



## Welcome

Welcome to the Winter 2023 newsletter for users and partners of Datafile Software.

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

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## In This Issue

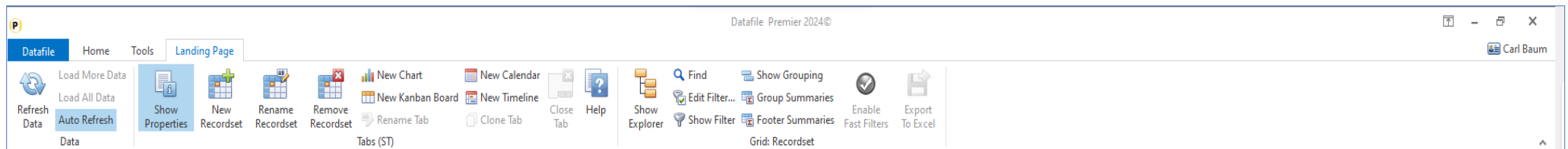
- Gold Software Update – Key Features
- New Integrated E-Commerce Platform
- Post Code Lookups
- Coming in 2024



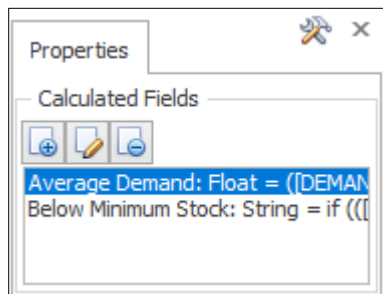
## Gold Software Update – Key Features

### 1. Calculated Fields on Landing Pages

The Datafile database structures allow calculated field options that can be included within a database – adding, subtracting, multiplying, and dividing data item values. This new feature allows you to create calculation items on the fly for inclusion in a landing page tab and filters but also greatly extends the functionality of the calculations available over the database structure options.



To view the calculated fields available for a tab, click on the landing page tab and choose the 'Show Properties' option. If using Data Visualisations with multiple tabs, then calculated fields are created for the tab you are on only (though they are copied if you 'clone' a tab). The Calculated Fields option has been added to the right-hand panel with the Saved Filters and Conditional Highlight options.



- Click the '+' icon to add a new calculated field.
- Highlight the item and click the 'pencil' icon to edit a calculated field.
- Highlight the item and click the '-' icon to remove a calculated field.



## Adding A Calculated Field

When adding a calculated field, you are prompted for four options.

- **Caption** – the Title of the calculated field to be displayed as the column heading on the Landing Page.
- **Expression** – the formula for the calculation. The format and syntax of these functions are broadly based upon those found in Microsoft Excel
- **Type** – Display type e.g. Text / Number / Date etc.
- **Decimals** – on a number the number of decimal places to display the calculation at.

The **Expression Editor** is split into four panels.

The top panel shows the formula entered.

The bottom left panel shows the option types.

The middle panel shows values / fields from the Datafile database available.

The right panel shows help text for the selection.

Calculation options are like those within Microsoft Excel. You can build the formula required by entering required text in the editor, dropping in field names by selecting the 'Fields' option type and double-clicking the field name from the available options within the middle panel. Standard mathematical formulae options apply '+', '-', '\*', and '/'.

This example shows how to create an Average Demand calculation for a Stock Item by adding the individual monthly values up and dividing by 12.



## 2. Replicate an Order – Selective Details

Stock	Description	Qty	Selected
CH0167	Dining chair-teak/dralon	4.00	Y
DI0167	Dining Chair - teak/dralon	1.00	Y
CH0168	Carver-teak/dralon	2.00	Y
CH0173	Oval dining table-teak	1.00	Y

When you replicate a sales or purchase order you are prompted to confirm if you want to replicate the order lines but not which lines to replicate. This new feature allows this option.

If enabled, then after replicating the order header the system will create a pick list for the order details. Subject to any criteria the system will presume all lines are to be replicated and you can either double-click a line or highlight line and click the SELECT button to toggle off/on whether you wish to replicate it.

