

CAPITAL V8

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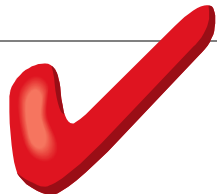
Capital Business Software White Paper

New Features Available in  
Capital Office V8,  
Release 8.2

CAPITAL OFFICE BUSINESS SOFTWARE

# **Capital Business Software Technical Series**

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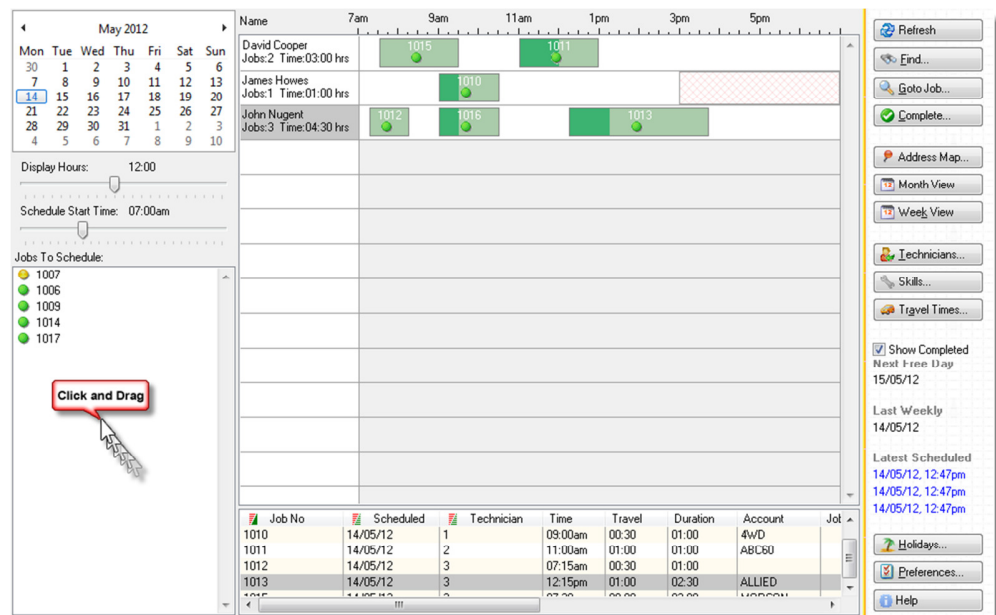
## Service Manager Job Scheduling

*A New Component Available for the V8 Series*

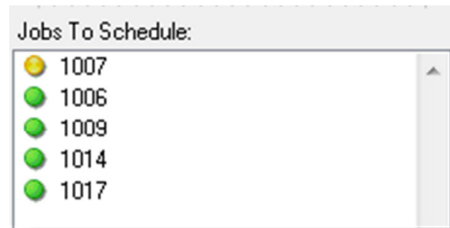
Service Manager Job Scheduling is a new optional component available for release 8.2 or higher. Its purpose is to allow your service staff to make use of an easy to use 'drag and drop' graphical interface for scheduling service work.

The Job Scheduler is divided into several screen regions consisting of:

- Month Calendar
- Job Schedule List
- Day Calendar
- Schedule History



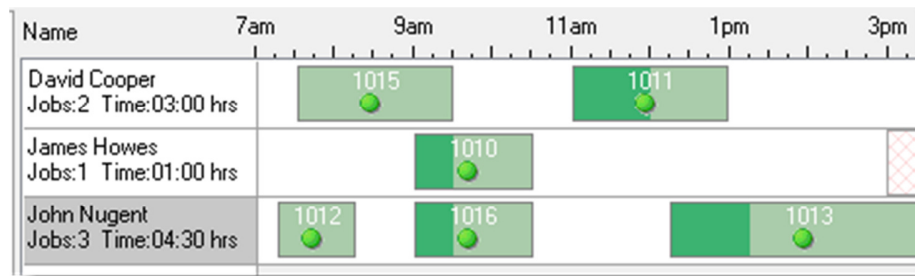
## WHAT'S NEW IN 8.2



To schedule a job, click on the job found under the **Jobs To Schedule** list. This is the list of all jobs awaiting scheduling.

(Jobs unsuitable for scheduling may be excluded from the list.)

Next hold down the left mouse button and then *drag it onto* the Day Calendar.



