Ezy Systems

EzyAuction.News May 2016

New Clients 2016

Australia

Schild Estate
Rusden Wines
Sidewood Estate
Gooree Park
Murray Street
Bimbadgen Wines

South Africa

Cloof Wine Estate
Barnard Boyes Wines
De Grendel Wines

We can host your copy of ***EzyAuction*** and you will no longer need to:

- purchase a server for ***EzyAuction***
- upgrade your operating system
- load ***EzyAuction*** upgrades
- manage antivirus software
- worry about daily backups.

For more information, including pricing, please phone our IT Manager, Adrian Lock on +61 (0)3 5441 2044 or email adrian@ezysys.com.au.

Like Us On facebook

Click on image for latest news, events and tips.

New Training Option

We can access your data via TeamViewer and provide up-to 3 hours of training, reconciliation or consulting for $450. Please contact us for available dates.

Customise Favourites Menu

Favourites Menu Entry option has been added to the Favourites menu so that you can easily customise your Favourites menu to only show required options.

Specify Default Buyer Premium

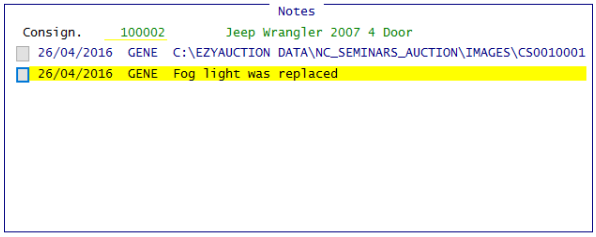
Buyer Premium and *Premium Amount* prompts have been added to the consignment defaults and system parameter *Auction: Item Entry, Prompt Buyer Prem.* determines whether it can be changed against items.

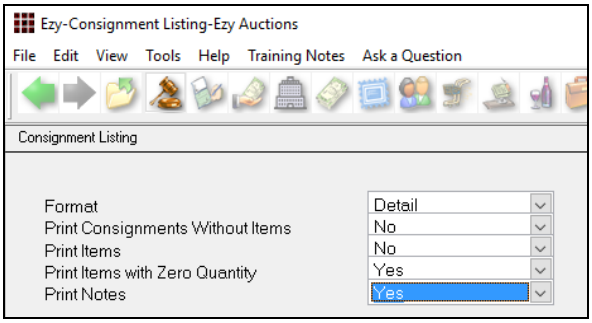
Improve Server Speed

Consider replacing your server hard disk with solid state drive which is inexpensive and will significantly improve performance. Contact your IT provider for more details.

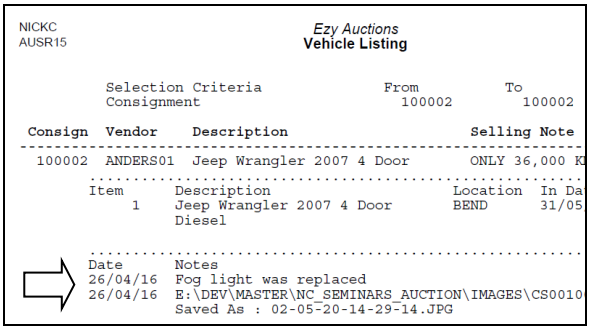
[F5] Consignment Notes

Unlimited notes and attachments can now be recorded against consignments. Categories can also be utilised for reporting purposes.





These [F5] notes can be displayed on the consignment and vehicle listings.



Link Sale & Regular Buyers

When new system parameter *Auction: Sales Buyer = Regular Buyer* is set to Yes:

- On inserting a Sale, all the Regular Buyers will be loaded into the sale
- On inserting a Sales Buyer, the Buyer will also be created as a Regular Buyer.

Buyer Invoice Enquiry

This Auction Enquiry option reports both *current* and *historic* invoices for a Buyer.

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No changes

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No changes

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No changes

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New Menu Options

Auction
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Stock Operations Reports, Stock/GL Reconciliation

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P/Orders Operations, Purchase Order Email Log
P/Orders Administration, Change P/O Department Code

Sales
Mail Order & Wine Club, M/Order Daily Sales Summary

New System Parameters

Auction: Sales Buyer = Regular Buyer
Stock: Adjustment Entry, Access GL Stock
Sales: Entry, Retain GL Override
Sales Orders: Entry, Promotion Mandatory
Sales Orders: Confirm., Modify Orig. Ord
C/Door: POS, Theme 2 PNG Logo 1
C/Door: POS, Theme 2 PNG Logo 2
C/Door: Daily Taking Float Default
P/Orders: Entry, Prompt For Supp. Stat.
GL: Cash Rec Jnl Imp, Drive\Dir.\File

On selecting a system parameter press the [F10] key or select the Help button, top right of screen, to display helpful information.

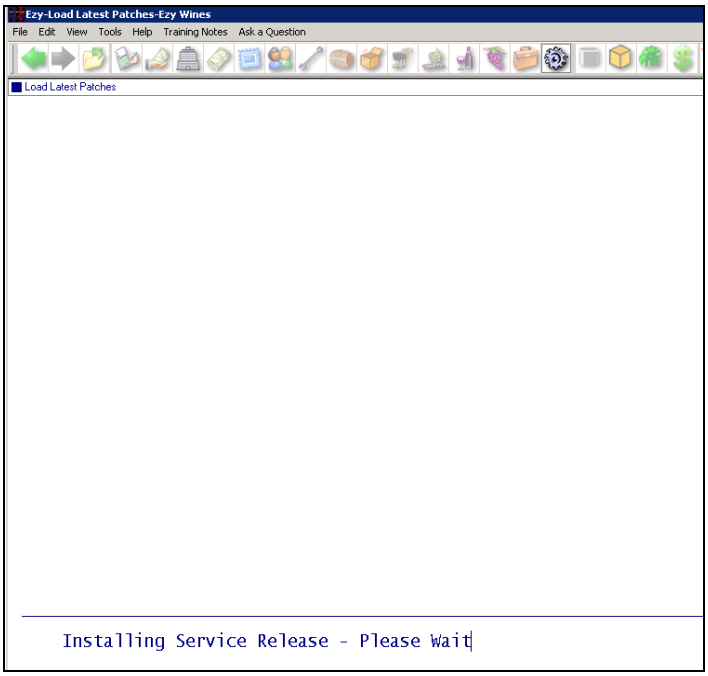
General

Load Latest Patches

This new option will load any bug fixes and statutory changes since the previous *upgrade*.

It should only be run when you have been instructed to do so by one of the Ezy Systems support staff as you need to ensure that you are running the latest version (ie. relevant May or October *upgrade*).

Ideal for users who cannot schedule the Rebuild Index option which does the same at a nominated time. Refer to the Overview training notes for more details.



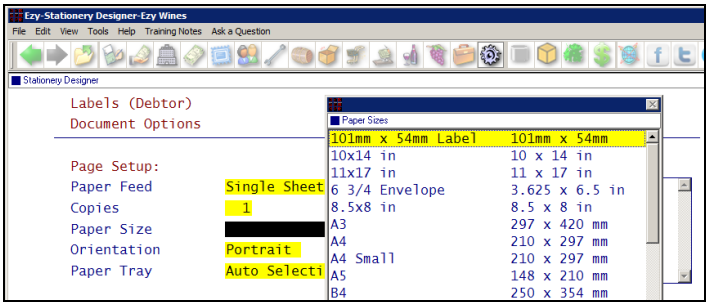
Benefit

- Easier to load latest patches as you don't have to get all users to logout.

System Administration
Load Latest Patches

Stationery Designer 101mm x 54mm Label

Paper Size 101mm x 54mm Label has been introduced for each *Label* stationery.



Benefit

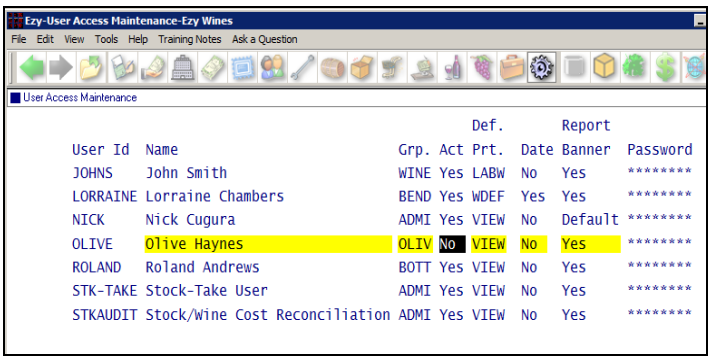
- Utilise a DYMO Labelwriter 450 printer, which costs less than $100.

