



CIM50

v2018 SP3 New Features Guide

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The purpose of this guide is to document all new features in Cim50 v2018 SP3, detailing how they work, how to setup and configure them (where necessary), and what impact the new features have on the system.

Please read below for a full list of new features...

Speed Improvements

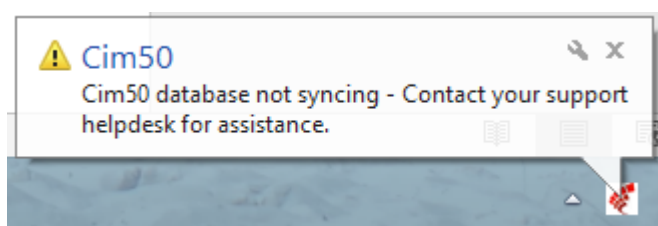
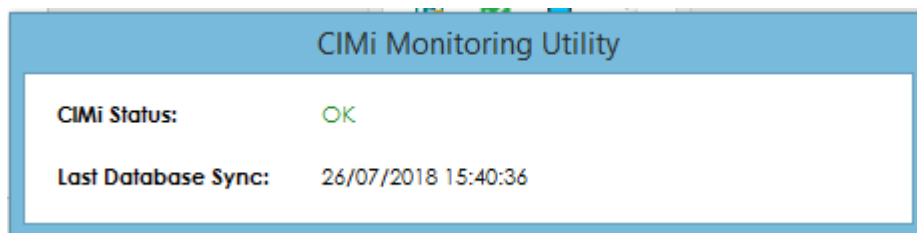
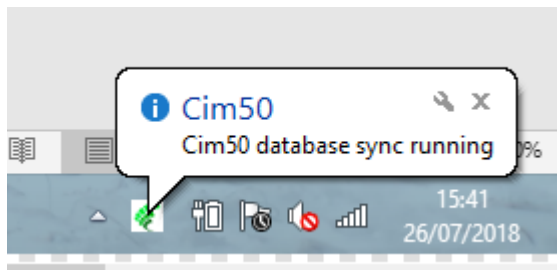
In previous versions of Cim50, the clients did all the day-to-day interactions with Sage 50 Accounts, maintaining the links and keeping the 2 databases in sync. This has proven to cause performance issues on large datasets, on sites where the network configuration is not ideal, and also for clients running over a wireless network.

As such from SP3 onwards, The CIMi program that runs on the clients server takes over responsibility for data syncing between the 2 systems.

This results in a much-improved performance for clients whilst interacting within Cim50.

There are some considerations for BPs to be aware of. Now that CIMi is performing all the syncing, it is crucial that this service is configured correctly, as per the deployment guide, and also that it remains running.

