Newsletter

Welcome

Welcome to the Summer newsletter for users and partners of Datafile Software.

If you have any suggestions for topics you would like to see covered in future newsletters please contact the team via the email address below.

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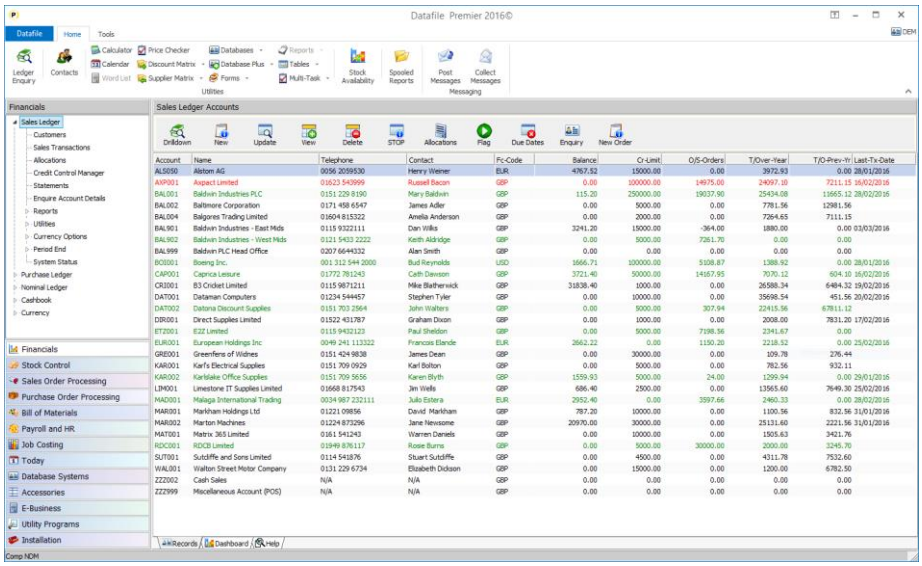
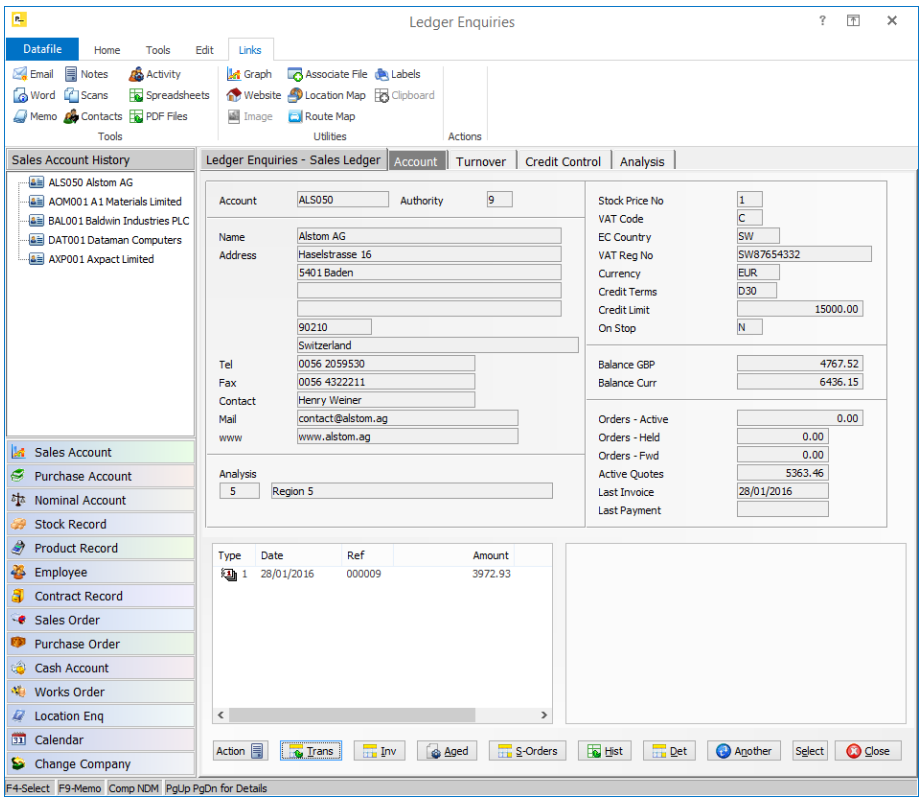
Datafile 2016

As part of our ongoing product improvement program, we've released a new version of the Datafile 2016 software. Features include a new Office 2016 style ribbon toolbar, removal of explorer menu icons to provide better spacing between options and support for display resolutions as low as 1024 x 768. In addition, there are a number of performance enhancements when navigating around the system.



