SATA 32MB HARD DRIVE	WD5002AALX	A	✓	55.04	1	0.00%	55.04
WN10EN...	Microsoft Windows 10 Enterprise E3 (Monthly)	WN10ENT3CSP	MICROSOFT WINDOWS 10 ENTERPRISE E3 (MONTHLY)	WN10ENT3CSP	A	✓	4.64	1	0.00%	4.64
WDL610	802.11b PCMCIA Wireless LAN card	DWL610	802.11b PCMCIA WIRELESS LAN CARD	DWL610	A	✓	0.01	1	0.00%	0.01
XE700TIC...	Samsung ATIVY Tablet -5.3313u 11.6" 4GB 128GB WSP A K/b Disk	XE700TIC-A5UK	SAMSUNG ATIVY TABLET -5.3313U 11.6" 4GB 128GB WSP A K/B DISK	XE700TIC-A...	A	✓	821.77	1	0.00%	821.77
XE700TIC...	Samsung ATIVY Tablet -5.3313u 11.6" 4GB 128GB 3G WSP A/b Disk	XE700TIC-H5UK	SAMSUNG ATIVY TABLET -5.3313U 11.6" 4GB 128GB 3G WSP A/B DISK	XE700TIC-H...	A	✓	900.27	1	0.00%	900.27

4.9. Purchase Order Update Options

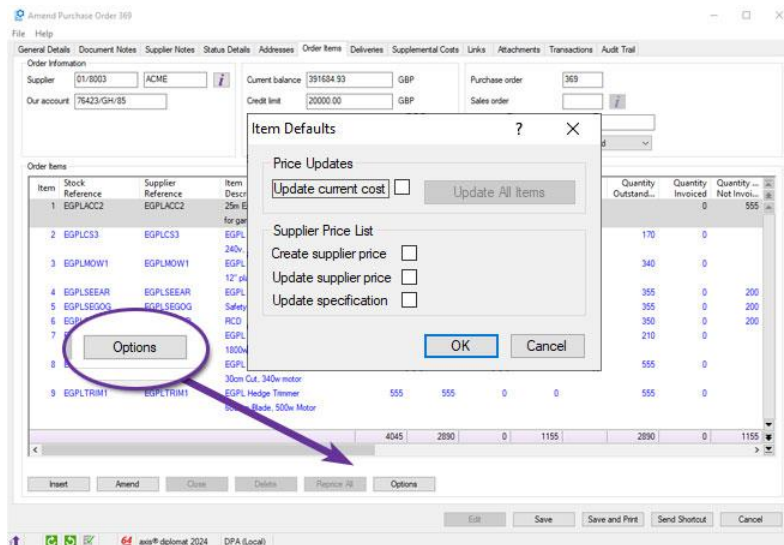
Available with axis diplomat 2024



The 'Order Items' tab of the Enter/Amend Purchase Order functions has been extended to include a new 'Options' button to set the default actions for updating current cost and supplier price list entries when adding new items to the order.

This makes the job of overriding the system's default behaviour easier.

When first opened, this new dialog will show the current setting and allow it to be changed for this order only.



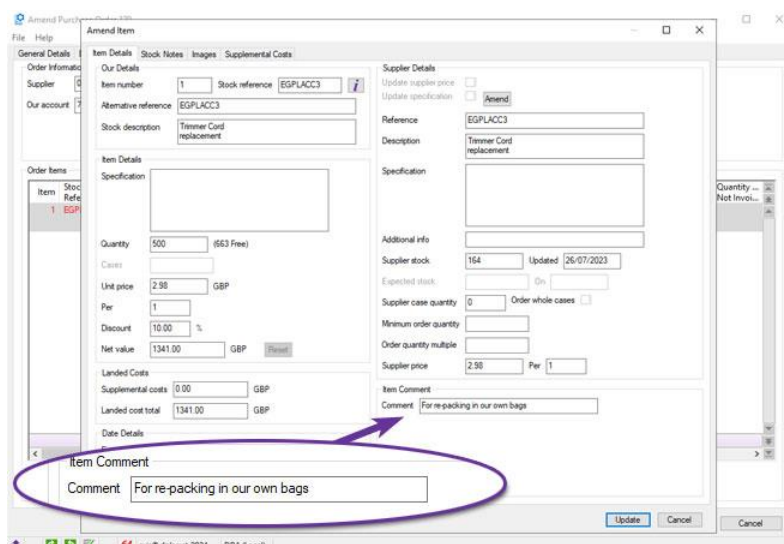
This can be useful, for example, if you normally update cost and/or supplier price list entries but, on this occasion, you do not want to because you have been offered preferential pricing by a supplier for this one order only. Previously, you would need to make the change on each individual line of the order.

4.10. Purchase Order Lines Comments

Pre-Released to Software Assurance customers



An additional comment of up to 30 characters can now be added to each purchase order line. The comment can be seen as a column on the Order items tab, as a column on 'Purchase Order Items' monitor tabs and in 'Goods Received from Supplier'.



Document Designer has also been updated to allow the comment field to be added to the line detail section of document templates.

4.11. Additional Purchase Order Items Monitor Columns

Pre-Released to Software Assurance customers



Additional columns have been added to Purchase Order Items monitor tabs to help manage expected credits.

Three new columns show the current Credit Expected value, the original value of expected credit and the difference, expressed as a percentage:

The screenshot shows the 'Purchase Order Monitor' window with the 'Purchase Order Items' tab selected. A table lists various items with their stock references and descriptions. Three new columns are highlighted with a purple circle: 'Credit Expected', 'Original Credit Expected', and 'Credit Expected (% of Original)'. The 'Credit Expected' column shows a value of 341.00 for the first item.

Stock Reference	Alternative Reference	Stock Line Reference	Credit Expected	Original Credit Expected	Credit Expected (% of Original)	Quantity
EGPLACC2	EGPLACC2		341.00			
EGPLACC3	EGPLACC3					
EGPLCS3	EGPLCS3					
EGPLMOW1	EGPLMOW1					
EGPLSEAR	EGPLSEAR					
EGPLSEGOG	EGPLSEGOG					
EGPLSERCD	EGPLSERCD					
EGPLSHR1	EGPLSHR1					

4.12. Specification on Purchase Order Items Monitors

Pre-Released to Software Assurance customers

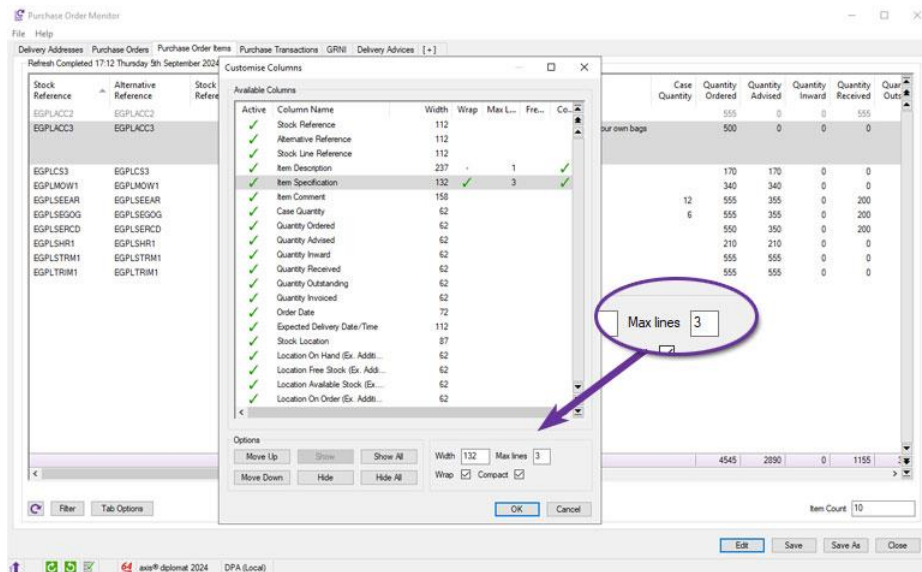


A new column has been added to Purchase Order Items monitor tabs to show each item's Specification.

The screenshot shows the 'Purchase Order Monitor' window with the 'Purchase Order Items' tab selected. A table lists various items with their stock references, descriptions, and specifications. A new column, 'Item Specification', is highlighted with a purple circle. The 'Item Specification' column shows details for each item, such as '25m Extension Lead for garden use' and 'pre-loaded onto orange plastic spools, suitable for most brands of trimmer'.

Stock Reference	Alternative Reference	Stock Line Reference	Item Description	Item Specification	Item Comment	Case Quantity	Quantity Ordered	Quantity Advised	Quantity Inward	Quantity Received	Quantity Outstanding
EGPLACC2	EGPLACC2		25m Extension Lead for garden use				555	0	0	555	
EGPLACC3	EGPLACC3		Trimmer Cord replacement	pre-loaded onto orange plastic spools, suitable for most brands of trimmer	For repacking in our own bags		500	0	0	0	
EGPLCS3	EGPLCS3		EGPL Electric Chainsaw 240v, 30cm bar				170	170	0	0	
EGPLMOW1	EGPLMOW1		EGPL Electric Mower 12" plastic blade				340	340	0	0	
EGPLSEAR	EGPLSEAR		EGPL Ear Defenders			12	555	355	0	200	
EGPLSEGOG	EGPLSEGOG		Safety Goggles			6	555	355	0	200	
EGPLSERCD	EGPLSERCD		EGPL Electric Shredder 1800w Induction Motor				550	350	0	200	
EGPLSHR1	EGPLSHR1		EGPL Trimmer 30cm Cut, 340w motor				210	210	0	0	
EGPLTRM1	EGPLTRM1		EGPL Trimmer 600mm Blade, 500w M...				555	555	0	0	

As an item's specification can be relatively long, you can elect to restrict the maximum number of lines to display:



4.13. Purchase Order Expected Delivery Dates

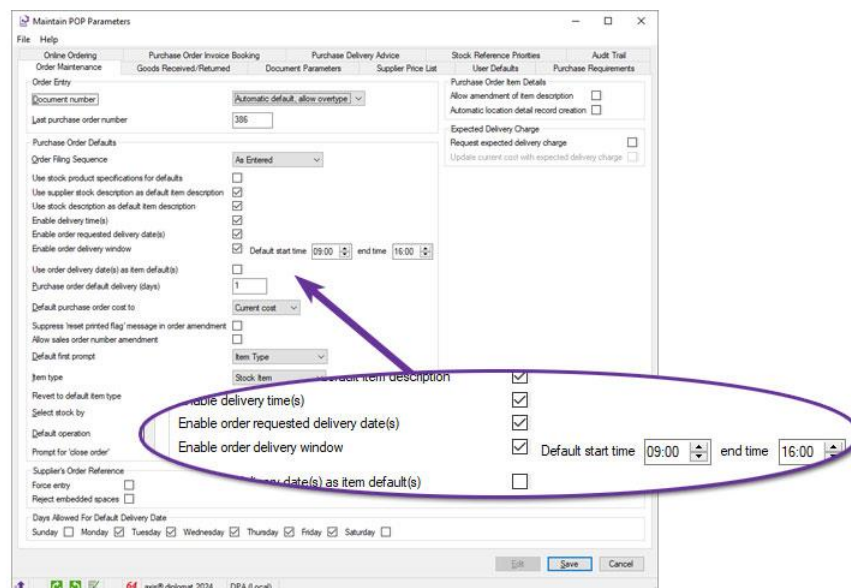
Available with axis diplomat 2024



New fields have been added to Purchase Orders to help appraise your suppliers' performance by allowing you to compare the requested dates (requested by you as the customer) and the expected dates (as defined by the supplier).

Existing fields have been renamed from 'Due Date' to 'Expected Due Date' and for Purchase lines 'Earliest Item Due Date' to 'Earliest Item Expected'.

The POP parameter prompt 'Enable delivery time(s)' makes it possible to record the time when a delivery is due and can be refined further by specifying a window of time using the prompt 'Enable order delivery window' (including setting default time slot, usually goods in receipt hours).



Once these parameters are set, the new fields are available in the following functions:

- Purchase Order Maintenance
- Import Purchase Orders
- Reschedule Purchase Orders
- 'Purchase Order' monitor tabs
- 'Purchase Order Items' monitor tabs

More detailed analysis is available to those using the Purchase Delivery Advice module.

4.14. Purchase Delivery Enhancements

Available with axis diplomat 2024 and the Purchase Delivery Advice module



The Purchase Order Processing module has been enhanced with Delivery slot Windows.