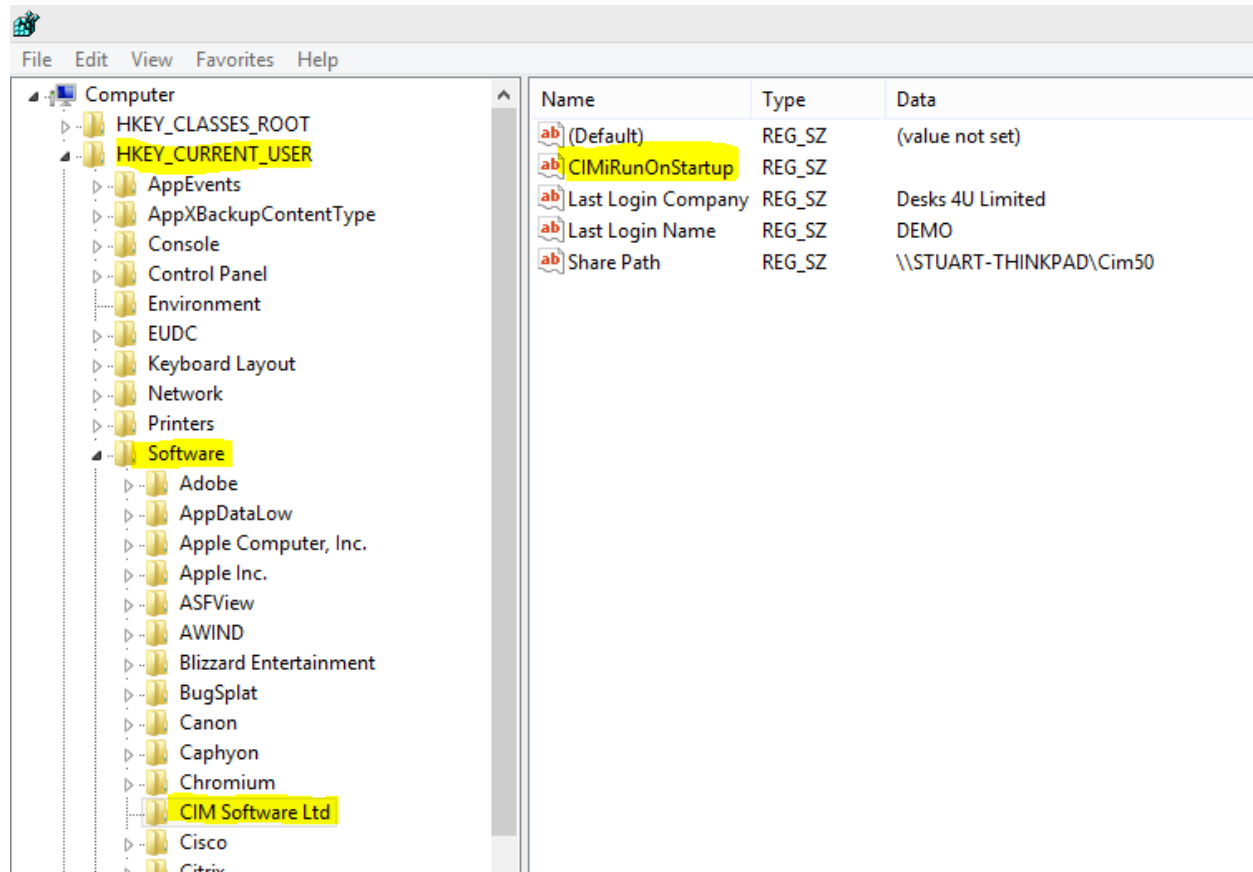
We have added a monitoring utility that will be installed automatically on all client machines, and will auto-run on startup, that monitors the status of the CIMi service on the server, and reports back to the user, via the system tray, if the sync has stopped. Clients will then need to contact you to investigate why the sync has stopped, and to get it restarted.



We would recommend configuring the service to automatically restart on error, so that if any issues occur, the data sync will automatically attempt to restart, and the customer will experience minimal downtime.

Speed Improvements Continued...

The other point for your consideration, is that in previous versions of Cim50, CIMi would automatically perform a data integrity check on startup. This does not occur automatically now. If you want this check to take place, you need to ensure a registry key is present as per the screenshot below, with a value of 1 in the key value (Data column).



Stock Control – New Features

Delivery Notes– The customer order number has been added as a column on the new delivery note screen, and users are able to search by customer order number as well.

Delivery Notes– You now have the ability to add lines to an existing delivery note. To do this, highlight the relevant delivery note in the delivery notes list and choose the 'Amend' option.

You will find an 'Add Item' button at the bottom of the list. Pressing this option loads a grid which details all items for that customer that are awaiting despatch and that can be added to that delivery note. If an item is not on that list that your customer is expecting to see, it is likely that the sales order delivery address is different to the despatch note they are trying to add the item to.

Populate the 'Despatch' column with the quantity you wish to despatch against the relevant item, and press the 'Despatch' button to add the items to the delivery note.