System Administration
Stationery Designer

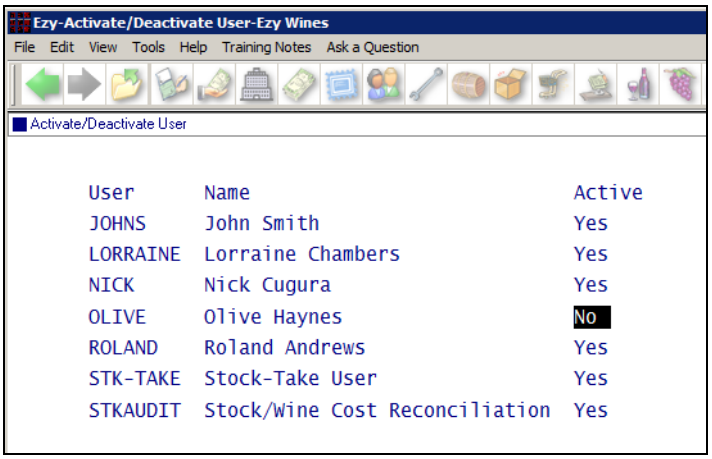
General (Cont'd)

Deactivate Users

You can flag a user as inactive.



The following new menu option also allows you to flag a user as inactive.



Benefit

- Rather than deleting a user, you can activate/deactivate a user as required.

User Access
Activate/Deactivate User
User Access Maintenance

Auction

Bank Deposit Listing Includes Company Details

'Print Company Details' prompt has been added to the selection criteria.

Benefit

- Useful when providing bank with listing.

Auction Post Sales Reports
Cash Receipt Listing
Bank Deposit Listing

```
NICKC                                   Ezy Auctions
AUSO21                                Bank Deposit Listing

                                Sequence  : Sale

All Sales

-----------------------------------------------------------------------------------------------
Ezy Auctions
17 Hopetoun St
Bendigo
Victoria
03 5441 2044

Cheque Receipts
User Id   Date       Invoice  Receipt  Buyer        Amount Bank       Branch              Drawer
-----------------------------------------------------------------------------------------------
Deposits
Sale  0609DE
NICKC     01/06/09       1        1  2          31912.50 CBA        BENDIGO             J. A. Leech

Card Receipts
User Id   Date       Invoice  Receipt  Buyer        Amount Card Type   Card Number       Expiry Date
-----------------------------------------------------------------------------------------------
Deposits
Sale  01APR07
NICK      01/02/08       1        7  1            100.00 Debit          ........
Sale  01MAR07
NICK      20/02/07       1        1  4            219.95 Visa        1002........       09/08
Sale  03DEC10
NICKC     08/04/13       4       12  103          959.38 Mastercard  1234........6     12/13
```

```
NICKC                                   Ezy Auctions
AUSO20                                Cash Receipt Listing

                                Sequence  : Sale

                                Selection Criteria            From        To
                                Receipt Date                  01/01/2010  31/12/2020

All Sales                                                                 Ezy Auctions
                                                                          17 Hopetoun St
                                                                          Bendigo
Sale      Receipt  Invoice  Buyer    Date      User Id      Amount  Details     Victoria 03 5441 2044
-----------------------------------------------------------------------------------------------
03DEC10         1        1  101      15/09/10  NICKC       28405.00  CASH
                Consign:   100000  Vendor: SMITHD01  Price:     25000.00
03DEC10         2        1  101      15/09/10  NICKC     (   100.00) CASH REFUND
                Consign:   100000  Vendor: SMITHD01  Price:     25000.00
03DEC10        10        5  1        08/04/13  NICKC         101.32  CASH
03DEC10        12        4  103      08/04/13  NICKC         959.38  Mastercard  NUMBER: 1234........6
03DEC10        13        8  4        16/10/13  NICKC           7.24  CASH
```

[F5] Consignment Notes

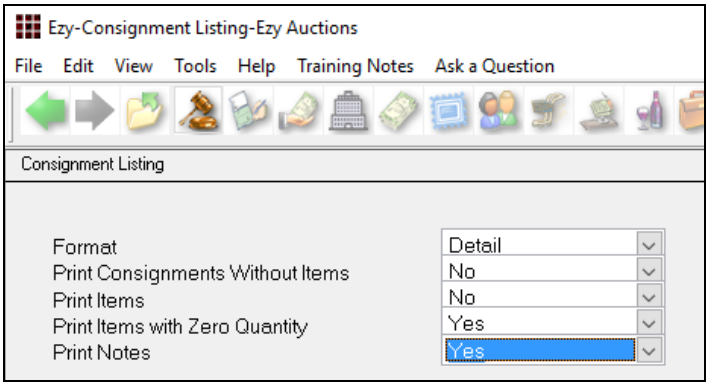
'Consignment' added to the [F5] options.

Benefit

- Ability to record unlimited miscellaneous notes against a consignment.

[F5]
Auction Pre Sales
Consignment Listing
Auction Vehicles
Vehicle Listing

```
Notes
Consign.    100002        Jeep Wrangler 2007 4 Door
26/04/2016  GENE  C:\EZYAUCTION DATA\NC_SEMINARS_AUCTION\IMAGES\CS0010001
26/04/2016  GENE  Fog light was replaced
```

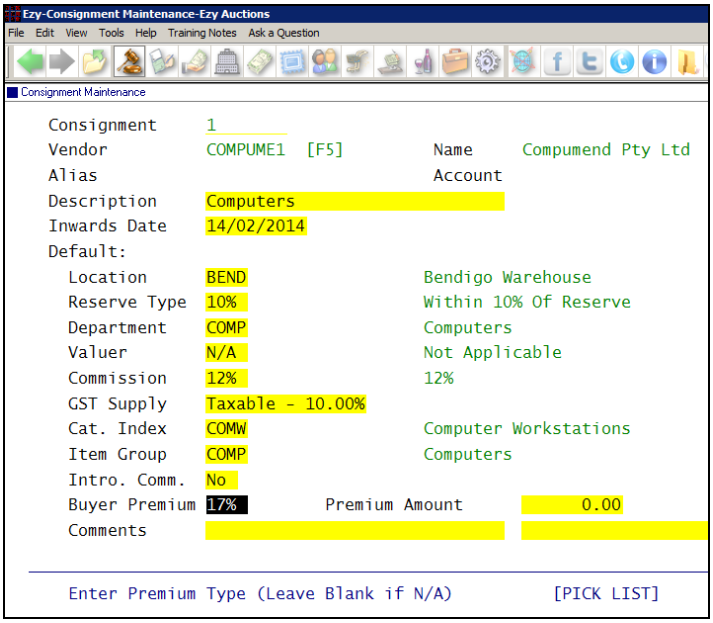



```
NICKC                                   Ezy Auctions
AUSR15                                Vehicle Listing

          Selection Criteria                From          To
          Consignment                         100002        100002

 Consign  Vendor    Description                          Selling Note
-----------------------------------------------------------------------
  100002  ANDERS01  Jeep Wrangler 2007 4 Door            ONLY 36,000 K
        ..............................................................
        Item       Description                          Location  In Da
             1     Jeep Wrangler 2007 4 Door            BEND      31/05
                   Diesel

        ..............................................................
        Date       Notes
        26/04/16   Fog light was replaced
        26/04/16   E:\DEV\MASTER\NC_SEMINARS_AUCTION\IMAGES\CS0010
                   Saved As : 02-05-20-14-29-14.JPG
        ..............................................................
------------------------------ End of Report -------------------
```

Auction (Cont'd)

Specify Default Buyer Premium

'Buyer Premium' and 'Premium Amount' prompts have been added to the consignment defaults.



Benefit

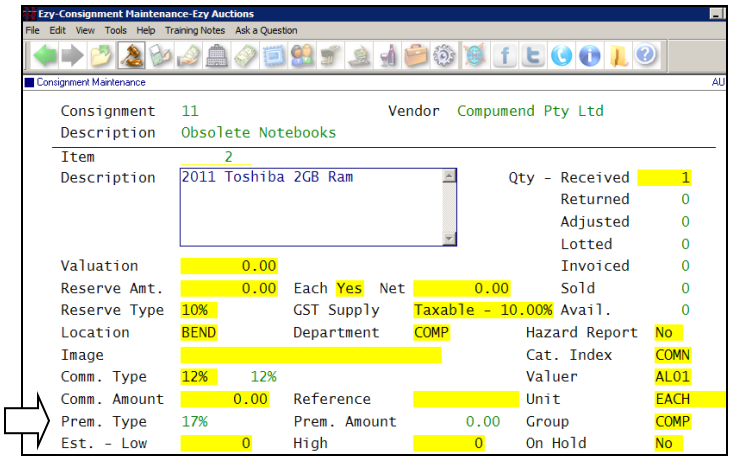
- Ensure that a buyer premium recorded against a consignment is applied to each item
- Reduce errors and save time.

