CAPITAL V8

Capital Business Software White Paper

New Features Available in Capital Office V8,

Release 8.5

CAPITAL OFFICE BUSINESS SOFTWARE

Capital Business Software Technical Series

ACN 30000538901
564 Princes Highway
Rockdale. NSW 2216
Sales 61 2 9311 1222 Support 1300 734 099 Fax: 61 2 8004 8264

Table of Contents

Section

1

Service Enhancements

A More Powerful Service Manager

Job Templates

Service Manager *Job Templates* are predefined *Service Manager* job cards. Templates are useful when you have similar types of jobs and wish to define a standard job that can be easily copied into an actual job.

For example, a template can be created for an engine recondition, general service, etc., including all job details, parts/materials, expected labour, job stages and so on.

Templates differ from quotes in that quotes are created for specific customers or prospects. Templates can be used more generically. They can be thought of as 'prepackaged' jobs that are easier to modify rather than re-enter from scratch.

Job templates don't appear on the main job list, but can easily be viewed by selecting from the service menu, Toolbox|Job Templates. Once a template is open, select from the menu Toolbox|Copy Template To New Job, to convert a template into a job card.

Stage Templates

Service Manager Stage Templates are predefined lists of stages that can be easily copied into job cards. Stages already entered on job cards may also be copied into *Stage Templates*.

Each stage of a *Service Manager Stage Template* can be assigned a position (step number) within the list of stages, a name, estimates such as labour, materials and expenses and costs, and an expected profit margin for the stage. A stage can also have a description of unlimited length and notes assigned to it, also of unlimited length. (More on this below.)

When invoicing a job card it is possible to selectively invoice a range of stages and also group by stage. Outstanding items on the job card to be billed will be grouped by their stage assignments. After general charges (if any), all items assigned to the next stage to bill are grouped with the stage heading appearing above those billable items. This format continues until all stages have been billed.

Stage 1

Labour

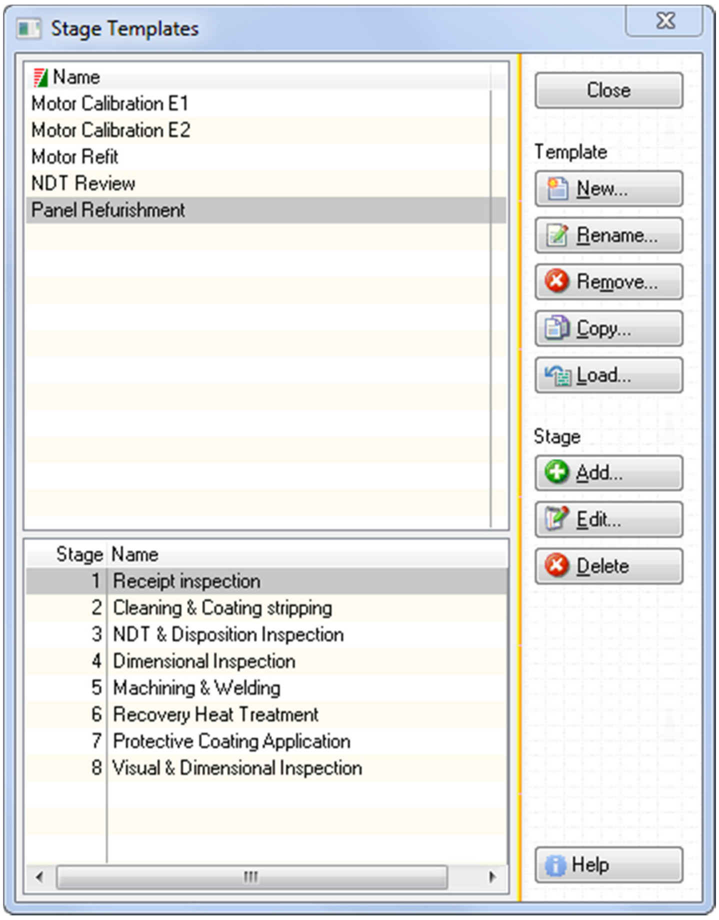
Materials

Stage 2

Labour

Materials

Stage descriptions and stages notes may also be optionally included under the stage name on invoices.