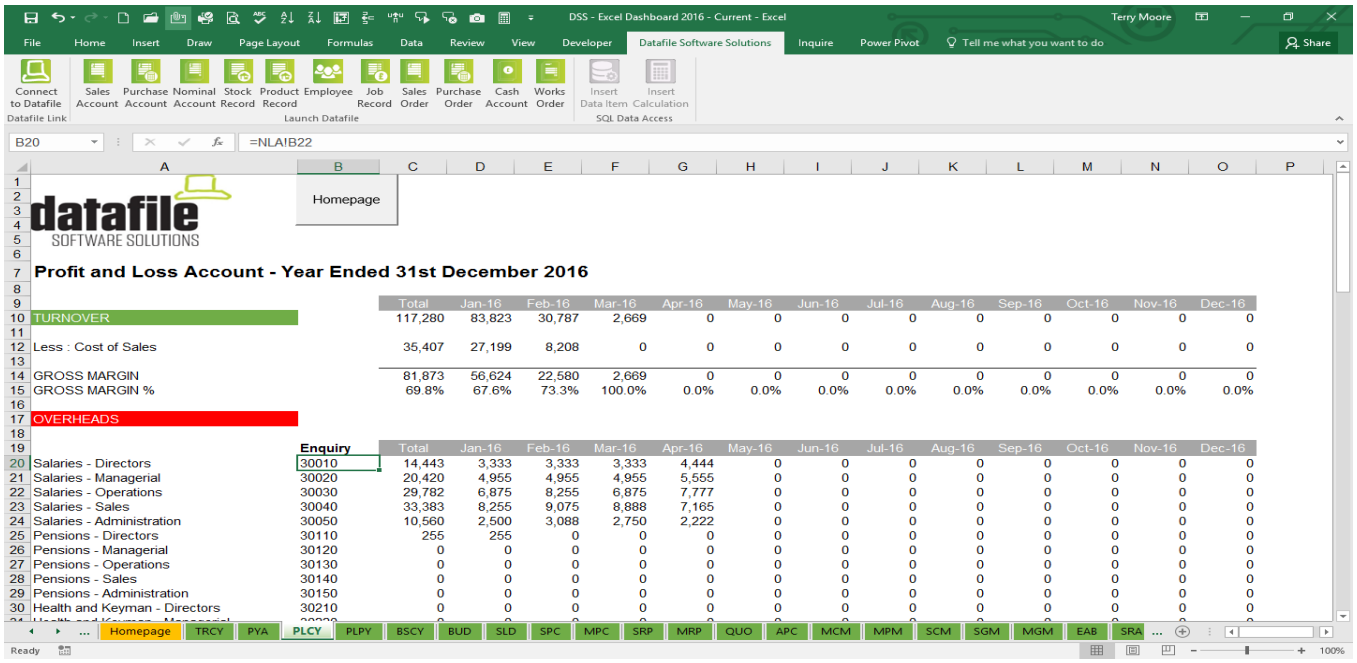


Visit our Youtube Channel for a Demonstration of Datafile 2016

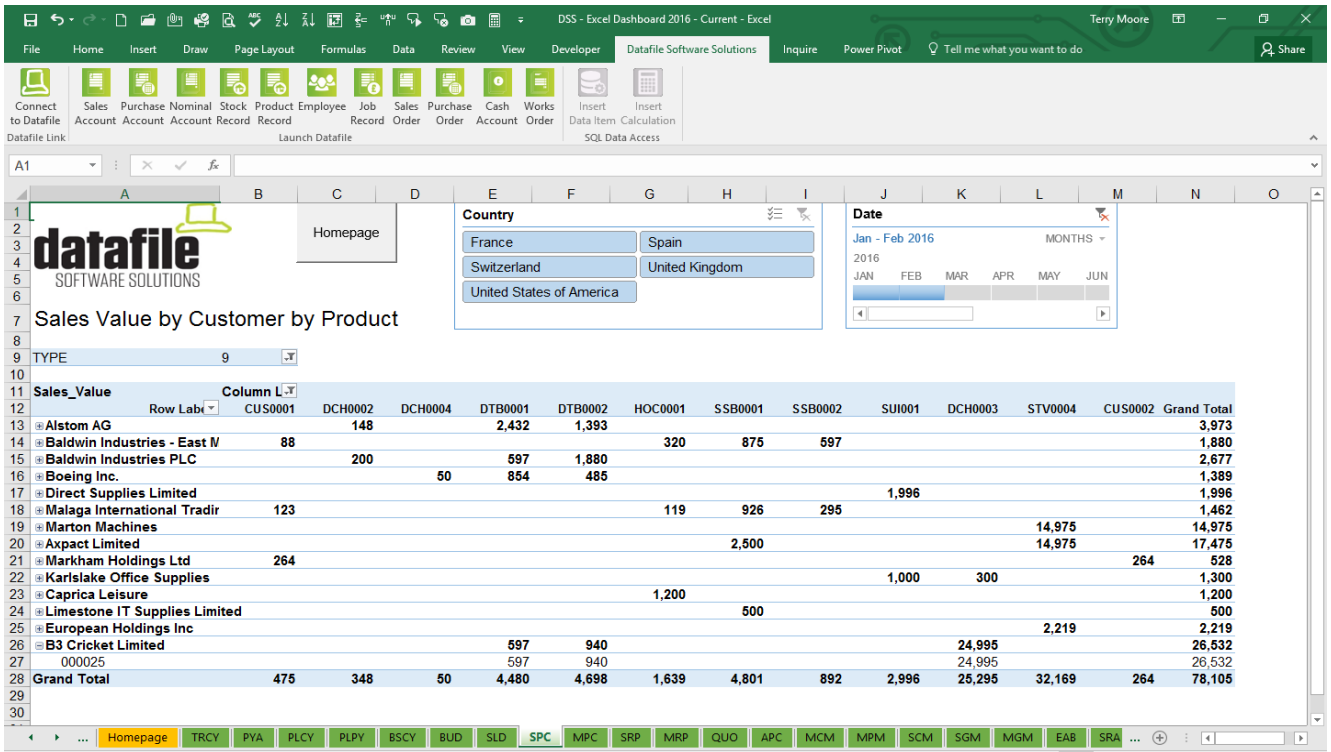
Next GOLD Release

The next GOLD release will be available in Quarter 4 of this year and we'll be including new Add-Ins for Excel, Word and, Outlook with Datafile 2016. Support will also be available for the Microsoft Office 64 Bit versions.

On the screenshots below, Microsoft Excel shows a Datafile Ribbon and allows the launch of our Ledger Enquiry from within Excel from any cell that contains an Account / Order Number / Stock Code / Job Code / Employee Code etc. This used alongside our Real Time Data module provides a powerful two-way link between Datafile and Excel.



	Enquiry	Total	Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16
TURNOVER		117,280	83,823	30,787	2,669	0	0	0	0	0	0	0	0	0
Less : Cost of Sales		35,407	27,199	8,208	0	0	0	0	0	0	0	0	0	0
