



Welcome

Welcome to the Autumn 2020 newsletter for users and partners of Datafile Software.

This newsletter contains details on features in our forthcoming release along with integrations with Partners and information on the current product roadmap.

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In This Issue

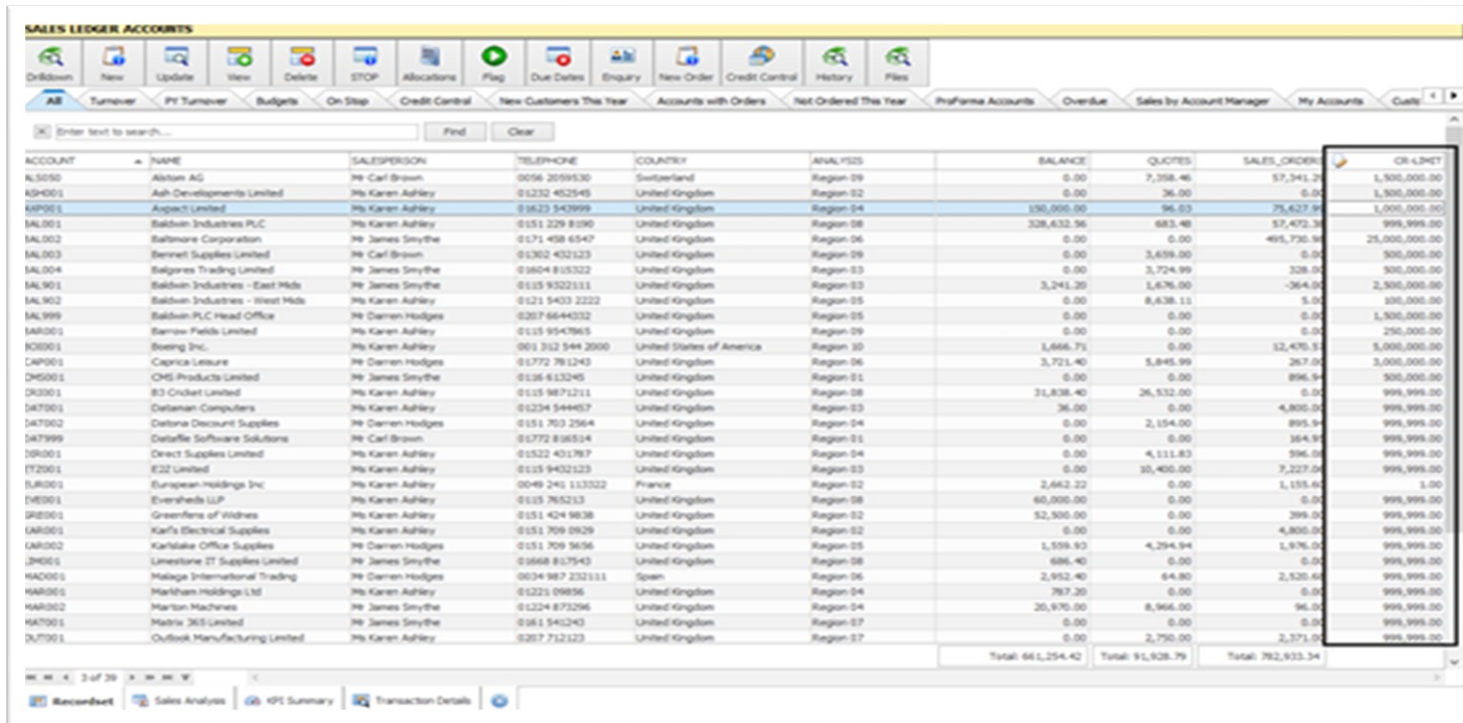
- Gold Software Maintenance Update – November 2020
- New Applications Available
- Datafile / Phocas Partnership
- Development Roadmap



Gold Software Maintenance Update – November 2020

New Landing Page Features

1. Edit Data Items on Grid



ACCOUNT	NAME	SALESPERSON	TELEPHONE	COUNTRY	ANALYSIS	BALANCE	QUOTES	SALES_ORDER	CR.LIMIT
N.5050	Alston AG	Mr Carl Brown	0056 2059530	Switzerland	Region 09	0.00	7,358.46	57,341.2	1,500,000.00
NR001	Ash Developments Limited	Ms Karen Ashley	01232 452545	United Kingdom	Region 02	0.00	36.00	0.00	1,500,000.00
AP001	Aspect Limited	Ms Karen Ashley	01823 343999	United Kingdom	Region 04	100,000.00	96.03	75,627.94	1,000,000.00
SA001	Baldwin Industries PLC	Ms Karen Ashley	0151 229 8190	United Kingdom	Region 08	328,632.56	683.48	57,472.34	999,999.00
SA002	Balfiore Corporation	Ms James Smythe	0171 458 6547	United Kingdom	Region 06	0.00	0.00	495,735.94	25,000,000.00
SA003	Bennet Supplies Limited	Mr Carl Brown	01302 452123	United Kingdom	Region 09	0.00	3,659.00	0.00	500,000.00
SA004	Belgian Trading Limited	Ms James Smythe	01804 815322	United Kingdom	Region 03	0.00	3,724.99	328.00	500,000.00
SA001	Baldwin Industries - East Mids	Ms James Ashley	0115 932311	United Kingdom	Region 03	3,241.20	1,676.90	-364.00	2,500,000.00
SA002	Baldwin Industries - West Mids	Ms Karen Ashley	0121 9433 2222	United Kingdom	Region 05	0.00	8,438.11	0.00	100,000.00
SA001	Baldwin PLC Head Office	Ms James Smythe	0207 664232	United Kingdom	Region 05	0.00	0.00	0.00	1,500,000.00
SA001	Barnes Fields Limited	Ms Karen Ashley	0115 9547865	United Kingdom	Region 09	0.00	0.00	0.00	250,000.00
KB001	Boring Inc.	Ms Karen Ashley	001 312 344 2000	United States of America	Region 10	1,666.71	0.00	12,470.51	5,000,000.00
CA001	Caprica Leisure	Ms James Smythe	01772 781243	United Kingdom	Region 06	3,721.40	5,845.99	267.00	3,000,000.00
DS001	CHS Products Limited	Ms James Smythe	0116 613245	United Kingdom	Region 01	0.00	0.00	896.54	500,000.00
CR001	CR Cricket Limited	Ms Karen Ashley	0115 9871211	United Kingdom	Region 08	31,838.40	26,532.00	0.00	999,999.00
SA001	Detaman Computers	Ms Karen Ashley	01234 544557	United Kingdom	Region 03	36.00	0.00	4,800.00	999,999.00
SA002	Detona Discount Supplies	Ms James Smythe	0151 703 2564	United Kingdom	Region 04	0.00	2,154.00	895.54	999,999.00
SA001	Datafile Software Solutions	Mr Carl Brown	01772 836534	United Kingdom	Region 01	0.00	0.00	164.91	999,999.00
DR001	Direct Supplies Limited	Ms Karen Ashley	01522 401787	United Kingdom	Region 04	0.00	4,111.83	596.04	999,999.00
ET001	E22 Limited	Ms Karen Ashley	0115 9432123	United Kingdom	Region 03	0.00	30,400.00	7,227.04	999,999.00
EU001	European Holdings Inc	Ms Karen Ashley	0049 241 133322	France	Region 02	2,662.22	0.00	1,155.64	1.00
EV001	Everheds LLP	Ms Karen Ashley	0115 765213	United Kingdom	Region 08	60,000.00	0.00	0.00	999,999.00
GR001	Greenfields of Widnes	Ms Karen Ashley	0151 424 9638	United Kingdom	Region 02	52,500.00	0.00	399.00	999,999.00
KA001	Karl's Electrical Supplies	Ms Karen Ashley	0151 709 0629	United Kingdom	Region 02	0.00	0.00	4,800.00	999,999.00
KA002	Karl's Office Supplies	Ms James Smythe	0151 709 3636	United Kingdom	Region 05	1,559.83	4,294.94	1,976.00	999,999.00
LM001	Limestone 27 Supplies Limited	Ms James Smythe	01668 817543	United Kingdom	Region 08	686.40	0.00	0.00	999,999.00
MA001	Malaga International Trading	Ms James Smythe	0034 987 232111	Spain	Region 06	2,952.40	64.80	2,520.64	999,999.00
MA002	Marham Holdings Ltd	Ms Karen Ashley	01221 09856	United Kingdom	Region 04	787.20	0.00	0.00	999,999.00
MA003	Marlon Machines	Ms James Smythe	01224 873296	United Kingdom	Region 04	20,970.00	8,966.00	96.00	999,999.00
MA001	Matrix 363 Limited	Ms James Smythe	0181 542243	United Kingdom	Region 07	0.00	0.00	0.00	999,999.00
DU001	Outback Manufacturing Limited	Ms Karen Ashley	0207 712123	United Kingdom	Region 07	0.00	2,750.00	2,371.00	999,999.00
						Total: 641,254.42	Total: 91,928.79	Total: 782,633.34	