Timesheet Copy

Existing *Service Manager* timesheet entries may now be selectively copied or moved to other jobs or other sections of the same job card. This is a very powerful and useful feature. To copy or move timesheets, open the timesheet list and 'tag' the entries you wish to duplicate and then press either *Copy* or *Move*.

Materials Copy

Existing *Service Manager* parts/stock entries may now be selectively copied or moved to other jobs or other sections of the same job. To copy or move parts, open the parts list and 'tag' the entries you wish to duplicate and then press either *Copy* or *Move*.

Timesheet Descriptions

Service Manager timesheets may now optionally contain text *describing* the labour task performed. The description has no practical size limit. These are transferred onto the service invoice during billing.

Job Card Copy

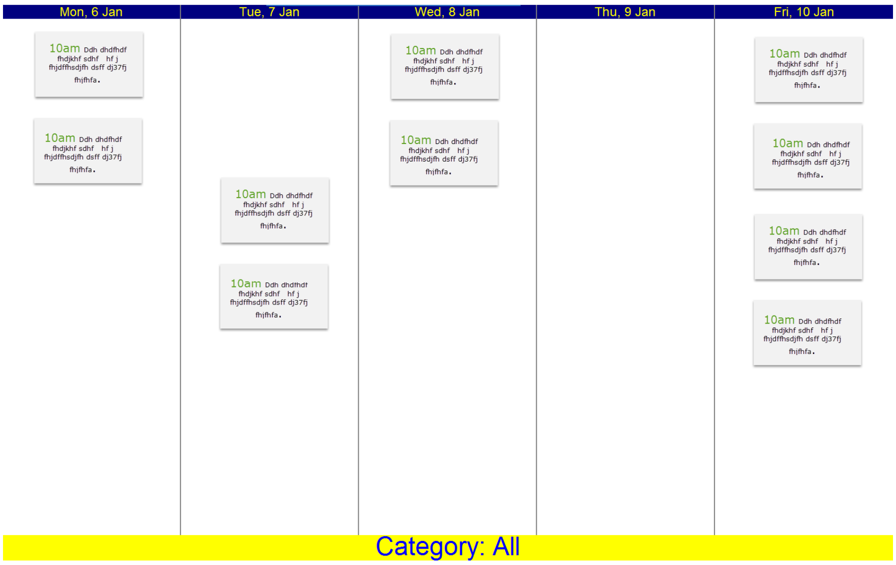
When copying job cards it is now possible to also copy timesheet entries, general notes and document links. Even *Stage Templates* may be copied into a new job card at this point.

Improved Stages

Whether or not you make use of *Stage Templates*, *Service Manager* Stages may now contain unlimited descriptive text describing the stage and notes relating to each stage. Stages can also be copied via a new copy feature. And descriptive stage information can be transferred onto your job invoicing.

Scheduler Whiteboard

Whiteboard is a new feature intended for displaying a job schedule calendar of activities on a large LCD panel or equivalent in a work area. *Whiteboard* displays for the current week *Service Manager Scheduler* bookings. The panel is highly configurable: it is possible to define colour selections for all major components of the panel and specify precisely what booking information should be shown.



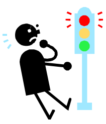
The Service Manager Scheduler Whiteboard

Scheduler Holidays

Different holiday periods by state may now be specified when entering holiday periods used by the *Service Manager Scheduler.*

Schedule By Job Type

Service Manager jobs that appear on the *Service Manager Scheduler* may now be filtered by job category. This allows the scheduler to focus on jobs of different types when creating bookings.



Job Templates and Stage Templates aren't available in *Professional Edition.* Scheduler features require a license for the *Scheduler* component.

Section

2

Marketing Campaigns

Marketing Campaigns are used to track the income, costs and expenses associated with a promotional activity. A marketing or promotional campaign consists of various activities that are used to generate sales. A campaign has these characteristics -

- A promotional budget
- A revenue projection
- Campaign expenses
- Income
- Income related expenses (such as cost of goods sold)
- A start and end date (proposed and actual)
- A campaign type, such as advertising, direct marketing, an event, etc.

