

CAPITAL V8

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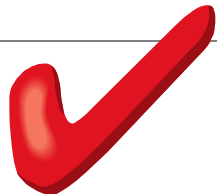
Capital Business Software White Paper

New Features Available in  
Capital Office V8,  
Release 8.3

CAPITAL OFFICE BUSINESS SOFTWARE

# **Capital Business Software Technical Series**

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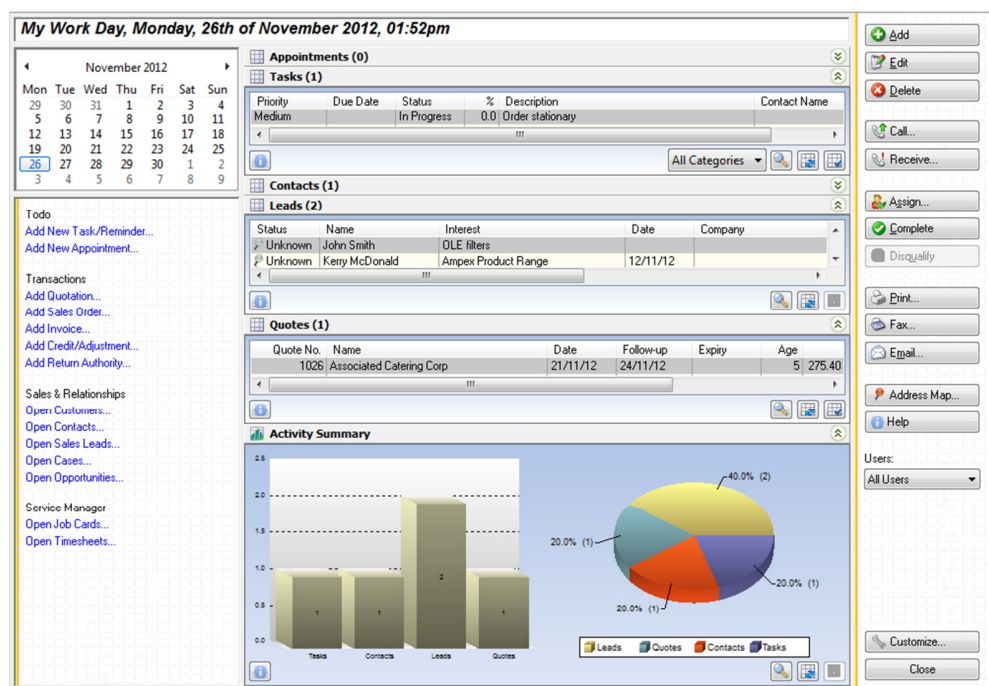
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## My Work Day

### *A New Way To Manage Your Work Day*

The *My Work Day* area presents on a single screen key information about your business activities. *My Work Day* summarizes appointments, to-do list tasks, quotations requiring follow-up, unpaid customer or supplier invoices, the status of open service manager jobs, and an overview of your workload.

For users of CAPITAL SALES FORCE MANAGER, it is also possible to monitor the status of open cases, leads, opportunities and those contacts who require follow-up.



The *My Work Day* screen can be customized to show only the information you are interested in viewing and it's possible to open or manage -- such as by re-assigning tasks to different users -- the various activities being monitored. Subject to your

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security settings, activity can also be displayed for the logged in user or for all users in the system.

It is also possible to add, edit and delete activities directly from the *My Work Day* screen. Activities may be assigned to other users, and emailed, printed or faxed as applicable. Sales leads may be qualified or the status of jobs or quotations changed. And if a particular area synchronizes with Microsoft Outlook, a 'Sync' button next to that area allows you to quickly exchange data.

You can directly open any of the areas referenced by the *My Work Day* screen by clicking on the applicable 'zoom' button or on one of the area links. Areas 'roll up' or 'roll down' dynamically, allowing you to view more easily the areas you wish to focus on.



November 2012						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

On the top left side of the *My Work Day* screen is found the Work Day Calendar.

You can view a snapshot of your workload for tomorrow, next week or for another time period (such as next month) by clicking on a different day on the calendar.

Each area of the *My Work Day* screen also has its own set of adjustable parameters. So for example, you may wish to only view tasks assigned to your daily 'hot list' category, or only meetings you need to attend for the current week.