Once ready click the GENERATE button to replicate the selected lines.



### 3. Replicate an Order Line within an Order

Maintain Orders

Order 000009 Entries 4 / 830.94 BAL001/Baldwin Industries plc

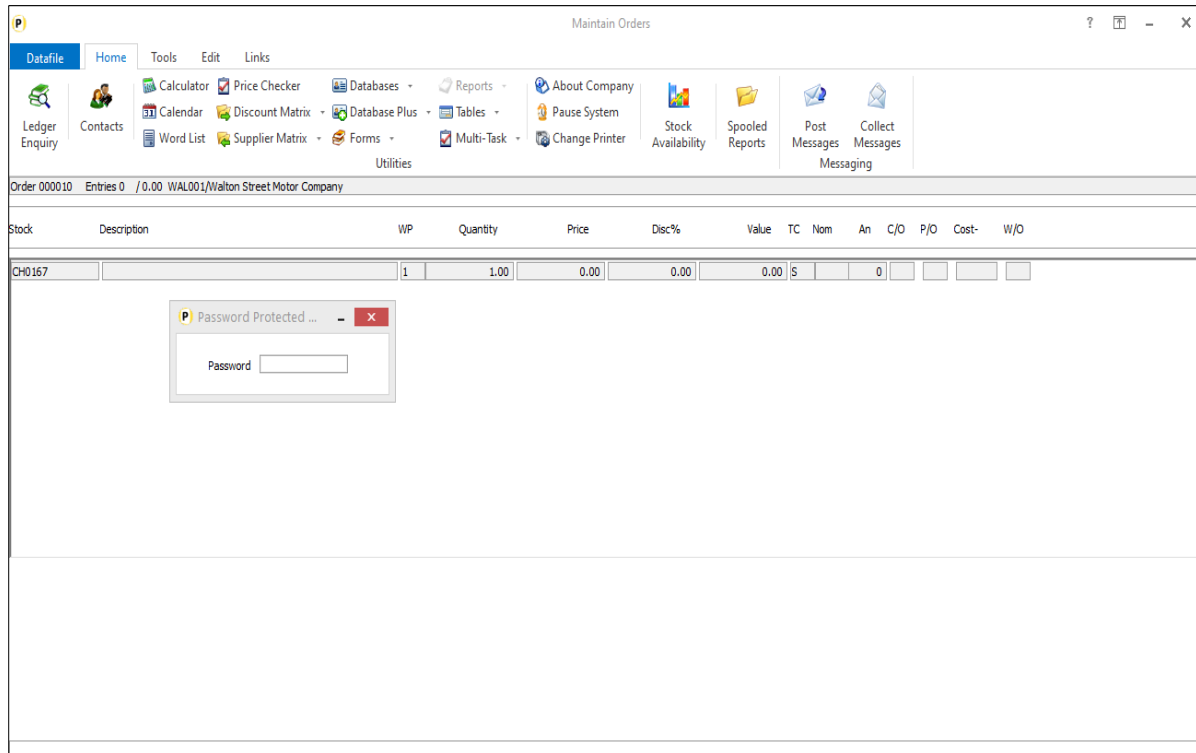
Stock	Description	WP	Quantity	Price	Disc%	Value	TC	Nom	An	C/O	P/O	Date-Require	Cost-	W/O
CH0167	Dining chair-teak/dralon	1	4.00	87.99	0.00	351.96	S	001	1	N	N	31/01/2022		N
D10167	Dining Chair - teak/dralon	1	1.00	87.99	0.00	87.99	S	001	1	N	N	31/01/2022		N
CH0168	Carver-teak/dralon	1	2.00	90.00	0.00	180.00	S	001	2			31/01/2022		
CH0173	Oval dining table-teak	1	1.00	210.99	0.00	210.99	S	001	2			31/01/2022		

F4-Full-Mode | F5-Insert | F6-Delete | F7-View | F9-Memo | F11-Replicate | Comp DEM | F5/Ins to Insert or F6/Del to Delete

When using the 'Detail Pick List' configuration for order entry you can scroll up/down the list of order lines and use the <F5> or <Ins> key to insert new line, <F6> or <Del> key to delete a line or press <Enter> to amend the order line. This new feature allows you to press the <F11> key to choose the line to be replicated and then move the highlighted entry to where you wish to copy the line to and press <F11> again to copy.