Auction Pre Sales
Consignment Maintenance
Item Maintenance
Auction Sales
Catalogue Maintenance

Specify Whether To Prompt For Buyer Premium

System parameter "Auction: Item Entry, Prompt Buyer Prem." has been introduced, defaulting to Yes.

It determines whether the Buyer premium and premium amount (when applicable) can be recorded or changed against an item.



Benefit

- Ensure that the default Buyer premium preloaded against items cannot be changed
- Reduce errors and save time.

Auction Pre Sales
Consignment Maintenance
Item Maintenance
Auction Sales
Catalogue Maintenance

Duplicate Vehicle VIN Warning

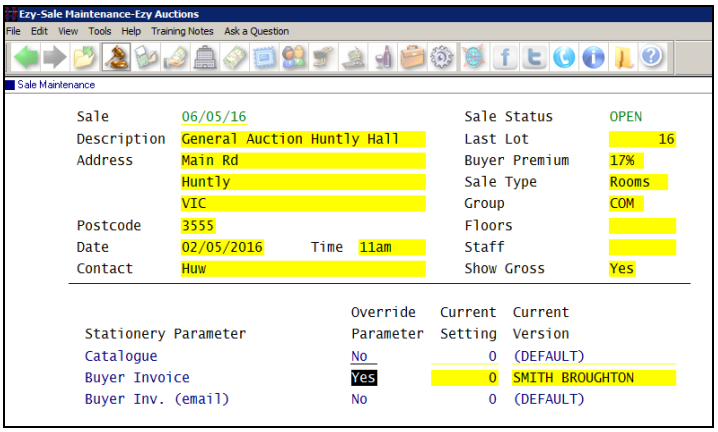
On inserting a vehicle, a warning message is displayed if VIN has been recorded against another vehicle.

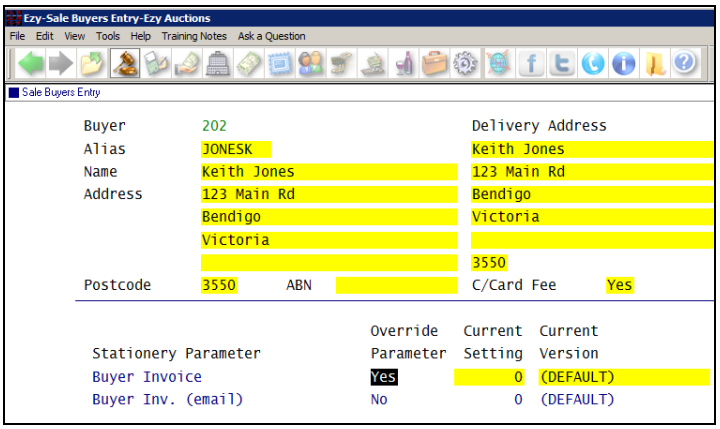
Auction Vehicles
Vehicle Maintenance

Auction (Cont'd)

Specify Sale Buyer Invoice Format

If you have utilised the Stationery Designer to produce different Buyer invoice formats, you can now specify which format is to be used for each sale.





Benefit

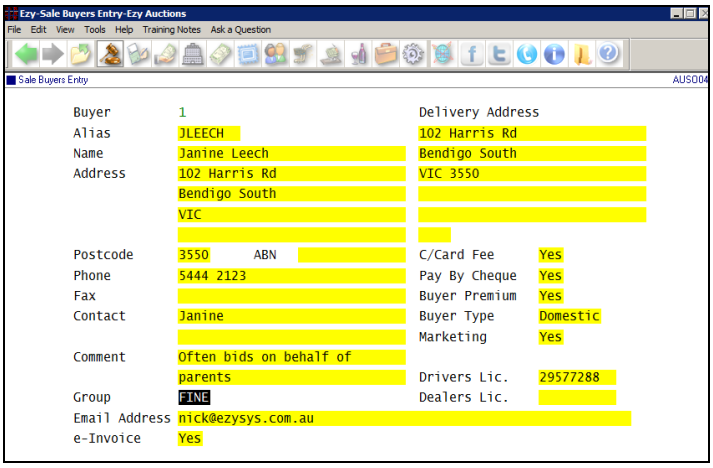
- Customise Buyer invoice by Sale.

Auction Pre Sales
Sale Maintenance

Auction: Sales Buyer = Regular Buyer

When this new system parameter is set to Yes:

- On inserting a Sale, all the Regular Buyers will be loaded into the sale
- On inserting a Sales Buyer, the Buyer will also be created as a Regular Buyer.



Benefit

- Avoid creating duplicate Buyers
- Ensure all Buyers are loaded for each sale, which is required for online auctions.

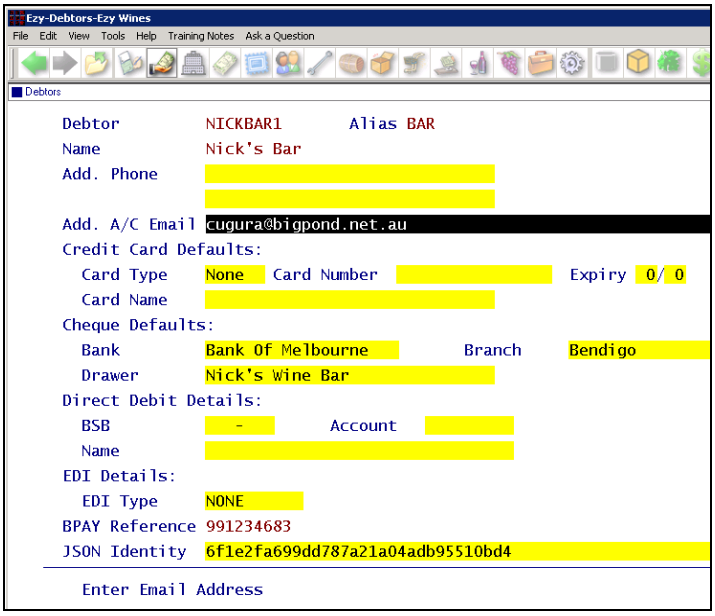
Auction Pre Sales
Sale Maintenance
Auction Sales
Sale Buyer Maintenance
Sale Buyer Registration
Buyer Invoice Entry

Note: Group has been added to Sales Buyer as it is required against Regular Buyer.

Accounts Receivable

2nd Debtor A/C Email Address

'Add. A/C Email' has been added to the Debtor profile so that more email addresses can be recorded.



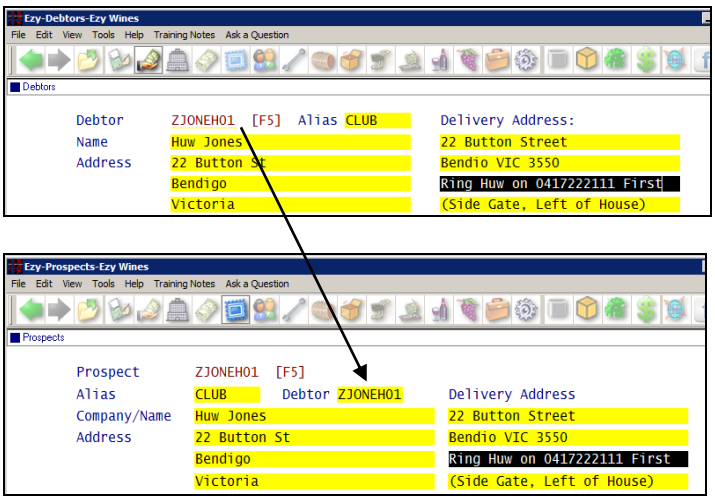
Benefit

- Debtor invoices and statements can be emailed to more recipients.