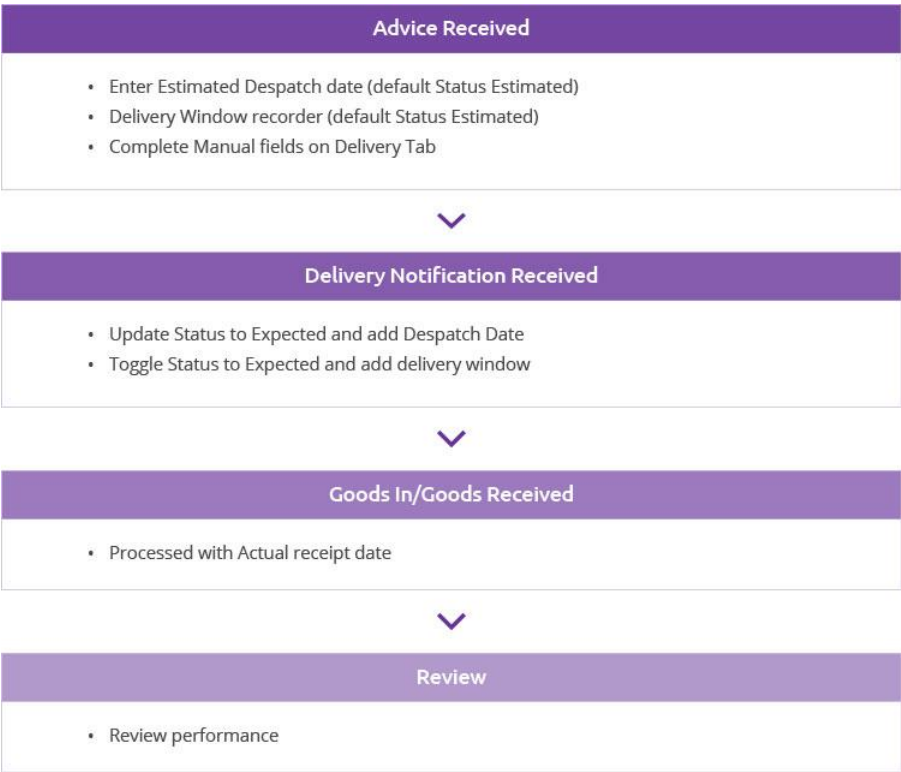
Further to the introduction of purchase order delivery times and windows, the Purchase Delivery Advice module has further enhancements to allow you to track the key stages in the inbound delivery process, including the date goods are dispatched by the supplier (estimated and then actual) and the date they are expected to arrive (estimated and then expected) at your location. The process allows for the new delivery windows and captures the actual delivery dates including newly available fields.

Supplier delivery references (Delivery Advice References) are recorded against an internal delivery record, with a unique internal number allocated by the system. This allows for manually recording key metrics for further analysis including:

- Expected Pallets
- Expected Packages
- Gross Weight (kg)
- Volumetric Weight (kg)

- Gross Volume (m³)

These improvements provide greater visibility and control over your purchase deliveries, ensuring a more detailed and efficient tracking process as well as enhanced monitoring of supplier performance.



4.15. Price Feed Information added to Suppliers Monitor

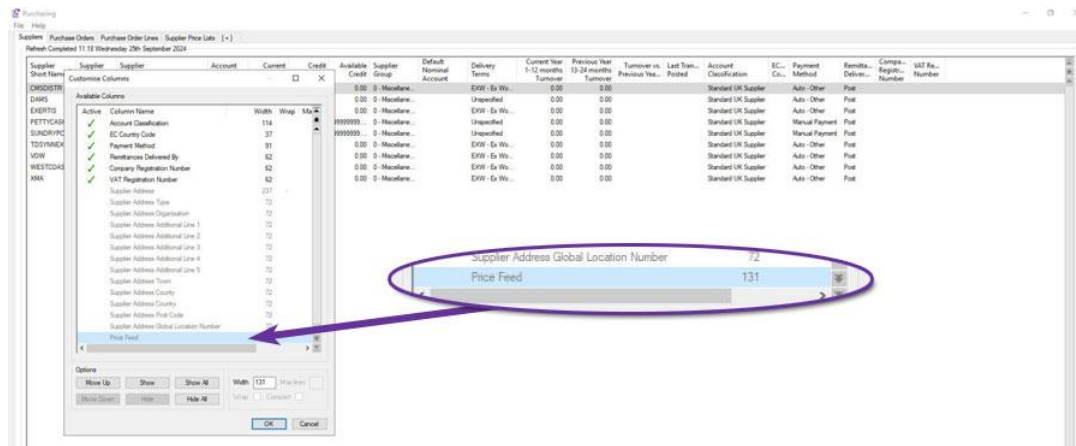
Pre-Released to Software Assurance customers with the Supplier Price Feed Foundation module



For those using Supplier Price Feeds, an additional column has been added to Supplier monitor tabs to indicate the type of price feed configured for each supplier.

Supplier Short Name	Supplier Account	Supplier Name	Price Feed	Account Type	Current Balance	Credit Limit	Available Credit	Supplier Group	Default Supplier	Current Year 1-12 months Turnover	Previous Year 1-12 months Turnover	Turnover vs. Previous Year	Last Trans. Posted	Account Classification	EC Co.	Payment Method	Remittance Number	Centre Region Number	UoT Ref. Number
CHESBURY	8008	CMS Distribution Ltd	CMS Distribution	Low	0.00	0.00	0.00	0 Months		0.00	0.00			Standard UK Supplier	Auto	Other	Post		
DAMS	8003	DAMS		Low	0.00	0.00	0.00	0 Months		0.00	0.00			Standard UK Supplier	Auto	Other	Post		
EXERTIS	8004	Exertis	Exertis Supplies (Advert)	Low	0.00	0.00	0.00	0 Months		0.00	0.00			Standard UK Supplier	Auto	Other	Post		
PETTYGISH	8001	Petty Cash Account		Low	0.00	99999999	99999999	0 Months		0.00	0.00			Standard UK Supplier	Manual Payment	Post			
SUNBURNCH	8002	Sunbury Purchases		Low	0.00	99999999	99999999	0 Months		0.00	0.00			Standard UK Supplier	Manual Payment	Post			
TD SYNEX	8005	TD SYNEX UK Ltd	TD SYNEX (TechData)	Low	0.00	0.00	0.00	0 Months		0.00	0.00			Standard UK Supplier	Auto	Other	Post		
VOW	8009	Vow Europe Limited		Low	0.00	0.00	0.00	0 Months		0.00	0.00			Standard UK Supplier	Auto	Other	Post		
WESTCOAST	8007	Westcoast Ltd	Westcoast	Low	0.00	0.00	0.00	0 Months		0.00	0.00			Standard UK Supplier	Auto	Other	Post		
XMA	8006	XMA Limited		Low	0.00	0.00	0.00	0 Months		0.00	0.00			Standard UK Supplier	Auto	Other	Post		

Please note that the column is not enabled by default and so, to see the column, right-click on the headings of the monitor tab and enable the column named Price Feed:

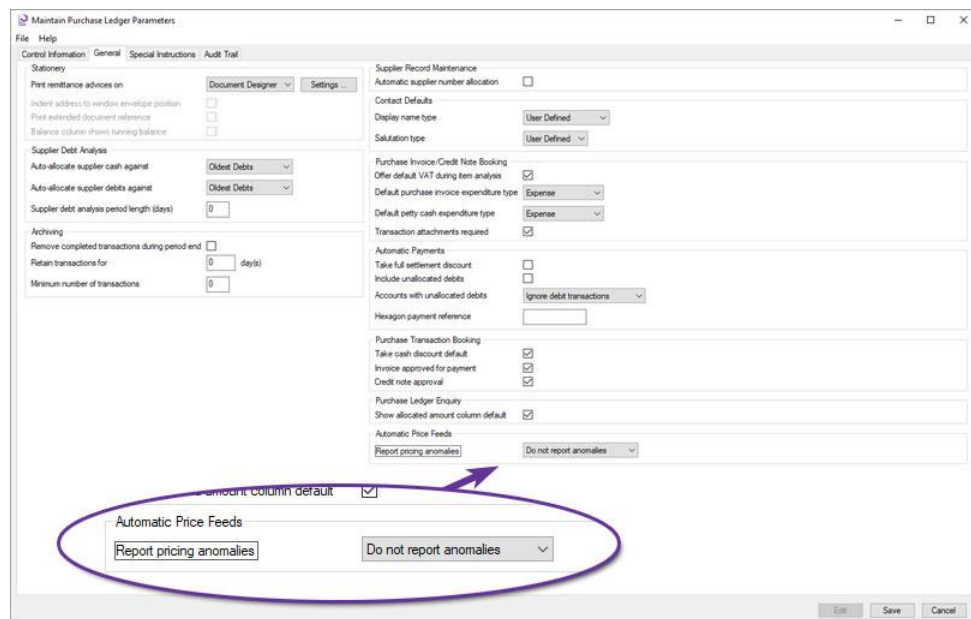


4.16. Exclude Price Feed Variance in Price Feed Report

Pre-Released to Software Assurance customers with the Supplier Price Feed Foundation module



Using a new Purchase Ledger Parameter, it is possible to adjust the Price Feed Report to exclude the Price Variance section, reducing the file size considerably. This change is ideal for systems importing multiple price feeds regularly throughout the day.



To change the behaviour, adjust the setting for 'Report pricing anomalies'. Select 'Compare with standard costs' or 'Compare with current costs' if you wish to report supplier price list records that differ from the selection by more than the variance defined on the product group record (excluding those that are not resaleable or superseded). Alternatively select 'Do not report anomalies'.

Section 5 Stock Ledger, Bill of Materials & MRP

5.1. Retail Price VAT Status

Available with axis diplomat 2024



There are some gross prices that cannot be represented as a VAT exclusive price; for example, £9.99 when the VAT rate is 20%. £8.32 plus 20% VAT gives £9.98 whilst £8.33 plus 20% VAT gives £10.00.

For this reason, it may be preferable to specify retail prices as VAT inclusive (gross) prices and trade prices as VAT exclusive (net) prices.

Stock EGPLSERCD

General Details: Stock Reference: EGPLSERCD, Item description: RCD

Pricing: Sales group: 1, VAT group: 1, Standard Rate, Price per: 1, Sell in: Units, Retail unit price: 9.99 GBP, Retail price VAT: Inclusive, Trade unit price: 6.85 GBP, Trade price VAT: Exclusive

Costing: Cost per: 1, Average purchase cost: 5.89 GBP, Average rolled up cost: 5.89 GBP, Standard cost at 15:13 on 18-09-24: 5.61 GBP, Current purchase cost: 5.61 GBP, Current rolled up cost: 0.00 GBP, Overhead rate %: 0.00

These settings can now be viewed using a Stock Items monitor tab, where additional columns have been added to provide more information on the VAT status of each item.

Alternative Reference	Stock Description	Default Delivery To Customer (Days)	Trade Unit Price Ex VAT (GBP)	Trade Unit Price Inc VAT (GBP)	Retail Unit Price Ex VAT (GBP)	Retail Unit Price Inc VAT (GBP)	Trade VAT Status	Retail VAT Status	Price Per	Case Quantity	Standard Cost (G...)
ACMEFORM01	Acme Standard Fork	1	8.97	11.48	14.99	17.99	Exclusive	Inclusive	1		7.65 C
ACMEFORM02	Acme Light Fork	1	8.29	9.95	12.49	14.99	Exclusive	Inclusive	1		6.63 C
ACMEH0E01	Acme Standard Dutch Hoe	1	4.43	13.78	15.83	18.99	Exclusive	Inclusive	1		9.19 C
ACMERAKE01	Acme Standard Rake	1	13.78	15.83	18.99	18.99	Exclusive	Inclusive	1		9.19 C
ACMERAKE02	Acme Standard Grass Rake	1	15.31	18.99	19.99	19.99	Exclusive	Inclusive	1		10.21 C
ACMESET01	Acme Standard Hand Tool Set (browl, fork, potting t...	1	19.14	24.99	25.99	25.99	Exclusive	Inclusive	1		12.76 C
ACMESPD01	Acme Standard Spade	1	14.99	17.99	17.99	17.99	Exclusive	Inclusive	1		7.65 C
BELSPKSTAGING	Bespoke Point of Sale Staging for Garden Centres (inc...	1	0.00	0.00	0.00	0.00	Exclusive	Inclusive	1		0.00
BOOK001	A:Z Weeds 214pp	1	9.95	9.95	9.95	9.95	Exclusive	Exclusive	1		7.30 I
BOOK002	A:Z Roses 196pp	1	9.95	9.95	9.95	9.95	Exclusive	Exclusive	1		7.30 I
BOOK003	A:Z Fruit Trees 278pp	1	9.95	9.95	9.95	9.95	Exclusive	Exclusive	1		7.30 I
BOOK004	A:Z Houseplants 180pp	1	9.95	9.95	9.95	9.95	Exclusive	Exclusive	1		7.30 I
BOOK012	Roses Made Easy	1	4.46	5.95	5.95	5.95	Exclusive	Exclusive	1		3.57 C
BOOK013	Fruit Trees Made Easy	1	4.46	5.95	5.95	5.95	Exclusive	Exclusive	1		3.57 C
BOOK014	Hostas Made Easy	1	4.46	5.95	5.95	5.95	Exclusive	Exclusive	1		3.57 C
BOOK015	Clematis Made Easy	1	4.46	5.95	5.95	5.95	Exclusive	Exclusive	1		3.57 C
BOOK016	Vegetables Made Easy	1	4.46	5.95	5.95	5.95	Exclusive	Exclusive	1		3.57 C
BOOK017	Weeding Made Easy	1	4.46	5.95	5.95	5.95	Exclusive	Exclusive	1		3.57 C
BOOK021	Decorating Made Easy	1	4.46	5.95	5.95	5.95	Exclusive	Exclusive	1		3.57 C
BOOK022	Re-wiring Made Easy	1	4.46	5.95	5.95	5.95	Exclusive	Exclusive	1		3.57 C

5.2. Date-Specific Costs

Available with axis diplomat 2024 and the Date Specific Prices and Discounts module



For those already using the Date-Specific Prices and Discounts module to hold future selling prices, the system can now also hold details of future costs.