Notes may also be assigned to a *Campaign* and documents attached to it.

Tracking Your Promotions

Expenses can be entered manually as a total, or if used in conjunction with CAPITAL BUSINESS MANAGER, recorded on supplier invoices as they are entered in the system. This is done by recording the campaign's promotional code against the expense.

Sub Campaigns

If you are executing a complex campaign you may assign an existing campaign as the 'child' of a 'parent' campaign. Revenue and expenses accumulate for each 'child' assigned to a 'parent.' The parent campaign therefore represents the costs and income of itself and all its assigned children. This allows you to evaluate the success not only of the overall *campaign* but of different aspects of the campaign, such as trade shows versus magazine advertising for a new product launch.

Marketing campaigns may be assigned to particular users or you may view all the campaigns underway for all users.

Campaigns also contain a status. So you can view promotions in progress, or proposed, or those that have ended.

Section

3

New Sales Force Manager Features

New Sales & Promotional Tools

SALES FORCE MANAGER now incorporates a number of new features to make business relationship management easier and more efficient.

Contact Merge

Merge Contacts will merge the activity history of two contacts into a single contact. The merge process combines communications history, notes, documents, email and other information associated with each contact. Sometimes mistakes are made and it is only realised later that a contact has been entered into the system more than once under slightly different names. At other times a new contact may take over the roll of an old contact who you are no longer in communication with. In these situations combining the contacts together ensures you don't overlook important data.

SMS Case Records

It is now possible to send an SMS directly from within *Case Manager*. This is convenient way to update concerned parties with the status of an issue or problem. (Note: A subscription to an SMS web based service provider is required.)

Case To Return Authority Link

A *Grab Case* capability added to *Return Authorities*. *Case Manager* related information may be loaded directly into *Return Authorities* without having to retype key information. (Requires CORPORATE EDITION.)

Contact Maintenance

The *Active & Reachable* query is a new standard query that is useful for tagging contact records that may no longer be active or are no longer contactable. Contacts that may not be reachable (i.e., have no phone or email address) can be cleared from *Contact Manager*. Or contacts who have been inactive for a specified period of time may also be 'tagged'.

Tagged contacts can be emailed, deleted, etc., as applicable. The query also allows you to focus on contacts by category, promotion, department, or those that have been assigned to particular staff members.

Fault Codes

Case Manager cases may now be assigned a specified (probable or claimed) fault and an actual identified (repaired) fault code per case. A new fault code table is now available to enable you to create standard lists of faults.

Section 4

Other New Features

What Else Is New In CAPITAL 8.5

Several new enhancements have been added to CAPITAL Office 8.5 which are summarized below.

Identify Company By Colour

The colour of the *status bar* (found at the bottom of the application) may be specified by individual company, which can visually assist users in remembering which company they have open. This is particularly useful if users train in a sample or test company which is a copy of your existing company database.

Stocktake Scan

Stocktake Scan is a new feature of *stocktaking* that allows you to enter counts directly using a plug-on barcode scanner. This is convenient when you wish to count using mobile devices such as tablet PC's. Scan the product code, Stock ID or barcode of an item, and the scan function will attempt to identify the correct product. Each successful scan operation increases the stocktake count by 1.

Training Tutorials

A new Tutorials menu selection on the help menu consolidates the various white papers and introductory tutorial materials found on the CAPITAL Business Software website, in one easy to access location. Tutorials are automatically downloaded onto your local system for future access. Viewing the list of available tutorials is as easy as selecting from the Help menu, *Tutorials*.

Tutorials are provided in PDF format, so they can be read on your computer or easily printed out if you prefer.

Reliability Improvements

CAPITAL BUSINESS MANAGER and CAPITAL SALES FORCE MANAGER have always been reliable and stable application suites. Previous versions introduced crash recovery, an automatic repair process if the software can't launch, and new safety features such as on-the-fly background back-up of your main transaction types *as you type them*. Release 8.5 introduces further refinements and improved handling of unusual situations such as when file corruption occurs.

Index