**Features of Service Scheduler** include:

- Easy to use *drag & drop* User Interface.
- Fully integrated with Service Manager.
- View daily bookings on Day Calendar or view all bookings on the main system calendar in week or month presentation format.
- Integrates with Google Maps – subject to license and terms of use restrictions. Please note that CAPITAL Office Business Software provides the connecting interface only, not the actual mapping service.
- Define travel time based on state or postcode, or create “travel zones” or allow Google Maps to calculate travel time automatically if available.
- The travel time component of a job is visually represented by colour shading for the booked job task.
- Rosters for technician by day of week, start and end work days and break or unavailability periods in-between.
- Specify overtime and absentee periods for individual technicians.
- Define holiday periods for the entire business.
- Define skill sets for technicians and skill requirements for jobs, to ensure technicians are able to perform the work specified.
- Rebook jobs simply by dragging the job onto a different technician’s schedule or shift into a different time period using your mouse.

## WHAT'S NEW IN 8.2

- Urgent or priority jobs are flagged in yellow and red.
- Booking clashes are visually represented by colour coding.
- Selected jobs can be excluded from the schedule. (Such as internal service work performed on a “when available” basis.)
- Email or SMS job details to technicians. (The SMS function requires a separate subscription to a compatible SMS web service.)



Service Manager Scheduler requires that the *Service Manager* component has already been activated and installed.

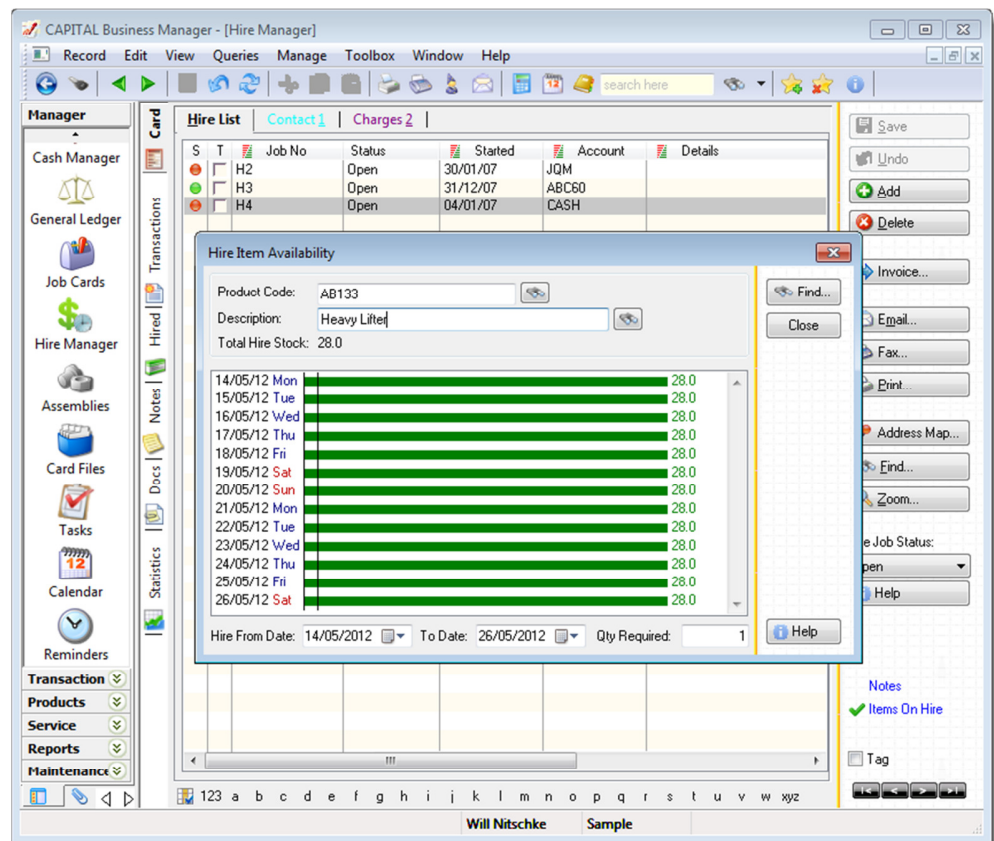
## Section

## 2

## Hire Manager

**H**ire Manager, previously available in CAPITAL Series 7, is now available as an optional component for CAPITAL Business Manager.

