CAPITAL V8

Capital Business Software White Paper

New Features Available in Capital Office V8,

Release 8.7

CAPITAL OFFICE BUSINESS SOFTWARE

Capital Business Software Technical Series

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Section 1

General Enhancements

Improved Day To Day Processes

Departmental Status Bar

It is now possible to set an application status bar colour according to the department you are logged into. When you change departments, the status bar colour changes to reflect the selected department.

Mandatory Salesperson Codes

Assigning salesperson codes may now be set as mandatory for invoices, sales orders and quotations. If your commission reporting system is dependent on accurate code entry this feature can help to ensure transactions aren't missed.

More Flexible Sales Reporting

The standard Sales Report now includes new options to exclude specified transaction types, such as adjustments. This is useful when you wish to remove certain adjusting transactions from your sales and profitability reporting.

Transaction Subtotals

Invoices, credit notes, return authorities, sales orders, stock returns, stock receipts, quotations, requisitions, purchase orders and stock transfers now include a sub total on all *Item* tabs.

Bulk Transaction Mailing

Forms such as invoices, purchase orders, quotations, etc., may now be emailed in bulk to the recipients of the accounts they have been assigned to. It is also now possible to use the 'Quickest' method as found in other areas of the system such as statement dispatch, so that forms will be emailed if available, then faxed if email is not available, and then if neither is available, printed.

Bank Reconciliation Locking

It is now possible to 'lock' bank reconciliations to prevent them from being accidentally changed later on. Now users even with high security levels cannot accidentally alter transactions that have been reconciled. Once a statement is balanced the system will offer to lock it automatically. Bank reconciliations can be unlocked again if required.

Bank Reconciliation Management

It is now possible to delete a bank reconciliation entered in error, or if you wish to quickly start over, or if you wish to clear an old reconciliation from the system.

Selective Statement Generation

Customer and Supplier statements may now be created and printed or emailed based on your selection of tagged accounts.

Customer Product Sales Analysis

Customer Product Sales is a new filtering tool found under the Customers Query menu. It allows you to easily build targeted customer lists based on product item or product group sales.

New Customer Canned Queries

New Customer query selections now include:

- filtering by customer type.
- filtering by customer inactivity.

Publish To Web

Publish Grid is a new feature that automates the upload of exported data files to the internet. This may be used, for example, to simplify the process of transferring data from your business system into cloud based mobile solutions or e-commerce web sites.

Quick Asset Creation

You may now create assets based on a selected stock item by selecting Toolbox|Create Asset, from the Stock Control area.

- ➢ Requires CAPITAL ASSET MANAGER

Enhanced Customer Sales Reporting

The Customer Sales Report has been enhanced with features to sub group the report by state or department.

Order Allocation Review

The Order Allocations Review window lists all back ordered items that may potentially be over or under allocated. It may be accessed by pressing the REVIEW button found inside the *Back Order Control Centre*, or you may set it to automatically appear when potential allocation issues arise, just before invoicing occurs.

The *Order Allocations Review* shows what has been allocated, available free stock, and suggests what quantities could be allocated, based on available stock. You can easily change allocations assigned to stock from within the review area.

Enhanced Global Search

Global Search panels in Customers, Contacts, Suppliers and Service Manager now feature new exclude options. For example, you can now automatically exclude closed jobs, customers on hold or inactive suppliers from your searches.

Enhanced Unpaid Invoices Report

The *Unpaid Invoices Report* has been enhanced to support all unpaid transactions or a date range.

Contract Price Last Sell

Last Sell Date and *Last Sell Price* are now available under *Contract Pricing* as new column selections. You can now easily see the last time an item was sold at a negotiated price.

Enhanced Pay Multiple Suppliers

The Pay Multiple Suppliers tool has been enhanced with the addition of a supplier account payment summary list. As transactions are marked for intended payment, suppliers and their total payment amounts are added to the summary list below the main transaction list.

More Flexible Backups

The *Backup Wizard* now includes a new *Advanced* back-up mode that allows you to specify the individual folders and files you wish to back-up. Advanced Mode can be used to back-up your applications, data and other parts of the system (such as image folders or even unrelated files) stored outside of your core database.

Amend Assembly Expenses

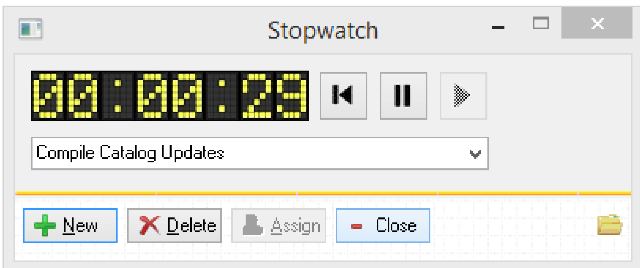
Assembly Manager expenses may now be amended before transfer to the General Ledger, via Record|Journals inside Assembly Manager. Prior to this release, changes had to journaled directly from within the General Ledger.