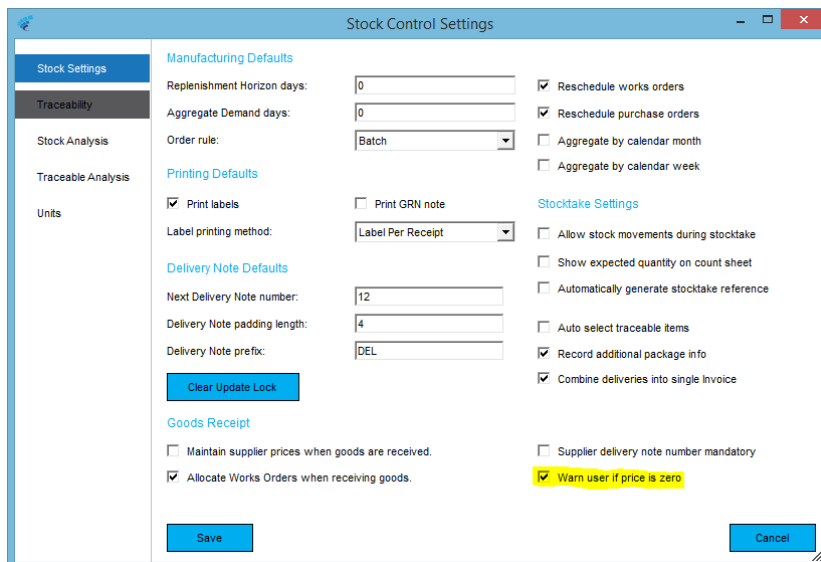
Stock Control – New Features Continued...

Receiving Goods – The location field from the relevant stock record is displayed within the receive goods grid, allowing you to see where items should be stored during the booking in process.

This was following a request from a customer to add this field.

Receiving Goods – An optional parameter has been added to the system, which, when enabled, will warn users when trying to receive goods that have zero value set on the purchase order.

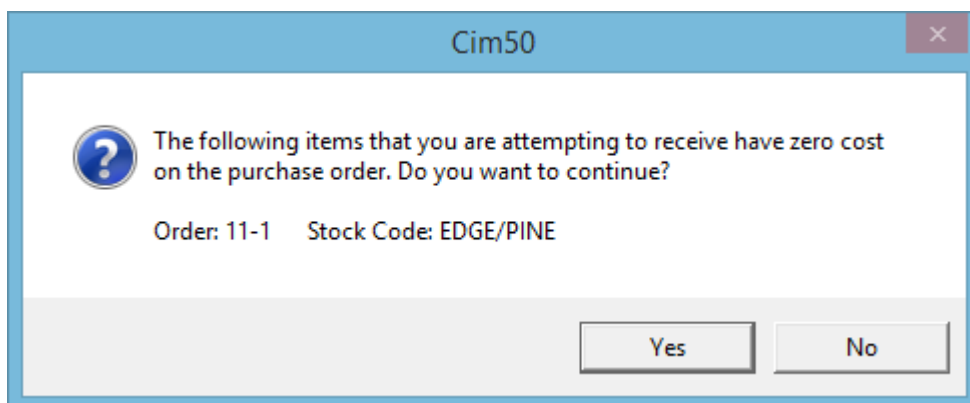
This parameter has been added in to Settings > Stock Control screen:



The screenshot shows the 'Stock Control Settings' window. The left sidebar has 'Traceability' selected. The main area is divided into several sections: 'Manufacturing Defaults', 'Printing Defaults', 'Delivery Note Defaults', 'Goods Receipt', and 'Stocktake Settings'. In the 'Goods Receipt' section, the checkbox 'Warn user if price is zero' is checked and highlighted in yellow. Other settings include 'Replenishment Horizon days' (0), 'Aggregate Demand days' (0), 'Order rule' (Batch), 'Print labels' (checked), 'Label printing method' (Label Per Receipt), 'Next Delivery Note number' (12), 'Delivery Note padding length' (4), 'Delivery Note prefix' (DEL), 'Reschedule works orders' (checked), 'Reschedule purchase orders' (checked), 'Aggregate by calendar month' (unchecked), 'Aggregate by calendar week' (unchecked), 'Allow stock movements during stocktake' (unchecked), 'Show expected quantity on count sheet' (unchecked), 'Automatically generate stocktake reference' (unchecked), 'Auto select traceable items' (unchecked), 'Record additional package info' (checked), 'Combine deliveries into single invoice' (checked), 'Maintain supplier prices when goods are received' (unchecked), and 'Supplier delivery note number mandatory' (unchecked).