## Integrated Form Printing

**V**isual Builder is the CAPITAL form print application which up until now, was required for the printing of forms and other types of documents such as certain reports and labels. This was part of CAPITAL's *distributed printing model*.

### What is Distributed Printing?

Distributed printing simply means that the computer or computer session generating a print request, for example, "produce a printed or email copy of invoice 10581," was not necessarily the same computer or session that would then process the task of actually generating the requested document.

A typical example of where distributed printing would be essential, would be in the case of warehouse staff running mobile scanners using CAPITAL's mobile console based scanner applications. These small hand held computers can access the CAPITAL database but don't have the 'smarts' to directly print complex Windows documents. In this scenario, the scanner computer would forward the print request to another computer on your network which would then process those documents. Hence the term 'distributed'.

While distributed printing is very powerful, it also creates overhead for your computer and your network. When a print request is first made, CAPITAL BUSINESS MANAGER or CAPITAL SALES FORCE MANAGER, must first launch the printing software – CAPITAL VISUAL BUILDER (if it was not already running) before printing can commence. This can introduce a delay of many seconds before printing starts, and also requires your 'network server' to load the additional software, which generates additional overhead.

A new feature found in CAPITAL BUSINESS MANAGER and CAPITAL SALES FORCE MANAGER now allows you 'turn off' *distributed printing* when it's not required in your circumstances. (Which for most users will mean most of the time.)

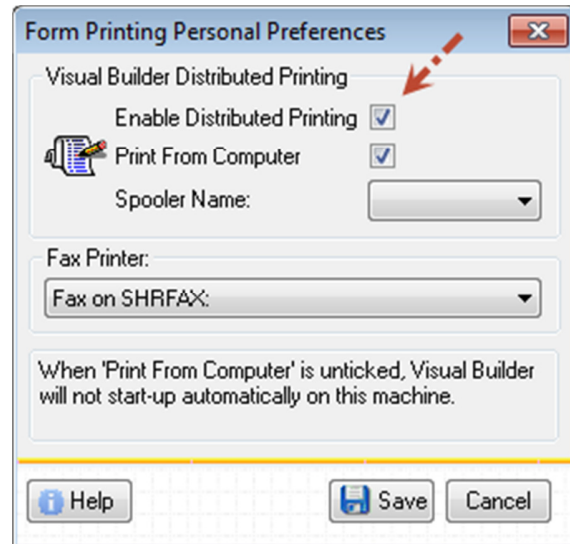
When *distributed printing* is turned off, the application you have open will handle the print request directly. There will no longer be the need to wait for CAPITAL VISUAL BUILDER to launch before printing commences.

Print requests, such as printing an invoice, becomes just another task handled by the application software you're running. There is no need to switch between different applications and you can print preview your invoice, purchase order (or whatever

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document you printed) alongside whatever transactions or records you have open at the time.

To turn off *distributed printing* launch your application and from the main menu select Company|Preferences|Form Settings. Next, untick **Enable Distributed Printing**. Then press Save.




## Outlook Integration

### *Connecting To Microsoft Outlook*

It is now possible to exchange calendar and contact information with the Microsoft Office edition of Outlook. Features include:

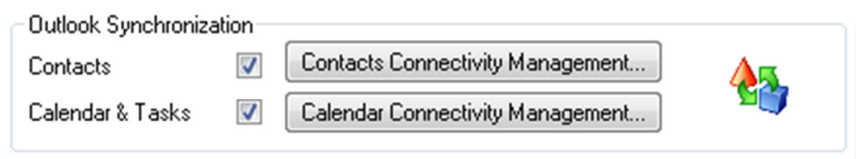
- Synchronize primary customer records with Microsoft Outlook.
- Synchronize primary supplier records with Microsoft Outlook.
- Synchronize SALES FORCE MANAGER primary business relationship contacts with Microsoft Outlook
- Synchronize SALES FORCE MANAGER sales leads with Microsoft Outlook.
- Synchronize appointment calendar entries with Microsoft Outlook calendar.
- Synchronize tasks (to-do list) items with Microsoft Outlook tasks.