The cost is updated by clicking the icon alongside the cost field:

As well as specifying a start date and time, you may optionally provide an end date as well, for situations where the price change is temporary. This, for example, allows you to hold details of future promotions offered by suppliers.

Note that only the Standard Cost can have future-dated values as it would not be logical to do so for Current Cost. The Current Cost field can also be updated as part of the day-to-day operation of the system and it would be unclear whether a price change superseded an imminent future cost that was already held in the system.

This development is particularly useful for those with suppliers who give advanced notice of price changes and want to ensure that future price changes are allowed for when determining their own pricing.

5.3. Date-Specific Stock Monitor

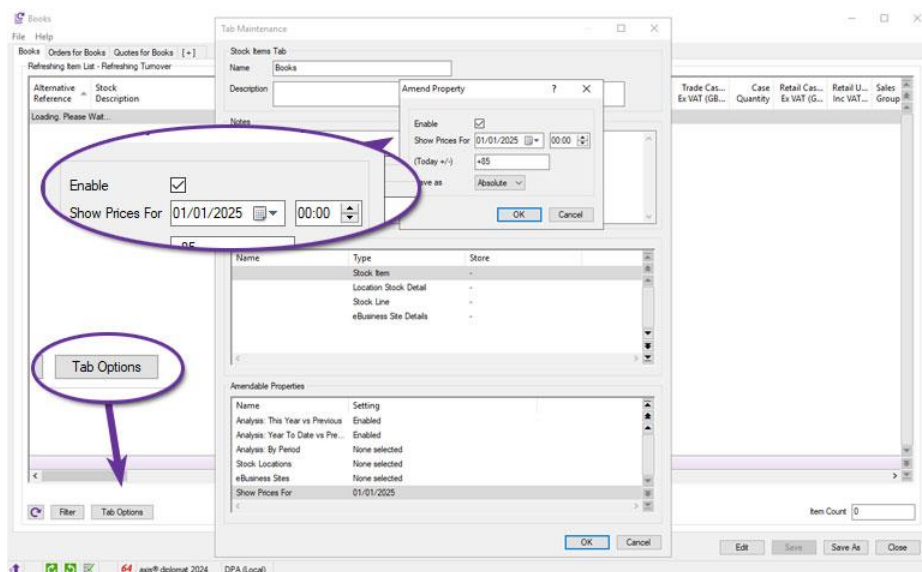
Available with axis diplomat 2024 and the Date Specific Prices and Discounts module



When used in conjunction with the Date Specific Prices and Discounts module, Stock Items monitor tabs are now able to show additional information as at a specific future date.

The functionality is controlled via a Tab Option, which then enables the following additional columns of information:

- Trade Unit Price Ex VAT
- Trade Unit Price Inc VAT
- Retail Unit Price Ex VAT
- Retail Unit Price Inc VAT
- Standard Cost
- Retail Margin
- Trade Margin



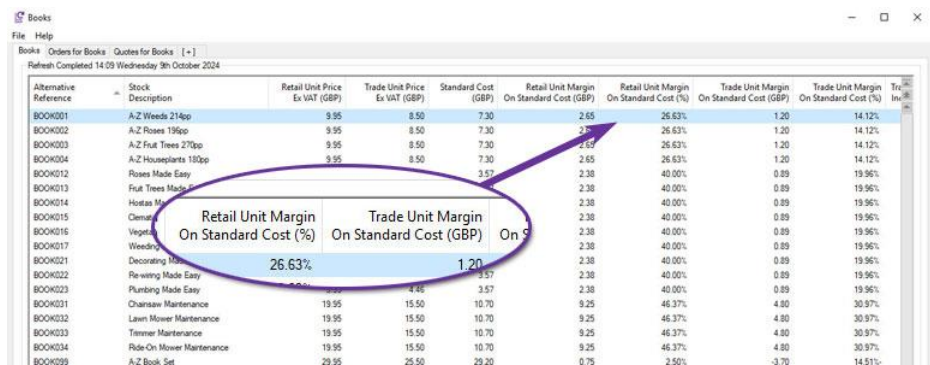
5.4. Margin Information in Stock Monitors

Available with axis diplomat 2024



Stock Items monitor tab types now include additional margin information.

Columns have now been added for retail and trade margins against standard cost, expressed as both currency and percentages. For those using case pricing, these columns are replicated again for cases.



Alternative Reference	Stock Description	Retail Unit Price Ex VAT (GBP)	Trade Unit Price Ex VAT (GBP)	Standard Cost (GBP)	Retail Unit Margin On Standard Cost (GBP)	Retail Unit Margin On Standard Cost (%)	Trade Unit Margin On Standard Cost (GBP)	Trade Unit Margin On Standard Cost (%)	Tr. Inv.
BOOK001	A-Z Weeds 214pp	9.95	8.50	7.30	2.65	26.63%	1.20	14.12%	
BOOK002	A-Z Roses 196pp	9.95	8.50	7.30	2.65	26.63%	1.20	14.12%	
BOOK003	A-Z Fruit Trees 270pp	9.95	8.50	7.30	2.65	26.63%	1.20	14.12%	
BOOK004	A-Z Houseplants 180pp	9.95	8.50	7.30	2.65	26.63%	1.20	14.12%	
BOOK012	Roses Made Easy			3.57	2.38	40.00%	0.89	19.96%	
BOOK013	Fruit Trees Made Easy			3.57	2.38	40.00%	0.89	19.96%	
BOOK014	Hostas Made Easy			3.57	2.38	40.00%	0.89	19.96%	
BOOK015	Clematis Made Easy			3.57	2.38	40.00%	0.89	19.96%	
BOOK016	Vegetables Made Easy			3.57	2.38	40.00%	0.89	19.96%	
BOOK017	Woolfing Made Easy			3.57	2.38	40.00%	0.89	19.96%	
BOOK021	Decorating Made Easy			3.57	2.38	40.00%	0.89	19.96%	
BOOK022	Re-wiring Made Easy			3.57	2.38	40.00%	0.89	19.96%	
BOOK023	Plumbing Made Easy			3.57	2.38	40.00%	0.89	19.96%	
BOOK031	Chainsaw Maintenance	19.95	15.50	10.70	9.25	46.37%	4.80	30.97%	
BOOK032	Lawn Mower Maintenance	19.95	15.50	10.70	9.25	46.37%	4.80	30.97%	
BOOK033	Trimmer Maintenance	19.95	15.50	10.70	9.25	46.37%	4.80	30.97%	
BOOK034	Ride On Mower Maintenance	19.95	15.50	10.70	9.25	46.37%	4.80	30.97%	
BOOK099	A-Z Book Set	29.95	25.50	29.20	0.75	2.50%	-3.70	14.51%	

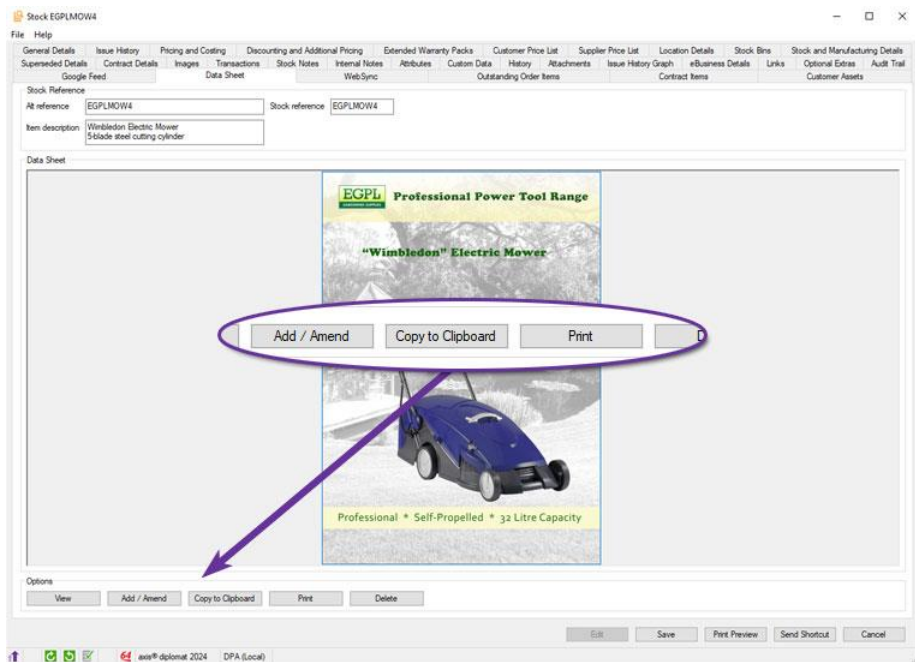
5.5. Stock Data Sheet Enhancements

Pre-Released to Software Assurance customers



Enhancements have been made to the stock record's Data Sheet maintenance tab, including new buttons:

- Copy to Clipboard allows you to copy the PDF to your clipboard, allowing you to easily paste it into another application.
- Print opens a printer selection options including number of copies.
- Add / Amend allows the user to specify a new PDF document to replace the document that is currently being used.

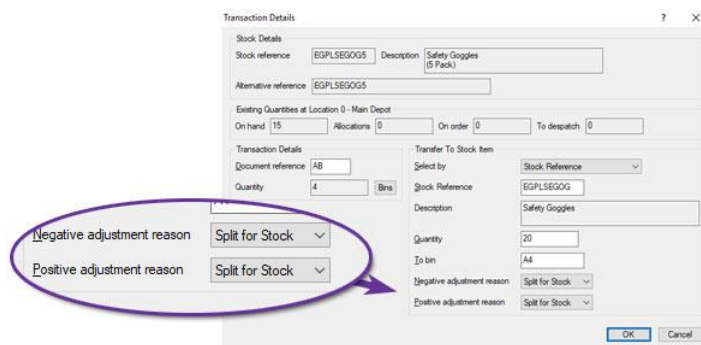


5.6. Reason Codes for Transfer Between Stock Items

Pre-Released to Software Assurance customers



The Transfer Between Stock Items function allows stock on hand quantities to be transferred from one stock item to another. You can now specify reason codes and these can be different for the issue from the first stock item and the receipt into the second stock item.



The example above illustrates a scenario where safety goggles are sold individually and in packs of 5 and there is an unexpected shortage of the individual items and so the decision is made to split a number of packs of 5 to re-stock the individual items. The transfer shows a quantity of 4 x 5 packs being transferred to 20 single items with a reason code of "Split for Stock".

5.7. Support for Additional Image Formats

Available with axis diplomat 2024



You are now able to add images in a wider variety of formats to stock records. In addition to the formats already supported (GIF, JPG, BMP and PNG), you can now add images in SVG and WEBP formats.

For those with axis vMerchant websites, these formats are also supported for eBusiness Group images and for banners and can be used on your website.

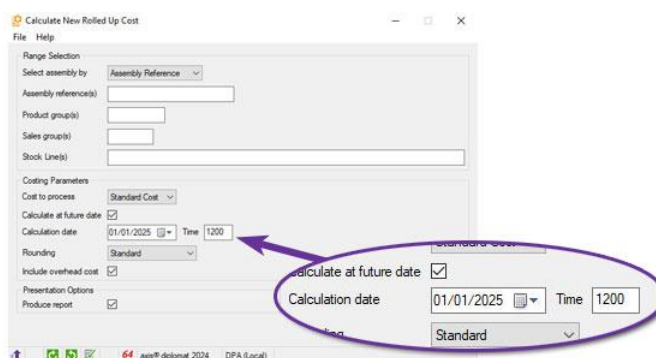
Please note that image resizing is not supported for these formats. SVG files can be vector-based graphics and so are then intrinsically scaleable whilst WEBP can contain multiple image sizes within the one file.

5.8. Future Rolled-Up Costs

Available with axis diplomat 2024 and the Date Specific Prices and Discounts module



For those using the Date-Specific Prices and Discounts module to hold future cost prices, the system can now calculate the rolled-up cost of Bill of Materials Assemblies as at a given point in the future.