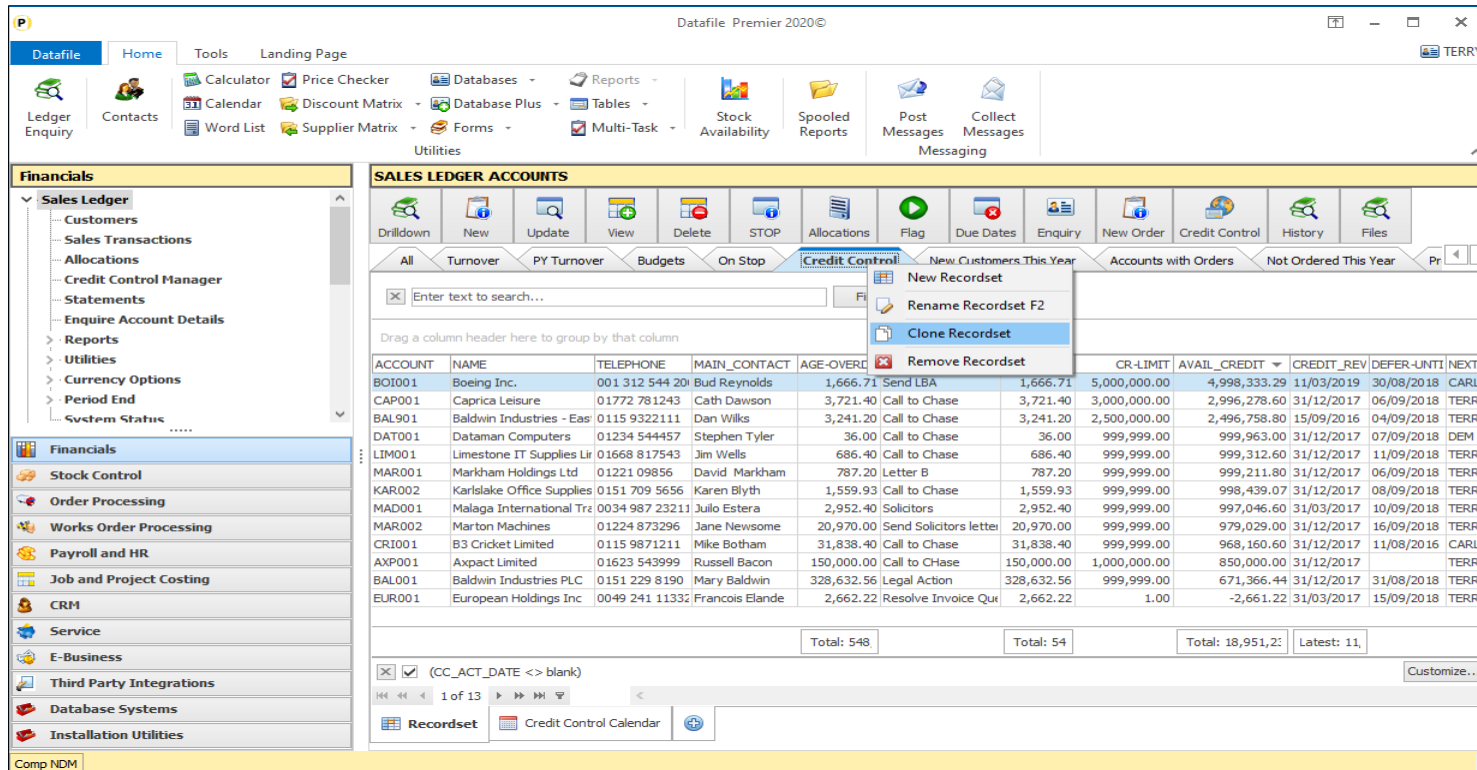
The Landing Page set-up now allows an option to define 'Editable' fields.

Edit mode is selected by right-clicking on the grid. Editable fields are identified by the icon in the column heading.

The nominated items can then be changed directly by clicking into the field on the grid and typing in the new value.



2. Clone A Tab



The screenshot shows the Datafile Premier 2020 interface. The main window is titled 'SALES LEDGER ACCOUNTS' and displays a table of account records. A context menu is open over the table, with the 'Clone Recordset' option highlighted. The table contains the following data:

ACCOUNT	NAME	TELEPHONE	MAIN_CONTACT	AGE-OVER	Remove Recordset	CR-LIMIT	AVAIL_CREDIT	CREDIT_REV	DEFER-UNTI	NEXT-J	
BOI001	Boeing Inc.	001 312 544 20	Bud Reynolds	1,666.71	Send LBA	1,666.71	5,000,000.00	4,998,333.29	11/03/2019	30/08/2018	CARL
CAP001	Caprica Leisure	01772 781243	Cath Dawson	3,721.40	Call to Chase	3,721.40	3,000,000.00	2,996,278.60	31/12/2017	06/09/2018	TERRY
BAL901	Baldwin Industries - Eas	0115 9322111	Dan Wilks	3,241.20	Call to Chase	3,241.20	2,500,000.00	2,496,758.80	15/09/2016	04/09/2018	TERRY
DAT001	Dataman Computers	01234 544457	Stephen Tyler	36.00	Call to Chase	36.00	999,999.00	999,963.00	31/12/2017	07/09/2018	DEM
LIM001	Limestone IT Supplies Lir	01668 817543	Jim Wells	686.40	Call to Chase	686.40	999,999.00	999,312.60	31/12/2017	11/09/2018	TERRY
MAR001	Markham Holdings Ltd	01221 09856	David Markham	787.20	Letter B	787.20	999,999.00	999,211.80	31/12/2017	06/09/2018	TERRY
KAR002	Karlslake Office Supplies	0151 709 5656	Karen Blyth	1,559.93	Call to Chase	1,559.93	999,999.00	998,439.07	31/12/2017	08/09/2018	TERRY
MAD001	Malaga International Trz	0034 987 23211	Julio Estera	2,952.40	Solicitors	2,952.40	999,999.00	997,046.60	31/03/2017	10/09/2018	TERRY
MAR002	Marlon Machines	01224 873296	Jane Newsome	20,970.00	Send Solicitors letter	20,970.00	999,999.00	979,029.00	31/12/2017	16/09/2018	TERRY
CR1001	B3 Cricket Limited	0115 9871211	Mike Botham	31,838.40	Call to Chase	31,838.40	999,999.00	968,160.60	31/12/2017	11/08/2016	CARL
AXP001	Axpact Limited	01623 543999	Russell Bacon	150,000.00	Call to Chase	150,000.00	1,000,000.00	850,000.00	31/12/2017		TERRY
BAL001	Baldwin Industries PLC	0151 229 8190	Mary Baldwin	328,632.56	Legal Action	328,632.56	999,999.00	671,366.44	31/12/2017	31/08/2018	TERRY
EUR001	European Holdings Inc	0049 241 11332	Francois Elande	2,662.22	Resolve Invoice Qu	2,662.22	1.00	-2,661.22	31/03/2017	15/09/2018	TERRY

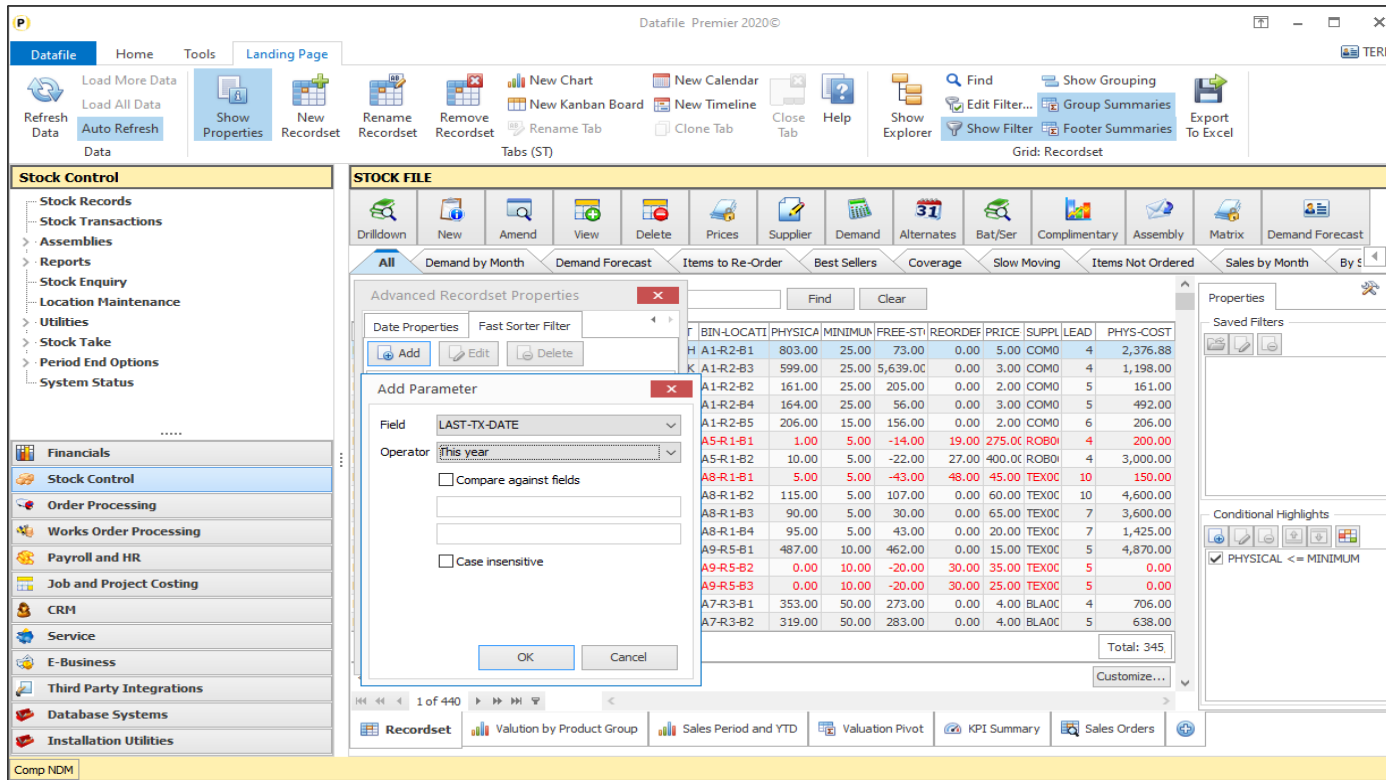
The context menu options are: New Recordset, Rename Recordset F2, Clone Recordset, and Remove Recordset. The 'Clone Recordset' option is highlighted in blue.