Stopwatch

The entirely new *Stopwatch* function allows you to start a timer and then assign your accumulated time to a:

- job card timesheet in Service Manager (for later billing)
- as general consultation time under a contact's communications log (requires SALES FORCE MANAGER)
- or transfer any accumulated time directly to an invoice for billing.

You may start and stop as many stopwatch timers as you wish. Tracking consultation time allows you to maintain a record of how much time you have spent servicing customers, or dealing with suppliers or performing other contact related tasks.



Section
2

New Features In Quotation Management

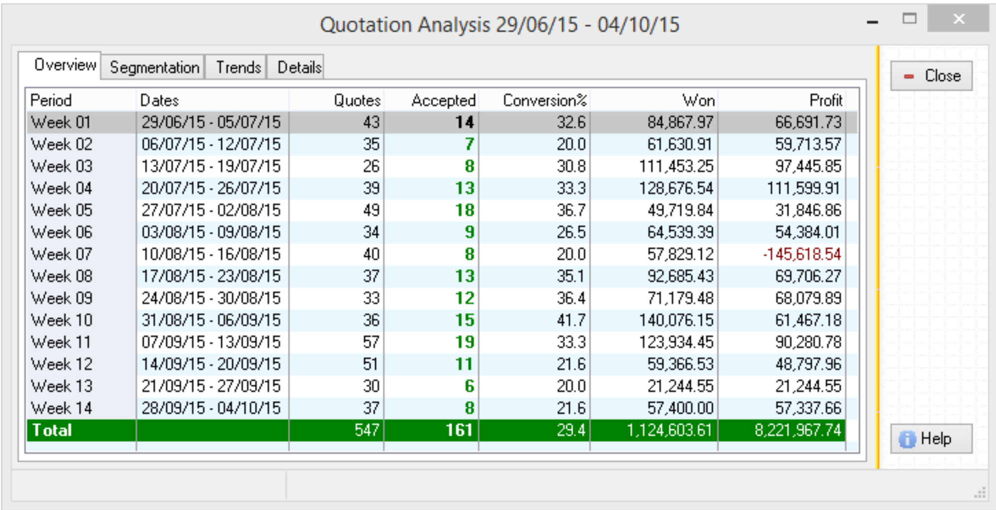
Quotation Analysis allows you to analysis quoting trends by user specified periods. Some of the variables that are analysed over time include:

Quotation Analysis

- number of quotes versus accepted quotes
- acceptance rates
- profit margins
- busy versus quiet periods
- quotes by source
- promotion type
- type of quote (category)
- state
- department
- priority
- customer category
- quotation value (minimum and maximum dollar range)

➢ Requires CAPITAL ENTERPRISE or CORPORATE EDITION

It is possible to report between any two date ranges and consolidate by week, month, quarter or year.