Accounts Receivable Maintenance
Debtors
Sales Invoices
Sales Invoice Print
Accounts Receivable Reports
Debtors
Debtor Statement Print

Prospect Delivery Address Auto Updated

When a Debtor, such as a wine club member, has been linked to a prospect, on changing the Debtor delivery address, the address recorded against the corresponding Prospect will be changed accordingly.



Benefit

- Save time and ensure details are correct in CRM module.

Accounts Receivable Maintenance
Debtors

General Ledger

Debtor Receipts & Creditor Payment Projections

Debtor receipts and Creditor payments have been added.

Debtor Receipts Projection

April	May	June	July	August	September+
199577.64	0.00	0.00	0.00	0.00	0.00

Creditor Payments Projection

April	May	June	July	August	September+
45121.45	800.00	2400.00	0.00	0.00	0.00

Benefit

- Includes projected cashflow.

General Ledger Reports
Financial Position

Marketing & CRM

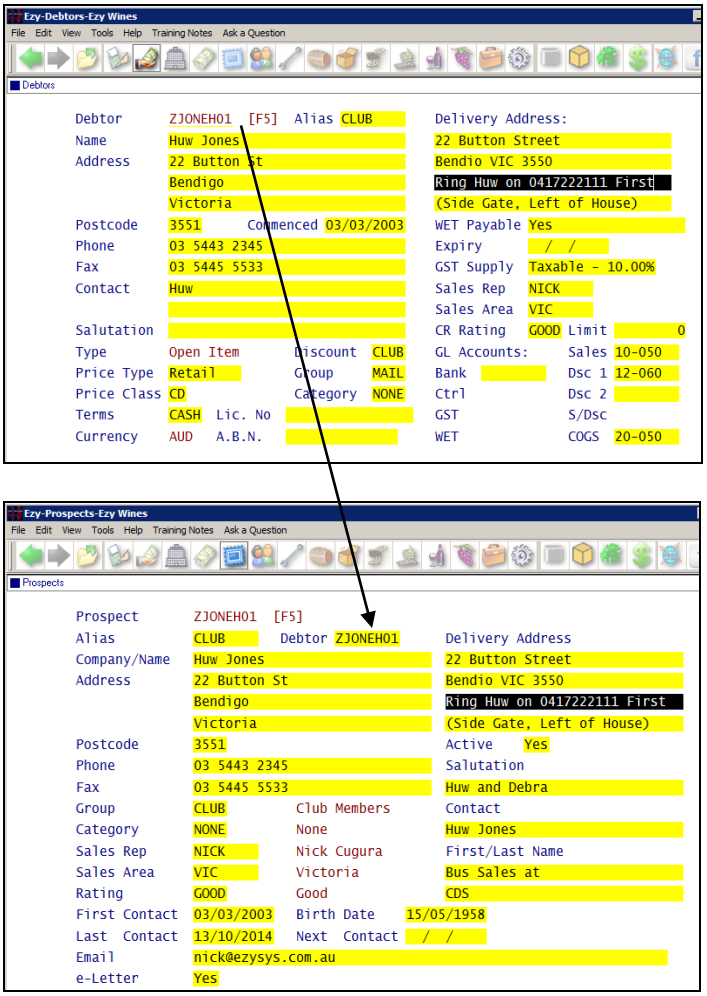
Prospect Delivery Address Auto Updated

When a Debtor, such as a wine club member, has been linked to a prospect, on changing the Debtor deliver address, the address recorded against the corresponding Prospect will be changed accordingly.

Benefit

- Save time and ensure details are correct in CRM module.

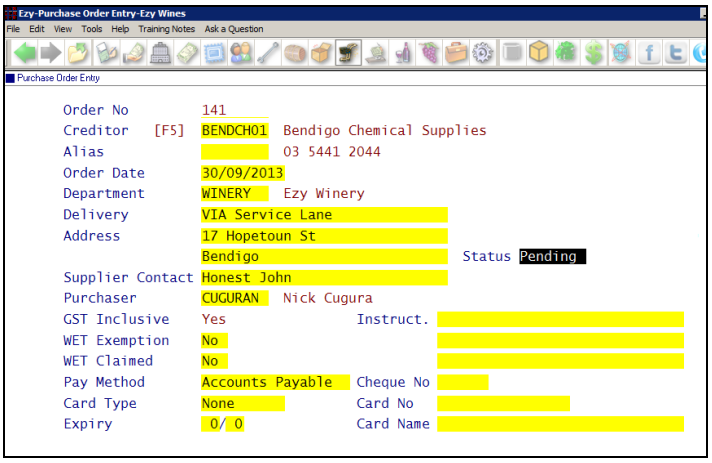
Accounts Receivable Maintenance
Debtors



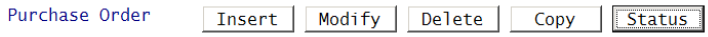
Purchase Orders

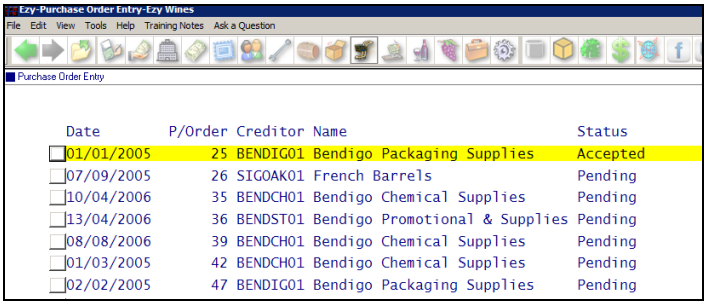
Purchase Order Supplier Status

When system parameter "P/Order: Entry, Prompt For Supp Stat." is set to Yes, purchase orders can be flagged as *Accepted*, *Rejected* or *Pending*.

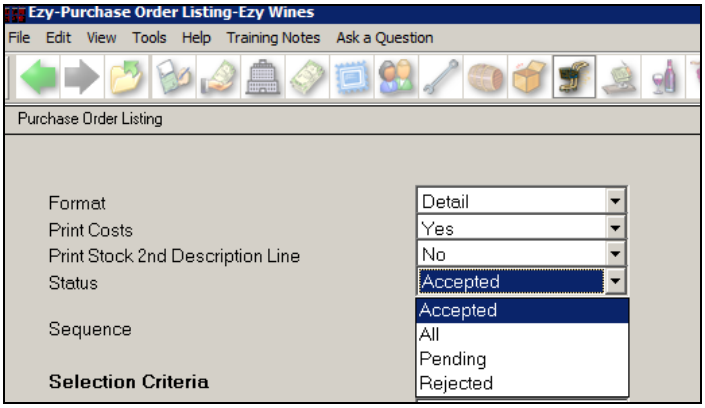


[Status] button has been added to the first screen.





Status has also been added to the Listing option.



On inserting or generating a purchase order, the Status defaults to *Pending*.

Benefit

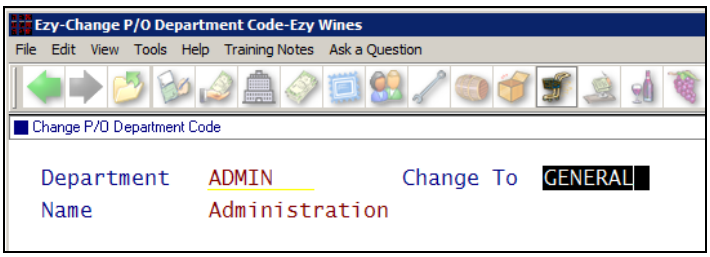
- Better manage status of purchase orders.

P/Orders Operations
Purchase Order Entry
Purchase Order Listing
Bottling Administration
Generate Bottling Run P/Orders

Purchase Orders (Cont'd)

Change Department Code

New menu option.



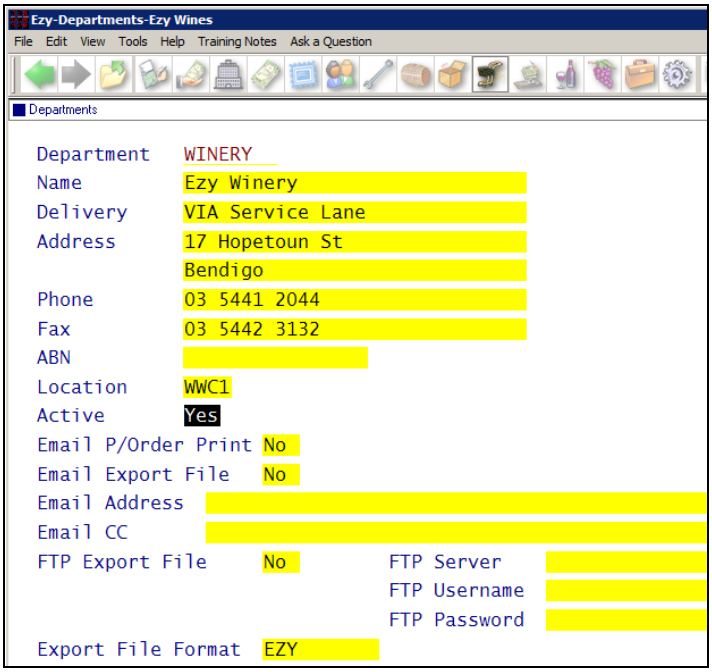
Benefit

- Easily change every occurrence of a department code that needs to be corrected.

