What's New in Version 3.03

Version 3.03 was released on 22 March 2011.

It is available for download from www.estimac.com or www.estipc.com.

Install over your previous version. All your projects, data and settings will be preserved. For full installation instructions, please see How To Install EstiPC or How To Install EstiMac.

So what's new...

Purchasing from Reports



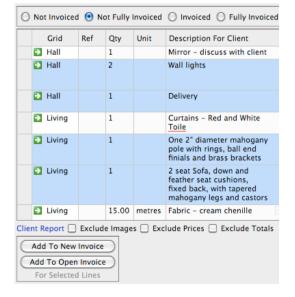
Lines can now be purchased from the Purchasing and Codes Reports. Multiple lines can be purchased by first selecting multiple report lines.

Setting the 'Not Purchased' option on the Purchasing Report presents a list of all lines not yet purchased for one or all suppliers. You can then purchase some or all them from a single report page without having to move around different grids.

Just like purchasing from the grids, you can add lines to new orders or existing open orders. You can also purchase without order.

Using the Codes Report allows you to purchase some or all of the lines for a particular product category code or status code.

Itemised Invoicing from Reports



Lines can now be invoiced from the Invoicing and Codes Reports. Multiple lines can be invoiced by first selecting multiple report lines.

Setting the 'Not Fully Invoiced' option on the Invoicing Report presents a list of all lines not yet fully invoiced to your client. You can then invoice some or all them from a single report page without having to move around different grids.

Using the Codes Report allows you to invoice some or all of the lines for a particular product category code or status code.

Add To New Invoice, either from the reports or the grids, now includes a check for previously used invoice numbers.

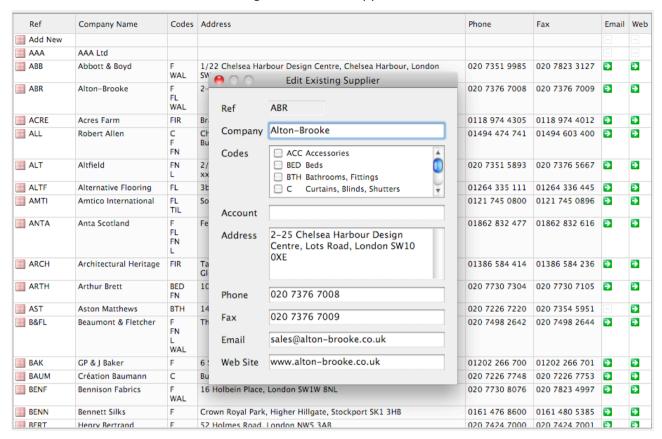
Itemised Invoicing of Fees, Extras and Delivery Charges

Grid Fees, Project Fees, Extras and Delivery Charges are now included at the bottom of the Invoicing Report. From the report they can be added to Itemised Client Invoices. They can be fully or partially invoiced, just like grid lines.

You can raise new invoices for fees, extras and deliveries if you want to keep them separate, or you can include them on invoices with grid lines.

Supplier Codes

One or more Codes can now be assigned to each Supplier.



The Supplier Data included in the EstiMac / EstiPC download has the codes preset. You can assign codes to your own additional suppliers.

As well as product category codes, you can set up and use specific codes for suppliers, such as 'Preferred Supplier' or 'Account Supplier'.

Faster Supplier Selection

Suppliers can be pre-selected by double-clicking on an empty Purchase column for a grid line. Suppliers are also selected when orders are raised, either from the grids or the reports. Both these selections are now significantly faster.



The Select Supplier popup now features a Codes List. When a code is selected, only the suppliers assigned to that code are shown. You can quickly see, for example, just fabric suppliers or just furniture suppliers.

If you set one or more codes for a grid line before pre-selecting a supplier or raising a purchase order, then the Select Supplier popup initially shows just the suppliers for those codes. You can cancel this selection, if required, to see all the suppliers.

There's also a Search box that quickly reduces the listed suppliers to match what you type. If you type 'b', for example, you'll just see the suppliers whose references start with b. If you type 'be' the list of suppliers is further refined.

You can use the Company option to search for any part of the company name rather than the start of the reference.

Improved Client Statements



Mrs Hilary Tait Mole Hall Winchester

Mole Hall

Statement							
Date	Invoice		Amount	VAT	Total		
06/01/2011 28/01/2011	1020 1035	Deposit Invoice 50% of Hall, Living Room and Kitchen	£5,000.00 £1,864.90	20% 20%	£6,000.00 £2,237.88		
	Invoice Totals £6,864.90 £1,372.98						
	Balanc	e To Be Invoiced	£14,507.38				
	Project Total		£21,372.28				
Date	Payme	nt			Total		
10/01/2011	Deposit Payment						
	Total Received						
	Balanc		£2,237.88				

Client Statements now include a figure for 'Balance To Be Invoiced' and 'Project Total'.

As before, the client is shown what's been invoiced versus what they've paid.

Now they're also shown what's not yet been invoiced.

Charge Status included in Grid Purchase Column

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		Qty Unit		Description For Client		Purchase			Unit Cost
	4			Living Room					
Γ	æ	1		Curtains – Red and White <u>Toile</u>					
	4	1		To cut and make one pair curtains, lined and interlined		I.			550.00
T		14.00	metres	Fabric - Red and White Toile		3	330 FRE		33.00
T		14.00	metres	Interlining		I			4.00
L	4	14.00	metres	Lining					4.00
		1		One 2" diameter mahogany pole with rings, ball end finials and brass brackets		-	331 MCK	2	400.00

The Purchase column now shows the Charge Status to the right of the Order Number and Supplier Reference.

This lets you quickly see whether any charges have been recorded for a purchase and whether the the purchase has been Closed.

Other Changes

- The full Charge Reference is now shown on the Purchase and Charges Report pages.
- Office Worksheets and Reports now show currency symbols and decimal separators.
- Grid References are now included on Supplier Enquiries.
- Various minor modifications and bug fixes. For details see www.estimac.com/versions.shtml or www.estipc.com/versions.shtml