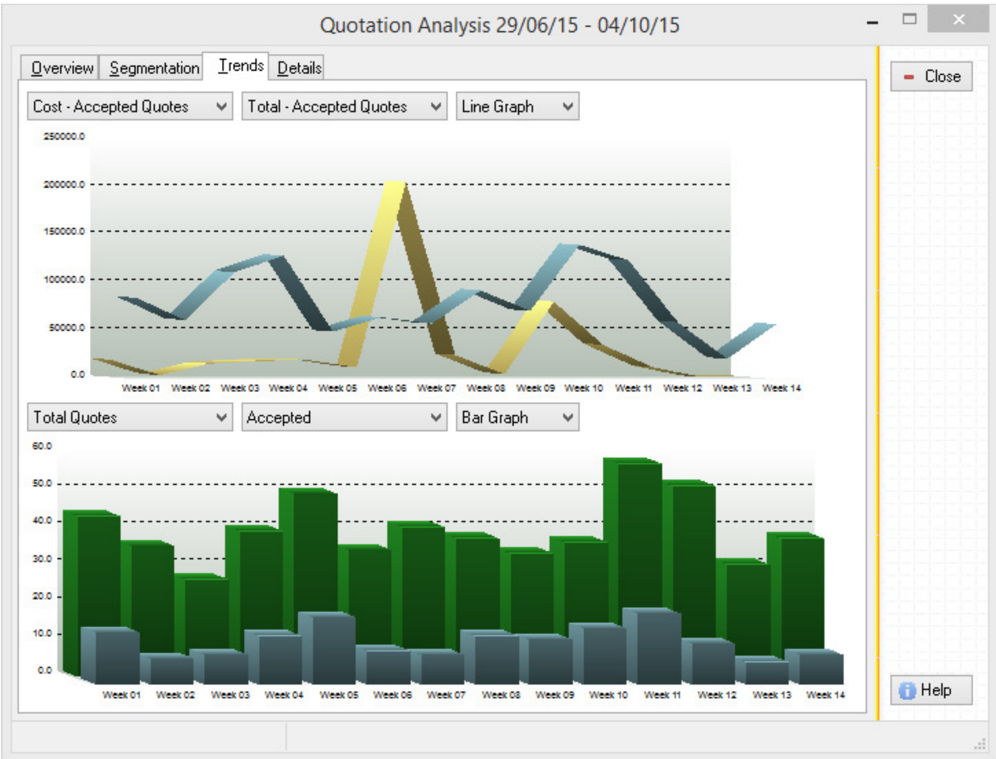


Quotation Analysis 29/06/15 - 04/10/15

Period	Dates	Quotes	Accepted	Conversion%	Won	Profit
Week 01	29/06/15 - 05/07/15	43	14	32.6	84,867.97	66,691.73
Week 02	06/07/15 - 12/07/15	35	7	20.0	61,630.91	59,713.57
Week 03	13/07/15 - 19/07/15	26	8	30.8	111,453.25	97,445.85
Week 04	20/07/15 - 26/07/15	39	13	33.3	128,676.54	111,599.91
Week 05	27/07/15 - 02/08/15	49	18	36.7	49,719.84	31,846.86
Week 06	03/08/15 - 09/08/15	34	9	26.5	64,539.39	54,384.01
Week 07	10/08/15 - 16/08/15	40	8	20.0	57,829.12	-145,618.54
Week 08	17/08/15 - 23/08/15	37	13	35.1	92,685.43	69,706.27
Week 09	24/08/15 - 30/08/15	33	12	36.4	71,179.48	68,079.89
Week 10	31/08/15 - 06/09/15	36	15	41.7	140,076.15	61,467.18
Week 11	07/09/15 - 13/09/15	57	19	33.3	123,934.45	90,280.78
Week 12	14/09/15 - 20/09/15	51	11	21.6	59,366.53	48,797.96
Week 13	21/09/15 - 27/09/15	30	6	20.0	21,244.55	21,244.55
Week 14	28/09/15 - 04/10/15	37	8	21.6	57,400.00	57,337.66
Total		547	161	29.4	1,124,603.61	8,221,967.74

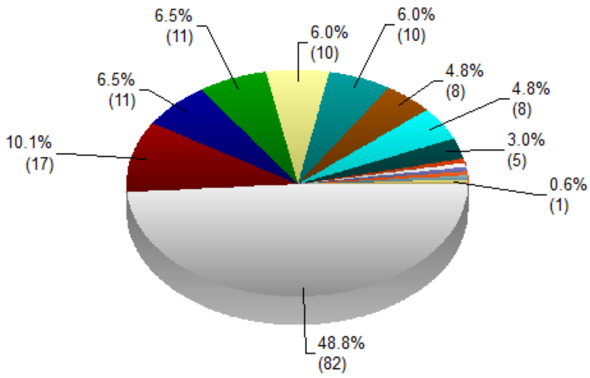
2.1 Consolidated Quote Analysis By Week

Various trends may also be plotted onto graphs.



2.2 Quote Analysis Trends By Week

And in addition to trends, market segments analysed.



2.3 Quote Analysis Broken Down By Customer Type

The underlying data that makes up the analysis may also be easily exported as a data file or spreadsheet for more specialized analysis in such applications as Excel.

New Quote Tracking Features

Quotations have also been enhanced to now track promotional codes, origin codes, priority of quote, quotation category, and up to 3 additional user defined references.

And if SALES FORCE MANAGER is in use, it is also possible to link a Contact to a quotation.

New Quote To Job Card Links

Under *Quotation Customization* settings it is now possible to have the system automatically create a Service Manager job card and transfer the contents of the quotation into that job card, when a quotation is resaved with its status changed to Accepted.

This eliminates any manual effort involved in converting a quote into a job when required.

Improved Contact To Quote Links

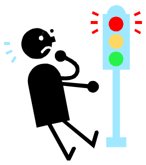
If you are using SALES FORCE MANAGER it is now possible to transfer all the applicable details of a prospect into a quotation, even if that contact is not a customer. In prior releases it was not possible to enter email, contact name, phone and business name and address information until an account had been established in the system.

Section
3

New Features Using Stock Transfers

More Flexibility When Working With Transfers

CAPITAL BUSINESS MANAGER now includes a number of new features to make working with Stock Transfers even easier, more flexible, and more efficient.



Stock Transfers are only available in the CAPITAL ENTERPRISE or CORPORATE EDITIONs of CAPITAL BUSINESS MANAGER.

New Transfer Report

The *Transfers Report* is a new report added under the *Distribution* section of reporting. It summarises transfer activity by location.