Hire Manager V8 incorporates a new and improved look and feel:



Features of Hire Manager include:

- Integrated Stock Control. Full access to the CAPITAL stock control system. The Hire Manager allows you to both hire and sell inventory items.
- Item Tracking. Locates which items are on hire, for how long and to whom.

## WHAT'S NEW IN 8.2

- Maintains Hire Details. Name, address, account, start of hire, category, department, order number, reference, phone and special price or discount information kept on file for each hire "job".
- User Definable Screen. Hire Manager 'job cards' can be customized to suit your individual needs. Up to 6 screen pages of information relating to hire data can be created, altered and searched. Non-relevant fields may be removed.
- User Definable Forms. Hire job cards can be fully customized to print information relevant to each specific business.
- Miscellaneous Charges. Up to 10 charges, such as cleaning, delivery, etc., may be specified on jobs and transferred to invoices during billing.
- Stamp Duty. A stamp duty or hire tax may be specified for all stock items or may be changed by group. This permits the exclusion of services from stamp duty if applicable.
- GST. Flexible GST calculations can be programmed into the system. Include or exclude stamp duty from your tax. Or apply GST before or after stamp duty.
- Activity Manifest. List all goods to be returned and/or to be hired out for a specified day or date range.
- Hire Quotations. Hire jobs may initially be entered as quotes and then converted to actual "on hire" jobs.
- Close & Reopen. Hire jobs may be closed when finalized but reopened at any time.
- On-Screen Status. Lists the total amount invoiced for each job, the client's credit limit, value on hire, the last invoice details, the balance owing, total yearly rentals billed, and last payment received details.
- Invoice Link. Pop-up list of all invoices relating to a specific hire job with "drill-down" feature to inspect invoice details.
- Normal Sales. Normal sale items may be included on hire jobs and included on the same invoice.
- Invoice By Category. Different customer categories may be set-up in order to establish selective billing procedures.
- Global Invoicing. Operators may bill the current job, all selected (marked) jobs, and all open jobs.
- Invoice In Advance. Operators may invoice in advance for hired goods for a user specified number of days. Defaults to end of month.
- Returns & Sales. Invoices may be selectively generated for returned goods only or sale items only.



## WHAT'S NEW IN 8.2

- Hire Stock Itemization. Stock on hire may be itemized on invoices or displayed in summary form only.
- Stock Marking. Operators may specify which items are to be included in any particular invoice "run".
- Customize Invoices. The lay-out/design of hire invoices may be different from regular or service invoices or may print to a different printer.
- Link To Customer Special Pricing. The customer special pricing system may be used to assist in calculating rates for customers based on products hired, time period of hire, etc.
- Flat Rate Hire. Invoice for an agreed amount irrespective of period held on hire.
- Transfer Quote/Sales Order. Pre-existing sales orders or quotations may be transferred into hire jobs.
- Job Overview. View hire jobs in "list" or "spreadsheet" format, with job status, details, started and last invoiced date on-screen.
- Unpays Warning. Accounts with unpaid hire jobs will generate operator warning message.
- Hire Plan Recharges. Automatic recalculation of charges if goods are returned early (which may cause a different hire rate to be applied.)
- Serial Number Tracking. Supports tracking of individual items by serial number, batch number, etc. Current item location can be traced by serial or batch number. Requires *Serial Number and Special Property Tracking* component.
- Integrated Email & Fax. Combined with CAPITAL's *Electronic Data Exchange* component, hire jobs, invoices and related forms and reports can be either printed, emailed or faxed directly to customers.
- Reporting:
  - Hire Jobs Report
  - Activity Manifest
  - Item Hire History
  - Hire Item Profitability
  - Hire Item Due & Overdue
  - Item Utilization
  - Item Bookings

### New V8 Features

New features found in Hire Manager V8 specific to CAPITAL Business Manager Release 8.2 include:

## WHAT'S NEW IN 8.2

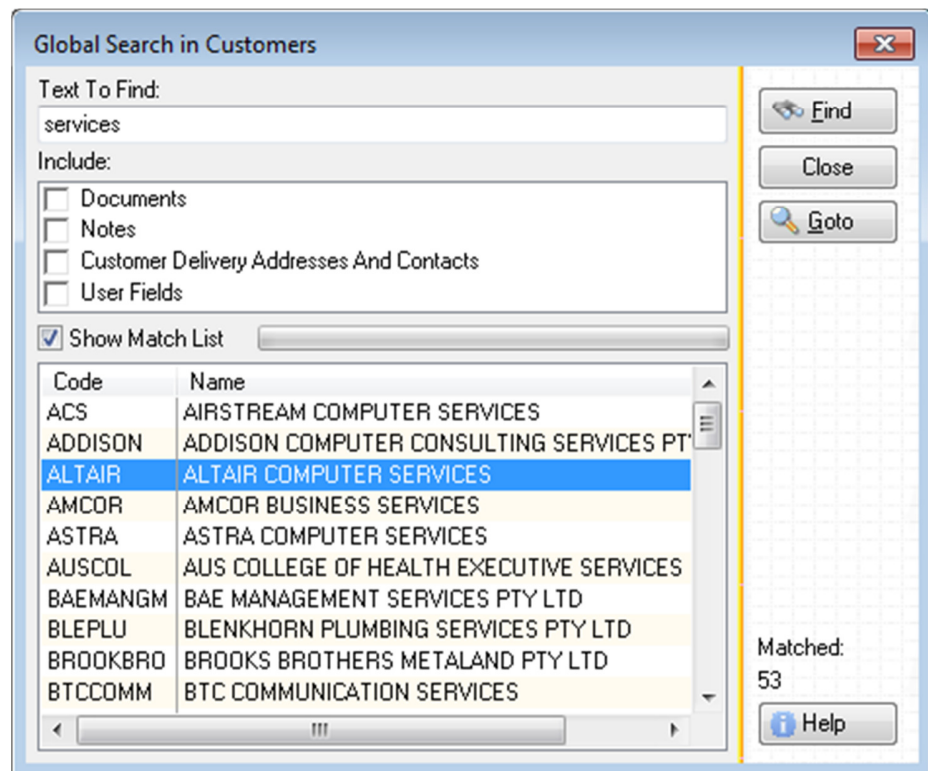
- Quick Query and Query Builder functionality. Easily view jobs by priority, expected return date, postcode range, category, account, etc.
- Unlimited note pads with integrated spell checking, fonts and text colours.
- Link documents to hire jobs.
- Unlimited secondary contacts per hire job.
- View street maps of hire job locations.
- Global job text search across hire records and associated data such as notes and document links.
- User specific customizable hire job lists.
- Open and view multiple hire jobs simultaneously.

## Enhanced Global Text Search

### *Improved Search Capabilities*

**S**earch capabilities have been enhanced in Customers, Suppliers, Service Manager Job Cards, Service Manager Scheduled Job Tasks, Hire Manager and Contact Manager.

Multiple search matches are now listed consecutively. You may also optionally search secondary resources, such as document links, enhanced notes, auxiliary contact details and user fields.