By default, when a new record set is created on a landing page, the items displayed are the default items defined within the Landing Page Manager.

By right-clicking on the existing record set tab and selecting to **Clone Recordset** a new tab is created using the same settings as the existing tab and it can then be renamed and edited accordingly.



3. Fast Sorter Filter



The screenshot shows the Datafile Premier 2020 interface. The main window displays a 'STOCK FILE' grid with columns: BIN-LOCATI, PHYSICA, MINIMUM, FREE-STI, REORDEF, PRICE, SUPPL LEAD, and PHYS-COST. A dialog box titled 'Advanced Recordset Properties' is open, showing the 'Fast Sorter Filter' tab. The 'Add Parameter' dialog is also open, showing the field 'LAST-TX-DATE' and the operator 'this year'. The grid shows various stock records with values in different colors (blue, red, green) indicating different statuses or values.

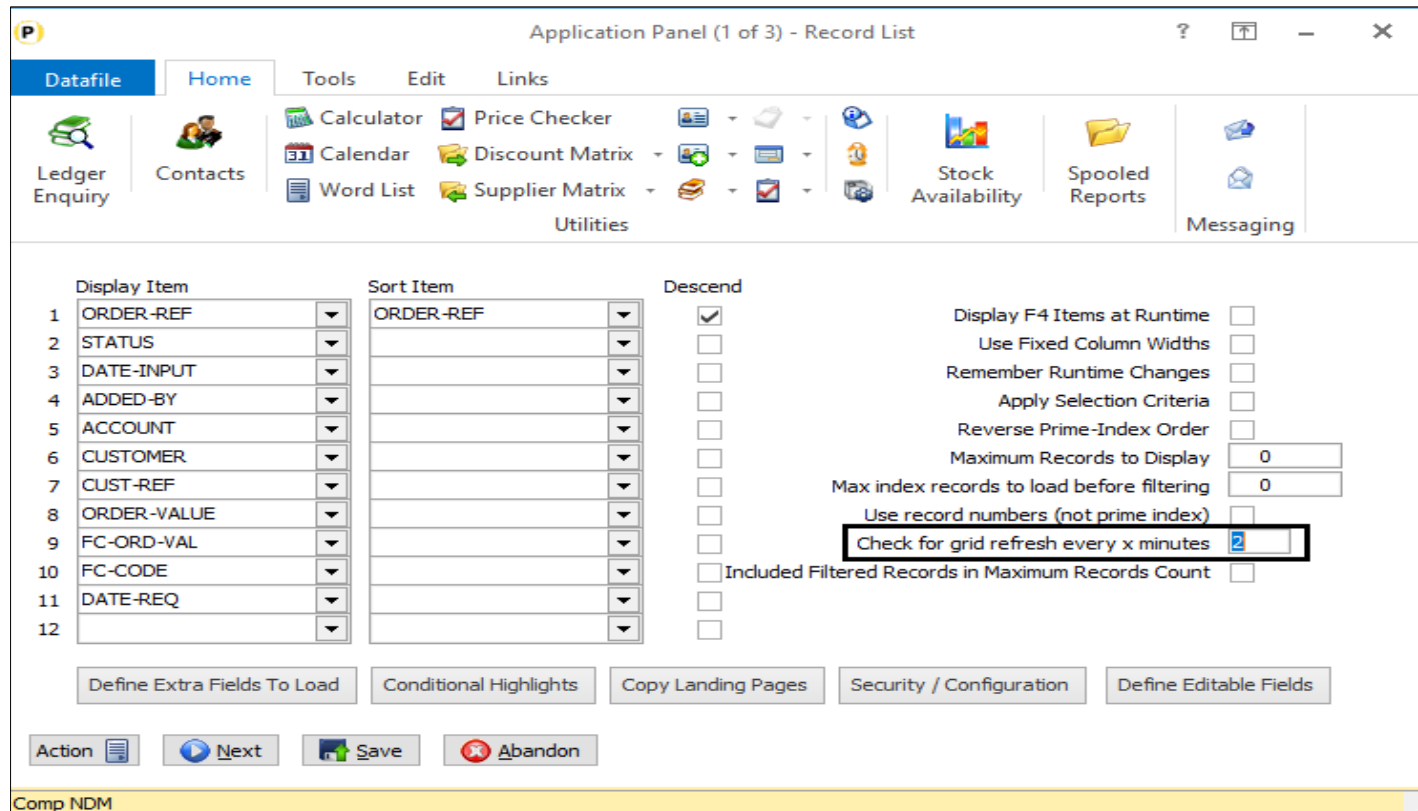
BIN-LOCATI	PHYSICA	MINIMUM	FREE-STI	REORDEF	PRICE	SUPPL LEAD	PHYS-COST
A1-R2-B1	803.00	25.00	73.00	0.00	5.00	COMO	4 2,376.88
A1-R2-B3	599.00	25.00	5,639.00	0.00	3.00	COMO	4 1,198.00
A1-R2-B2	161.00	25.00	205.00	0.00	2.00	COMO	5 161.00
A1-R2-B4	164.00	25.00	56.00	0.00	3.00	COMO	5 492.00
A1-R2-B5	206.00	15.00	156.00	0.00	2.00	COMO	6 206.00
A5-R1-B1	1.00	5.00	-14.00	19.00	275.00	ROBO	4 200.00
A5-R1-B2	10.00	5.00	-22.00	27.00	400.00	ROBO	4 3,000.00
A8-R1-B1	5.00	5.00	-43.00	48.00	45.00	TEXOC	10 150.00
A8-R1-B2	115.00	5.00	107.00	0.00	60.00	TEXOC	10 4,600.00
A8-R1-B3	90.00	5.00	30.00	0.00	65.00	TEXOC	7 3,600.00
A8-R1-B4	95.00	5.00	43.00	0.00	20.00	TEXOC	7 1,425.00
A9-R5-B1	487.00	10.00	462.00	0.00	15.00	TEXOC	5 4,870.00
A9-R5-B2	0.00	10.00	-20.00	30.00	35.00	TEXOC	5 0.00
A9-R5-B3	0.00	10.00	-20.00	30.00	25.00	TEXOC	5 0.00
A7-R3-B1	353.00	50.00	273.00	0.00	4.00	BLAOC	4 706.00
A7-R3-B2	319.00	50.00	283.00	0.00	4.00	BLAOC	5 638.00

As files sizes grow then sometimes you may experience a delay in displaying the Landing Page. If, for example, you have a large set of stock records then identifying the 'active' stock records can involve searching the entire stock table.

The new **Fast Sorter Filter** feature allows you to quickly identify and display the required records – speeding up display.



4. Automatic Refresh Timer



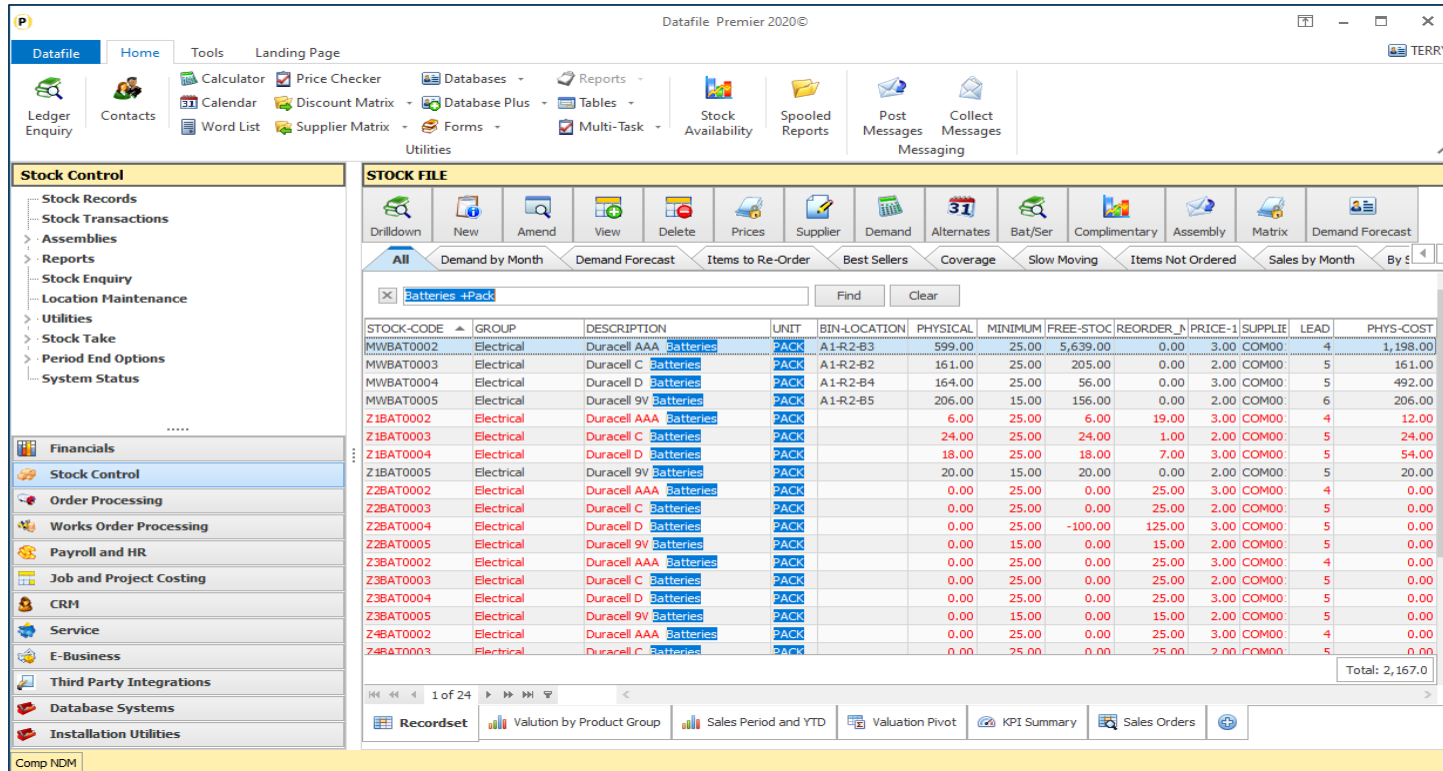
Where a user is actively processing in Datafile the data displayed on their landing page is refreshed automatically after the action is completed. For example, if a user is entering sales orders and returns to the landing page the data is refreshed to include the latest orders.