P/Orders Administration
Change P/O Department Code

Flag Departments Inactive

'Active' has been introduced.



Benefit

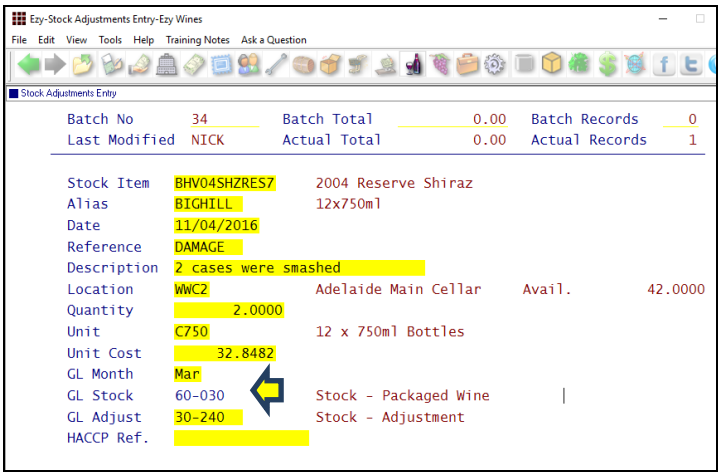
- Flag a department as inactive if it's no longer to be used.

P/Orders Reference
Departments
P/Orders Operations
Purchase Order Entry
Purchase Order Listing

Stock Control

Restrict Access To Stock Adjustment GL A/C

System parameter "Stock: Adjustment, Access GL Account" determines whether the default STOH GL A/C recorded against the stock item can be changed.



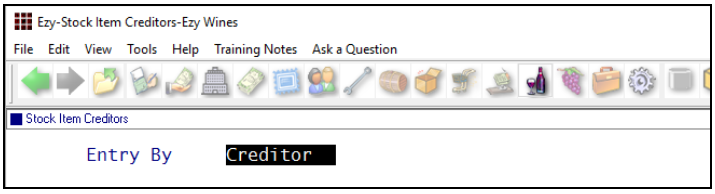
Benefit

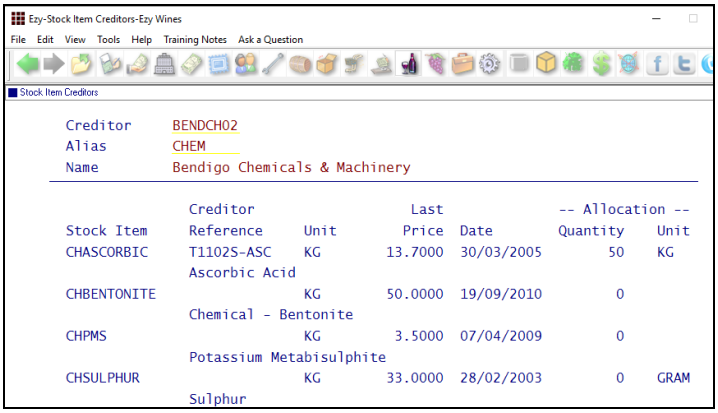
- Ensure that the default STOH account recorded against the stock item cannot be changed.

Stock Adjustments
Stock Adjustments Entry

Enter Stock Item Creditors By Creditor

'Entry By' prompt has been introduced with scroll list options 'Stock' (current) and 'Creditor' (new).





Benefit

- Easily manage all stock items supplied by a Creditor.

Stock Reference Maintenance
Stock Item Creditors

Import Stock Std/Ave Costs

New menu option. On changing average costs, a stock movement will be recorded.

Click on *Sample Documents* button for format.

Benefit

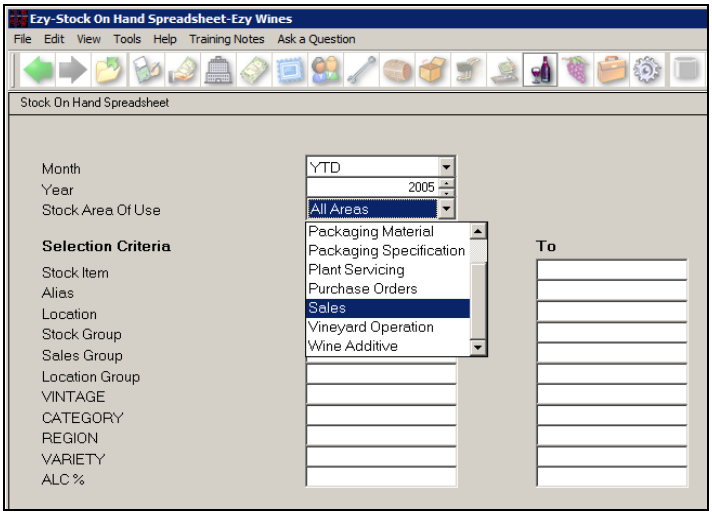
- Quicker and easier method of changing many stock item costs.

Stock Reference Maintenance
Import Stock Std/Ave Costs

Stock Control (Cont'd)

Monthly Stock On Hand Report

New menu option.



NICK
STR66

Ezy Wines
Stock On Hand Spreadsheet

11:23 20/04/2016
Page 1 of 1

Selection Criteria From To
Stock Item ********** Last

Stock Item	Description	Unit	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
04CHRRES7	2004 Chardonnay Reserve 750ml	C750	420	420	420	420	420	420	420	420	420	420	420	420
04SHZRES7-UK	2004 Shiraz Reserve UK	C750	309	309	310	310	310	310	303	300	300	300	300	300
BHV04SHZRES7	2004 Reserve Shiraz	C750	190	263	263	319	319	319	319	350	630	629	629	629
12 x 750ml Bottles		C750	919	992	993	1049	1049	1049	1042	1070	1350	1349	1349	1349

---------- End of Report ----------

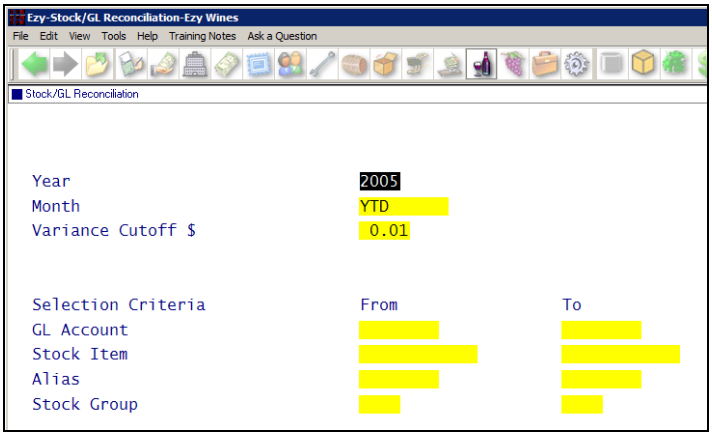
Benefit

- Easily browse STOH by month.

Stock Operations Reports
Stock On Hand Spreadsheet

Stock/GL Reconciliation

New menu option.