Transfer Between Product Codes

It is now possible to transfer goods between different product codes.

If a product has a different identity at one location versus another, when transferring goods you may now specify the *destination* product to transfer into.

New Transfer Creation Process

The *Back Order Control Centre* can now generate Stock Transfers in addition to releasing invoices, when sales orders are issued to departments.

This feature can be used to enter order goods for different branches within an organisation for processing and transfer to a destination branch. For example if you have a branch that receives all goods as a central warehouse or that manufactures goods required by other branches, individual branches can place orders for the goods they require as internal customers. Stock transfers are then raised as goods are released.

To facilitate this process, Sales Orders have a new *Replenish From This Department* feature. Use this feature to replenish required stock when that stock is available from a department within the business entity rather than from an external supplier.

To achieve this result you assign your own department to the billing code of the sales order. And then assign the department code you wish to order from, to the Location field of the order.

For example if your department is QLD and you wish to order goods from NSW, you would assign the account code of the order as QLD (your branch), and specify the location (where the goods are found) to NSW.

This will make your sales order appear as just another customer order for the NSW department.

Order quantities are determined by the reorder requirement for each stock item. Factors that are considered include stock on hand, stock already in-coming (on transfers and purchase orders), customer back orders, the minimum unit of purchase, and the ideal holding level determined by the reorder point and overstock level values.

If a stock item is already found on your sales order, the item is ignored when Replenish From This Department is selected. Stock Kits are never ordered, however the individual items that make up stock kits will be, if required.

An intra-departmental order is sent to the *Back Order Control Centre* as would a conventional sales order. However, when allocated and released, a Stock Transfer will be raised in place of a conventional invoice.

It is also possible to raise intra-departmental orders from within *Reorder Plans*.

Manage Location Codes

Manage Location Codes is a new utility that allows department and location codes to be changed globally if required.

Section 4

Sales Force Manager Enhancements

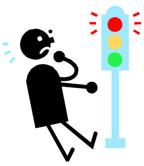
New Sales & Marketing Tools

Marketing Lists

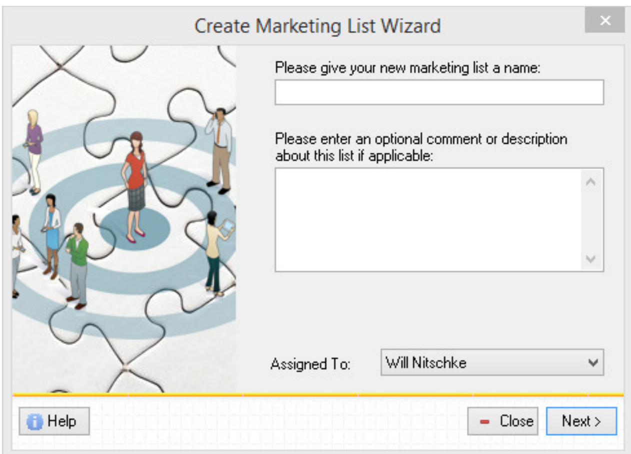
Marketing Lists is new mailing list management system. It allows you to easily build lists based on customer records, contacts and sales leads.

Marketing lists can be used to:

- send emails or faxes, or emails and fax with attached personalised forms
- print personalised forms
- create external mail lists suitable for loading into other mailing systems.
- Generate mail merges using Microsoft Word in order to produce personalized letters.



You require a CAPITAL SALES FORCE MANAGER license in order to be able to make use of any of the features discussed in this section.



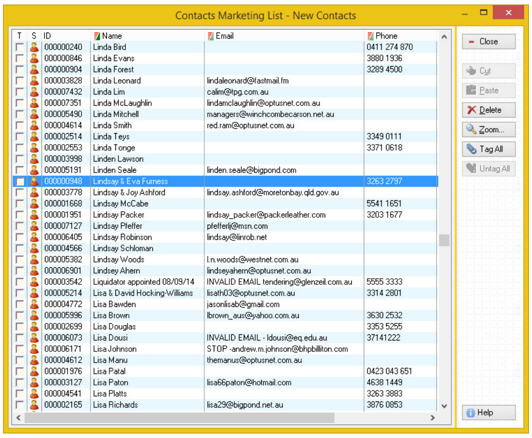
4.1 The Make New Marketing List Wizard

The Marketing List system has a number of *Wizards* that can be used to generate lists, and export or send lists to their intended targets.

All lists are managed dynamically, meaning you can refresh them with the latest information as it changes in these different areas of your system.