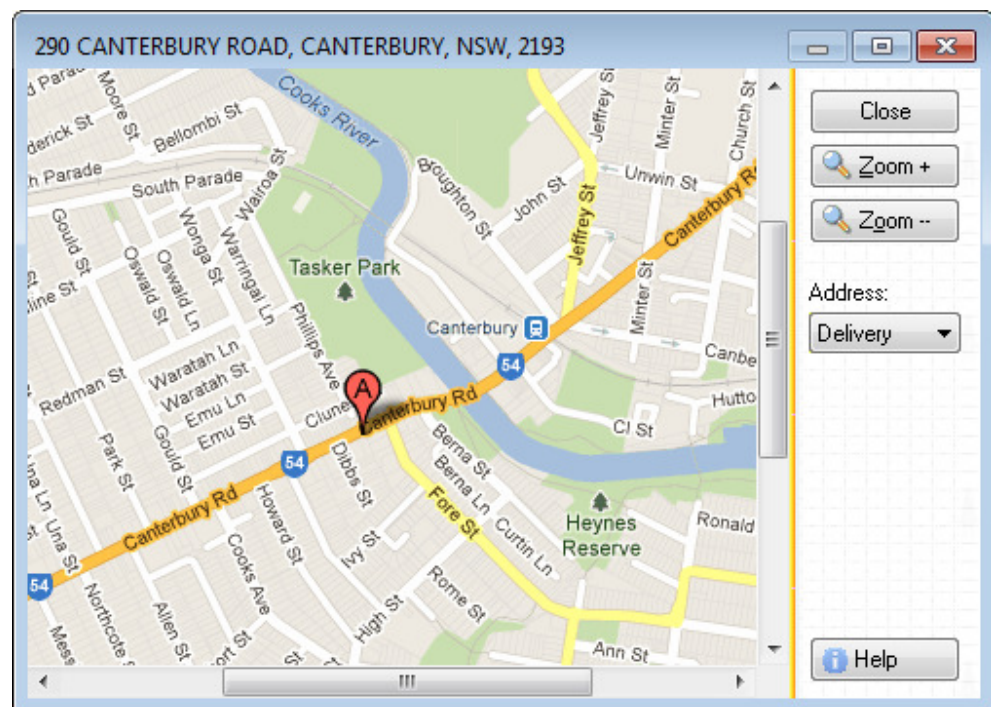


## Google Maps Integration

### *Viewing Street Address Information For Your Database*

Google Maps Integration is accessible on records where address information is stored. It provides an integrated gateway to the Google Maps service, which renders street directory information on selected account and job addresses.

Your system must have Internet access in order to make use of this function.



Record entities may reference more than one address. If multiple addresses are available, different address options may be selected by changing the **Address** setting on the map.

Google Maps are accessed by pressing the **Address Map** button next to the record entity where the feature is available.

## WHAT'S NEW IN 8.2



### DISCLAIMER:

Google Maps is a trademark of Google Inc. CAPITAL Office Business Software provides only a link to this service and does not provide the mapping service itself.

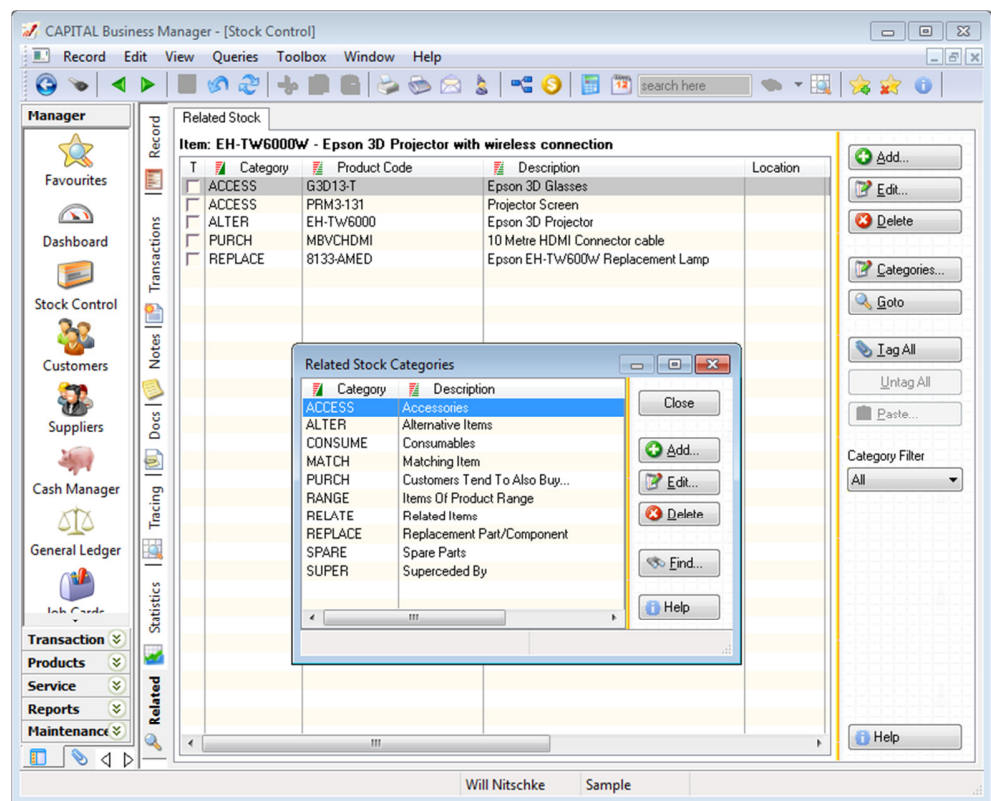
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## Related Stock Management

*Powerful New Features For Tracking Related Stock Items*

**R**elated Stock Management can be used to create links between product items of equivalent function or that have relationships with other stock items in your database.

For example, if spare parts are interchangeable, you can make note of this information under the “related” list. Users can then quickly check available stock levels for equivalent parts. In a similar way, replacement parts, consumables and accessories may be related to different items and can also be listed here.