NICK
STR65

Ezy Wines
Stock/GL Reconciliation

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2004/2005 March

GL Stock	Stock Item	STOH	Opening Total Cost	Opening Average	Movement Qty	Movement Cost	Closing STOH	Closing Total Cost	Closing Average	Variance
60-030	Stock - Packaged Wine									
60-030	GL		393041.39			14003.66		407045.05		0.00
60-030	STOCK		529665.95			43151.92		558898.14		-13919.73
60-030	VARIANCE		-136624.56			-29148.26		-151853.09		
60-030	PRDBRN	17 STK	1838.71	GL	0.00 VAR	-1838.71				
60-030	PRDBRN	20 STK	0.00	GL	2404.70 VAR	2404.70				
60-030	PRDBRN	21 STK	0.00	GL	4861.65 VAR	4861.65				
60-030	PRDBRN	23 STK	0.00	GL	2019.22 VAR	2019.22				
60-030	PRDBRN	26 STK	0.00	GL	2389.05 VAR	2389.05				
60-030	PRDBRN	27 STK	0.00	GL	3216.00 VAR	3216.00				
60-030	PRDBRN	28 STK	0.00	GL	2325.65 VAR	2325.65				
60-030	PRDBRN	32 STK	0.00	GL	2330.83 VAR	2330.83				

Benefit

- Report stock items where value in Stock Control module does not reconcile with the value against the STOH balance sheet accounts in the GL module.

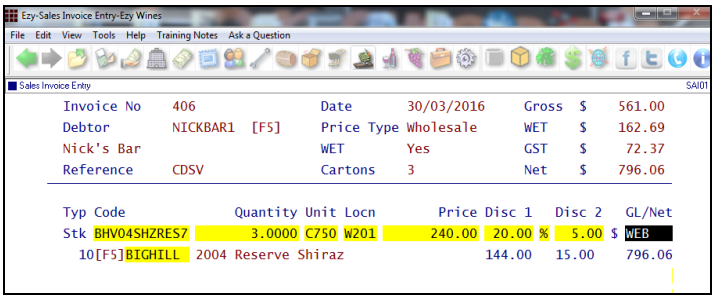
Stock Operations Reports
Stock/GL Reconciliation

Sales

Sales Entry Retain GL Override

New system parameter "Sales: Entry, Retain GL Override" determines whether the Sales Order and Sales Invoice Entry options retains the GL Override from one stock item to the next.

The default is Yes.



GL accounts to be impacted on processing a sale are recorded against stock items and/or Debtors. However, these can be overridden by the accounts recorded against the Sales Reference Maintenance, Sales/GL Overrides option.

Benefit

- Assuming all the stock items recorded against the sale are to impact the same GL accounts, this change will ensure that the same GL Override is recorded for each stock item.

Sales
Sales Order Entry
Sales Invoice Entry

Sales Report Writer Summary Listing

Format has been added to the selection criteria with scroll list options 'Detail' (current format) and 'Summary' (new format).

NICK
SAW02

Ezy Wines
Sales Report Listing

Report	Title	Style	Sequence/Totalling Primary	Secondary	Tertiary
.BYSOURC	Sales By Source	Special	Stock Item		
.COUNT	Count of sales transactions	Date Range	Debtor		
.NICK	fdsdsdsdfr	Spreadsheet	Debtor	Stock Item	
.ORDTYP	Sales By Order Type	Date Range	Order Type	Stock Item	
.STOH	Stock On Hand	Special	Location Grp	Location	Stock Item
AADEBTOR	Debtor Last Sale	Special	Debtor		
AASALES	Sales Summary By Area	Special	Sales Area	Debtor	Stock Item
ALLOCATE	Allocations	Date Range	S/Area Group	Sales Group	Stock Item
ALLSALES	Updated & Unupdated Sales	Date Range	Stock Item		
ALLUNUPD	All Unupdate (Open) Sales	Date Range	Stock Item		
ASALES	Sales Group Summary	Spreadsheet	Sales Group	Stock Item	
AVSALLOC	Actual Vs Allocation	Date Range	Debtor	Stock Item	
AVSALOC	Actual Vs Allocation	MTD/YTD	Debtor	Stock Item	
BUDVAR%	Acrual Vs Budget Discount %	MTD/YTD	Stock Item		
BYDATE	Sales By Date	Date Range	Date		
CANCEL	Cancelled Debtors	Date Range	Debtor		
CASES01	Cases (Based On 9 Litre/Case)	MTD/YTD	Stock Item		
CLUB0001	Club summary	MTD/YTD	Category	Debtor	
CLUBSUMM	Wine Club Sales Summary	Date Range	Debtor		
CURRENCY	Currency Summary	Special	Currency	Debtor	
CUST/STK	Sales By Customer / Stock	MTD/YTD	Debtor	Stock Item	
DEBT/LTD	Debtor LTD Sales	Date Range	Debtor		
DEBT/STK	Debtor / Stock Summary	Spreadsheet	Debtor	Stock Item	
DEBTOR01	Sales By Debtor	Matrix	Stock Group	Sales Area	
DEBTORG2	Extra Debtor Groups 2	MTD/YTD	On Premise	ABS Class	
DEBTORG3	Extra Group 1 & 2	MTD/YTD	On Premise	Table Talker	
DEBTORGR	Extra Debtor Groups	MTD/YTD	ABS Class	On Premise	

Benefit

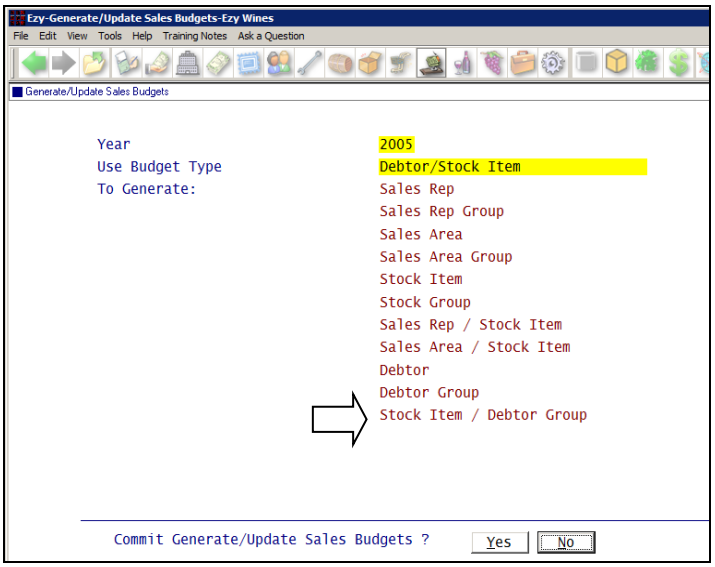
- Print a summary of customised reports that are available.

Sales Report Writer
Sales Report Listing

Sales (Cont'd)

Generate Stock Item/Debtor Group Budgets

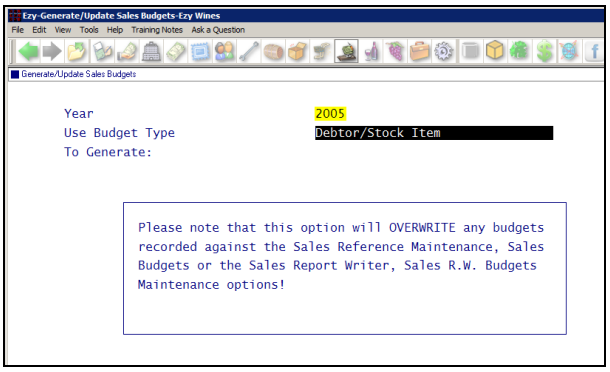
When 'Use Budget Type' is 'Debtor/Stock Item', budgets will also be generated for Stock Item/Debtor Group.



Benefit

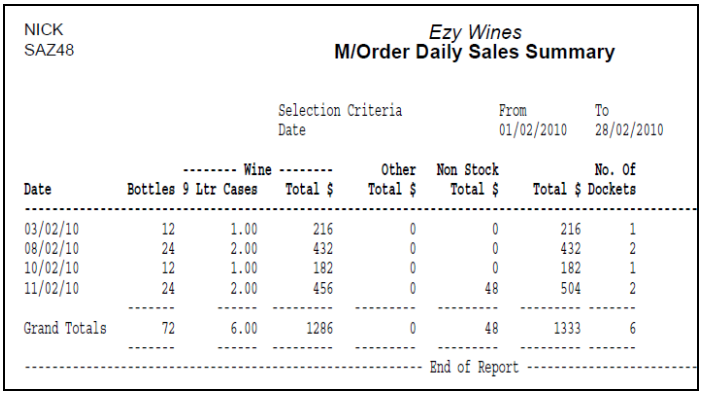
- Generate another option for comparing actuals against budgets.

Sales Reference Maintenance
Generate/Update Sales Budgets



M/Order Daily Sales Summary

New menu option.