During or after you have create a list using the *New Marketing List Wizard*, you can populate that list using various techniques:

- You can open a list of all contacts, customers or leads, and tag those records you wish to add to your list.
- You can assign a *query* to your list and *execute* the query which will build the list for you. The *query* specifies the criteria for membership of the list.
- You can open the applicable area of your system, such as contacts, customers, or leads, and then tag the records you wish to add to your list. Then paste the tags into your list.
- Or you can open the applicable area of your system and select a 'canned query' - one of the predefined queries found on the Queries menu - and then tag all members of the resulting selection. Then paste the tags into your list.



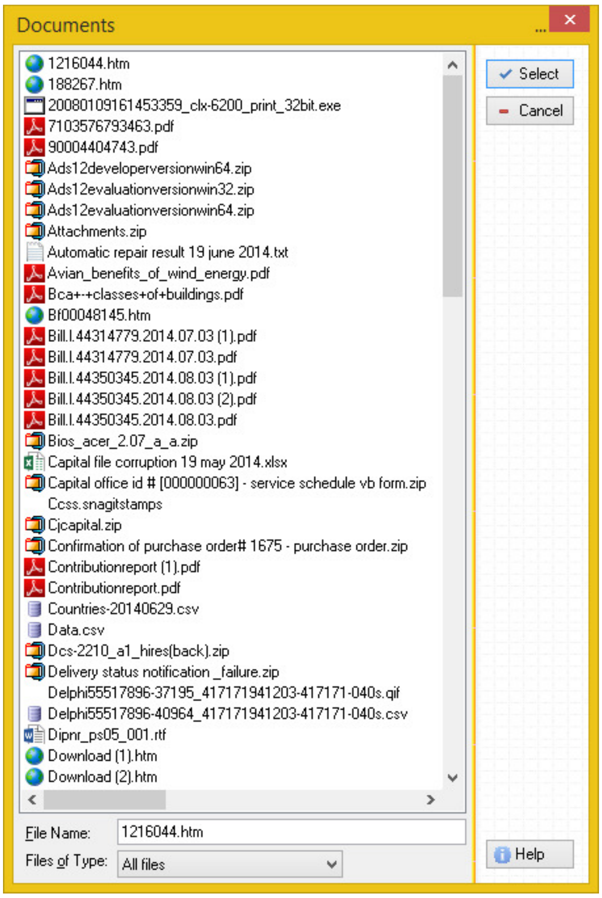
4.2 An Open Marketing List

Marketing Lists are both partially dynamic and partially static. The word 'static' means that the members of the list do not change unless you specify that you wish to update the list. You can, of course, update a list at any time. If you've manually *tagged* records and added them to your list, these records will remain on your list after you update your list.

Document Library

Document Manager now support folders as links in addition to individual files or web links. When a folder is specified, opening the link will present a list of all files found in the specified folder. These can be opened in the same manner as other types of file links.

This makes the process of adding documents to the Document Manager, much easier, especially if you have certain types of files already organized inside Windows folders.



4.2 Document Folder Link

Communication Log Export

It is now possible to export communication log events and associated comments and notes into spreadsheets or PDFs.

This is useful if you need to report or analysis business communication activity from an external location, such as during group meetings.

Querying the Communication Log

A Queries menu has been added to the Communications Log.

You may now easily run 'canned' queries on your communications activity. Current options include filtering by:

- Event Type
- Date Range
- Result
- User Name

And support has been added for Quick Queries.

Meeting Minutes

Meeting Minutes may now be logged from directly within the *Appointment Calendar*.

Section

5

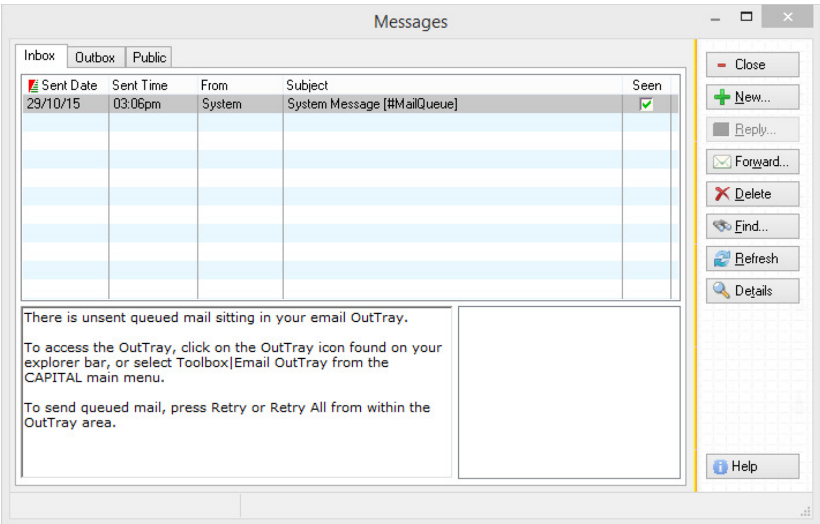
Message Centre

A New Way To Manage Internal Communications

Message Centre is a new feature to assist staff in posting internal communications and bulletins. It consists of three main areas:

- the Inbox
- the Outbox
- and the Public announcements area.