When selecting Standard Cost as the cost to process (date-specific costs are not applicable to Current Cost), you have the option to specify a particular point in time. The component costs in effect at the time are used for the calculation and the rolled-up cost record that is created for the assembly has that date as its start date.

This is ideal for situations where you receive advance notification of price changes from suppliers and you want to see what effect this will have on your assembly costs and, ultimately, your margins.

5.9. Cost Information in Stock function

Pre-Released to Software Assurance customers

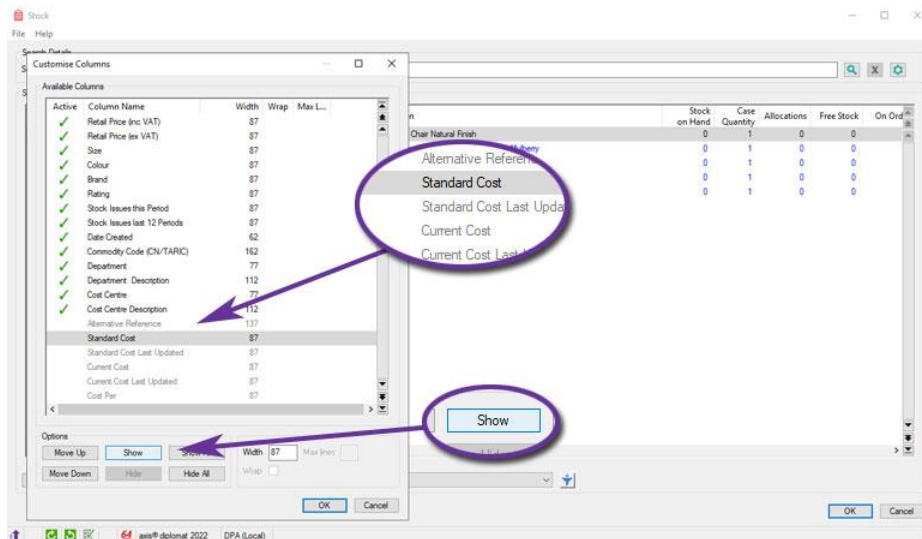


A number of additional columns have been added to the Stock function's search results:

- Standard cost
- Standard cost last updated
- Current cost
- Current cost last updated
- Cost per

Stock Reference	Description	Standard Cost	Standard Cost Last Updated	Current Cost	Current Cost Last Updated	Cost Per	Case Quantity	Stock Issues this Period	Stock Issues last 12 Periods	Stock on Hand	Allocations	Free Stock
EGPLFURN01	Adirondack Chair Natural Finish	41.00	06-02-2023	41.00	06-02-2023	1	1	0	0	0	0	0
EGPLFURN02	Deluxe Adirondack Chair Painted Finish - Mulberry	60.00	06-02-2023	60.00	06-02-2023	1	1	0	0	0	0	0
EGPLFURN03	Deluxe Adirondack Chair Painted Finish - Sage	60.00	06-02-2023	60.00	06-02-2023	1	1	0	0	0	0	0
EGPLFURN04	Deluxe Adirondack Chair Painted Finish - Red	60.00	06-02-2023	60.00	06-02-2023	1	1	0	0	0	0	0
EGPLFURN05	Adirondack Chair	60.00	06-02-2023	60.00	06-02-2023	1	1	0	0	0	0	0

These columns are hidden by default but can be enabled, subject to user permissions, in the usual way; right-click on the results heading and select "More..." and then highlight the required columns and enable by hitting the space bar or clicking on "Show".



5.10. Default Delivery to Customer on Stock Monitor tabs

Pre-Released to Software Assurance customers



Stock Monitor tabs now have an additional column, showing the Default Delivery to Customer (in days):

Stock Reference	Alternative Reference	Stock Description	Specification	Default Delivery To Customer (Days)	Trade Unit Price Ex VAT (GBP)
EGPLFURN02	EGPLFURN02	Deluxe Adirondack Chair Painted Finish - Mulberry		0	85.00
EGPLFURN03	EGPLFURN03	Deluxe Adirondack Chair Painted Finish - Sage		0	85.00
EGPLFURN04	EGPLFURN04	Deluxe Adirondack Chair Painted Finish - Thunder		0	85.00
EGPLFURN05	EGPLFURN05	Adirondack Rocking Chair Dark Grey		0	70.00
EGPLGB1	EGPLGB1	Deluxe Gardening Boots Size 5		1	12.76
EGPLGB2	EGPLGB2	Deluxe Gardening Boots Size 6		1	12.76
EGPLGB3	EGPLGB3	Deluxe Gardening Boots Size 7		1	12.76
EGPLGB4	EGPLGB4	Deluxe Gardening Boots Size 8		1	12.76
EGPLGB5	EGPLGB5	Deluxe Gardening Boots Size 9		1	12.76
EGPLGB6	EGPLGB6	Deluxe Gardening Boots Size 10		1	12.76
EGPLGB7	EGPLGB7	Deluxe Gardening Boots Size 11		1	12.76
EGPLGB8	EGPLGB8	Deluxe Gardening Boots Size 12		1	12.76
EGPLGG11	EGPLGG11	EGPL Gardening Gloves Ladies		0	5.10
EGPLGG11A	EGPLGG11A	EGPL Gardening Gloves Ladies		0	5.10
EGPLGG11B	EGPLGG11B	EGPL Gardening Gloves Ladies		0	5.10
EGPLGG12	EGPLGG12	EGPL Gardening Gloves Ladies		0	5.10
EGPLGG12A	EGPLGG12A	EGPL Gardening Gloves Ladies		1	5.10
EGPLGG12B	EGPLGG12B	EGPL Gardening Gloves Ladies		1	5.10
EGPLGG13	EGPLGG13	EGPL Gardening Gloves Ladies, Large		1	5.10
EGPLGG13A	EGPLGG13A	EGPL Gardening Gloves Ladies, Large		1	5.10
EGPLGG13B	EGPLGG13B	EGPL Gardening Gloves Ladies, Large		1	5.10
EGPLGG21	EGPLGG21	EGPL Gardening Gloves Mens, Small		1	5.10
EGPLGG21A	EGPLGG21A	EGPL Gardening Gloves Mens, Small		1	5.10
EGPLGG21B	EGPLGG21B	EGPL Gardening Gloves Mens, Small		1	5.10

This field is found on the General Details tab of Stock Enquiry and is the number of days that you would normally expect delivery of the item to your customers to take.

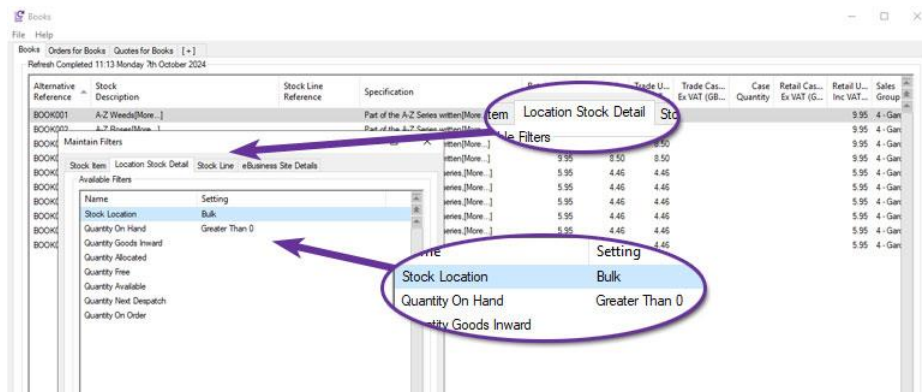
5.11. Stock Items Monitor Locations Filter

Available with axis diplomat 2024



The filter options for Stock Items monitor tabs now includes an additional section for Location Stock Detail filtering.

This filter tab allow you to limit the items listed on the monitor to those defined at particular locations and, optionally, with quantities within certain ranges.



The example above shows a Stock Items monitor tab filtered to show only those items with stock on hand in the Bulk location.

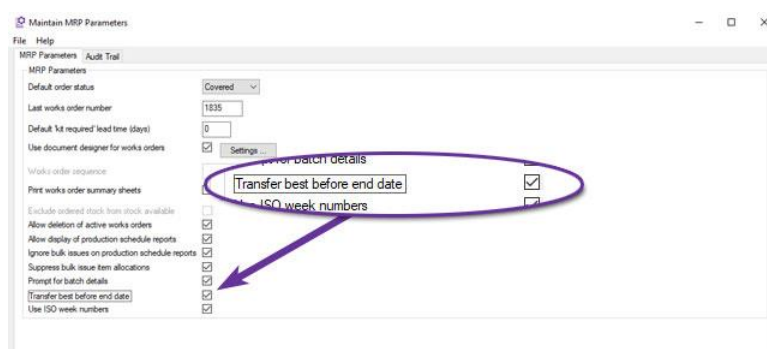
5.12. Transfer Best Before End Date

Pre-Released to Software Assurance customers with the Stock Transaction Traceability module



For systems using both the Compact MRP and Stock Transaction Traceability modules, a new system parameter has been added, configured within the Maintain MRP Parameters function, to allow the transfer of best before end dates from components issued to works to finished goods.

With this new parameter set, when receiving goods from works, if any of the issued components have best before dates, the best before date of the component with the shortest shelf life will be used for the finished goods.



5.13. Automatic Allocation of Batch References

Pre-Released to Software Assurance customers with the Auto Allocate Traceability Numbers module



The Auto Allocate Traceability Numbers module has been extended to allow automatic allocation of Batch References as well as Serial Numbers when receiving goods from works.

The automatically created Batch Reference is a combination of the Works Order Reference and a sequential receipt number.

For example, with a Works Order 5678, manufactured in four batches, the four receipts would be assigned the Batch References 56783/001, 56783/002, 56783/003 and 56783/004.

The behaviour is controlled by the same MRP system parameter that enables the automatic allocation of serial numbers:



5.14. Traceability Details Added to Stock Transactions Monitor

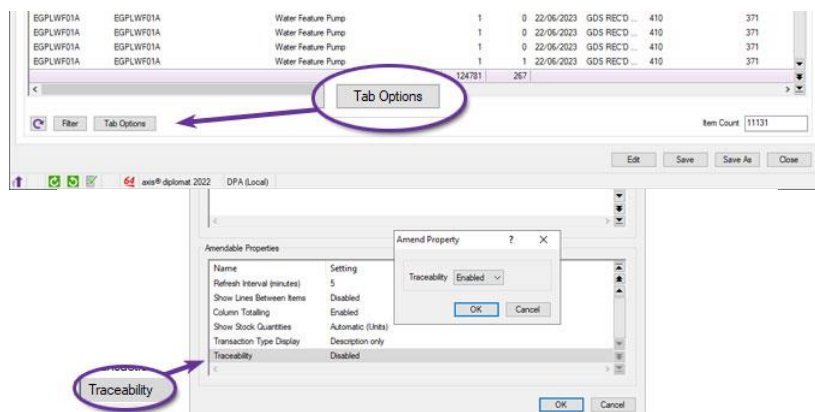
Pre-Released to Software Assurance customers with the Stock Transaction Traceability module



For those using the Stock Transaction Traceability module, an additional column showing the Batch or Serial Number has been made available on Stock Transactions type monitor tabs.

Initially disabled, this additional information is enabled by going to Tab Options and setting Traceability to Enabled in the 'Amendable properties' group.

For traceable items, the receipt transactions are split into separate rows for each serial number or batch reference.



5.15. New Calculate New Rolled Up Cost Function

Available with axis diplomat 2024 and the Bill of Materials module



The Calculate New Rolled Up Cost function has been rewritten to generate an interactive scrolling data list rather than a legacy-style printed report.

The new style function can still be used to print a report (or generate a PDF) by using the right-click, Print Preview option but can also be easily searched, filtered, sorted or exported to a spreadsheet as required.