NICK
SAZ48

Ezy Wines
M/Order Daily Sales Summary

Selection Criteria — From 01/02/2010 — To 28/02/2010
Date

Date	Wine Bottles	Wine 9 Ltr Cases	Wine Total $	Other Total $	Non Stock Total $	Total $	No. Of Dockets
03/02/10	12	1.00	216	0	0	216	1
08/02/10	24	2.00	432	0	0	432	2
10/02/10	12	1.00	182	0	0	182	1
11/02/10	24	2.00	456	0	48	504	2
Grand Totals	72	6.00	1286	0	48	1333	6

End of Report

Benefit

- Ability to report wine club sales each day for specified period.

Mail Order & Wine Club
M/Order Daily Sales Summary

Pallet Label Stock Group Selection

Stock Group has been added to the selection criteria.

Benefit

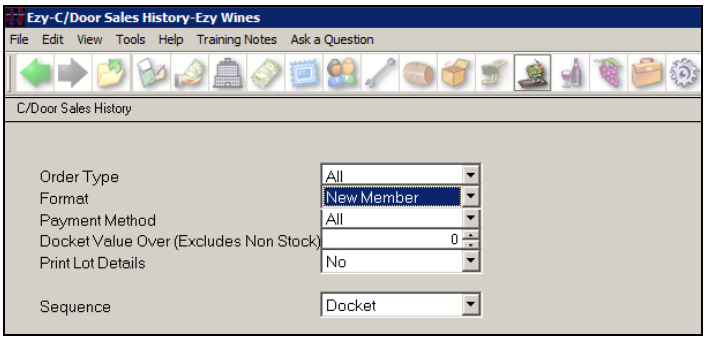
- Only print labels for applicable stock items on an invoice.

Sales Invoices
Invoice Pallet Label Print

Sales (Cont'd)

C/Door Sales History Lists New Members

When system parameter 'C/Door: POS, Record Email Address' is set to Yes, 'New Member' appears as a Format option.



NICK
SAD07

Ezy Wines
C/Door Sales History

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Page

Selection Criteria From To
Docket No 442 494

Docket No	Date	First Name	Last Name	Email	Member Type
442	12/09/14	Jason	Fin	nick@ezysys.com.au	Mailing List
460	29/10/14	Paul	Mathews	paulm@ezysys.com.au	Mailing List
490	08/01/16	Nick	Cugura	nick@hotmail.com	Mailing List
491	11/01/16	Nina	Cugura	nick@ezysys.com.au	Wine Club

NICK
SAD22

Ezy Wines
C/Door Sales Daily Summary

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Page

Selection Criteria From To
Date 12/09/2014 31/12/2014

Date	Wine Bottles	Wine $ Ltr	Wine Cases	Wine Total $	Other Total $	Non Stock Total $	Total $	No. Of Dockets	No. Of Tastings	New Members Mailing List	New Members Wine Club
12/09/14	1		0.08	17	0	0	17	1	0	1	0
29/10/14	1		0.08	23	0	0	23	1	0	1	0
18/12/14	0		0.00	0	0	0	0	1	0	0	0
Grand Totals	2		0.17	40	0	0	40	3	0	2	0

Benefit

- Easily identify new wine club and mailing list members that signup at cellar door each day.

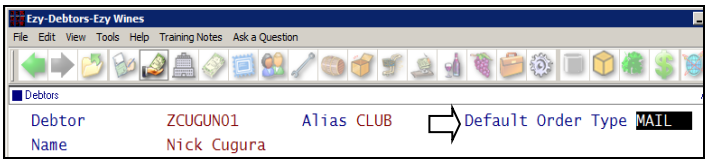
Cellar Door Sales
Cellar Door Sales Listing
C/Door Sales History
C/Door Sales Daily Summary

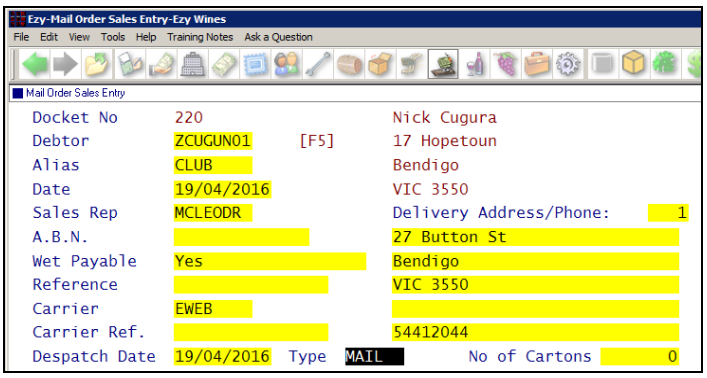
New Mailing List Member
Where email address recorded against a cash sale.

New Wine Club Member
Where Debtor has been recorded with start date the same as the sale date. The new Debtor's group also need to be flagged with *Member* as Yes.

Mail Order Debtor Default Order Type

The 'Default Order Type' recorded against the Debtor is used on inserting a sale.





Benefit

- Easily identify new wine club and mail list members that signup at cellar door each day.

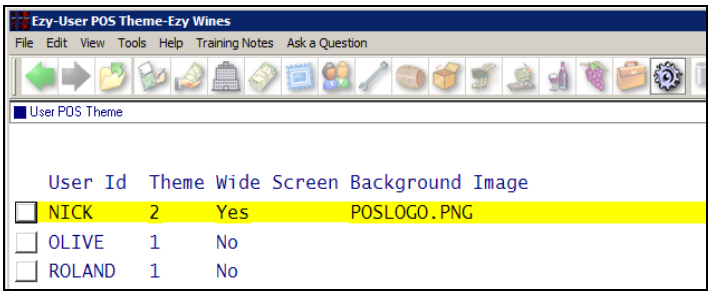
Mail Orders & Wine Club
Mail Order Sales Entry

Sales (Cont'd)

POS Themes

New menu option allowing you to specify each user's preferred POS theme. Please note that the following screen resolutions are recommended:

- 800x600
- 1024x768
- 1280x720
- 1920x1080.



Benefit

- Pastel colours makes it easier to read
- Up to 2 company logos can be displayed
- Will automatically resize to fit wide screens, including notebooks, making the buttons much larger & easier to use
- Hide the desktop and its icons.

POS
User Access
User POS Theme

Wine Club Processing By Debtor Category

Debtor Category has been added to the selection criteria.

Note: Category is generally used to distinguish between the different clubs or wine selections that are available.

Benefit

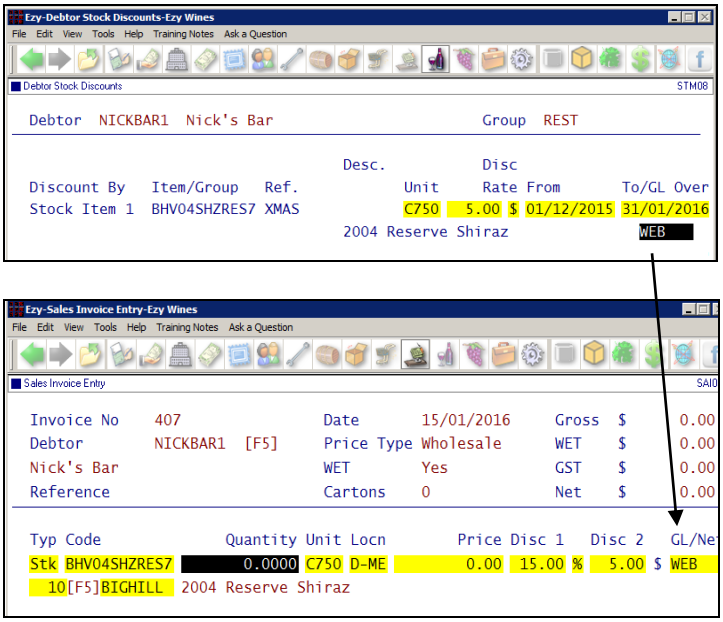
- Process members by category.

Mail Order & Wine Club
Mail Order Sales Print
Mail Order Picking Slip
Mail Order Carton Labels
Mail Order Con-Note Print
Mail Order Sales Update

Sales (Cont'd)

Debtor Stock Discounts GL Override

Default GL Override can now be recorded against Debtor and Debtor Group.