When active, should the user go to receive goods which have a zero price, after pressing the 'Receive' button, they will be asked to confirm if they wish to receipt these goods even though they are priced at zero.

The warning details the order number, line number and stock code for the item.



The screenshot shows a warning dialog box titled 'Cim50'. It contains a question mark icon and the text: 'The following items that you are attempting to receive have zero cost on the purchase order. Do you want to continue?'. Below this, it displays 'Order: 11-1' and 'Stock Code: EDGE/PINE'. At the bottom, there are two buttons: 'Yes' and 'No'.

Receiving Goods – The option to re-print GRN labels has been added in within Stock Control > Reports.

You will find the GRN Label Reprint report in the 'General' Folder.
Physical location - <Cim50 Share>\Reports\Stock Control\General

Stock Control – New Features Continued...

Analysis Code Update – You can now update analysis codes throughout the system with a click of a button. So, if you change the value of an analysis code on your stock record, you can update this value to all Bills of Material, live Quotations and live Works Orders.

This functionality can be found in Tools > Stock Control > Update Analysis Values.
The screen that opens laid out in a step by step way.

The screenshot shows the 'Update Analysis Values' window with three steps:

Step 1: Select the analysis values you wish to update.

| Analysis Code |
|--|
| <input checked="" type="checkbox"/> Colour |
| <input type="checkbox"/> Temperature |
| <input type="checkbox"/> Checked |
| <input type="checkbox"/> Expiry Date |
| <input type="checkbox"/> Test Text |
| <input type="checkbox"/> Test Numeric |

Select All

Step 2: Select the modules you wish to update.

| Module |
|--|
| <input checked="" type="checkbox"/> Bill of Material Records |
| <input type="checkbox"/> Bill of Material Components |
| <input type="checkbox"/> Quotation Items |
| <input type="checkbox"/> Quotation Item Components |
| <input type="checkbox"/> Works Order Records |
| <input type="checkbox"/> Works Order Components |

Select All

Step 3: Select the relevant stock records to update analysis values for. Quick Search:

| Stock Code | Description | Colour | Temperature | Checked |
|--|----------------------------------|--------|-------------|---------|
| <input checked="" type="checkbox"/> 012345 | 012345 | | 0.000000 | False |
| <input type="checkbox"/> 02356 | Test | | 0.000000 | False |
| <input type="checkbox"/> 10110100 | Test | | 0.000000 | False |
| <input type="checkbox"/> 12345 | Test | | 0.000000 | False |
| <input type="checkbox"/> 23424 | 012345 | | 0.000000 | False |
| <input type="checkbox"/> AD2 | Industrial Adhesive - Bulk Issue | | 0.000000 | False |
| <input type="checkbox"/> BOMITEM | Bom Item | | 0.000000 | False |
| <input type="checkbox"/> CHAIRBASE-SILVER | | Blue | 10.000000 | False |
| <input type="checkbox"/> CUPB | Cupboard | | 0.000000 | False |
| <input type="checkbox"/> DRAW/M | Drawset - Mahooanv | | 0.000000 | False |

Select All

Step 1: Tick the analysis value you want to update throughout the system.

Step 2: Tick the relevant modules/analysis code types you want to update.

Step 3: Select the relevant stock records you want the update to apply to.

Press the 'Select' button and click through the confirmation to perform the update.

So, if you had an analysis code called 'Colour' setup in Stock Control, Bills of Materials and Works Orders, and you updated the value on the stock record. You would select the 'Colour' analysis code, select the 'Bill of Material Records' and 'Works Order Records' options from the modules, and then the relevant stock record in the stock record grid.

This utility only updates live works orders and quotations.

Bill of Materials – New Features

Component Analysis Codes – You can now configure up to 20 analysis codes to be stored against Bill of Material Components. These values are automatically populated with the analysis value from the relevant stock record, where applicable.

This functionality enables you to define an analysis code for a Stock Record, set the default value and then amend it individually for each separate Bill of Material.