The screenshot shows a software window titled "Calculate New Rolled Up Cost" with a menu bar (File, Help) and a table of data. The table has columns for Assembly Reference, Description, Product Group, Product Group Description, Material Cost, Labour Cost, Sub-Contract Cost, Prime Cost, Overhead (Included), Rolled Up Cost, and Preset Cost. The data is as follows:

Assembly Reference	Description	Product Group	Product Group Description	Material Cost	Labour Cost	Sub-Contract Cost	Prime Cost	Overhead (Included)	Rolled Up Cost	Preset Cost
BOOK099	A-Z Book Set	3	Books	29.20	0.00	0.00	29.20	0.00	29.20	7.00
EGPLPTK01	EGPL Power Tools Kit #1	12	PowerTools	147.57	0.00	0.00	147.57	0.00	147.57	147.57
EGPLPTK02	EGPL Power Tools Kit #2	12	PowerTools	104.17	0.00	0.00	104.17	0.00	104.17	0.00
EGPLPTK03	EGPL Power Tools Kit #3	12	PowerTools	111.91	0.00	0.00	111.91	0.00	111.91	0.00
EGPLPTKA1	EGPL Power Tool Kit Accessory Pack	12	PowerTools	25.00	0.00	0.00	25.00	0.00	25.00	0.00
EGPLWF01	EGPL Water Feature (240v)	7	Gifts	80.00	0.00	0.00	80.00	0.00	80.00	80.00

Section 6 Warehouse Management

6.1. Auto Feed Sales Order Picking by Despatch Value

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

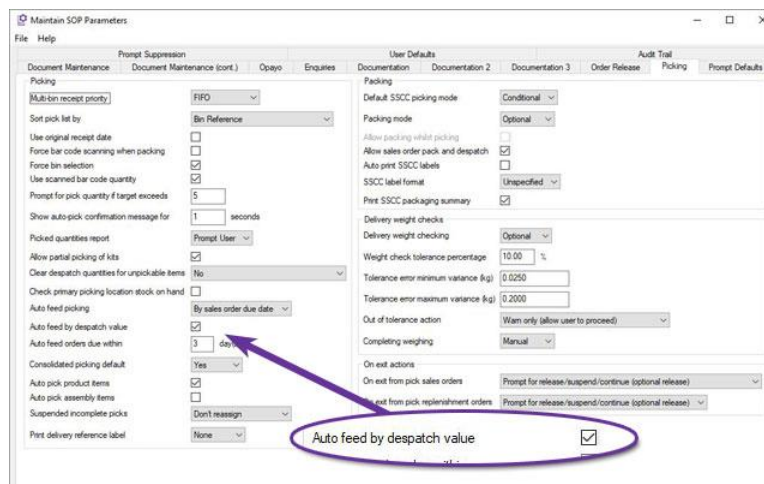


A new enhancement to the auto feed picking mechanism allows you to streamline your order fulfilment process by ensuring that the highest value orders are processed first.

Orders can now be prioritised by the total value of items available for dispatch, ensuring that high-value orders receive attention first.

This operates seamlessly within the existing order priority framework. For example, high priority orders will be sorted and picked by dispatch value, followed by normal and low priority orders, each in descending order of dispatch value.

This new option is enabled via a system parameter:



6.2. Unconsign Delivery

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



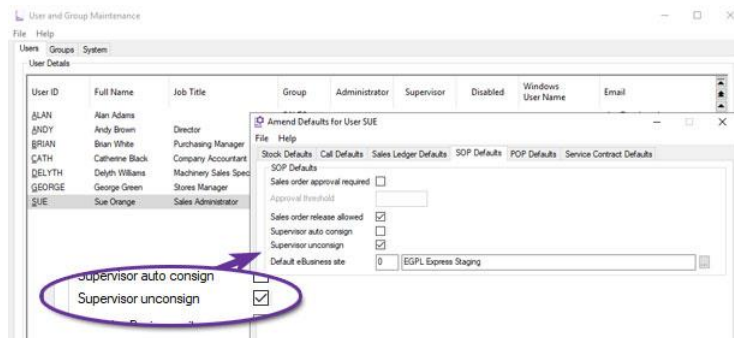
A new supervisor function has been added to allow the consigned status of a Delivery to be reset to 'Awaiting Consignment' and, where supported, cancel the consignment with the Delivery Service Provider.

Please note that the ability to cancel a consignment with the Delivery Service Provider is dependent on the functionality provided by their interface and its implementation within axis diplomat.

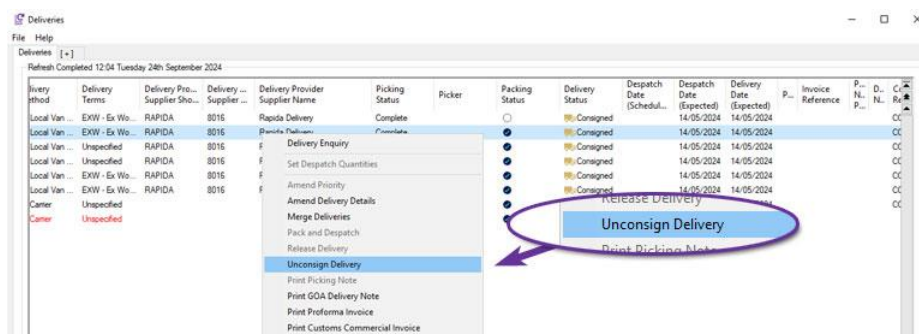
Once a Delivery has been unconsigned, an audit trail event is created. If the DSP interface supports cancellation, a second audit trail event is created to show that, not only was the delivery status reset, but that the DSP has confirmed that a cancellation has been accepted.

The delivery may be reconsigned with either the same delivery option or changed to an alternative by amending its Delivery Method.

The ability to unconsign a delivery is restricted via User and Group Maintenance:



In addition to running Unconsign Delivery from the menu, the same function can be run via the right-click context menu from a Deliveries monitor tab:



6.3. Show Zero Stock on Handheld Bin Enquiry

Pre-Released to Software Assurance customers with Warehouse Management



The function 'Handheld Bin Enquiry' now includes a prompt to 'Include Zero Stock on Hand' for Single Bin Locations.



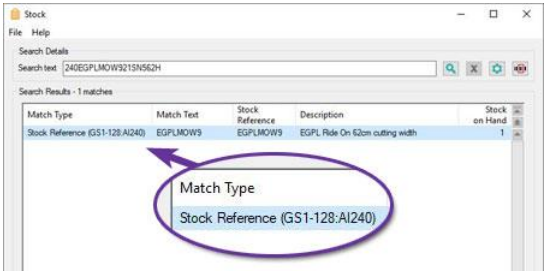
A user of a handheld device is now able to scan a bin to see what should be in it even when it is empty.

6.4. GS1-128 Bar Code Support

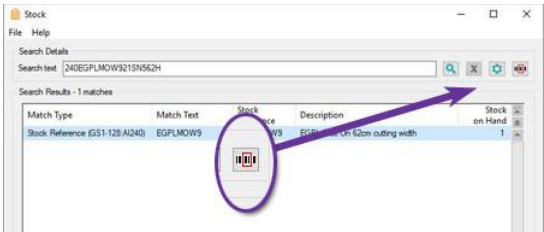
Pre-Released to Software Assurance customers with Warehouse Management



Stock searches can now handle GS1-128 format bar codes in the search term. The actual reference is extracted from the GS1-128 barcode and the Match Type indicates that this is how the match was identified:



The functionality can be toggled on and off if required using the bar code button:



6.5. Picked Quantity on Stock Transactions List

Pre-Released to Software Assurance customers with Warehouse Management



The Transactions tab of Stock Enquiry now includes an additional column for the Picked Quantity.

Date	Type	Reference	Account Reference	Account Name	Location Code	Quantity	Picked Quantity	Location Description	Quantity	Picked Quantity	Location Description
05-01-2024	SLS ALLOCATION	14893	01/3465	PROST-S001	0	5	5	Main Depot	5	3	Main Depot
05-01-2024	SLS ALLOCATION	14894	01/3116	PQ-INT001	0	1	1	Main Depot	1	0	Main Depot
05-01-2024	SLS ALLOCATION	14900	01/2689	EXZ-FR001	0	1	1	Main Depot	1	1	Main Depot
05-01-2024	SLS ALLOCATION	14908	01/2696	WLF-ONL001	0	1	1	Main Depot	1	1	Main Depot
05-01-2024	SLS ALLOCATION	14934	01/3615	JAMES-M001	0	3	3	Main Depot	1	1	Main Depot
05-01-2024	SLS ALLOCATION	14947	01/3139	HI-TECH003	0	6	6	Main Depot	1	1	Main Depot
05-01-2024	SLS ALLOCATION	14949	01/3358	SKYE-TO001	0	6	6	Main Depot	3	0	Main Depot
05-01-2024	SLS ALLOCATION	14953	01/3144	BROOK-H001	0	1	1	Main Depot	6	6	Main Depot
05-01-2024	SLS ALLOCATION	14956	01/3941	EAH-HOL001	0	2	2	Main Depot			
05-01-2024	SLS ALLOCATION	14969	01/2941	MEGA-MA002	0	2	2	Main Depot			
05-01-2024	SLS ALLOCATION	14979	01/3381	Q-DI00001	0	1	1	Main Depot			
05-01-2024	SLS ALLOCATION	14998	01/3794	BLACK-8003	0	1	1	Main Depot			
05-01-2024	SLS ALLOCATION	15009	01/3435	JONES-4001	0	6	6	Main Depot			
05-01-2024	SLS ALLOCATION	15020	01/3088	JU-TECH001	0	6	6	Main Depot			
05-01-2024	SLS ALLOCATION	15022	01/3098	BLACK-M001	0	3	3	Main Depot			
05-01-2024	SLS ALLOCATION	15024	01/3314	JERSEY-002	0	6	6	Main Depot			

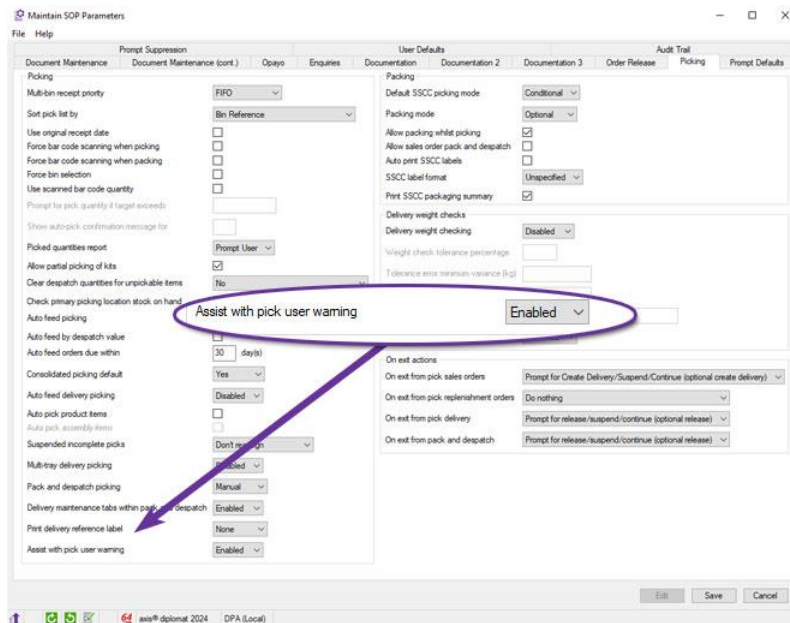
6.6. Multi-User Sales Order Picking Prompt Suppression

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



When using the Handheld Pick Sales Orders function, it is now possible to suppress the prompt "Do you wish to assist with orders currently being picked?".

The prompt is issued when the order selected for picking is already being picked by another user. The user may still proceed to assist with a pick by manually selecting orders which show their status as 'Being picked'.



6.7. Additional Columns in Maintain Delivery Methods

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



A number of additional columns have been added to the main scrolling data list in Maintain Delivery Methods:

- Request Notifications
- Consignment
- Delivery Weight Checking
- Delivery Advice Email Template
- Customs CN22 Declaration
- Packaging Stock Reference
- Packaging Stock Description

This makes it easier to manage Delivery Methods by reducing the number of times that you need to drill into an individual delivery method to see its configuration.

6.8. DHL Consignment Paperwork

Pre-Released to Software Assurance customers with the DHL DSP Interface module



DHL consignments to destinations that do not support paperless trade will now print the following physical documents as the final step in the process for release at the end of Sales Order Picking, or release from Pack and Despatch:

- An additional label (Way bill) to hand to the carrier. (Airway Bill Label (6"x4"))
- A 'commercial invoice' (A4 document)

6.9. Manually Control DSP Despatch Date

Pre-Released to Software Assurance customers with the Delivery Service Provider Interfaces Foundation module



The ability to control a delivery's despatch date via a manually specified date has been added.

This allows the user to determine when to switch from consigning deliveries that are to be despatched (i.e. collected by the Delivery Service Provider) today and, instead, start consigning deliveries to be despatched on the next working day.

This can be controlled via an additional prompt on the DSP's supplier account or via the Delivery Service Provider Enquiry.

