Version 3.54

Enhancements and Resolutions

Calidore Computer Systems Ltd.
August 2023

Contents

Table of Contents

Purpose of this document

This document lists all the enhancements and resolutions to known issues that have been added to the Power Gx software suite during the period covered by each version. If you require any information on any new features or further clarification of any resolutions please email support@calidore.com. For further details on the enhancements please see the online help that can be accessed by clicking on the Help menu option at the top of the window in Power-Gx.

Version 3.54

This version was dated August 2023.

Enhancements

CRM

1. Contact Details – New Opportunities tab. This tab displays any past opportunities that have been input. Selecting an opportunity will allow you to edit the date, value, comment, and status.
2. Global Email-shot – New option to simplify the export of email-shot data.
3. Purchasing History - Where a product has been superseded or is the supersede, display the history of both products.
4. Opportunities Report. Added Status to the report filters.
5. Triggered Emails – Used in conjunction with ICM's Marketing Platform integration. This allows the user to configure the automatic sending of emails from ICM when certain events occur, such as a lapsed customer. Contact support for more information.

EPOS

1. Retail Entry – At the checkout for an account customer there is a new button to allow the user to set up a new delivery address.

Sales

1. Addresses – New web disabled checkbox. Use this if you do not wish the address to be sent to your Web store.
2. Contacts – New web disabled checkbox. Use this if you do not wish the contacts information to be sent to your Web store.
3. Debtors Report – Added due date to the transaction report.

Purchase

1. Automated Payments – Added a Pay by date range button which allows the user to pay for all transactions within a date range.
2. Import Third Party Invoices and Credit Notes – This new option allows the user to import invoices and credit notes from suppliers or other systems. See the help for further details.

Nominal

1. Bank Reconciliation
    - Added a Source column (SL for Sales Ledger, PL for Purchase Ledger) to help the user find the origin of the transaction.
    - A new Find button has been added.
    - A Reconcile by Date facility has been added to enable the user to mark all transactions within a date range as reconciled.
2. VAT Return – When using the Pay VAT button, the nominal code list now has 2 columns for code and description.

Stock

1. Fusion Catalogues – Added new tabs for the Integra, Office Team and Nemo catalogues. These tabs allow the user to match suppliers from these catalogues with suppliers on Power-Gx before importing the catalogue into the system.
2. Product Details
    - Added Weight per Unit to the General Tab.
    - Suppliers Tab
        - Check Last Cost Price (right-click menu option). Added the date and time the system last checked for new prices.
        - If a stock level has been retrieved via a stock enquiry or the automated stock feed, display it in the "In Stock" column.
3. Product File Import – New options to delete supplier prices and remove a catalogue before loading a new file.

SOP

1. Collection Note – Warn the user when they include a non-returnable product on the collection note.
2. Delivery Notes Enquiry – New Force on to POD checkbox will push the delivery note on to the POD app regardless of delivery status, date etc.
3. Invoice Enquiry – Added the ability to change the delivery address via a drop-down list and a search button.
4. Order Daybook Report – Added delivery address name, address line 1 and line 2 to the export.
5. Order Enquiry – new facility to view the multi-date delivery schedule that may have been defined in Order Entry.
6. Order Entry
    - Delivery Schedule – new facility to define a multi-date delivery schedule, please note this is for information only and is not used in the selection of orders for picking lists and delivery notes.
    - Purchase History - Where a product has been superseded or is the supersede, display the history of both products.
7. Print Invoices – new option to select by Customer Reference, also a new "Toggle Display" button has been added, pressing this button will toggle the display to show the customer reference and the gross order value.
8. Quotation Entry – Print PDF form regardless of whether the user wants images or not. Please contact support if you wish to use this.
9. Supplier Analysis Reports – Added Weight per Unit to the export.

System

1. EDI Ordering – added TC, North West Teas, Inkjet and Trimfold.
2. POD app – Updated to enable compatibility with latest Android devices.
3. Stock Feed – added AM Dunne's, North West Teas, Inkjet and Trimfold's stock feed.
4. Web Store Integration – for those customers that are using Calidore's full integration with their web store this new feature can be used to see the history of messages that have been sent by the integration software. Additionally, there is an option to start and stop the software. The display will show the time the software last ran and when it is next due to run.
5. Marketing Platform Integration – same features as the option above. This is available only if the integration with ICM's Marketing Platform has been installed.
6. Accounts Integration – same features as the option above. This is available only if the integration with Xero or Sage has been installed.