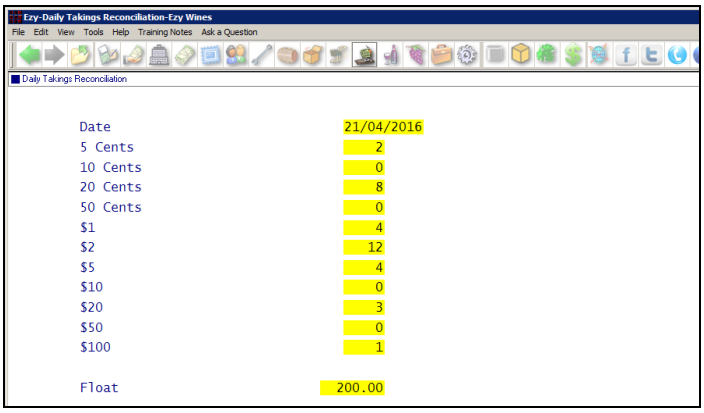
Benefit

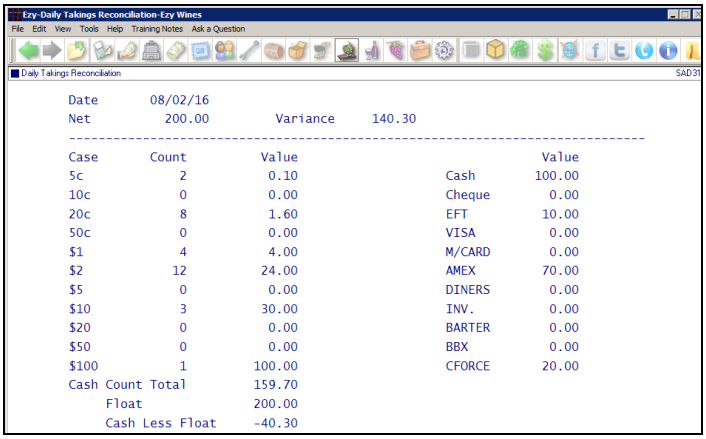
- Specify GL Override for a specific sales period/discount.

Stock Reference
Debtor Stock Discounts
Sales
Sales Order Entry
Sales Invoice Entry
Sales Credit Note Entry
Sales Administration
Import Sales Dockets

POS Daily Takings Reconciliation *(Australian Only)*

New system parameter "C/Door: Daily Taking Float Default" will preload float.





Benefit

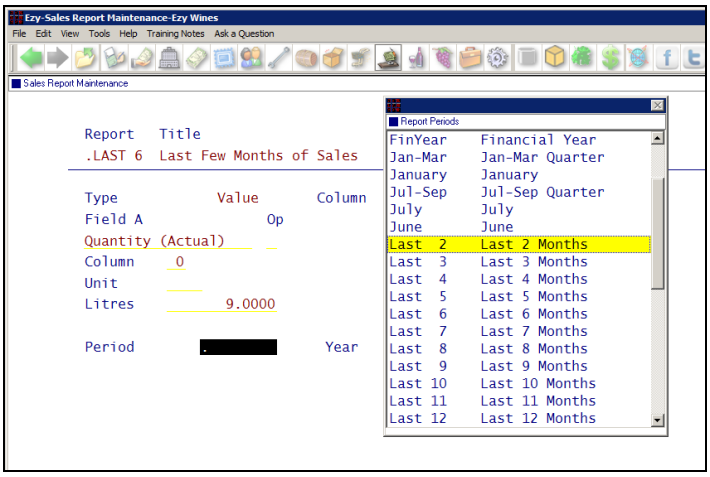
- Automatically total cash from the till and reconcile to the actual takings.

Cellar Door Sales
Daily Takings Reconciliation

Sales (Cont'd)

Sales R.W. Specify Number Of Months

'Last 2' to 'Last 12' months have been added to the field options for the 'Special' style.



Benefit

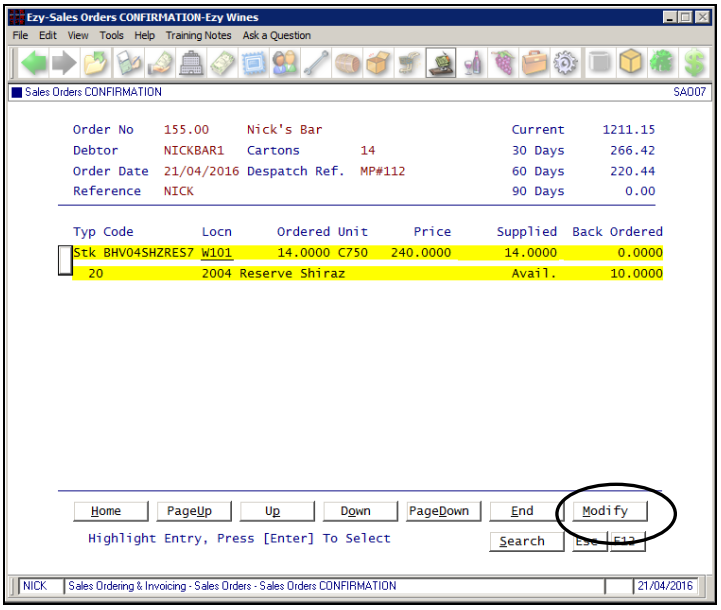
- Accumulate values for the last number of specified months
- More flexible customization of sales reports.

Stock Report Writer
Sales Report Maintenance
Sales Report Generation

Confirmation To Modify Original Order

New system parameter "Sales Orders: Confirm., Modify Orig. Ord" determines whether the Sales Order Confirmation has a [Modify] button.

When there isn't sufficient STOH, the [Modify] button can be utilised to ***temporarily*** access the original sales order and change the original order quantity or add the same wine but with a different vintage.



Benefit

- Quicker and easier to address shortfalls whilst in the Order Confirmation option.

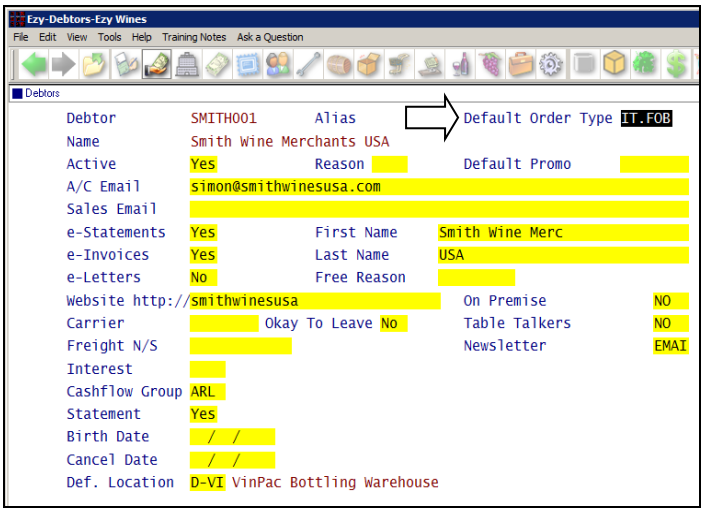
Sales Orders
Sales Order Confirmation

On making the adjustments against the sales order, you will be returned to the Confirmation option.

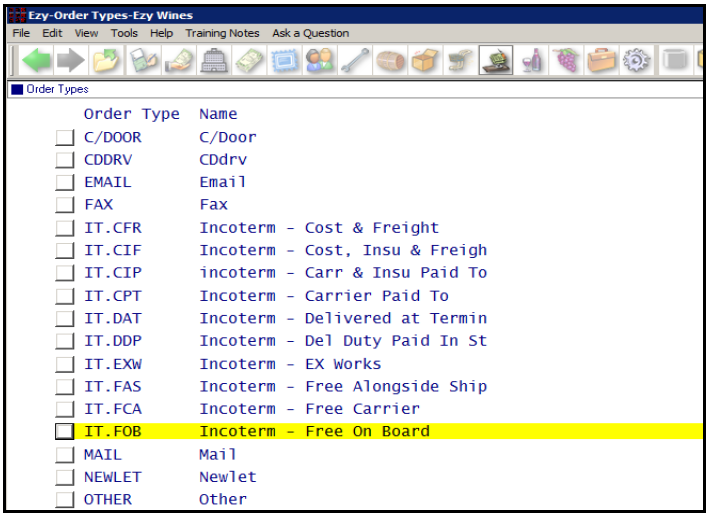
Sales (Cont'd)

Incoterms

Default Order Type to be used on entering a sale can now be recorded against Debtors.



Order Type could be utilised to record incoterms.



Benefit

- Include incoterm on sales documentation
- Ensure that correct Order Type is recorded against sale for the Debtor.

Accounts Receivable
Debtors
Sales Invoices
Sales Invoice Entry
Sales Orders
Sales Order Entry
System Administration
Stationery Designer