Supplier RAPIDA 01/0016

File Help

General Details Account Details Supplier Notes Attachments Traceability Call History Events Custom Data Audit Trail

Supplier reference 01/0016 RAPIDA Rapida Delivery

Account Details

Account classification Standard UK Supplier

Company registration number

Default nominal account

Purchase nominal account

Discounts

Supplier discount 0.00 %

Cash discount 0.00 %

Discount terms (days)

Credit Terms

Credit Limit 0 GBP

Credit terms Days from date

Credit terms 0 days

Credit terms day of month

Credit terms month

VAT Details

Country United Kingdom

EC Country Code GB

VAT registration number

Check for existing

EORI number

Nature of transaction

VAT calculation method Line

Sage Exporting

Sage account reference

Delivery Service Provider

Delivery service provider

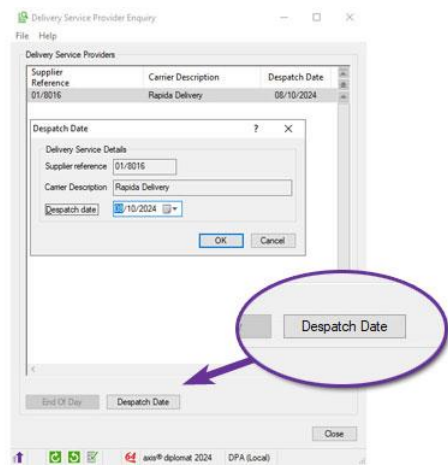
Software interface None

Software interface Credential

Despatch date setting Manual

Despatch date 08/10/2024

Buttons: Edit, Save, Print Preview, Send Shoutout, Cancel



Section 7 eBusiness

7.1. Real Time Order Updates

Available with axis diplomat 2024 and the axis vMerchant module



With the release of axis diplomat 2024, those customers with axis vMerchant Express websites can now show order status information to customers in near-realtime.

Not only can this now include quantity shipped and outstanding (back order) quantities but, for those with the appropriate axis diplomat modules, information on deliveries (where, for example, deliveries contain items from multiple orders), shipping containers and links to courier's tracking websites.

This is enabled very easily, by simply ticking the appropriate option with the Maintain eBusiness Sites function:

The screenshot shows the 'Site Details' window with various tabs. The 'Real Time Updates' section is expanded, showing several checkboxes. The 'Deliveries' checkbox is highlighted with a red circle and an arrow pointing to it. Other checkboxes include 'Stock levels upload enabled', 'Stock details upload enabled', 'Contact upload enabled', and 'Deliveries'.

How frequently the data is updated is determined by the Amend Scheduled Processing Settings function:

The screenshot shows the 'Amend Scheduled Processing Settings' window. The 'Automatic web synchronisation' checkbox is highlighted with a red circle and an arrow pointing to it. A 'Schedule Settings' dialog box is also shown, displaying the 'Days to Run' and 'Run Between' settings. The 'Days to Run' section includes checkboxes for 'Include Sunday' through 'Include Saturday'. The 'Run Between' section includes 'Start time' (0800) and 'End time' (2200). The 'Period' section includes 'Frequency (minutes)' (5).

In the screenshot above, for example, within 5 minutes of an order being consigned, its status will be updated on the website and the customer will be able to track their delivery.

7.2. eBusiness Customers without Permission to Buy

Available with axis diplomat 2024 and the axis vMerchant module



It is now possible to flag customer account contacts as eBusiness but without the ability to place orders.

This is ideal if, for example, you have clients using your website for account management purposes but they do not want all of their staff ordering from you.

This method of operation is supported by axis vMerchant Express. When a contact logs in who cannot buy online, they continue to see your product catalogue but the "Buy" button is replaced with an "Enquire" button.

You are also able to flag eBusiness Groups as not applicable (or only applicable) to logged-in users who cannot buy. You can use this method to suppress some or all of your product catalogue from such users.

7.3. eBusiness Search Dictionary

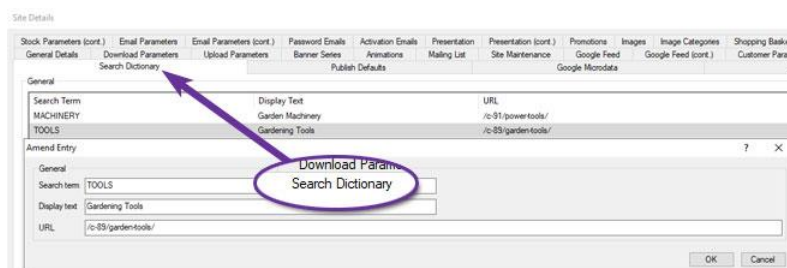
Available with axis diplomat 2024 and the axis vMerchant module



The eBusiness Search Dictionary, previously available as an additional option for systems linked to axis vMerchant Express websites, is now provided as standard.

It is designed to enable a list of search terms and preferred results to be maintained and published. Matching searches are then offered as "recommended results" ahead of normal category and/or product lists.

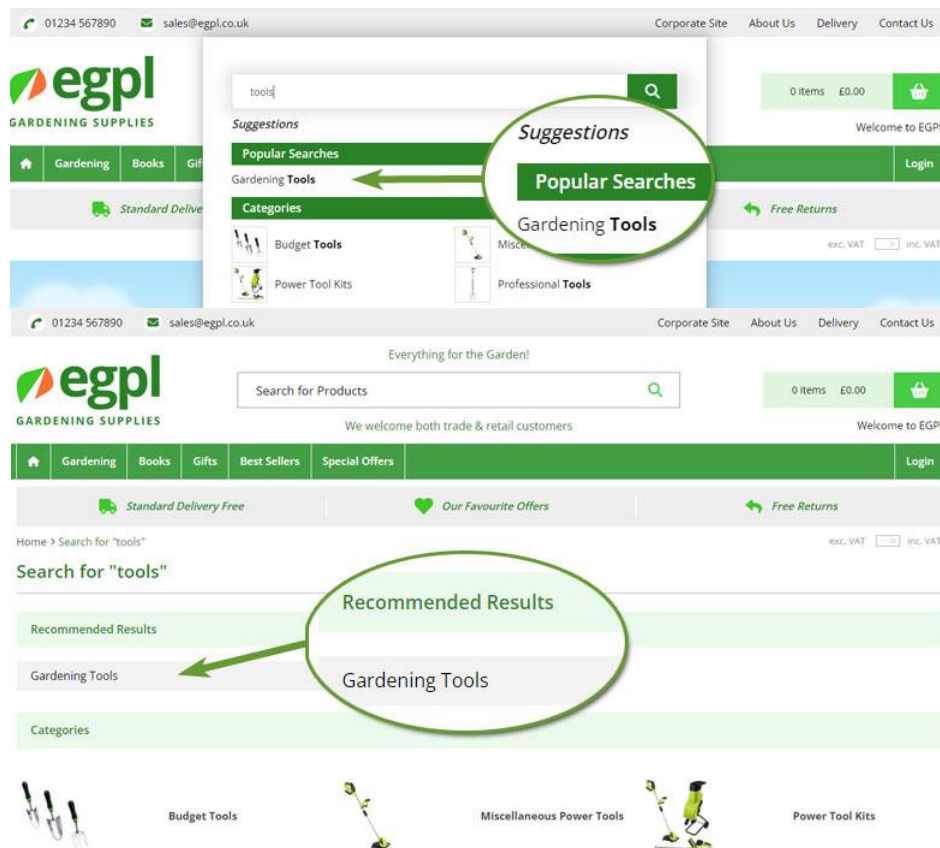
This can help visitors to your site find what they are looking for by guiding them to specific pages, categories or products.



Each entry consists of the search term (the word or phrase that the user types into the search box of the website), the display text (for the website to display in the search results) and the URL (the address of the web page that they are directed to in the search results).

For added convenience in setup, a Search Dictionary can also be imported from a CSV file.

Once published to the website, the results appear as highlighted options, in both predictive search results (as you type) and on full search results pages:



As always with axis vMerchant Express, you can change the terminology to suit your purposes, so Search Dictionary results can be described as Popular Searches, Recommended Results, Top Searches or any other term that aptly describes the search terms you have focused on with the dictionary.

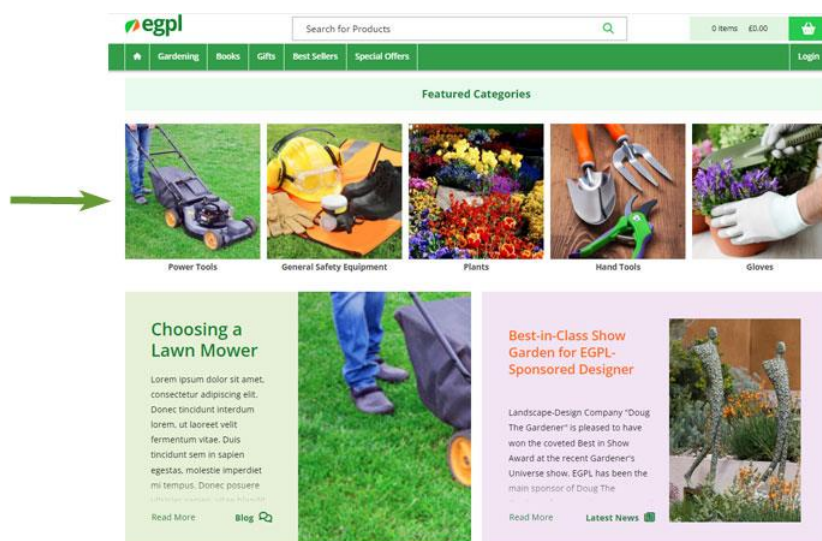
7.4. Highlighted eBusiness Groups

Pre-Released to Software Assurance customers with the axis vMerchant module



It is now possible to mark individual eBusiness Groups as highlighted - either as Featured, Best Seller or Special Offer categories in a similar way to the existing options for individual stock items.

These settings can then be used on an axis vMerchant Express website to add a Highlighted eBusiness Group module to, typically, your home page:



7.5. Default for Allow Different Delivery Address on Web Orders

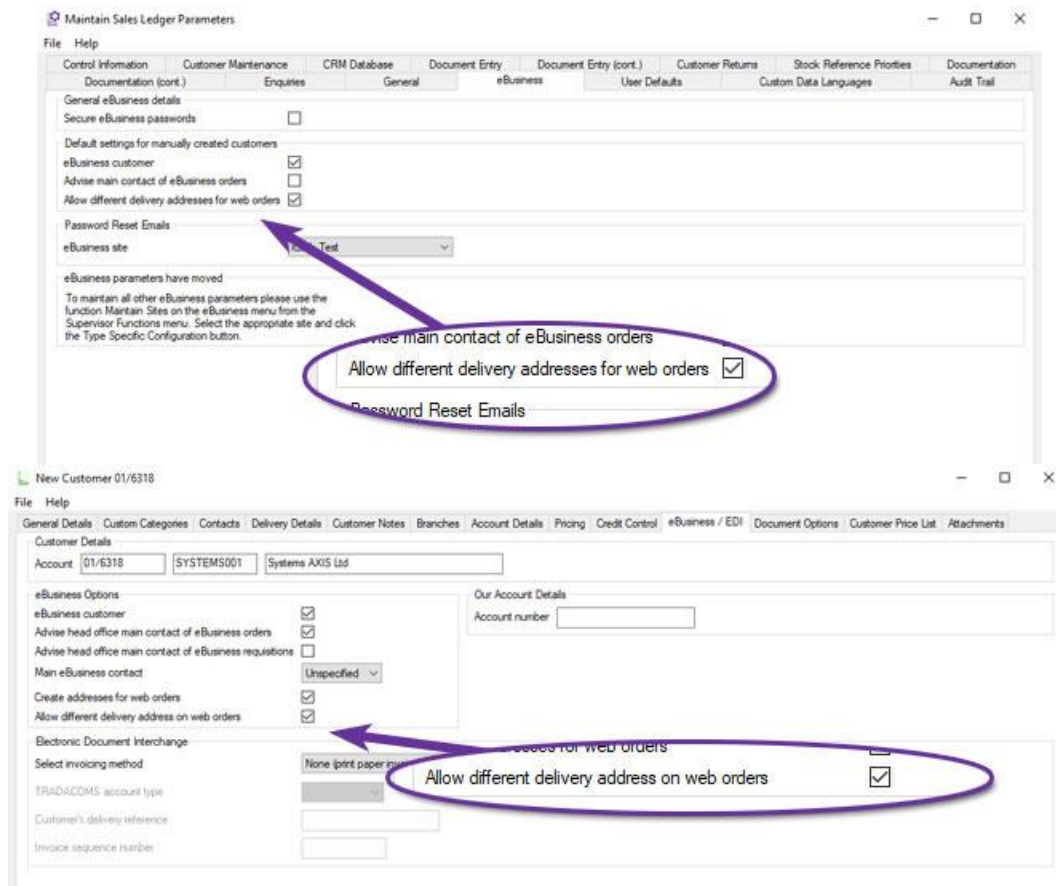
Pre-Released to Software Assurance customers with the eProcurement module



For those using the eProcurement module in conjunction with an axis vMerchant website, a tickbox on customer accounts determines whether the customer in question is able to specify a different delivery address at the checkout.

Under normal circumstances, this defaults to not ticked when setting up new customer accounts - i.e. the default behaviour is for customers to be unable to specify a different delivery address.

A new system parameter allows you to indicate that the default setting should be ticked (customers can specify a different delivery address).