Message Centre will notify you of any new messages that are addressed to you when you log in. Notifications appear on the application status bar.



5.1 Message Centre

The Inbox

The *Inbox* is where you can view private messages sent to you. Although a message may be private, it may also have been sent to other users within the system.

You may respond to messages by replying to them, forwarding them, deleting them or you may create your own messages.

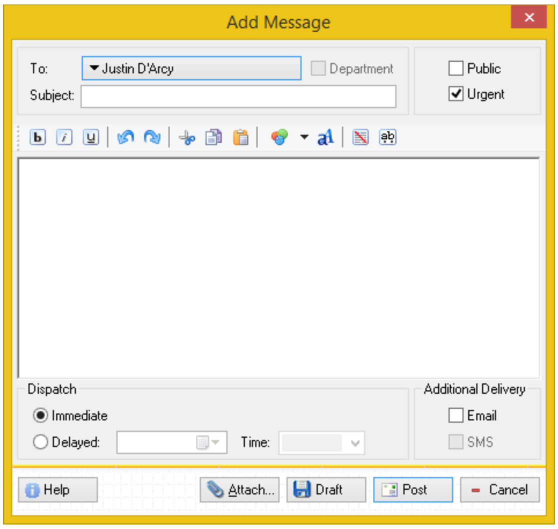
Any message that is viewed for 5 seconds or longer will be considered as seen. You may also mark a message as having been seen by ticking the *Seen* box next to the message.

The Outbox

When you reply to a message or create a new message, a copy of your message appears in the *Outbox*. If you no longer wish to retain copies of messages you have sent, you may delete them.

Public Messages

The *public message area* is where all public messages are stored. You may also reply to, or forward (with comments) public messages. The system will notify you of any new public messages you may not have yet seen.



5.2 Creating a New Message

External Messaging

Besides internal communications, you may also send copies of your messages via SMS or email.

System Messaging

A new feature that will evolve over time are *system messages*. These are messages internally generated by the software to advise and remind you when it is necessary to take action. For example, if you have unsent email waiting in your OutTray, the system will send you a reminder message automatically after you log in.

Section 6

Enhancements To Import Shipment Costing

More Flexible Costing Options

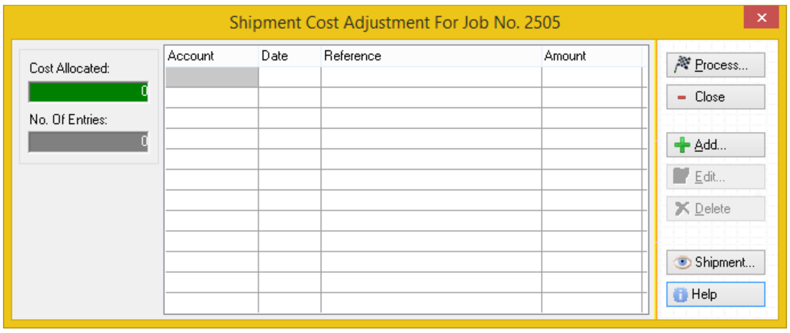
Shipment Tracking

Shipment Costing jobs can now track the following additional information:

- The default supplier that the shipment relates to, if there is one.
- The shipment contract number.
- The shipping terms.
- General comments.

Shipment Costing Adjuster

The *Shipment Cost Adjuster* tool now allows you to make amendments to import shipment costings that have already been received and processed.



6.1 Shipment Cost Adjuster Tool

This tool will allow you to:

- Enter additional supplier invoices or credits as applicable.
- Assign those additional costs or credits to your received goods.

You may assign costs proportionally by price, weight, volume or quantity (units). For example, if you cost by price and you are costing two items and one of those two items makes up 80 percent of the shipment cost, then 80 percent of the cost adjustment value will also be assigned to that item.

You may also manually override any automatic assignments of costs or manually assign costs if you wish. You may also exclude selected items from cost adjustments.

You may also create further adjustments to correct, or add to, previous adjustments as necessary. There is no limit to the number of times you may run the adjustment tool, however you may only adjust current stock on hand, not stock that has left your premises (i.e., been dispatched to your customers).

