Newsletter

July 2009 - Issue 16

APWARE Systems

CMS - Contact Management System
Version 1.1.284 - 1.1.290 Updates...

Account Details - Post Code Area Search
A new button has been added to provide an instant search for other accounts within the same post code area as that of the current account.
Useful to see before visiting the account, in order to call in on another in the local area.

Account Details - Auto Code Creation
The system will now automatically assign (if required) an account code based on the account name, when creating a new account.

Find Results Window - Print Option
You may now print the content of the find results window, by right clicking the list and selecting the print option.

Did you know...
The Account Details overlay can load 10,000 records in less than 1 second - now thats' fast!

Account / Resp ID Find
A new find button has been added along side the account and responsibility id drop down lists so that you may now perform a text search for the required item. This is useful on systems containing many entries in the list.

Account Document Creation - NEW
A new overlay has been added within Supervisor Functions, Software, to allow creation of charge documents within your linked accounts package.

Denotes modifications added to the system based on specific user requests.

Such modifications that are deemed useful as an enhancement to the product are implemented **free of charge**.

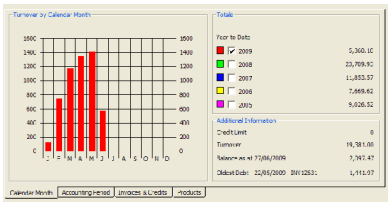
Development Requests
Account Reference Amendment
Integration with Microsoft Outlook
Internal Email Courtesy Copy Groups
Email Collection with Account Distribution
Pegasus Opera II Sales Order Creation
Pegasus Opera II New Customer Creation
Call Log Transfer between Accounts
APWARE Accounts Package

Focus on... Account Analysis

CMS can provide analysis information per account record by linking directly to your external accounts package.

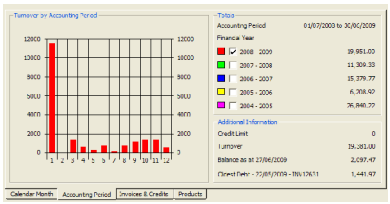
Once configured, an 'Analysis' tab appears within Account Details in order to show the following details:

Turnover by Calendar Month



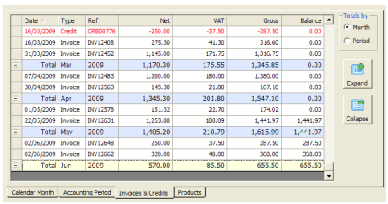
Turnover shown by calendar month for the past 5 years.

Turnover by Financial Period



Turnover shown by financial period for the past 5 years.

Invoices & Credits

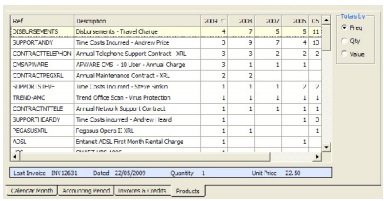


List of Invoices and Credits with outstanding balance figures.

Group by calendar month, or financial period.

Ability to view line details and PDF copy of the original Invoice / Credit.

Products



List of Products sold in the past 5 years.

Analyse by Frequency, Quantity or Value.

Option to list all invoices and Credits for a particular product.

Ability to view line details and PDF copy of the original Invoice / Credit.

**This newsletter contains only a brief selection of the enhancements made to the system.
For a full detailed list, please refer to the version specific documentation supplied at time of each release.**

Windows Vista, Windows 2003, XP, ME, 2000, 98 Compatible

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www.apwaresystems.co.uk

Contact Details

Sales: sales@apwaresystems.co.uk
Support: support@apwaresystems.co.uk
Development: development@apwaresystems.co.uk

Should you be interested in any of the enhancements listed, or have an idea of your own that you would like to see introduced into the product, please Email: development@apwaresystems.co.uk

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