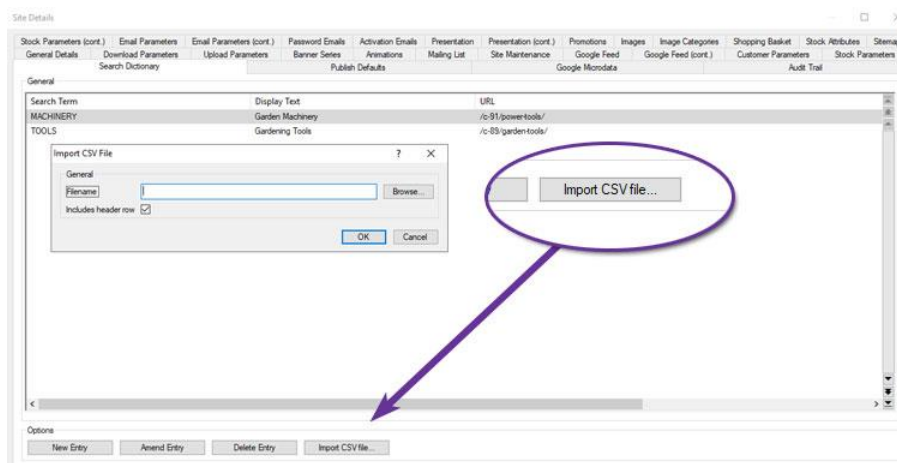
This default only affects the creation of new customer accounts but the setting of existing accounts can be changed 'en masse' using the function Customer Record Block Amendment.

7.6. Import Search Dictionary

Pre-Released to Software Assurance customers with the eBusiness Search Dictionary module



For those using the eBusiness Search Dictionary to provide finer control over specific search terms, these may now be imported from a CSV file.



The file should simply contain three columns (with or without a header row):

- Search Term
- Display Text
- URL

7.7. Amazon VAT Calculation Services & Business

Available with axis diplomat 2024 and the Amazon Seller Central Interface module



The axis diplomat Amazon Seller Central Interface module has been enhanced to support Amazon's VAT Calculation Service.

This service allows Amazon to automatically generate VAT invoices on your behalf and make them available to customers without anyone having to request them directly. This also allows Amazon Business to show VAT exclusive pricing to business customers looking at your products.

Section 8 Service Contract Management

8.1. Calculate Projected Revenue

Pre-Released to Software Assurance customers with Service Contract Management

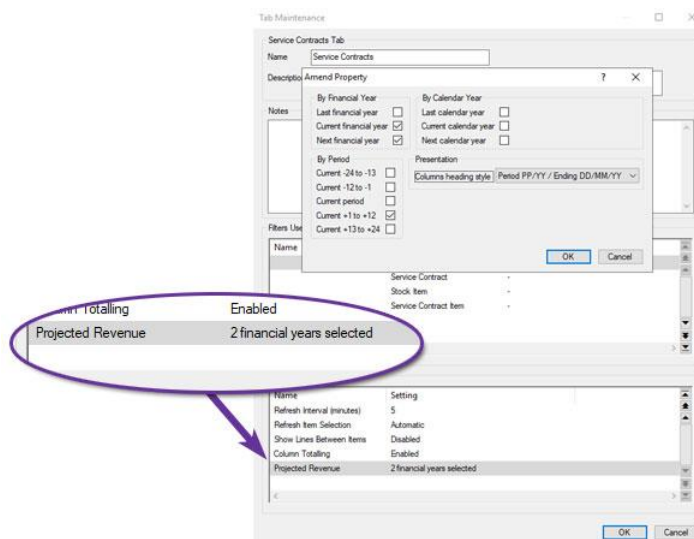


The Service Contract Management module now maintains detailed and accurate forecasts of projected revenue for all contracts. These forecasts take into account both individual contract lines that are not yet active and lines that are due to terminate as well as the overall contract start and end dates. The projected revenue is also calculated for contract requests, so it is possible to include potential contracts in your forecast calculations as well.

This projected revenue is updated every time a contract is changed or invoiced and so is available for inclusion on any of the following monitor tabs without any additional overhead caused by incurring further calculations:

- Service Contract
- Service Contract Items
- Service Contract Requests
- Service Contract Requests Items

Due to the amount of information that can be shown, these additional columns are not enabled by default but can be added in by using the Tab Options on the required monitor:



You are able to include, for example, projected revenue for the current or following financial year, calendar year and/or have a month-by-month breakdown of the forecast.

The projected revenue takes into account both existing and planned future invoicing to give a complete picture of the expected income from the service contracts currently on the system.

In addition, since the forecast projections are calculated and stored in advance, they are also available to query via the SQL database, for example from Microsoft Excel or Microsoft PowerBI.

8.2. Service Contract Enquiry Transactions Tab

Pre-Released to Software Assurance customers with Service Contract Management



It is now easier to manage billing enquiries on Service Contracts with the addition of a Transactions tab to Service Contract Enquiry.

Reference	Date	Type	Net Value (GBP)	VAT Value (GBP)	Total Value (GBP)	User ID	Attachments	Posted
462962	01/06/2024	INVOICE	360.00	72.00	432.00	SUE	Yes	Yes
462475	01/07/2024	INVOICE	360.00	72.00	432.00	SUE	Yes	Yes
462089	01/06/2024	INVOICE	360.00	72.00	432.00	SUE	Yes	Yes
461717	01/05/2024	INVOICE	360.00	72.00	432.00	SUE	Yes	Yes
461332	01/04/2024	INVOICE	340.00	68.00	408.00	SUE	Yes	Yes
460955	01/03/2024	INVOICE	340.00	68.00	408.00	SUE	Yes	Yes
460572	01/02/2024	INVOICE	340.00	68.00	408.00	SUE	Yes	Yes
460190	01/01/2024	INVOICE	340.00	68.00	408.00	SUE	Yes	Yes
459802	01/12/2023	INVOICE	340.00	68.00	408.00	SUE	Yes	Yes
459405	01/11/2023	INVOICE	340.00	68.00	408.00	SUE	Yes	Yes
459028	01/10/2023	INVOICE	340.00	68.00	408.00	SUE	Yes	Yes
458650	01/09/2023	INVOICE	340.00	68.00	408.00	SUE	Yes	Yes
458252	01/08/2023	INVOICE	340.00	68.00	408.00	SUE	Yes	Yes
457859	01/07/2023	INVOICE	300.00	60.00	360.00	SUE	Yes	Yes
457457	01/06/2023	INVOICE	300.00	60.00	360.00	SUE	Yes	Yes
457065	01/05/2023	INVOICE	300.00	60.00	360.00	SUE	Yes	Yes
456665	01/04/2023	INVOICE	300.00	60.00	360.00	SUE	Yes	Yes

The Transactions tab also provides a quick and simple view of how the contract value has changed over time; in the illustration above, for example, we can see that the net monthly contract value has steadily increased from £300 per month to £360.

8.3. Additional Controls on Contract Termination

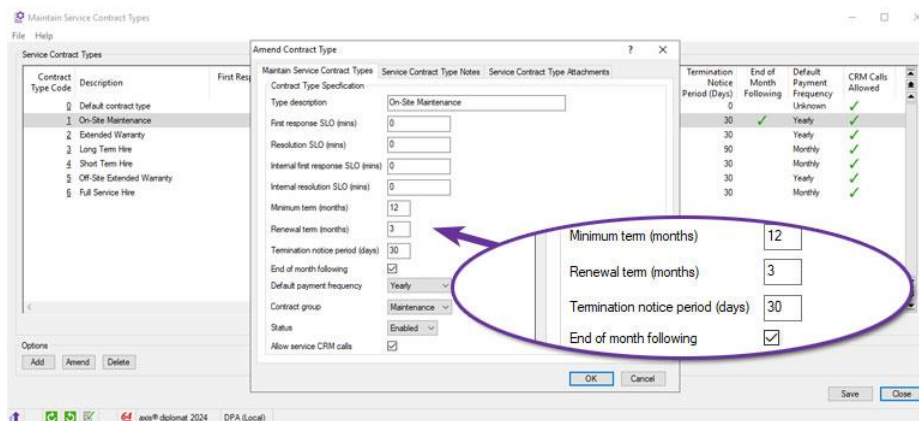
Available with axis diplomat 2024 with Service Contract Management



A number of enhancements have been made to the Service Contract Management module which, collectively, provide greater control and better information on a contracts term.

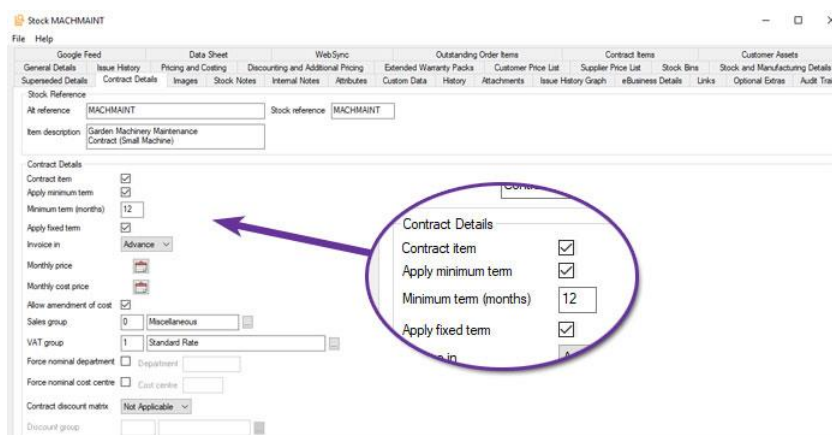
Service Contract Types now have the following additional fields:

- **Renewal Term (Months)** - this defines the renewal period after the initial minimum term has been met. For example, a contract might automatically renew every 12 months unless terminated.
- **End of Month Following** - when selected, this ensures that termination can only occur at the end of the month following the specified notice period.



Stock items that are also contract items now also have additional fields:

- Apply Minimum Term - this enforces a minimum contract term based on either the contract type or the item itself. When enabled, this prevents changes to the contract line if it has been invoiced and is still within the minimum term.
- Minimum Term (Months) - this sets the minimum contract term for the item.
- Apply Fixed Term - this enforces a fixed contract term, ensuring the contract can only be terminated on specific dates, based on the item's start date and the minimum term.



Contracts flagged with "End of Month Following" can only be terminated on the last day of the month following the notice period.

If an item is flagged as "Apply Minimum Term" and has been invoiced, changes such as deletion or quantity adjustment are restricted.

For items flagged with "Apply Fixed Term," termination dates must align with the specified contract term.

In each case, specific users can be configured with permissions to override these restrictions.

When entering or amending a Service Contract, the Item Details tab now includes an additional column showing the earliest termination date:

Enter Service Contract

File Enquiries Help

Customer Details Customer Notes General Details Document Notes Rem Details Terms and Addresses Attachments Links Assets

New Service Contract

Customer reference: 01/3070 Date Signed: 1/2/2014

Credit limit: 5000 GBP Current balance: 0.00 GBP

Values

Net: 1890.00 GBP Cost: 1440.00 GBP Margin: 23.51 % (£450.00 GBP)

VAT: 378.00 GBP

Total: 2268.00 GBP

Current Items

Item Number	Stock Reference	Description	Quantity	Unit Price (GBP)	Asset Links	Item Discount %	Total Value (GBP)	Status	Next Due Date	Earliest Termination Date	Sub-Total Net Value (GBP)	End Date	Sub-Total Gross Value (GBP)
2		On site maintenance of petrol mowers. Asset IDs: 4363, 4394, 4687, 4778, 5123, 5124, 5125, 5477, 8810, 8941, 9012, 9013						Outstanding					
3								Outstanding					
4	MACHMAINT	Garden Machinery Maintenance Contract (Small Machine)	12	180.00		0.00%	2268.00	Outstanding	04-09-24	03-09-25	1890.00		2268.00
			12				1890.00				1890.00		2268.00

Options

Outstanding ☐ Insert Amend Delete Sub-total View Move Up Move Down Review Favourites Options Import Reprice All Print Asset Labels

File Service Contract | Abandon Service Contract

Document Designer now also includes additional document elements for the Notice Period (Days) and Earliest Termination Date as well as a document line element for the line item-specific Notice Period

By controlling and displaying contract dates and restrictions, these updates collectively help to ensure compliance with contract terms and streamline the management process.

8.4. Validation of Contract Request Dates

Pre-Released to Software Assurance customers with Service Contract Management



The Request for Service Contract maintenance function has been modified to add further validation on a request's next due date.

When amending the date, the function will now offer to update any line item with a date prior to the contract's overall date to that date (any line items with a date later then the contract date are not amended unless the user selects this).