Section 7

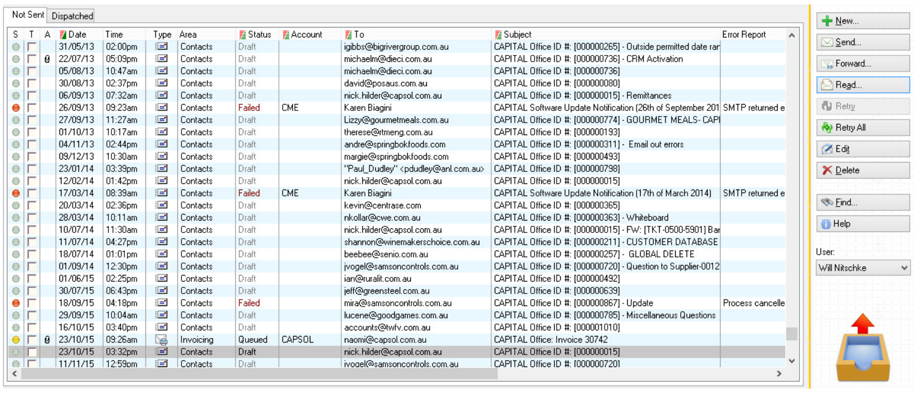
Out Tray

Consolidated Email Management

Consolidated Mail Management

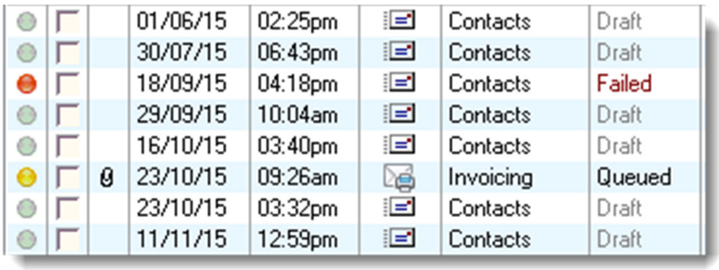
Previously limited to *Contact Manager* and related emailing inside CAPITAL SALES FORCE MANAGER the functionality of the OutTray has been expanded and is now included within CAPITAL BUSINESS MANAGER. All dispatched mail is now sent from the OutTray, including forms such as invoices and purchase orders, and remittances and statements.

Sent email appears under the *Dispatched* tab, and queued, failed or draft emails under the *Not Sent* tab.



If mail fails to be sent because of a communications error, you can now open the OutTray area, select the failed email and press the *Retry* button.

If the mail has the wrong email address, or you wish to change the subject heading, or CC or BCC mail addresses, you can just press *Edit* or double click on the message to be sent.



			01/06/15	02:25pm	Contacts	Draft
			30/07/15	06:43pm	Contacts	Draft
			18/09/15	04:18pm	Contacts	Failed
			29/09/15	10:04am	Contacts	Draft
			16/10/15	03:40pm	Contacts	Draft
			23/10/15	09:26am	Invoicing	Queued
			23/10/15	03:32pm	Contacts	Draft
			11/11/15	12:59pm	Contacts	Draft

It is also possible to re-send, forward or view most types of mail that you have sent out or have queued but not dispatched.

OutTray now tracks:

Mail Tracking

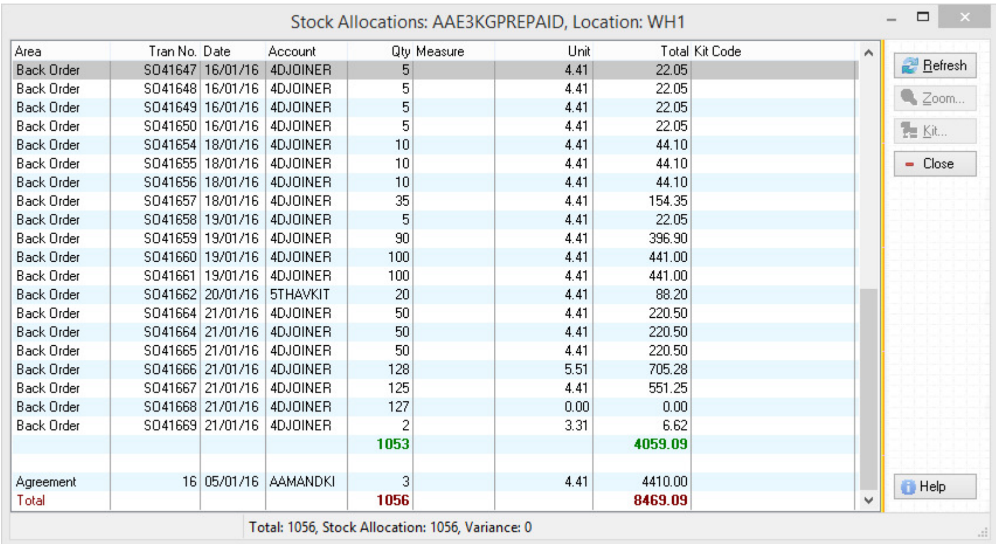
- The email status – dispatched, failed to send or draft.
- If the mail has attachments and the attachment names when applicable.
- The date and time of sending or the attempt to send.
- The type of mail (general email or an invoice or other type of form)
- The area from which the email was generated (i.e., Contact, Suppliers, Customers)
- The user who created the email.
- The customer or supplier account related to the mail if applicable.
- The send To, CC or BCC addresses.
- The form file name if applicable.
- The Contact ID and contact name if applicable.
- The subject heading.
- The mail server error message if a message failed to send.