In some environments a user may not be actively processing but instead waiting for data to appear on the landing page. For example, a warehouse operator waiting for an entry on the landing page for an order to be picked.

This new feature allows for a timer to be set so that the current landing page is updated automatically every X minutes on inactivity – i.e. if a user hasn't performed an action in Datafile for last '2' minutes the data on the landing page is refreshed.



5. Improved Search Options



The screenshot shows the Datafile Premier 2020 interface. The 'Stock Control' module is active, and the 'STOCK FILE' window is open. A search for 'Batteries +Pack' has been performed, resulting in a list of items. The search criteria are visible in the search bar: 'Batteries +Pack'. The results table shows various Duracell battery packs with their respective stock codes, descriptions, and costs.

STOCK-CODE	GROUP	DESCRIPTION	UNIT	BIN-LOCATION	PHYSICAL	MINIMUM	FREE-STOC	REORDER_I	PRICE-1	SUPPLIE	LEAD	PHYS-COST
MWBAT002	Electrical	Duracell AAA Batteries	PACK	A1-R2-B3	599.00	25.00	5,639.00	0.00	3.00	COM00	4	1,198.00
MWBAT003	Electrical	Duracell C Batteries	PACK	A1-R2-B2	161.00	25.00	205.00	0.00	2.00	COM00	5	161.00
MWBAT004	Electrical	Duracell D Batteries	PACK	A1-R2-B4	164.00	25.00	56.00	0.00	3.00	COM00	5	492.00
MWBAT005	Electrical	Duracell 9V Batteries	PACK	A1-R2-B5	206.00	15.00	156.00	0.00	2.00	COM00	6	206.00
Z1BAT0002	Electrical	Duracell AAA Batteries	PACK		6.00	25.00	6.00	19.00	3.00	COM00	4	12.00
Z1BAT0003	Electrical	Duracell C Batteries	PACK		24.00	25.00	24.00	1.00	2.00	COM00	5	24.00
Z1BAT0004	Electrical	Duracell D Batteries	PACK		18.00	25.00	18.00	7.00	3.00	COM00	5	54.00
Z1BAT0005	Electrical	Duracell 9V Batteries	PACK		20.00	15.00	20.00	0.00	2.00	COM00	5	20.00
Z2BAT0002	Electrical	Duracell AAA Batteries	PACK		0.00	25.00	0.00	25.00	3.00	COM00	4	0.00
Z2BAT0003	Electrical	Duracell C Batteries	PACK		0.00	25.00	0.00	25.00	2.00	COM00	5	0.00
Z2BAT0004	Electrical	Duracell D Batteries	PACK		0.00	25.00	-100.00	125.00	3.00	COM00	5	0.00
Z2BAT0005	Electrical	Duracell 9V Batteries	PACK		0.00	15.00	0.00	15.00	2.00	COM00	5	0.00
Z3BAT0002	Electrical	Duracell AAA Batteries	PACK		0.00	25.00	0.00	25.00	3.00	COM00	4	0.00
Z3BAT0003	Electrical	Duracell C Batteries	PACK		0.00	25.00	0.00	25.00	2.00	COM00	5	0.00
Z3BAT0004	Electrical	Duracell D Batteries	PACK		0.00	25.00	0.00	25.00	3.00	COM00	5	0.00
Z3BAT0005	Electrical	Duracell 9V Batteries	PACK		0.00	15.00	0.00	15.00	2.00	COM00	5	0.00
Z4BAT0002	Electrical	Duracell AAA Batteries	PACK		0.00	25.00	0.00	25.00	3.00	COM00	4	0.00
Z4BAT0003	Electrical	Duracell C Batteries	PACK		0.00	25.00	0.00	25.00	2.00	COM00	5	0.00

The **Find** option on the Landing Page has now been improved to allow for 'and' and 'or' search functions across the items displayed on the page.

In the example here the search is for "Batteries +Pack" and this finds 'Batteries' within the Description and 'Pack' within the Unit of Issue.

You can extend the search "Batteries +Pack +9V" for example will find entries with "Batteries" and "Pack" and "9V".

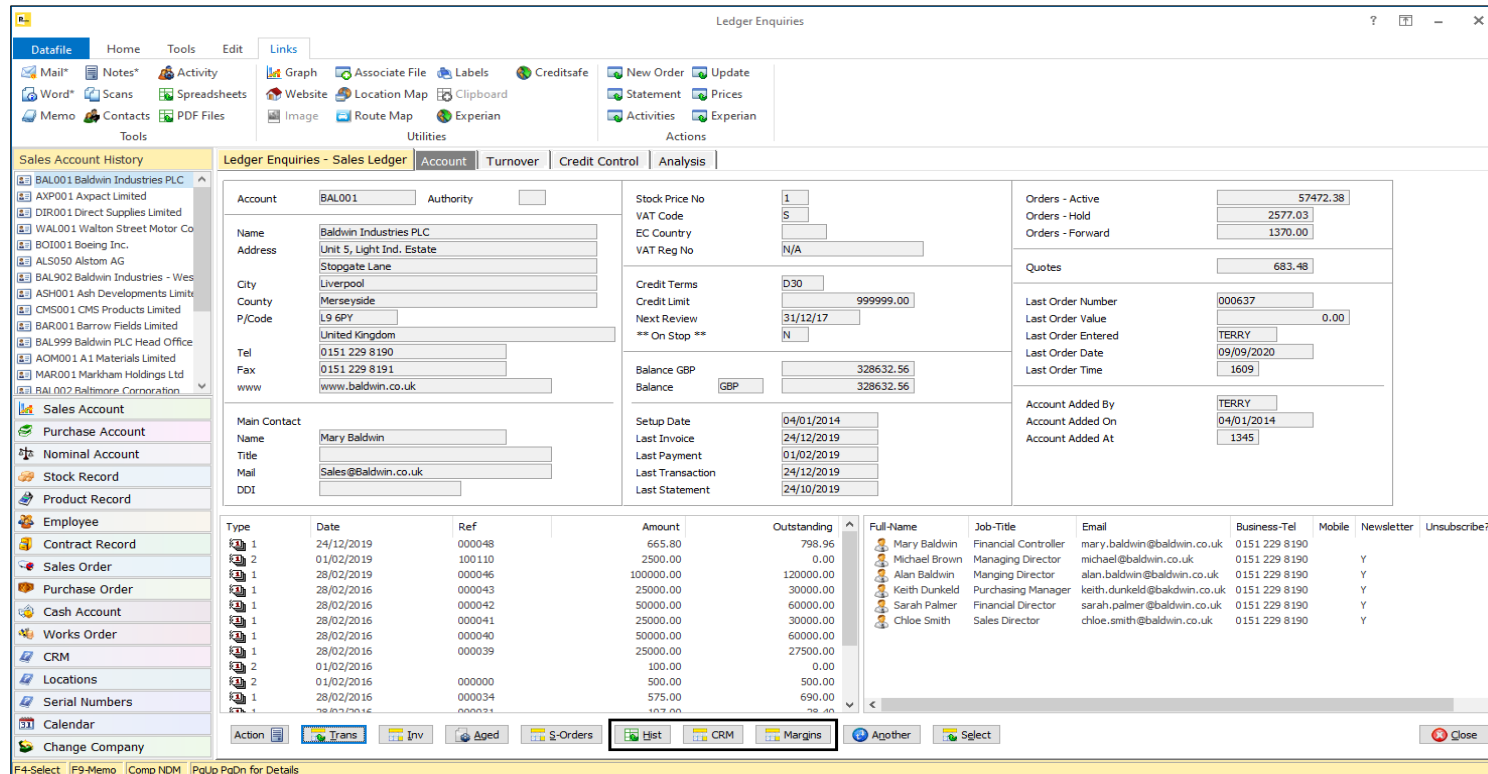
You can also use 'or' searches "Clarkes - Hugo" will find entries containing either "Clarkes" or "Hugo"



Ledger Enquiry Enhancements

The Ledger Enquiries are one of the most popular areas of the system. New features added to the Ledger Enquiry in this release include the following.