Resolutions

Purchase

1. EDI Invoicing Resolve – the user can resize the columns.

Stock

1. Product Details – removed maximum length of product code restriction.

SOP

1. Collection Notes
    - Allow more order history in the drop down.
    - Resolved an issue where the user could tick undo delivery and update the stock. Only one of these is allowed.
2. Price Check – if linking to this screen from another screen such as Order Entry do not clear the account code when the user presses cancel.
3. Quotation Entry – Resolved an issue if using the low value order charge and converting a quote into an order.

Version 3.49

This version was dated September 2022.

Enhancements

CRM

1. Call Analysis – added extra fields to the export.
2. Prospect Details. Added country drop down list if using Xero or Sage integration.
3. Letters to send/Mailmerge. Added Source and Contact Categories to the exported data.

EPOS

1. Layaway Report – Added last recalled details.
2. Retail Entry – if a layaway is recalled more than once inform the operator and ask them to continue or cancel.

Purchase

1. Nominal Analysis Report – added currency to the export.
2. Supplier Details
    a. New lead time field.
    b. Added country drop down list if using Xero or Sage integration.
3. Supplier Addresses.
    a. Added country drop down list if using Xero or Sage integration.
    b. Added new address button to automatically assign the next address reference number.
4. Supplier Contacts. Added a new contact button to automatically assign the next contact code.
5. Transaction Entry – Added 2 new transaction types that are classified differently for VAT purposes (see VAT Return). These are Invoice Service and Credit Note Service.

Nominal

1. Period End – a new prompt to remind the user to run their Management Accounts before completing the period end.
2. VAT Return
    a. Added separate total for Intra-EU VAT. In the transactions list individual Intra-EU acquisitions are highlighted in a different colour.
    b. Added separate total for Imported Services. In the transactions list individual Intra-EU acquisitions are highlighted in a different colour.
    c. Transactions that are using Postponed VAT Accounting are highlighted in a different colour.

3. Management Accounts – Added a period number selection so that the user isn't restricted to creating management accounts for the current period.

Sales

1. Customer Contacts – changed the delivery address drop down list to show the first line of address rather than the address reference code.
2. Customer Details – new option to email invoices to the order contact only.
3. Nominal Analysis Report – added currency to the export.

Stock

1. EPOS Price List – added pack size and preferred suppliers cost price to the export.
2. Product Details – new cost price audit display which lists the changes to a suppliers cost price over time. This is available on the Suppliers tab via the context menu (right click menu).
3. Product Label Print – the import facility can use the bar code as well as the product code.
4. Shopping. EDI order confirmations - For a direct delivery if no carriage is confirmed back but the user has specified that this supplier should charge for delivery then add the default cost for the charge code to the order.

SOP

1. Back Order Report – New customer selection button and the option to create a report for each customer separately.
2. Customer Contracts - Enhanced the contract import to include discount value and percentage.
3. Delivery Method Setup – New delivery service code grid to enable you to specify a service code per supplier for each delivery method. For example, specify XX for a next day pre 10am, XY for a next day pre 12pm.
4. Delivery Notes.
    a. Added an Exclude Zero Deliveries tick box. This excludes any deliveries in the list that have a 0% fulfilment.
    b. New Edit Delivery Date and Source option on the context menu (right click menu) allows the user to amend these values on an order.
5. Invoice Enquiry – Added a drop down box on the invoice address to allow the user to amend it.
6. Order Entry – Product search now allows multiple selections from the search results to be returned to the order.
7. Order Enquiry – In the web order number column if no web order number exists show the operator.
8. Picking List
    a. Added the product bar code to the print. See support if you wish to have this included on your print.
    b. After completing the print, the window will be refreshed rather than closed. See support if you wish to have this feature switched on.
9. Print Invoices
    a. Enhancements for Reverse Charge VAT. This is only available to UK customers using the CIS scheme.

b. Added a new column for POD (Proof of Delivery) to indicate whether the delivery has been confirmed by the customer or not.