## 4. Password Restrict Items from Sale



There can be situations where a product is restricted from general sale – perhaps an item that requires safety certification of the customer or need to verify storage requirements. This new feature allows you to flag a product item as password restricted and require entry of the password on selection in order entry.

As you select the item the system will prompt for the password and only accept the stock code on entry.

A Change is required to the Stock database to mark a Y/N flag to prompt for a password and that is then validated against the password stored in the System Manager.



## 5. Create QR Code Images



This is a new tool that allows you to create a QR Code Image based on a data item within a database and to record the image filename within a data item on the same database so that it can be included within Sales and Purchase Order Processing Documents and or Profiler User Defined Report Labels.

```

DFQR.ini
File Edit View
[Application]
AutoClose=0
[Datafile]
DatafileIniPath=
[DFD]
DFDFullPath=
Data=
BarCodeItemNumber=0
SelectionCriteria1=
SelectionCriteria2=
SelectionCriteria3=
SelectionCriteria4=
SelectionCriteria5=
SelectionCriteria6=
PathPrefix=
[BarCode]
FileOutputFullPath=
Rotation=0
ImageExtension=jpg
Symbology=0
    
```

Whilst this is a tool that can be called from within Datafile to create the QR code images, the configuration process uses an INI file for the setup. The INI file can be edited with any text editor (e.g. Notepad).

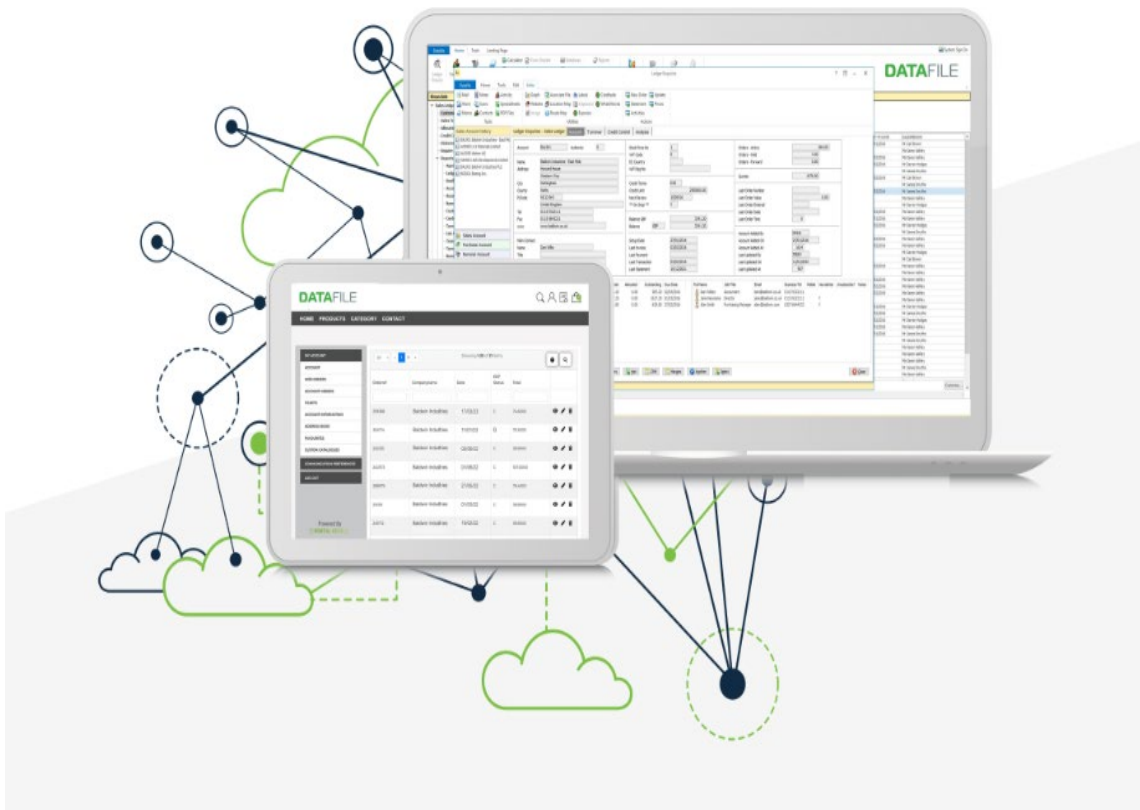
As part of the installation process a DFQR folder will be created within the main Datafile folder