Analysis values defined on the Bill of Material are automatically pulled through on new Quotations and Works Orders, where comparable analysis codes have been setup.

These component analysis codes are configured in exactly the same way as analysis codes in Stock, Bom, Quotes and Works Orders. You will find in Bill of Material Settings a Component Analysis tab. You can setup your analysis codes as desired in there.

Working with these analysis values can be done via the 'Components' screen within the Bill of Material:

The screenshot shows the 'Amend Bill of Material - MAH' window. The 'Bom Reference' is 'MAH' and the 'Bom Description' is 'Office Desk - Mahogany'. The 'Components' section is active, displaying a table with the following data:

| Seq. | Stock Code | Description | Quantity | Unit |
|-------|------------|--------------------|----------|---------|
| 10.00 | DRAWM | Drawset - Mahogany | 1.000 | Each |
| 15.00 | LEG | Desk Leg Assembly | 4.000 | Each |
| 20.00 | SCREWS | 2 wood screws | 0.200 | Box 100 |
| 25.00 | STUDS | Rubber leg studs | 0.060 | Per 100 |
| 30.00 | TOPM | Desktop - Mahogany | 1.000 | Each |
| 40.00 | | | | |

Below the table are buttons for 'Resequence', 'Add', 'Remove', 'View Stock Record', and 'Edit Sub-Assembly'. A legend indicates that the selected row is a 'Component'. Below this is the 'Component Settings' section, with the 'Analysis Values' tab selected, showing a grid:

| Analysis Code | Value |
|---------------|------------|
| Test Text | Testing |
| Test Numeric | 100.000000 |
| Test DateTime | 31/07/2018 |

At the bottom of the window are 'Save' and 'Cancel' buttons.

As you click through the component lines, there is an 'Analysis Values' grid at the bottom of the screen that details the analysis values for the highlighted line.

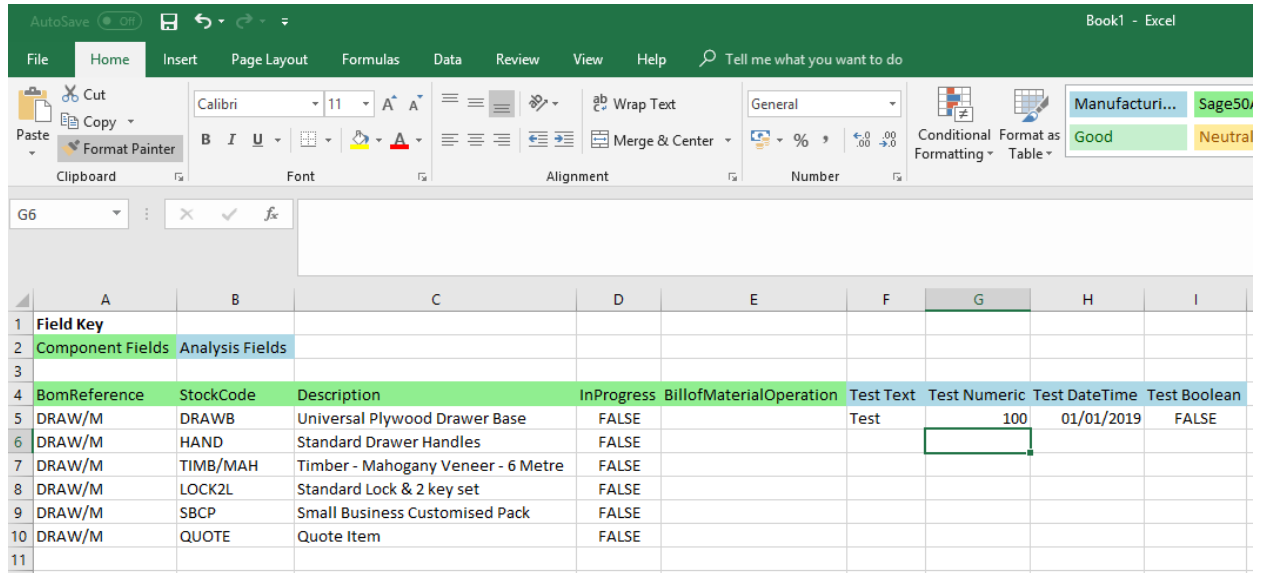
When you add a new line to a Bill of Material, any analysis values configured against the stock record for codes with the same name will be pulled through by default.