Amend Contract Request 18743

File Enquiries Help

Customer Details Customer Notes General Details Document Notes Item Details Terms and Addresses Attachments Links Audit Trail Assets

Amending Contract 18743

Customer reference 01/2005 Tools R Us

Asset

Credit limit 10000 GBP Current balance 9904.30 GBP

References

Batch number 0

Customer contract reference 23534

Our reference ANDY

Status code 0 Outstanding

Document Dates

Contract start date 01/11/2024 Time 00:00

Next due date 01/01/2025

Termination date 31/10/2025

Analysis Details

Department code 0 Miscellaneous

Cost centre 0 Sales

Order source code 1 Alan

Contract Details

Contract status ACTIVE

Contract type 1 On-Site Maintenance

Contract status Confirmation Required

Next due date has been changed from 01/12/2024 to 01/01/2025. Please select which items should be updated with the new due date.

Options

Update earlier items (1 item) ☒

Payment terms

Other details

Quote valid for

Validity period (days)

Revision number

Remarks

Values

Net 25920.00 GBP Cost 1440.00 GBP Margin \$4.44 % (24400.00 GBP)

VAT 5104.00 GBP

Total 31104.00 GBP

Stock Location

Location 0 Main Depot

Contract Details

Service contract type 1 On-Site Maintenance

Contract status Confirmation Required

Next due date has been changed from 01/12/2024 to 01/01/2025. Please select which items should be updated with the new due date.

Options

Update earlier items (1 item) ☒

Payment terms

Other details

Quote valid for

Validity period (days)

Revision number

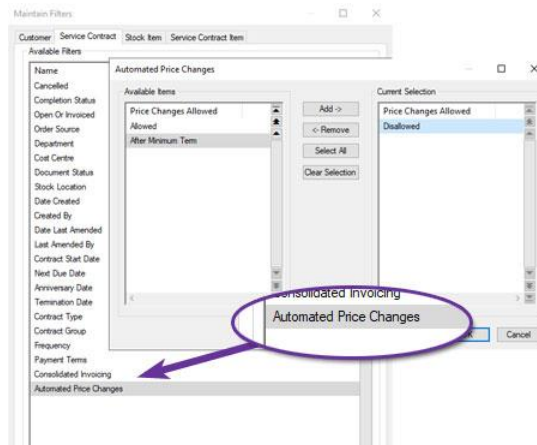
Remarks

8.5. Filter Service Contract Monitors by Automatic Price Changes

Pre-Released to Software Assurance customers with Service Contract Management



It is now possible to filter Service Contract monitor tabs by the automated price change status of each contract.



This means, for example, it is now possible to produce a monitor listing only those contracts that do not update their pricing automatically. This would be particularly useful when manually reviewing those contracts.

Section 9 Workshop Job Management

9.1. Workshop Job Despatch Quantities and Picking

Pre-Released to Software Assurance customers with Workshop Job Management



Two additional options have been made available for users of the Workshop Job Management Module.

Workshop Job Despatch Quantities allows stock to be hard-allocated to workshop jobs. Working in the same way as sales order and works order despatch quantities, setting despatch quantities on workshop job lines protects that stock from being taken for other transactions. This option is available at no additional cost to those with the Despatch Quantity Recording module.

Workshop Job Picking harnesses the technology used by the existing handheld picking functionality for Sales Orders and Works Orders and is available, also at no additional cost, to users of the Warehouse Management module. The Handheld Pick Workshop Jobs function provides a picking list of items, sorted by bin reference, to a handheld terminal which the stores team then use to carry out the picking before passing the stock to the workshop to allow them to carry out the job.

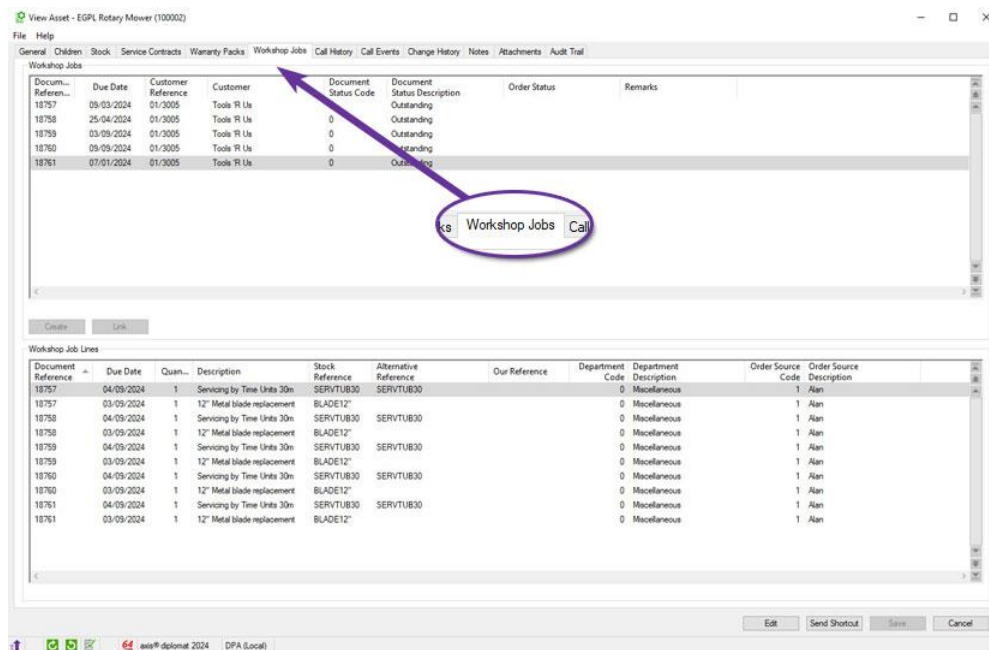
9.2. Linking Workshop Jobs to Assets

Pre-Released to Software Assurance customers with the Customer Assets module



For those with both the Workshop Job Management and Customer Assets modules, workshop jobs can now be linked to a specific customer asset.

This allows you to build a comprehensive service history for each asset (even when work has been invoiced to different customer records, such as finance companies or previous owners).



New asset records can also be created from within the Workshop Job maintenance function, which is helpful when creating a Workshop Job for a piece of equipment that has not been seen before. Conversely, it is possible to create a new Workshop Job from within an Asset Enquiry.

Links between Assets and Workshop Jobs are shown across various parts of the system, including a number of monitor tabs, such as 'Workshop Job,' 'Workshop Job Items,' and 'Customer Transaction History.' These now include additional columns for Asset ID, Asset Type, and Serial Number, as well as right-click menu options to drill down to the specific asset or workshop job.

9.3. Workshop Job Monitors and Assets

Pre-Released to Software Assurance customers with the Customer Assets module



A number of additional columns have been added to the Workshop Job and Workshop Job Item monitor tabs, designed to provide greater visibility of asset-related activities:

- Asset ID
- Asset Name
- Asset Serial Number
- Asset Type

Asset Name	Asset Type	Asset ID	Asset Serial Number
EGPL Rotary Mower	Ride On Mowers	100007	
EGPL Rotary Mower	Ride On Mowers	100012	
HUGH Ride-on M...	Ride On Mowers	100001	JYV87589
... Rotary Mower	Ride On Mowers	100004	

These additions will be particularly useful to those who carry out routine servicing and maintenance on customers' equipment, whether vehicles, machinery, etc. because linking workshop jobs to specific assets allows you to build and interrogate the full service history.

9.4. Workshop Jobs and Back-to-Back Process Monitors

Pre-Released to Software Assurance customers with Workshop Job Management



Back-to-back order information has been added to the Workshop Job and Workshop Job Item as well as Purchase Order and Purchase Order Items monitor tabs. This enhancement is designed to provide greater visibility of linked purchasing activities.

These additions will be particularly useful to those who arrange Workshop Job specific parts for the servicing and maintenance on customers' equipment. From a Workshop Job or Workshop Job Items monitor, a user can view the purchase order number or even use a context menu (right-click) to view the Purchase Order in full. From a Purchase Order Monitor or Purchase Order Items Monitor, a Sales Order column displays the Workshop Job.

Workshop Reference	Purchase Order	Status	Stock Reference	Alternative Reference	Stock Line Reference	Item Description	Case Quantity	Quantity Ordered	Quantity Despat...	Quantity Outsta...
10743	387	All stock available at order location	EGPLMOW1	EGPLMOW1		EGPL Electric Mower 12" plastic blades	3	0	3	
10744	388	Insufficient stock, no items available	BOOK34	BOOK34		Ride-On Mower Maintenance	1	0	1	
10745	389	All stock available at order location	EGPLACC1	Workshop Job Enquiry		Replacement Battery for cordless hedge trimmer	1	0	1	
10746	390	All stock available at order location	EGPLACC1	Amend Workshop Job		Trimmer Cord replacement	1	0	1	
10747	390	All stock available at order location	EGPLACC1	Stock Enquiry		Replacement Battery for cordless hedge trimmer	1	0	1	
10748			LABOUR	Stock Line Enquiry		Maintenance for 1st Or of Contract	6	0	6	
10749			LABOUR	Customer Enquiry		Maintenance for 1st Or of Contract	6	0	6	
10750			LABOUR	Purchase Order Enquiry		Maintenance for 1st Or of Contract	6	0	6	
10750	391	All stock available at order location	EGPLACC3	Asset Enquiry		Outside of contract	3	0	3	
500056	386	All stock available at order location	EGPLMOW1	Refresh		Trimmer Cord replacement	1	0	1	
				Find		EGPL Electric Mower 12" plastic blades	3	0	3	
				Help						
				Print Preview						
				Export						
				Copy 'BOOK34'						

Users may track from Purchase Request to Goods Received. Purchase Invoicing may also be traced through Purchase Invoice Booking where Invoices booked against purchase orders, thus providing cost sheet details for the Workshop if required.

Section 10 axis payroll

10.1. Additional Word Template Fields

Pre-Released to Software Assurance customers



Microsoft Word document templates (.dotx) can be created for use within axis payroll.

In addition to the standard facilities provided by Microsoft Word, it is also possible to include in these templates axis payroll-specific substitutions that are replaced with the actual data from the employee's record when creating documents from the template.

The list of available substitutions has now been extended to include the following:

- {KnownAs}
- {Paypoint}
- {PaypointDescription}
- {StartDate}

10.2. Automated Emails with Paperless Payroll

Available with axis payroll 2024 and the eDoc Deposit Interface module



eDoc Deposit is an online document portal which axis payroll can use for the delivery of electronic payslips and payroll documents. This optional module has been extended to allow sending of an email when documents have been uploaded from either 'Deliver Payslip Attachments' or 'Deliver P60 Attachments'.

The automated email can include a number of substitutions to personalise each individual email:

- {Title}
- {Initials}
- {Forename}
- {Surname}
- {EmployeeName}
- {EmployerName}

An example email template could read:

Dear {Title} {Initials} {Surname}

Your latest Payslip has been uploaded to your employee document portal account.
{Employer Name}

An Employee Details record holds both an email (personal) and a work email address. The Payment Details tab allows you to select which email address should be used and also allows a test email to be sent.

Section 11 Upgrade Options and Pricing

11.1. Upgrade Pricing

The price for upgrading from an axis diplomat 2022 system is equal to a 65% discount on the equivalent new axis diplomat 2024 software.

The price for upgrading from an axis diplomat 2020 system is equal to a 30% discount on the equivalent new axis diplomat 2024 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 2024, this means there is no upgrade path for those upgrading from axis diplomat 2018 or below.

11.2. Transition Pricing

Transition To	Transition From
	axis diplomat 2024 Express
axis diplomat 2024 Small Business Edition Client	£395

11.3. 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	1.85%
Software Support, Software Assurance	3.40%
Software Support, Software Assurance, Software Rental	6.00%

11.4. 'Early Bird' Discounts

Anyone without Software Assurance ordering an upgrade to axis diplomat 2024 by 31st January 2025 is entitled to a discount of 30% on the cost of the licence upgrade.

Similarly, upgrades ordered by 31st March 2025 are entitled to a discount of 20% and upgrades ordered by 30th June 2025 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.

11.5. Additional Services

Product	
---------	--

PassTime Implementation Services (40x15 minutes)	£995
PassTime Implementation Services (30x15 minutes)	£795
PassTime Implementation Services (20x15 minutes)	£595
PassTime Implementation Services (10x15 minutes)	£345

PassTime Implementation Services can be used for online remote upgrade of an axis diplomat system to axis diplomat 2024.

Training is strongly recommended for all upgrades to axis diplomat 2024 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 PassTime Implementation Services or in whole day or half day sessions, invoiced at our standard rates.

11.6. Software Assurance Upgrades

For customers subscribing to Software Assurance only

A number of the new developments within axis diplomat 2024 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 2024 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 2024, please go to our web site at

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

and click on the link to request your upgrade.

Section 12 Policies

12.1. Supported Environments

For the latest information on **axis diplomat 2024**'s supported environments, including additional information such as approved Thin Client software and Microsoft Office versions, please visit our website at:

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

12.2. Product Lifecycle

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

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

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

E & OE.

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Document Reference: axisddiplomat2024Upgrade/3.0