GROSS MARGIN		81,873	56,624	22,580	2,669	0	0	0	0	0	0	0	0	0
GROSS MARGIN %		69.8%	67.6%	73.3%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OVERHEADS														
	Enquiry	Total	Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16
Salaries - Directors	30010	14,443	3,333	3,333	3,333	4,444	0	0	0	0	0	0	0	0
Salaries - Managerial	30020	20,420	4,955	4,955	4,955	5,555	0	0	0	0	0	0	0	0
Salaries - Operations	30030	29,782	6,875	8,255	6,875	7,777	0	0	0	0	0	0	0	0
Salaries - Sales	30040	33,383	8,255	9,075	8,888	7,165	0	0	0	0	0	0	0	0
Salaries - Administration	30050	10,560	2,500	3,088	2,750	2,222	0	0	0	0	0	0	0	0
Pensions - Directors	30110	255	255	0	0	0	0	0	0	0	0	0	0	0
Pensions - Managerial	30120	0	0	0	0	0	0	0	0	0	0	0	0	0
Pensions - Operations	30130	0	0	0	0	0	0	0	0	0	0	0	0	0
Pensions - Sales	30140	0	0	0	0	0	0	0	0	0	0	0	0	0
Pensions - Administration	30150	0	0	0	0	0	0	0	0	0	0	0	0	0
Health and Keyman - Directors	30210	0	0	0	0	0	0	0	0	0	0	0	0	0