Bill of Materials – New Features Continued...

Component Analysis Codes Continued...

You are also able to import these values in to the BOM Components in the same way as you can with Stock or BOM Header analysis codes.

Please note, if you have prepped an import spreadsheet for BOMs prior to SP3, you will need to move the header rows for the components down to line 4, as per the screenshot below.

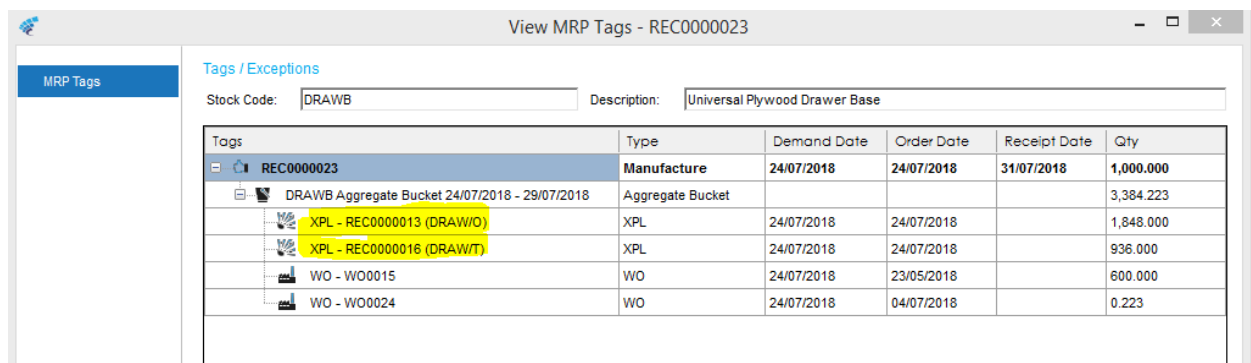


| Field Key | Component Fields | Analysis Fields | | | | | | | |
|--------------|------------------|------------------------------------|------------|-------------------------|-----------|--------------|---------------|--------------|--|
| BomReference | StockCode | Description | InProgress | BillofMaterialOperation | Test Text | Test Numeric | Test DateTime | Test Boolean | |
| DRAW/M | DRAWB | Universal Plywood Drawer Base | FALSE | | Test | 100 | 01/01/2019 | FALSE | |
| DRAW/M | HAND | Standard Drawer Handles | FALSE | | | | | | |
| DRAW/M | TIMB/MAH | Timber - Mahogany Veneer - 6 Metre | FALSE | | | | | | |
| DRAW/M | LOCK2L | Standard Lock & 2 key set | FALSE | | | | | | |
| DRAW/M | SBCP | Small Business Customised Pack | FALSE | | | | | | |
| DRAW/M | QUOTE | Quote Item | FALSE | | | | | | |

Planning – New Features

MRP Tags – We have added the 'Bom Reference' field to the MRP tags screen for exploded demand, allowing you to see what Bill of Material the demand has been generated from.

As per the screenshot below, you can see the BOM reference for the relevant XPL demand, giving the user some additional info as to what the XPL relates to.



| Tags | Type | Demand Date | Order Date | Receipt Date | Qty |
|--|------------------|-------------|------------|--------------|-----------|
| REC0000023 | Manufacture | 24/07/2018 | 24/07/2018 | 31/07/2018 | 1,000.000 |
| DRAWB Aggregate Bucket 24/07/2018 - 29/07/2018 | Aggregate Bucket | | | | 3,384.223 |
| XPL - REC0000013 (DRAW/O) | XPL | 24/07/2018 | 24/07/2018 | | 1,848.000 |
| XPL - REC0000016 (DRAW/T) | XPL | 24/07/2018 | 24/07/2018 | | 936.000 |
| WO - WO0015 | WO | 24/07/2018 | 23/05/2018 | | 600.000 |
| WO - WO0024 | WO | 24/07/2018 | 04/07/2018 | | 0.223 |

Quotations – New Features

Component Analysis Codes – You can now configure up to 20 analysis codes to be stored against Quotation Item Components. These values are automatically populated with the analysis value from the relevant Stock Record or Bill of Material, where applicable.