System

1. EDI – integration with GO2 distribution (previously known as DMC) for orders and invoices.
2. Groups and Users – added an “Access To Administration Menu” tick box to the user form.
3. Terms (Cost Price) Import
    a. Added JGBM and AM Dunne to the automatic terms file import.
    b. Added DAMS terms and stock feed.
    c. Amendments to keep a cost price audit of changes to the cost prices over time. This can be viewed in Product Details on the stock menu.
4. **Xero Integration** – integration with Xero accounting software, see https://www.calidore.co.uk/integrations for further details.
5. **Sage Integration** – integration with Sale accounting software, in development.
6. New Accounting Integration menu if using one of the 3rd party accounting packages above. This will allow a user to monitor the status of the integration and start or stop it running.

Resolutions

CRM

1. Contact Details – resolved an issue where the appointment date was not being shown consistently with a 2 digit year.
2. Prospect Details – resolved an issue with the date created.

Purchase

1. Supplier Details
    a. Resolved an issue with the variance percentage on the Turnover tab.
    b. Fixed a problem when changing a contact's address and an address's contact.
2. Transaction Entry.
    a. Resolved an issue with the currency abbreviation in the column headers.
    b. Resolved an issue where under certain circumstances a nominal imbalance was caused with a foreign currency transaction.

Sales

1. Customer Details – resolved an issue with the variance percentage on the Turnover tab.
2. Transaction Entry – resolved an issue with the currency abbreviation in the column headers.

SOP

1. Customer Contracts – resolved an issue with Cost Plus pricing.
2. Order Acknowledgements – resolved an issue with the VAT summary at the foot of the print for vat code 0.

Stock

1. Purchase Order Details.
    a. Resolved an issue with the delivery type for non-EDI direct deliveries.
    b. Resolved an issue with non-stock lines on the print for a consolidated purchase order.
2. Shopping
    a. EDI orders with UFP – resolved an issue with illegal blank address lines.

System

1. Resolved an issue with JGBM terms update.
2. Windows 11, fixed a display issue caused by this new operating system.

Version 3.41

This version was dated July 2021.

Enhancements

CRM

1. Contact Search. This search has been enhanced to look at the contact's position as well as their name. The position is shown in the search results.

EPOS

1. Retail Entry. New tick box on the deposit sales window to indicate that the deposit sale is for a member of staff.
2. Price Exception Report. New report that lists transactions where the scanned price differs to the price the customers pays when they checked out, because they have received a discount or the price has been overwritten by the operator.
3. Staff Purchases Report. New report that lists all the transactions that have been put through the Staff Purchase sales ledger account.

Nominal

1. VAT Return
    a. New option to use Postponed Import VAT Accounting. This can be switched on in the Nominal Ledger options.
    b. Added PIVA amounts to the VAT Return report.

Purchase

1. EDI – Addition of new Office Team labels and logos (UK only).
2. Supplier Remittances. When sending remittances via email default the recipients to those contacts that have been identified as "Email Remittance".

Stock

1. Product Label Print. Allowed multi-line paste of product codes into the grid and added a new import function to enable the user to import a large list of product codes.
2. Product Groups. New menu item to simplify the maintenance of Product Groups from Level 1 down to Level 3.
3. Shopping.
    a. Amended labels and images for Spicers UK to OfficeTeam.
    b. Added new EDI links for Go2 Distribution.

SOP

1. Catalogue Pricing. The implementation of catalogue start and end dates throughout the system. If a catalogue has been assigned start and end dates then the prices contained in the catalogue will not be applied outside of these dates. Please note that this feature must be switched on by support so please contact us if you wish to use it.
2. Low Order Value Charge. This new option allows you to automatically add an additional charge to a sales order if the value is below a set threshold. The setup for this is in SOP – Options – Setup Options – Low Order Value Options.

Resolutions

CRM

1. Prospect Details. Resolved an issue when converting a prospect into a customer a list of default catalogues was not being set.

Version 2.45 to 3.38

Version 3.38 was dated March 2021

Version 3.28 was dated August 2019

Version 3.20 was dated August 2018

Version 3.17 was dated May 2018

Version 3.03 was dated November 2016.

Version 2.85 was dated November 2015.

Version 2.73.2 was dated December 2014.

Version 2.51.2 was dated November 2013.

Version 2.48.12 was dated December 2011.

Version 2.48.1 was dated August 2011.

Version 2.47 was dated April 2011.

Version 2.46.9 was dated February 2011.

Version 2.46.5 was dated November 2010.

Information regarding these versions can be supplied on request.