TYPE 9

Sales_Value / Row Labels	CUS0001	DCH0002	DCH0004	DTB0001	DTB0002	HOC0001	SSB0001	SSB0002	SUI001	DCH0003	STV0004	CUS0002	Grand Total
Alstom AG		148		2,432	1,393								3,973
Baldwin Industries - East M	88					320	875	597					1,880
Baldwin Industries PLC		200		597	1,880								2,677
Boeing Inc.			50	854	485								1,389
Direct Supplies Limited									1,996				1,996
Malaga International Tradir	123					119	926	295					1,462
Marton Machines											14,975		14,975
Axpact Limited							2,500				14,975		17,475
Markham Holdings Ltd	264											264	528
Karlslake Office Supplies									1,000	300			1,300
Caprica Leisure						1,200							1,200
Limestone IT Supplies Limited							500						500
European Holdings Inc											2,219		2,219
B3 Cricket Limited				597	940					24,995			26,532
000025				597	940					24,995			26,532
Grand Total	475	348	50	4,480	4,698	1,639	4,801	892	2,996	25,295	32,169	264	78,105

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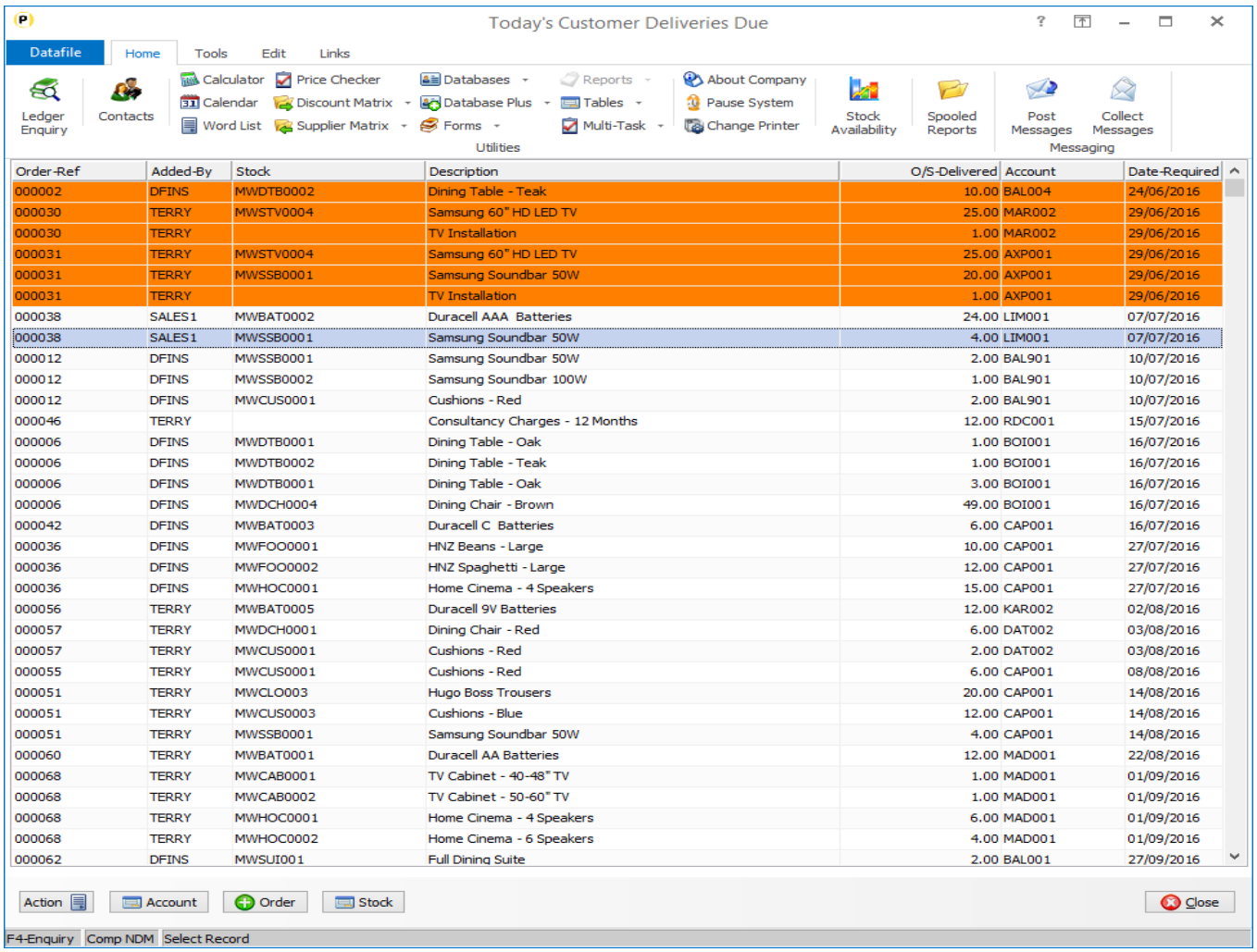
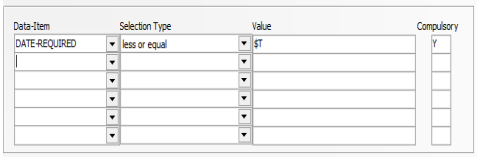
"Today" in Selection Criteria ($T)