## WHAT'S NEW IN 8.2

It is also possible to create relationship categories. The default category list includes:

- Accessories
- Alternative Items
- Consumables
- Matches
- Customers Also Tend To Buy
- Items of Same Range
- Replacement Parts/Components
- Spare Parts
- Superseded By

Related Stock Management supports *tagging*, so multiple items can be copied and moved under the Relationship lists for different product items. This greatly speeds up the process of establishing relationships between items.

When ordering or invoicing, the system will alert you to available related items without disrupting your data input.

## Other Enhancements

### *Other New Features Found in Release 8.2*

This section describes the other new features found in the 8.2 release of CAPITAL Business Manager V8 and CAPITAL Sales Force Manager V8.

#### Corporate Edition Enhanced Record Locking

The *Corporate Edition* Record Locking Scheme has been enhanced to provide information on which computers or server sessions are holding locks open. This can assist in determining who within the business has information locked that others may require access to. For example, if a user is editing the details of a customer account and has not yet saved his changes, this will prevent other users from also editing the same account. Enhanced Record Locking can assist in helping you identify who is working on which record by passing the user's computer name back to you.



This feature requires *Corporate Edition*.

#### Case Manager Enhancements

Case Manager for CAPITAL Sales Force Manager has been enhanced with the ability to link transactions of various types to cases and add tasks and reminders. New information tracked by Case Manager include:

- Street and mail addresses.



## WHAT'S NEW IN 8.2

- Next action date and times.
- Tasks (to-do list items) to follow-up on.
- 

The screenshot shows the 'Add New Case' dialog box with the 'Address' tab selected. The 'Street Address' section contains fields for Name, Address, Suburb, State, and Postcode. The 'Mail Address' section contains fields for Name, Address, Suburb, State, and Postcode. There is also a 'Country' field and a 'Country' dropdown. On the right side, there are buttons for 'Save', 'Cancel', 'Complete', 'Ticket', 'Attach Docs', and 'Help'.

This feature requires that the *Sales Force Manager* application be installed.

### Stock Transfer Freight

Freight may now be merged into inventory value using Stock Transfers when the configuration setting **Merge Freight Cost Into CIS** is activated.

For General Ledger users the merged freight amounts are posted to a new Freight Transfer Clearing account.

This feature requires *Enterprise Edition* or higher.

### Improved Transaction Record Editing

It is now possible to edit and change the account code of unallocated payments, invoices and other transactions from within the customer and supplier transaction management areas. This simplifies the task of moving transactions that have been assigned to the wrong customer and supplier accounts. Previously, the transaction had to be deleted and re-entered, or reversed and re-entered.

### Sales Lead Notes

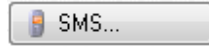
Notes when attached to Sales Leads in Sales Force Manager are now automatically copied to customers, contacts, opportunities and tasks where applicable, during the lead conversion process.

## WHAT'S NEW IN 8.2

Requires that the *Sales Force Manager* application be installed.

### Send SMS

The new *Dispatch SMS* interface facilitates the sending of information directly to mobile phones via text messaging. When activated, a new send option appears on the applicable area's Action Panel.



Technicians may also be emailed job details when scheduling job tasks using the new Service Manager Scheduler facility.



### General Ledger Roll Back Year

It is now possible to roll back a financial year from within the General Ledger. This will permit you to more easily start over if you need to.

This feature requires that the *General Ledger* Component be installed.

### Dashboard

Individual graphs on the Dashboard can now be magnified in size by using the Graph Zoom feature.

### Collections Manager

Collections Manager has been enhanced with additional column and sorting options and additional integration with the *Debt Collection Notes* system.

The feature requires *Corporate Edition*.

### Card Files

Selected Card Files can be added to the application's main menu on start up for quick access.

### Queries

Query menu in Customers and Suppliers now allow users to optionally only view accounts that have been active in the last 12 months.

### Time Input

Time input fields have been enhanced through-out the system. It is now possible to enter times in HH:MM am/pm format or select from time increments via an adjoining drop down list.

## WHAT'S NEW IN 8.2

### **Import Costing**

Item tagging within the Import Landed Costing system is now more logical and less error prone. When partially allocating stock, it is now possible to customize the column arrangements of the **Select Line Items To Cost** window.

### **Check For Updates**

A new Help menu option allows you to easily check on whether you are running the latest version of CAPITAL Business Manager or CAPITAL Sales Force Manager.

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