1. Additional History Databases



The screenshot shows the 'Ledger Enquiries' window for account 'BAL001'. The interface includes a menu bar, a toolbar, and a sidebar with navigation options like 'Sales Account History', 'Purchase Account', and 'Nominal Account'. The main area is divided into several sections:

- Account Details:** Name: Baldwin Industries PLC, Address: Unit 5, Light Ind. Estate, Stoppage Lane, Liverpool, Merseyside, L9 6PY, United Kingdom. Tel: 0151 229 8190, Fax: 0151 229 8191, www: www.baldwin.co.uk.
- Financial Summary:** Balance GBP: 328632.56, Balance: 328632.56.
- Orders and Quotes:** Orders - Active: 57472.38, Orders - Hold: 2577.03, Orders - Forward: 1370.00, Quotes: 683.48.
- Transaction Table:**

Type	Date	Ref	Amount	Outstanding	Full-Name	Job-Title	Email	Business-Tel	Mobile	Newsletter	Unsubscribe?
Contract Record	24/12/2019	000048	665.80	798.96	Mary Baldwin	Financial Controller	mary.baldwin@baldwin.co.uk	0151 229 8190			
Sales Order	01/02/2019	100110	2500.00	0.00	Michael Brown	Managing Director	michael@baldwin.co.uk	0151 229 8190	Y		
Purchase Order	28/02/2019	000046	100000.00	120000.00	Alan Baldwin	Managing Director	alan.baldwin@baldwin.co.uk	0151 229 8190	Y		
Cash Account	28/02/2016	000043	25000.00	30000.00	Keith Dunkeld	Purchasing Manager	keith.dunkeld@baldwin.co.uk	0151 229 8190	Y		
Works Order	28/02/2016	000042	50000.00	60000.00	Sarah Palmer	Financial Director	sarah.palmer@baldwin.co.uk	0151 229 8190	Y		
CRM	28/02/2016	000041	25000.00	30000.00	Chloe Smith	Sales Director	chloe.smith@baldwin.co.uk	0151 229 8190	Y		
Locations	28/02/2016	000040	50000.00	60000.00							
Serial Numbers	28/02/2016	000039	25000.00	27500.00							
Calendar	01/02/2016	000000	100.00	0.00							
Change Company	01/02/2016	500.00	500.00	0.00							
	28/02/2016	000034	575.00	690.00							
	28/02/2016	000031	107.00	78.40							

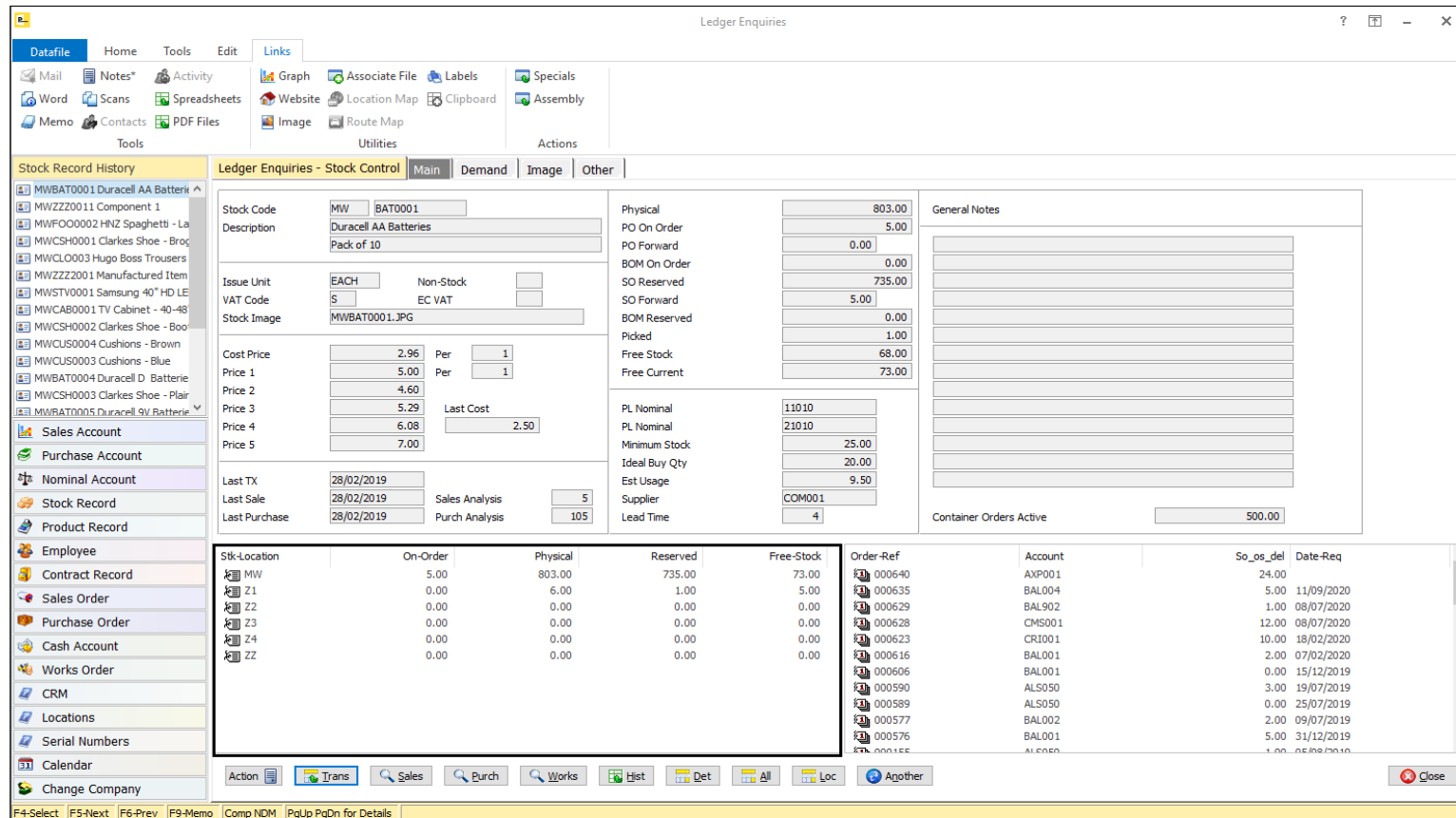
A **History** or Enquiry database is a user-definable drill-down option from the main application to another linked database. The Sales enquiry, for example, could drill-down options to show CRM Activities for the customer, Special Prices (Discount Matrix) entries for the customer or any other line-of-business ProFiler application database you have in place.

In this release the options for history databases have been extended for the following applications:

Sales Ledger now allows three history databases. Stock Control now allows three history databases. Sales and Purchase Order Processing now allow two history databases. Bill of Materials / Works Orders now allow two history databases.



2. Stock Location Panel



The screenshot shows the 'Ledger Enquiries - Stock Control' window. The 'Stock Location Panel' is highlighted, displaying a table of stock locations for Duracell AA Batteries (Stock Code: MW BAT0001). The table includes columns for Stock-Location, On-Order, Physical, Reserved, and Free-Stock.

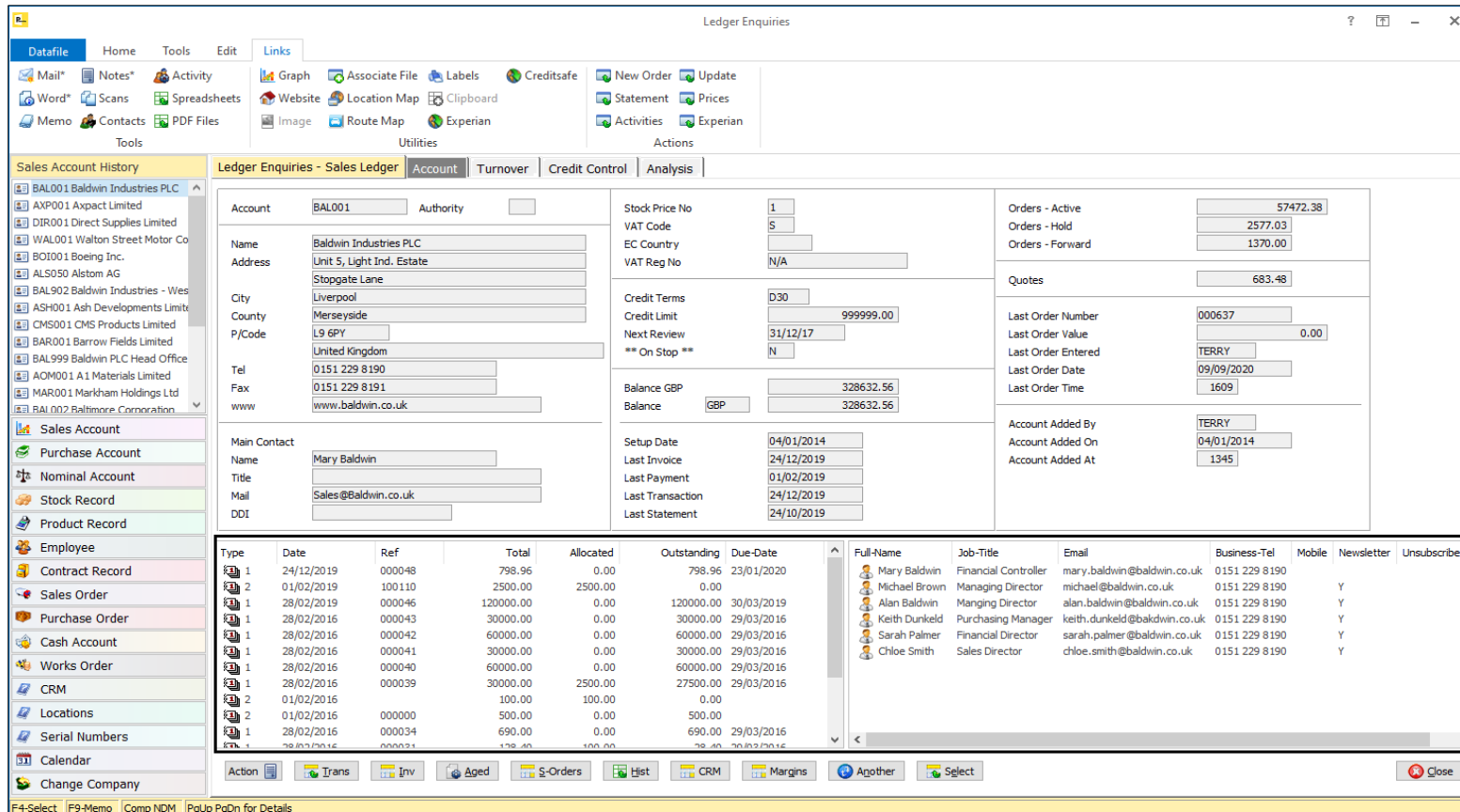
Stock-Location	On-Order	Physical	Reserved	Free-Stock
MW	5.00	803.00	735.00	73.00
Z1	0.00	6.00	1.00	5.00
Z2	0.00	0.00	0.00	0.00
Z3	0.00	0.00	0.00	0.00
Z4	0.00	0.00	0.00	0.00
ZZ	0.00	0.00	0.00	0.00