One of the most popular features in Datafile 2016 is ability to reference 'Today' within Selection Criteria – this allows Reports and Picklists to be automatically generated and filtered on Today's Date without need for any operator changes.



Order-Ref	Added-By	Stock	Description	O/S-Delivered	Account	Date-Required
000002	DFINS	MWDTB0002	Dining Table - Teak	10.00	BAL004	24/06/2016
000030	TERRY	MWSTV0004	Samsung 60" HD LED TV	25.00	MAR002	29/06/2016
000030	TERRY		TV Installation	1.00	MAR002	29/06/2016
000031	TERRY	MWSTV0004	Samsung 60" HD LED TV	25.00	AXP001	29/06/2016
000031	TERRY	MWSSB0001	Samsung Soundbar 50W	20.00	AXP001	29/06/2016
000031	TERRY		TV Installation	1.00	AXP001	29/06/2016
000038	SALES1	MWBAT0002	Duracell AAA Batteries	24.00	LIM001	07/07/2016
000038	SALES1	MWSSB0001	Samsung Soundbar 50W	4.00	LIM001	07/07/2016
000012	DFINS	MWSSB0001	Samsung Soundbar 50W	2.00	BAL901	10/07/2016
000012	DFINS	MWSSB0002	Samsung Soundbar 100W	1.00	BAL901	10/07/2016
000012	DFINS	MWCUS0001	Cushions - Red	2.00	BAL901	10/07/2016
000046	TERRY		Consultancy Charges - 12 Months	12.00	RDC001	15/07/2016
000006	DFINS	MWDTB0001	Dining Table - Oak	1.00	BOI001	16/07/2016
000006	DFINS	MWDTB0002	Dining Table - Teak	1.00	BOI001	16/07/2016
000006	DFINS	MWDTB0001	Dining Table - Oak	3.00	BOI001	16/07/2016
000006	DFINS	MWDCH0004	Dining Chair - Brown	49.00	BOI001	16/07/2016
000042	DFINS	MWBAT0003	Duracell C Batteries	6.00	CAP001	16/07/2016
000036	DFINS	MWFOO0001	HNZ Beans - Large	10.00	CAP001	27/07/2016
000036	DFINS	MWFOO0002	HNZ Spaghetti - Large	12.00	CAP001	27/07/2016
000036	DFINS	MWHOC0001	Home Cinema - 4 Speakers	15.00	CAP001	27/07/2016
000056	TERRY	MWBAT0005	Duracell 9V Batteries	12.00	KAR002	02/08/2016
000057	TERRY	MWDCH0001	Dining Chair - Red	6.00	DAT002	03/08/2016
000057	TERRY	MWCUS0001	Cushions - Red	2.00	DAT002	03/08/2016
000055	TERRY	MWCUS0001	Cushions - Red	6.00	CAP001	08/08/2016
000051	TERRY	MWCLO003	Hugo Boss Trousers	20.00	CAP001	14/08/2016
000051	TERRY	MWCUS0003	Cushions - Blue	12.00	CAP001	14/08/2016
000051	TERRY	MWSSB0001	Samsung Soundbar 50W	4.00	CAP001	14/08/2016
000060	TERRY	MWBAT0001	Duracell AA Batteries	12.00	MAD001	22/08/2016
000068	TERRY	MWCAB0001	TV Cabinet - 40-48" TV	1.00	MAD001	01/09/2016
000068	TERRY	MWCAB0002	TV Cabinet - 50-60" TV	1.00	MAD001	01/09/2016
000068	TERRY	MWHOC0001	Home Cinema - 4 Speakers	6.00	MAD001	01/09/2016
000068	TERRY	MWHOC0002	Home Cinema - 6 Speakers	4.00	MAD001	01/09/2016
000062	DFINS	MWSUI001	Full Dining Suite	2.00	BAL001	27/09/2016