Section 8

What's New In Stock Control

Allocation Tracing

The *Stock Allocations* window makes it easy to trace where stock is being reserved in your system. All transactions or system areas that may be allocating a selected stock item are listed in this window. If the stock item is used as part of a kit component, all kits that are actively allocating stock are also listed. It is also possible to drill down further on kit usage when required.


Stock Allocations: AAE3KGPREPAID, Location: WH1

Area	Tran No.	Date	Account	Qty	Measure	Unit	Total	Kit Code
Back Order	SO41647	16/01/16	4DJOINER	5		4.41	22.05	
Back Order	SO41648	16/01/16	4DJOINER	5		4.41	22.05	
Back Order	SO41649	16/01/16	4DJOINER	5		4.41	22.05	
Back Order	SO41650	16/01/16	4DJOINER	5		4.41	22.05	
Back Order	SO41654	18/01/16	4DJOINER	10		4.41	44.10	
Back Order	SO41655	18/01/16	4DJOINER	10		4.41	44.10	
Back Order	SO41656	18/01/16	4DJOINER	10		4.41	44.10	
Back Order	SO41657	18/01/16	4DJOINER	35		4.41	154.35	
Back Order	SO41658	19/01/16	4DJOINER	5		4.41	22.05	
Back Order	SO41659	19/01/16	4DJOINER	90		4.41	396.90	
Back Order	SO41660	19/01/16	4DJOINER	100		4.41	441.00	
Back Order	SO41661	19/01/16	4DJOINER	100		4.41	441.00	
Back Order	SO41662	20/01/16	5THAVKIT	20		4.41	88.20	
Back Order	SO41664	21/01/16	4DJOINER	50		4.41	220.50	
Back Order	SO41664	21/01/16	4DJOINER	50		4.41	220.50	
Back Order	SO41665	21/01/16	4DJOINER	50		4.41	220.50	
Back Order	SO41666	21/01/16	4DJOINER	128		5.51	705.28	
Back Order	SO41667	21/01/16	4DJOINER	125		4.41	551.25	
Back Order	SO41668	21/01/16	4DJOINER	127		0.00	0.00	
Back Order	SO41669	21/01/16	4DJOINER	2		3.31	6.62	
				1053			4059.09	
Agreement	16	05/01/16	AAMANDKI	3		4.41	4410.00	
Total				1056			8469.09	

Total: 1056, Stock Allocation: 1056, Variance: 0

Quick Supplier Reorder

The *Replenish From This Supplier* feature automatically reorders for a specified supplier by simply selecting a single menu option.

Open a purchase order and select a supplier account. Then from the menu select Toolbox|Replenish From This Supplier. Your purchase order will immediately be populated with all the stock you require from this supplier.

Intra-departmental Branch Ordering

A new system is available to raise sales orders between branches of the same business, called *Replenish From This Department.*

Use this feature to replenish required stock when that stock is available from a department within the business entity rather than from an external supplier.

For more information on this topic consult Section 3, **New Transfer Creation Process.**

Section 9

Customer Order Agreements

A New Advanced Distribution Feature

Advanced Distribution Component

Customer Order Agreements allow you to create and manage purchasing agreements between you and your customers. Agreements allow you to reserve stock for selected customers, track how many they have purchased from you and what remains outstanding, and lock in agreed pricing for the items applicable to the Agreement.

This new functionality requires the purchase of the ADVANCED DISTRIBUTION COMPONENT.

An agreement consists of three main components:

- The agreement itself which briefly describes the 'purchasing contract'
- The list of product items that form part of the agreement. This also includes quantities and agreed pricing.
- The customer or list of customers that the agreement applies to.

Selected stock items may be pasted into an agreement, one or more customers may be assigned to an agreement and agreements can be copied into new agreements. Product items may also be selectively copied and pasted between existing agreements.

Agreements may be assigned:

- A name
- A pricing account
- Reference and comment information
- An 'owner'
- A status, such as open/active, on hold, closed or suspended.
- A start and expiry date
- A department and a location

- Draw down and allocation characteristics

It is also possible to import agreements into the system via spreadsheets and data files, and quickly change the locations where agreement related stock is being held.

Product items assigned to agreements may exist at more than one warehouse location.

To facilitate agreement management, agreements can be printed or emailed to your customers and you can easily create agreement *billing activity reports*, showing what has been drawn down from agreements over specified time periods, including invoice quantities and dates.

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