ACCRIVIA V11 MAJOR FEATURES

General Overview

- New style guide to give system a Windows 7 / 8 native "look and feel".
- Progressive, ongoing redevelopment of the Help System.

Try clicking F1 in any screen, if it answers your question you're away, and if not, let us know

- Report Hints at the footer of the report selection page to indicate the information shown and purpose of the report, with search functionality.
- Training videos which can be run through the Accrivia Help menu, or via a stand-alone Help Application (which is the preferred method for operators in a Terminal Server environment).
- Data Extract interface (replaces "Viewer")
- Enhanced Excel based Extract tools (replaces old KPI output engine)

Debtors

- A new Debtor module feature allows you to define the Default payment type (eg EFT rather than CHQ).
- Debtor "Days to Pay" routines have been tightened up and include a "recalculate" button. We can also reset all debtor accounts to accurately reflect the last 12 payments with an initialisation feature.
- New functionality allows all Debtor "Set Sell" (including project pricing) to be exported to excel, manipulated, and reloaded. Data output also allows all margins for set sells to be analysed.

New CRM Module (Customer Relationship Management)*

- Issue emails for Overdue accounts
- Targeted advertising campaigns and Quote Management
- Follow up emails using the new CRM interface which supports template layout with full HTML support.
- Debtor and Creditor Accounts now support unlimited "Contacts", which interact with CRM emailing functionality.

Creditors

- A new Creditor module feature allows you to define the Default payment type (eg EFT rather than CHQ).
- Credit Request functionality for short supply or damaged stock received as part of the Purchase Order process.

General Ledger & Cashbook

- Cashbook Search form (as per General Ledger search form)
- Extended Excel-Based General Ledger "Profit & Loss" or "Balance Sheet" report output

Job System

- Job System – Dashboard for Estimators, Project Managers & Supervisors
- Rearrangement of Job Setup form to capture tender document information, and offer quote tracking for analysis of won/loss ratios for Contract Jobs.
- New tabs allow for better analysis of cost and revenue postings, as well as enhanced support for default "folder tree structure" against Jobs for cleaner storage of associated documentation.
- Quotes can be allocated against a contact, and if the project is won, the contact is converted to a Debtor so the Job can proceed

Payroll

- Web Timesheets are now available - see Web Based / Mobile Support below
- Revamped screens and menus with clearer grouping of like fields
- Greater control over timesheet data imports
- Award consolidation:

  - new level codes to manage rates
  - reduces overall number of awards required

- Associated Files support in payroll giving the option to:

  - store scanned images of license, employment agreement, etc
  - ability to restrict access to Files

Web Based / Mobile Device Support Module*

Web based Mobile Device support for functions such as:

- Creditor Invoice Authorisation
- Timesheet on/off times for Payroll processing
- Ability to issue Purchase Orders to suppliers from Mobile Device
- "Job Forms" to issue works to employees and capture signature of client upon finalisation
- KPI reporting that is user defined and customisable.

The local server export/import service also has capabilities of emailing standard Accrivia reports to selected users at predetermined times

* The CRM and Web/Mobile device modules are brand new modules available for purchase with V11 of Accrivia. To enable you to fully assess the functionality of the CRM Module, it is included in the V11 upgrade (for all clients using the Debtors module) with limitations on the volume of emails that can be generated. To fully activiate this module please contact the Support Desk for pricing.