This functionality enables you to define an analysis code for a stock record, set the default value and then amend it individually for each separate Quotation Item Component.

Analysis values defined on the Quotation Item are automatically pulled through in to new Works Orders, where comparable analysis codes have been setup.

These component analysis codes are configured in exactly the same way as analysis codes in Stock, Bom, Quotes and Works Orders. You will find in Quotation Settings a Component Analysis tab. You can setup your analysis codes as desired in there.

Working with these analysis values can be done via the 'Components' screen within the Quotation Item Configuration Screen:

| Seq. | Stock Code | Description | Quantity | Unit | Unit Cost | Item Type |
|-------|------------|----------------------------------|----------|---------|-----------|----------------|
| 10.00 | TEAK | Office Desk - Teak | 1.000 | Each | 1.090 | Stock Item |
| 20.00 | OAK | Office Desk - Oak | 1.000 | Each | 941.363 | Stock Item |
| 30.00 | AD2 | Industrial Adhesive - Bulk Issue | 1.000 | 5 litre | 20.000 | Stock Item |
| 70.00 | NONSTOCK | Test | 1.000 | 5 litre | 0.000 | Non-Stock Item |
| 80.00 | | | | | | |

| Analysis Code | Value |
|---------------|------------|
| Test Text | Test Copy |
| Test Numeric | 999.000000 |
| Test DateTime | 31/07/2018 |

As you click through the component lines, there is an 'Analysis Values' grid at the bottom of the screen that details the analysis values for the highlighted line.

When you add a new product to a quote, if a bill of material exists for it, the analysis values from the Bill of Material will be pulled through to the Quote Item Configuration where comparable analysis codes exist.

Quotations – New Features Continued...

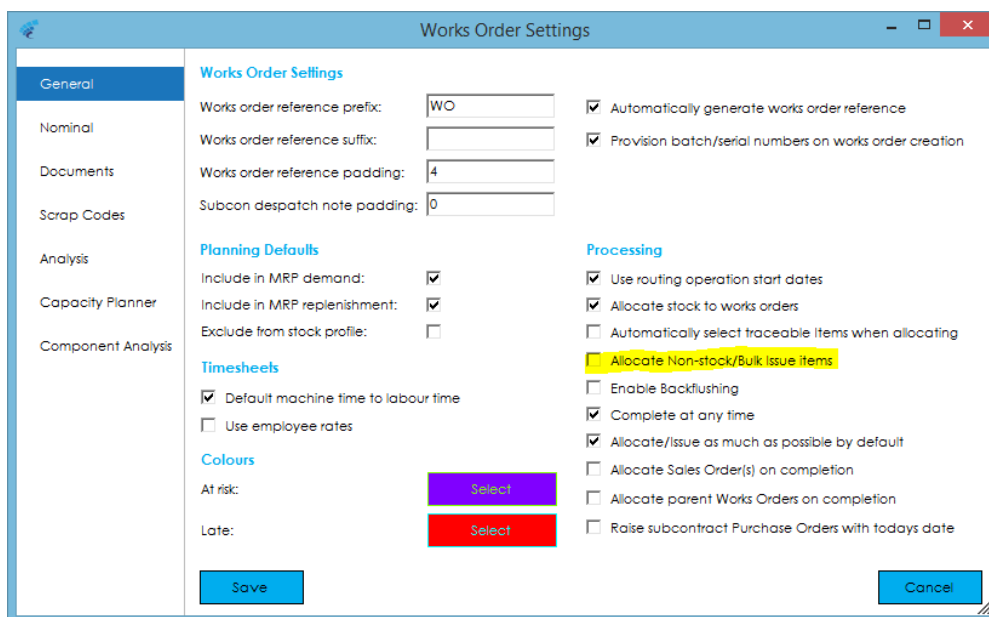
Component Analysis Codes Continued...