The area that is synchronized, the direction of the synchronization (into Outlook or into CAPITAL or an exchange between both) and the individual contact fields that are exchanged, can be customized using the CAPITAL to Outlook configuration and mapping tools provided.

To begin a 'sync' press the  synchronize button found on the application area's toolbar at the top of the window.

To turn on, turn off, or customize synchronization behaviour, go into the Customize area of CAPITAL and select the CONNECTIVITY tab.

Connectivity options are found at the bottom of this area:





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For information interchange to work, Microsoft Outlook 2008 or later must be installed on your computer. Outlook integration is not supported using the *Outlook Express* version of Microsoft Outlook.

## Shipment Docket Tracking

### *Track What You Dispatch*

**S**hipment Docket Tracking is a new feature available in CORPORATE EDITION only. This feature allows you to search and manage shipping dockets entered in your system. A shipping docket may optionally be generated with all or certain goods that are dispatched from your premises. When an invoice is generated by the system, an associated shipping record may be produced. This record can be used to print a shipping docket if required or for tracking and handling customer inquiries as to when a shipment was dispatched.

Certain carriers will issue their own shipping dockets, while you may wish to generate your own selectively. The shipping docket system may be used in conjunction with a barcode scanner for quick capture of dispatch information.

Shipping dockets may be issued at the time of saving an invoice directly from the invoicing system or from the *Back Order Control Centre*. If you opt to issue shipping documents during these processes you may also request that the system prompt you for shipping docket details or generate them for warehouse staff to fill in later.

### Validating Your Carriers

The Shipment Docket Tracking system integrates with your *Carriers* database to assist with confirming that the correct couriers and shipping companies have been selected, when possible. You can specify whether a carrier ships locally or internationally, which states in Australia the carrier will cover, and on what days and times of day they are available for picking up goods.

If the assigned carrier does not match the criteria you've specified on your invoice, warehouse staff will be warned of the mismatch.

Service Availability		
Country:	▼ Choose Countries	
State:	▼ NSW, QLD, VIC	
Monday	<input checked="" type="checkbox"/>	All Day ▼
Tuesday	<input checked="" type="checkbox"/>	All Day ▼
Wednesday	<input checked="" type="checkbox"/>	All Day ▼
Thursday	<input checked="" type="checkbox"/>	All Day ▼
Friday	<input checked="" type="checkbox"/>	All Day ▼
Saturday	<input type="checkbox"/>	No Pickup ▼
Sunday	<input type="checkbox"/>	No Pickup ▼
Next Issued Delivery Docket		
Docket No.	<input type="text"/>	

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A shipping record can store a considerable amount of information on your dispatch, which can assist you in generating consignment notes, handling customer shipment inquiries, and in analyzing your shipping patterns over time.

**Add Shipment Record**

Details | Notes | Special Instructions

Docket ID:  Date: 06/12/12 Time: 07:38am

Description:

Carrier:  Zone:

Name: DHL

Time Slot: All Day

Docket No.

Dispatched: ☐ International ☐

Service Type: Courier

Shipped:  Shipment Time:

Account:

Name:

Tran No. 0

Order No. 0 Date:

Freight: 0.00 Weight: 0.000

Department:  Cartons: 0

Shipped By: Administrator

Save Save & Add Cancel Help

## Other New Features

### *What Else Is New In CAPITAL 8.3*

Several other new enhancements have been added to CAPITAL Office 8.3 which are summarized below.

#### **Customer Statements**

When generating customer statements you may now also print or attach to your Email, copies of the individual transactions that make up the statement. This is particularly helpful if you create a large number of smaller invoices for your clients each month and it is more convenient to issue them as a batch periodically.

#### **Contact Split Screen Mode**

*Contact Manager* in CAPITAL SALES FORCE MANAGER has a new split screen mode that can display the last communication with each contact on your contact list. It is no longer necessary to click on the **Logs** vertical tab to view the outcome of your last communication with your contact.

#### **Document Manager**

Using CAPITAL SALES FORCE MANAGER it is now possible to import an entire folder and its sub folder contents into Document Manager using the new *Import Documents* feature. This is a very easy way to get started with Document Manager if you already have a folder of documents located on your server.