The interface also shows a 'General Notes' section and a table of 'Order-Ref', 'Account', 'So_os_del', and 'Date-Req'.

A new panel option is available within the Stock Ledger Enquiry to display stock availability at all Warehouse locations. Up to 10 items can be displayed from the Stock database.



3. Increased List of Items in Panels



The screenshot shows the 'Ledger Enquiries' window for account BAL001. The interface includes a menu bar, a toolbar, and several panels. The main panel displays account details for Baldwin Industries PLC, including contact information, financial data, and a list of transactions.

Type	Date	Ref	Total	Allocated	Outstanding	Due-Date
1	24/12/2019	000048	798.96	0.00	798.96	23/01/2020
2	01/02/2019	100110	2500.00	2500.00	0.00	
1	28/02/2019	000046	120000.00	0.00	120000.00	30/03/2019
1	28/02/2016	000043	30000.00	0.00	30000.00	29/03/2016
1	28/02/2016	000042	60000.00	0.00	60000.00	29/03/2016
1	28/02/2016	000041	30000.00	0.00	30000.00	29/03/2016
1	28/02/2016	000040	60000.00	0.00	60000.00	29/03/2016
1	28/02/2016	000039	30000.00	2500.00	27500.00	29/03/2016
2	01/02/2016		100.00	100.00	0.00	
2	01/02/2016	000000	500.00	0.00	500.00	
1	28/02/2016	000034	690.00	0.00	690.00	29/03/2016

An earlier release allowed the main Ledger Enquiry screens to be enlarged to allow for more data to be displayed. Increasing the width of the Enquiry screen also increased the width of the panels below the Enquiry screen.

Previously up to 5 data items could be displayed for the left and right panels. The number of items that can be listed has now been increased to 10.



New Application - Digital Signatures in Order Processing Documents

QUOTE

Datafile Demonstration Limited
Windgate Lodge
Windgate
Tarleton
Lancashire
PR4 6JF
Tel: 01772 818614
V.A.T. Registration No
123-4567-89

Axpaact Limited
Kestral Road
Hemridge Lane
Mansfield
Notts
NG18 5TY

Account: AXP001 Date: 28/02/2019 Quote No: 000640

Code	Description	Quantity	Price	Value	Tax
MWBAT0002	Duracell AAA Batteries Pack of 10	1.00	0.01	0.01	S
MWBAT0002	Duracell AAA Batteries Pack of 10	2.00	0.01	0.02	S
MWBAT0001	Duracell AA Batteries Pack of 10	24.00	4.00	96.00	S

Digital Signature Details

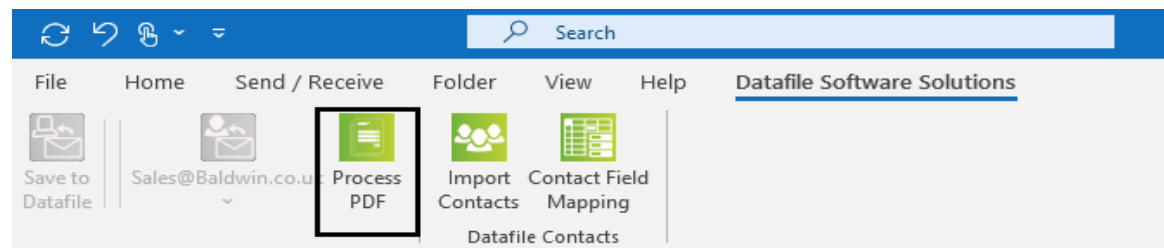
Customer Order No: [Redacted]
Dated: [Redacted]
Required By: [Redacted]
Signed: [Redacted]

Goods Total	96.03
V.A.T.	19.20
Total Quote Value	115.23

Traditionally clients send PDF Quotes or Order Documents by email. They then print them out, sign them, scan them back in and email back. When received back users then printed them out, filled them with the order documentation and updated the order manually with the customer's order number etc.

Within the Document Design for your Quote, Order Acknowledgement or Purchase Order Confirmation this new application allows you to add PDF Form Fields and link them to a data item. These form items can then be positioned on the document template. When you print the document to PDF / Email these form items are embedded within the PDF ready for the recipient to complete.

On receipt your customer or supplier opens that PDF and records the required detail on the PDF itself – i.e. they enter their order number, sign, and date the order in our example here. The updated PDF can then be saved and emailed back. The returned PDF can then be processed using our new plug in for Microsoft Outlook.



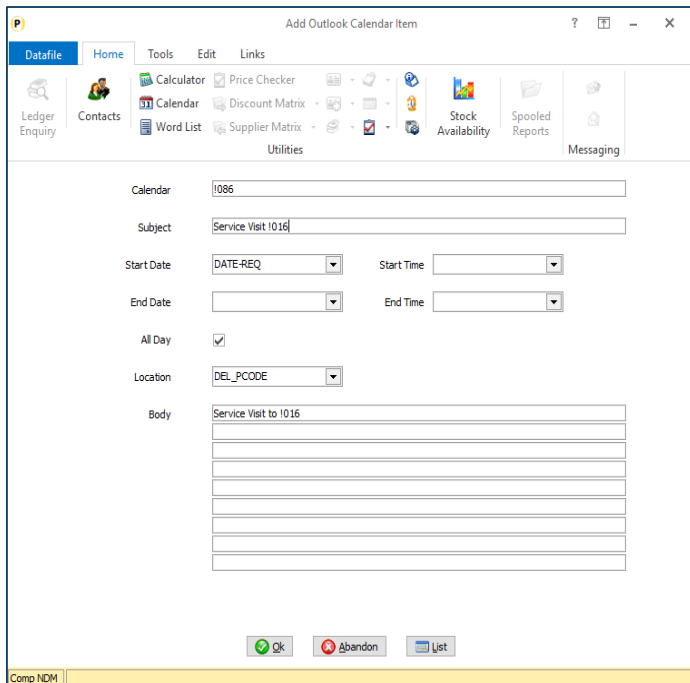
Clicking on the **Process PDF** button would save the PDF into the Associated Files folder for the order / quote and update the Sales or Purchase Order with the data items edited on the PDF.



New Application – Advanced Alerts

Setting Alerts in the system that trigger events such as sending Emails or updating Notes has been popular with clients. This new **Advanced Alerts** application provides for wider interaction with Office 365 and the Datafile CRM application.

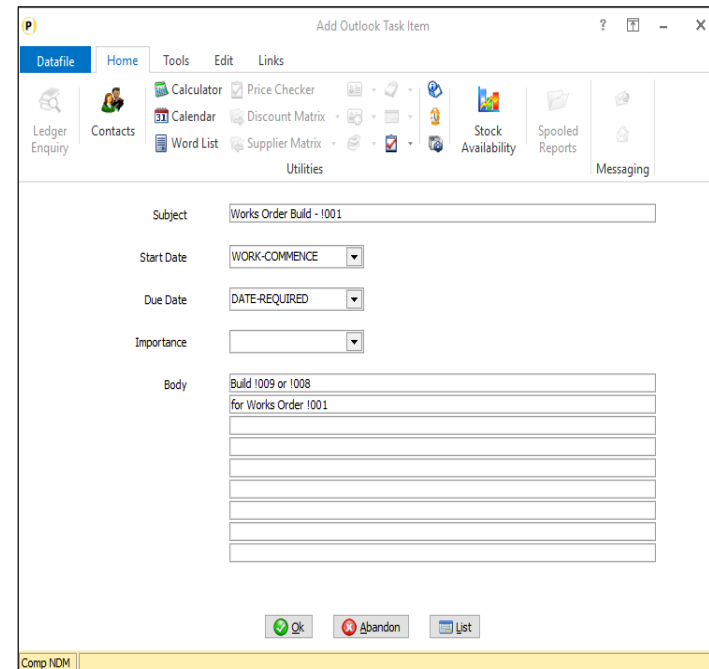
1. Automatically Create an Outlook Diary Entry



An alert can now create an Outlook Calendar Entry – ideal where a user does not have access to the Datafile system but requires notification of events.

In the screenshot example an alert has been set to create an Outlook Calendar Entry for a site visit by engineer when a Sales Order is entered.