Here we have a pick list of outstanding deliveries to customers and we've used our business rule colour coding to highlight items which are overdue. In addition to $T for Today you can use $Y for start of the year, $R for end of the year, $M for start of the month and $H for the end of the month (relative to calendar year / todays date)

Some other common uses of this feature for Reporting and Picklists include:

- Today's Supplier Deliveries
- Today's Customer Care Calls
- Today's CRM Activities
- Today's Business Tasks

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Web Shop Integration

A common query raised to the support team is for the integration of the Datafile Software system with an online web shop. Many existing Datafile customers already integrate their systems and Datafile has various tools that allow for this integration depending on the web shop software / developer you choose.

Below we outline a guide to some of the questions you need to be thinking of when looking at integrating with web shops.

What Data to Transfer?

1) What data is required from Datafile to send to the web shop – are you looking to output stock lists/prices, current stock levels, customer lists with contact log-in credentials etc.

2) How orders are to be processed on the web shop – is the web shop to raise the customer invoice and take payment or are you looking to transfer the order to Datafile for processing? Do you have special 'matrix' prices in use for customers in Datafile that needs to be available for use when that customer logs in on the website.

3) What data is returned from the web shop to Datafile – is it the sales order for import/processing within Datafile or the sales transactions (invoice and payment) and stock transactions the web shop has processed.

How Data is Transferred?

In addition to reviewing the data to be transferred between the online web shop and the Datafile system you need to think how the data it transferred. There are typically three methods of transfer your web developer may use – SQL, CSV or XML. CSV is available as a standard part of your Datafile system via Report Generator or ProFiler tools but you may require additional software for SQL or XML transfer and to import the resulting data into the Datafile Sales, Stock or Sales Order Processing systems.

SQL – SQL tools can be used to mirror Datafile tables to a (usually) MySQL table on the website these are then interrogated / synched with the web shop SQL tables (products / customers etc.). SQL can also be fetch data from a MySQL database on the web shop. SQL is typically used where live data interrogation is required.

CSV – Where static information is required for the web shop on a schedule or ad-hoc basis then your web developer may suggest CSV as a route for data transfer. You can use the Datafile Reporting Tools to create CSV files that can be uploaded to the web shop from the stock and/or customer files. This is usually a manual process triggered by an operator but you could use Task Scheduler tools to automate this. Similarly, your web developer may create CSV files for the order or invoices raised – these are typically transferred via FTP from the web shop to your server / local pc.

XML – Rarely used with online shops (it's more typically used when invoices are raised from Datafile and sent to a customer – i.e. when trade with likes of B&Q) XML files are a formatted text file that can be used for data transfer. Again this would typically be a manually triggered process for outputting data; import would be as per CSV – transferred via FTP from the web shop to your server / local pc.

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Datafile Software Solutions Partners with Sales-I

We're excited to announce that we have recently partnered with leading mobile sales performance software providers – sales-i. Take a look at their sales performance software today and discover how it can transform your business. http://sales-i.com

Sales-I is a sales performance tool created to make the life of *any* product-based salesperson less stressful and more profitable. Data from the Datafile system can be uploaded into Sales-I for analysis and key performance indicator reporting either using a web browser or Mobile application.

SMARTER SELLING
Find unmissable opportunities fast with customer targeted insights.

BETTER MANAGEMENT
Know exactly what is happening with any customer, any time.

POWERFUL REPORTS
Create in-depth, powerful customer facing reports in seconds.

More Productive Calls - Instant access to targeted customer data means you can spot new selling opportunities with ease. Our sales performance software is proven to make every salesperson more successful.

Measurable Sales Increase - Sales-i gives you a real reason to get in touch with your customers and the insight to increase the conversion of your sales calls. What's more, our software will also give you the visibility to spot competitor threats early.

Create Sales Reports Fast - The sales performance software can create rich, powerful customer facing sales reports in seconds. Available from your laptop, smartphone or tablet, preparing for meetings doesn't get easier than this.

What We Think of Sales-I

"The Partnership with Sales-I gives Datafile customers access to a mobile solution for best-in-breed sales reporting tools. Our clients can now have the best of both works, efficient back office business processes with Datafile and on the move slick key performance indicators from sales-i. We are looking forward to working with an organization which understands the needs of clients and one that can provide real value and information from their data." **Terry Moore, MD Datafile**

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