#### **Calls & Tasks**

You may now add tasks and appointments directly from the *Make a Phone Call* and *Receive a Phone Call* windows, found in the Contacts area of CAPITAL SALES FORCE MANAGER.

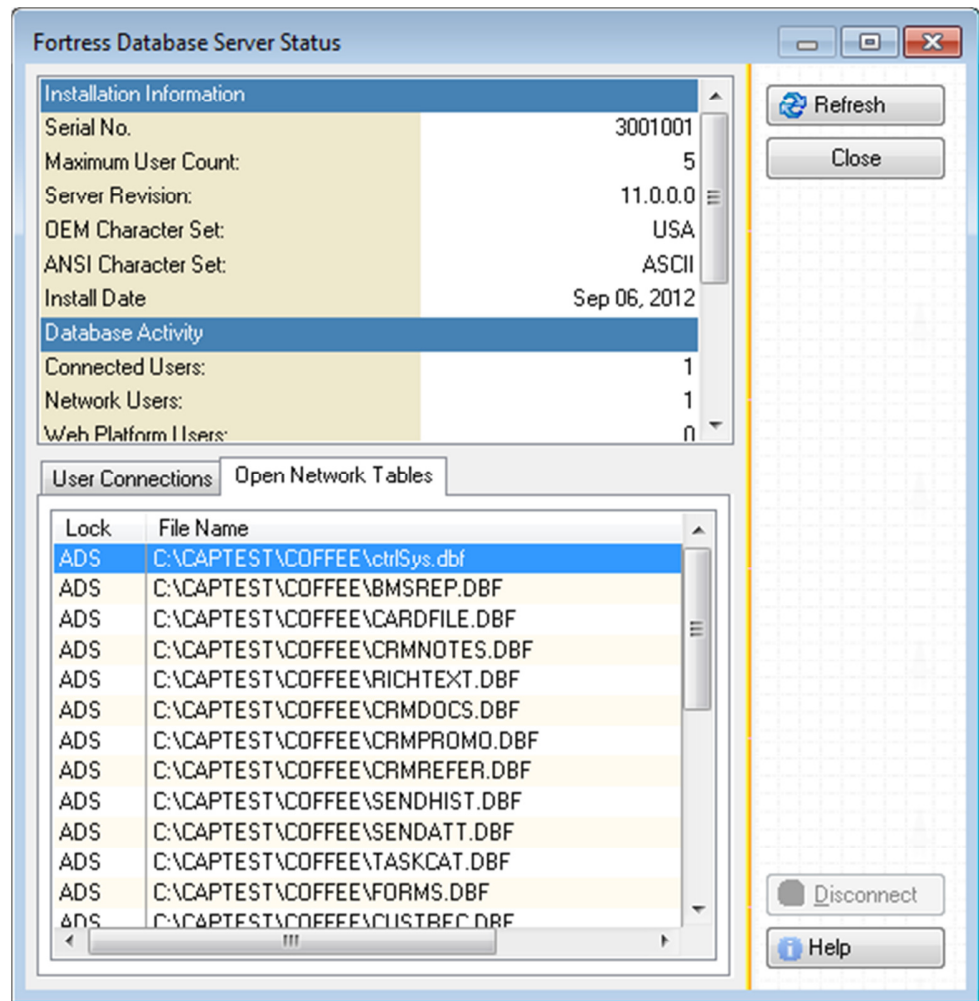
#### **Address Maps**

The Address Maps (Google Maps) integration feature has been enhanced with a new **Web** button. Pressing this will open your street address using your default web browser to allow further navigation such as street level views, etc.

#### **Corporate Edition Database Server Status**

The *Fortress Database Server Status* window provides information on the database server's configuration and status, connected users, and open tables. This feature is only available for the CORPORATE EDITION of CAPITAL Office. It is also possible to disconnect users from CAPITAL using this tool.

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*The Corporate Edition Database Server Status Windows*

### **Sales Force Dashboard Gauges**

New dashboard gauges have been added to CAPITAL SALES FORCE MANAGER.:

- Calls Made Activity
- Calls Made Summary
- Calls Received Activity
- Calls Received Summary
- Email Sent Summary
- Email Received Activity

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### **Bank Deposit List**

The Bank Deposit List report may now include the customer's BSB and bank account number if required.

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