You can have multiple QR code generation options. Clicking the DFQR.EXE will create a blank DFQR.INI – which you can rename as required for each unique configuration before editing via Notepad.





## Integrated E-Commerce Platform



## Datafile Cloud Portal & E-Business

Effortlessly manage online orders and accounts for both retail and sales ledger customers with full support for customer-specific pricing through the Datafile price bands and price matrix. Stock levels linked to online products and efficient account management, including features like copy invoices, statements, and online payments. Seamlessly integrated with your Datafile Business Software.

## Datafile Features Supported

- Datafile Sales Ledger Account Information
- Datafile Price Bands
- Datafile Discount Matrix and Customer Special Pricing
- Copy Invoices
- Statement Printing
- Payment Of Invoices Online
- Stock Enquiries
- Group Account Support With Order Approvals
- Sales Order History For Web and Orders Placed In Datafile
- Datafile SQL Replicator
- Datafile CSV Import and Export

\*Other Datafile Modules On Request





## Key Benefits

### Improved Customer Experience and Engagement

Provide your customers with an online self-service account, with real-time product availability, customer specific pricing via the Datafile price bands and price matrix, order creation and tracking, account enquiry and invoice payment to enhance their experience with your company.

### Real-time Data Synchronization:

A robust integration solution that synchronizes data between Datafile Software and the E-Business Portal in real-time.

### Streamlined Order Processing

Automate sales order creation, payment processing, and inventory updates to reduce manual intervention and order processing times.

### Enhanced Stock Management

Stock synchronization to maintain accurate stock levels, reducing the risk of overstocking or understocking.

### Data Accuracy

Data across both systems remains consistent and up to date, reducing errors and discrepancies.

### Cost Reduction

Decreases operational costs by minimizing manual data entry, order errors, and order fulfilment inefficiencies



## Post Code Lookup

This application integrates with the web based Simply Post Code\*\* platform allows validation on UK Post Codes for Customer / Supplier / Delivery addresses. On entering a Post Code and pressing the F11 addresses are automatically populated into the Datafile address fields. This action can be done for Existing Accounts as well as New.

**\*\* Requires additional Subscription**



## Coming in 2024

### New Selection Criteria Grids

The Selection Criteria pop up found when running reports will be updated to include the same Date options found in Landing Pages. i.e.

- Today / Yesterday / Tomorrow
- This Week / Next Week / Next 2 Weeks / Next 7 Days / Next 14 Days
- This Month / Last Month / Next Month / Next 30 Days / Last 30 Days
- Is Past
- Is this Year / Was Last Year

### Transaction Web Links

Ledger Enquiries currently allow a link to a Website URL which is stored against an Account / Order / Stock Item / Job / Employee. This new option will allow links to web URL's to be stored against Transaction records.

### Order Processing New History Panel

When entering Order Lines, a new pop-up panel will be available. The content is definable and can be set to display records from a related database e.g. Price History.

### F4 Multi-Selection

Currently when using the F4 select function, the search is only available on a single field. This new feature allows values to be entered into multiple search fields.



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