2. Automatically Create an Outlook Task Entry



Microsoft Outlook allows you to create and maintain a “To Do” List enhanced with reminders and tracking. This new option allows you to use an Advanced Alert to create an Outlook Task.

In the screenshot example a Task would be created for the building of a Works Order.



3. Create A CRM Activity

Windows window: Add Activity Log Alert

Menu: Datafile | Home | Tools | Edit | Links

Tools: Calculator, Price Checker, Databases, Reports, Ledger Enquiry, Contacts, Calendar, Discount Matrix, Database Plus, Tables, Word List, Supplier Matrix, Forms, Multi-Task, Stock Availability, Spooled Reports, Messaging

DFD to write alert to:

Copy-Item	Activities Item	Use Field?	Field	Free Text
Copy-Item 1	2	<input checked="" type="checkbox"/>	1	
Copy-Item 2	8	<input type="checkbox"/>	0	Follow Up Account On Stop
Copy-Item 3	9	<input type="checkbox"/>	0	Account 1001 - 1002 Placed On Stop
Copy-Item 4	10	<input type="checkbox"/>	0	as Overdue by 1096 Days
Copy-Item 5	11	<input type="checkbox"/>	0	Chase for Payment
Copy-Item 6	0	<input checked="" type="checkbox"/>	0	
Copy-Item 7	0	<input checked="" type="checkbox"/>	0	
Copy-Item 8	0	<input checked="" type="checkbox"/>	0	
Copy-Item 9	0	<input checked="" type="checkbox"/>	0	
Copy-Item 10	0	<input checked="" type="checkbox"/>	0	
Copy-Item 11	0	<input checked="" type="checkbox"/>	0	
Copy-Item 12	0	<input checked="" type="checkbox"/>	0	
Copy-Item 13	0	<input checked="" type="checkbox"/>	0	
Copy-Item 14	0	<input checked="" type="checkbox"/>	0	
Copy-Item 15	0	<input checked="" type="checkbox"/>	0	
Copy-Item 16	0	<input checked="" type="checkbox"/>	0	
Copy-Item 17	0	<input checked="" type="checkbox"/>	0	
Copy-Item 18	0	<input checked="" type="checkbox"/>	0	
Copy-Item 19	0	<input checked="" type="checkbox"/>	0	
Copy-Item 20	0	<input checked="" type="checkbox"/>	0	

Buttons: Action, Ok, Abandon

Comp NDM

This new Advanced Alert allows you to add an entry into the Datafile CRM Activity database.

In the screenshot example an Alert has been configured to create a CRM Activity to follow up with the customer when their account has been placed on stop. Other example activities might include triggering a follow up for a quote, chasing a supplier for a purchase order delivery date etc.

Whilst primarily designed to add entries into the Activity database the Alert is user definable as to the database that records are to be added to so can be used to add new records into any Datafile Database



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Bring data to life and use it as a daily guide with meaningful dashboards that update you on your progress towards targets.



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Collaboration

Get on the same page as your team. Share facts and figures and move towards your goals together.



Reporting

From a rich visual summary, you can quickly jump into the underlying detail.

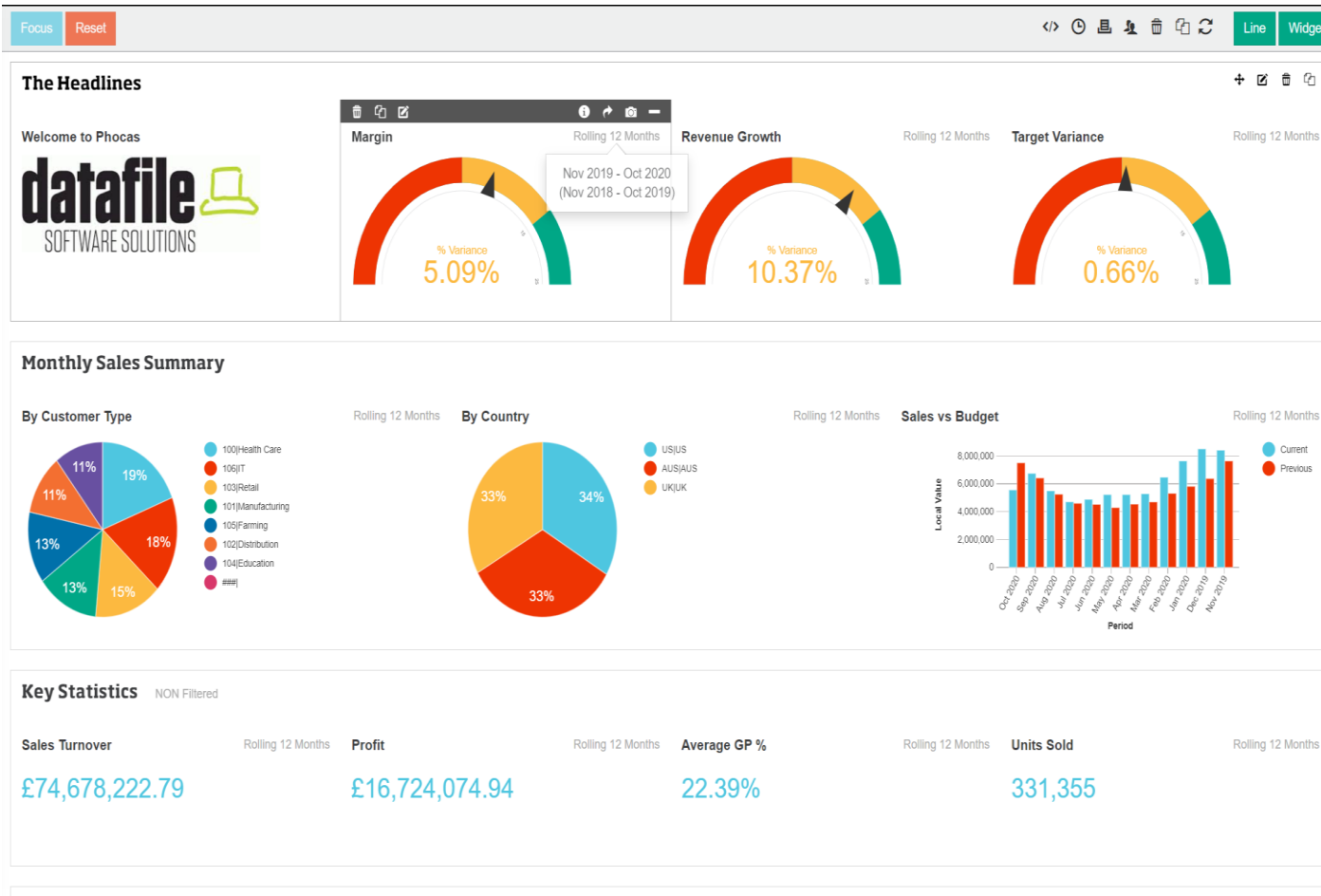


Technology

Phocas meets strict requirements around security, compliance, availability and performance.

Datafile Software Solutions have partnered with Phocas to provide integration to their range of award-winning Business Intelligence solutions.

Identifying sales opportunities. Growing margins. Optimising processes. It is possible to achieve these and more with one of the most valuable assets at your fingertips: data. Phocas delivers best-in-class analytics to Datafile users, helping them drill into key information and follow their train of thought to gain insights, empowering them to make better decisions for their business. Phocas offers an out-of-the box solution for Datafile and integrates seamlessly with all versions.



Live dashboards give the full picture at a glance. Customer scorecards enrich conversations and grow orders. Visually presenting performance improves individual and team responsiveness. It is easier to track, share and enhance what is happening across your business with visual information and vibrant reports.

If you are interested in learning more then we have a webinar running on Wed 18th November at 11am.

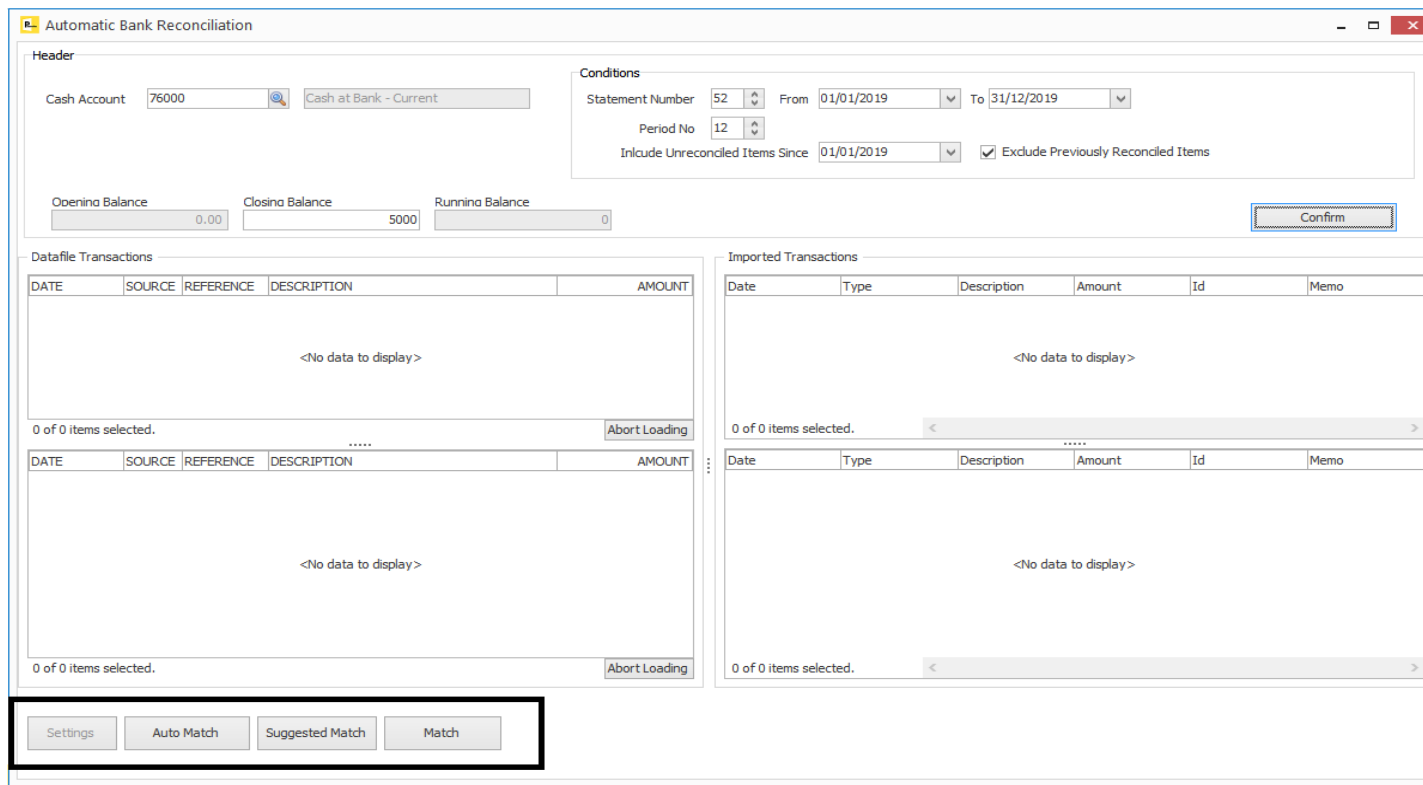
Please click on the link below:

[Register Here](#)



Roadmap for 2021

1. New Application – Automatic Bank Reconciliation



The screenshot shows the 'Automatic Bank Reconciliation' window. It includes a 'Header' section with 'Cash Account' (76000) and 'Cash at Bank - Current'. A 'Conditions' section allows setting 'Statement Number' (52), 'From' date (01/01/2019), 'To' date (31/12/2019), 'Period No' (12), and 'Include Unreconciled Items Since' (01/01/2019). There are also fields for 'Opening Balance' (0.00), 'Closing Balance' (5000), and 'Running Balance' (0). A 'Confirm' button is present. Below are two data tables: 'Datafile Transactions' and 'Imported Transactions', both currently empty with '<No data to display>' messages. At the bottom, there are buttons for 'Settings', 'Auto Match', 'Suggested Match', and 'Match'.

Work has already begun on creating a new time-saving Bank Reconciliation process allowing you to download from your bank your statement and then to match those transactions against entries in the Datafile Cashbook. The reconciliation process offers three-levels of matching:

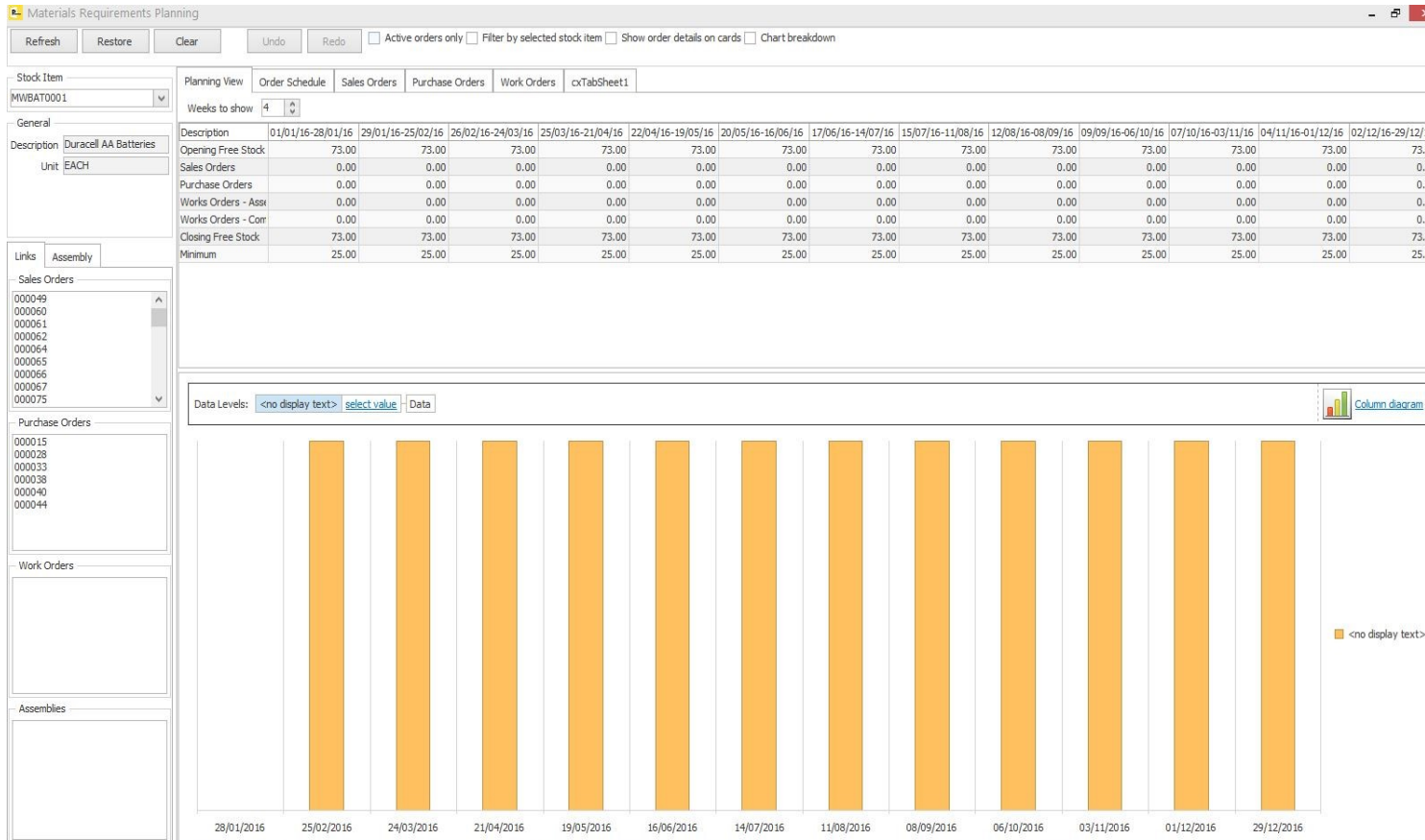
Auto Match – automatically matches entries between the bank statement and Cashbook postings where date, amount, and description match.

Suggested Match – suggest matches where amount and either date or description match between the bank statement and cashbook postings.

Manual Match – manually match entries from the bank statement and cashbook postings. This option will allow you to match on many-to-one basis where transactions to the bank may be more detailed than the cashbook posting (or vice versa).



2. New Application – Materials Requirement Planning



Planning Stock replenishment or production requirements is often achieved using a series of reports or Excel workbooks.

This new application will allow a time-based view on Stock forecasting using actual Sales Orders, Purchase Orders and Works Orders as well as optional Demand forecast values.

The view will allow “What If” style changes and “Firm Up” orders once planned.



Full List of Applications Available

Business Area	Module	Business Area	Module	Business Area	Module
Finance	Sales Ledger	Production	Works Order Processing	E-Business	XML Module
	Sales Invoice Surcharging		Works Order Batch Update		XML Sales Orders In
	Purchase Ledger		Works Order Time Logging		XML Sales Order ASN
	Payment Practices / Performance Reporting		Works Order Planning		XML Sales Invoices and Credits
			Amazon Web Order Import		
	Nominal Ledger	Service	CRM	Digital Forms	Formworks Integration Platform
	Cashbook		Contract Management / Repeat Billing		Sales Ledger Transaction Batch Update
	Currency		Contract Scheduling	Integrations	Purchase Ledger Tx Batch Update
	Intrastats / SSD		Customer Care Log		Stock Transaction Batch Update
	Fixed Asset Register	Helpdesk	Job Costing Transaction Batch Update		
Sales Invoicer	Stock Control and Order Processing	Stock Control	Carrier Integration	DPD	
Payroll		Payroll		Stock Forecasting	Tuffnells
		Human Resources		Sales Order Processing	FedEx
		Pension Management	Sales Order Batch Update	Other	Data Visualisations I
		NEST Integration	Sales Order Digital Signatures		Data Visualisations II
		Peoples Pension Integration	Sales Order Change Logging		Excel RTD
		Payroll +	Back 2 Back Order Processing		SQL Out Service
Costing		Project and Job Costing	Sales Order Call Off's		SQL In Service
		Advanced Budgeting	Sales Order Stock Assembly Link		Post Code Lookup
		Estimating	Inter Branch Transfers		Outlook Contact Synchronisation
		Project Tasks	Purchase Order Processing		Advanced Alerts
		Purchase Consignment Tracking	Automatic Purchase Ordering		Profiler
		Automatic Purchase Ordering	GRNI and Nominal Accrual Posting		Profiler +
		GRNI and Nominal Accrual Posting	Purchase Order Batch Update		
		Purchase Order Batch Update	Purchase Order Call Off's		
		Purchase Order Call Off's	Batch and Serial Number Tracking		
	Batch and Serial Number Tracking	Point of Sale			
	Point of Sale				