If you add a new line to the quote item configuration, any analysis values configured against the relevant stock record for codes with the same name will be pulled through by default.

Works Orders – New Features

[Allocating Non-Stock & Bulk Issue Items](#) – An optional parameter has been added in to the system to allow you to decide whether to allocate non-stock and bulk issue Stock Records or not.

You will find the setting in Settings > Works Orders



The screenshot shows the 'Works Order Settings' window with a sidebar on the left containing categories: General, Nominal, Documents, Scrap Codes, Analysis, Capacity Planner, and Component Analysis. The main area is divided into sections: 'Works Order Settings' (with fields for prefix, suffix, padding, and subcon padding), 'Planning Defaults' (with checkboxes for MRP demand, replenishment, and stock profile), 'Timesheets' (with checkboxes for machine time and employee rates), 'Colours' (with 'At risk' and 'Late' fields and 'Select' buttons), and 'Processing' (with checkboxes for routing dates, stock allocation, traceable items, backflushing, completion, and subcontract orders). The 'Allocate Non-stock/Bulk Issue Items' checkbox in the Processing section is highlighted in yellow.

With this option selected, when you go to allocate a works order, you will find non-stock parts and bulk issue items are included in the list. With the option unselected, the system will behave in the same way as it did pre SP3, whereby non-stock parts and bulk issue items are omitted from the list.

[Audit Logging Improvements](#) – The Works Order Audit Logging functionality now records when a Works Order Document has been previewed/printed, recording who printed it, and when.

After printing or previewing any of the works order documents, open the works order and review the audit log, you will find entries for the preview/print of each document type.

Works Orders – New Features Continued...

Component Analysis Codes – You can now configure up to 20 analysis codes to be stored against Works Order Components. These values are automatically populated with the analysis value from the relevant Bill of Material or Stock Record, where applicable.

This functionality enables you to define an analysis code for a stock record, set the default value and then amend it individually for each separate Works Order Component.

These component analysis codes are configured in exactly the same way as analysis codes in Stock, Bom, Quotes and Works Orders. You will find in Works Order Settings a Component Analysis tab. You can setup your analysis codes as desired in there.

Working with these analysis values can be done via the 'Components' screen within the Works Order Screen:

| Seq. | Stock Code | Description | Required | Allocated | Issued | Unit |
|-------|------------|----------------------------------|----------|-----------|--------|---------|
| 10.00 | 02356 | Test | 10.000 | 0.000 | 10.000 | Each |
| 20.00 | LEG | Desk Leg Assembly | 10.000 | 0.000 | 10.000 | Each |
| 30.00 | AD2 | Industrial Adhesive - Bulk Issue | 10.000 | 0.000 | 10.000 | 5 litre |
| 40.00 | EDGE/PINE | Edging - Pine | 5.000 | 5.000 | 0.000 | Metre |

| Analysis Code | Value |
|---------------|------------|
| Test Text | Test |
| Test Numeric | 0.000000 |
| Test DateTime | 05/08/2018 |

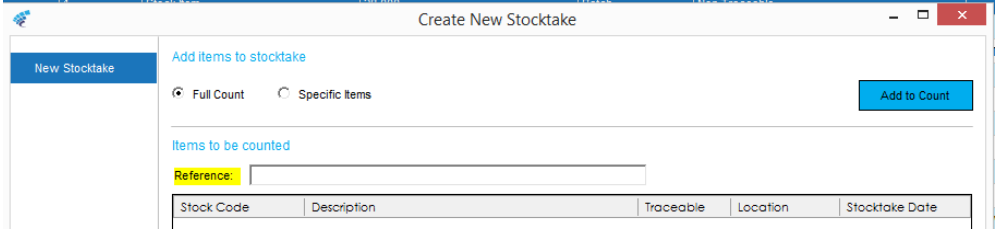
As you click through the component lines, there is an 'Analysis Values' grid at the bottom of the screen that details the analysis values for the highlighted line.

When you add a new product to a works order, the analysis values from the relevant Stock Record will be pulled through to the Works Order Component where comparable analysis codes exist.

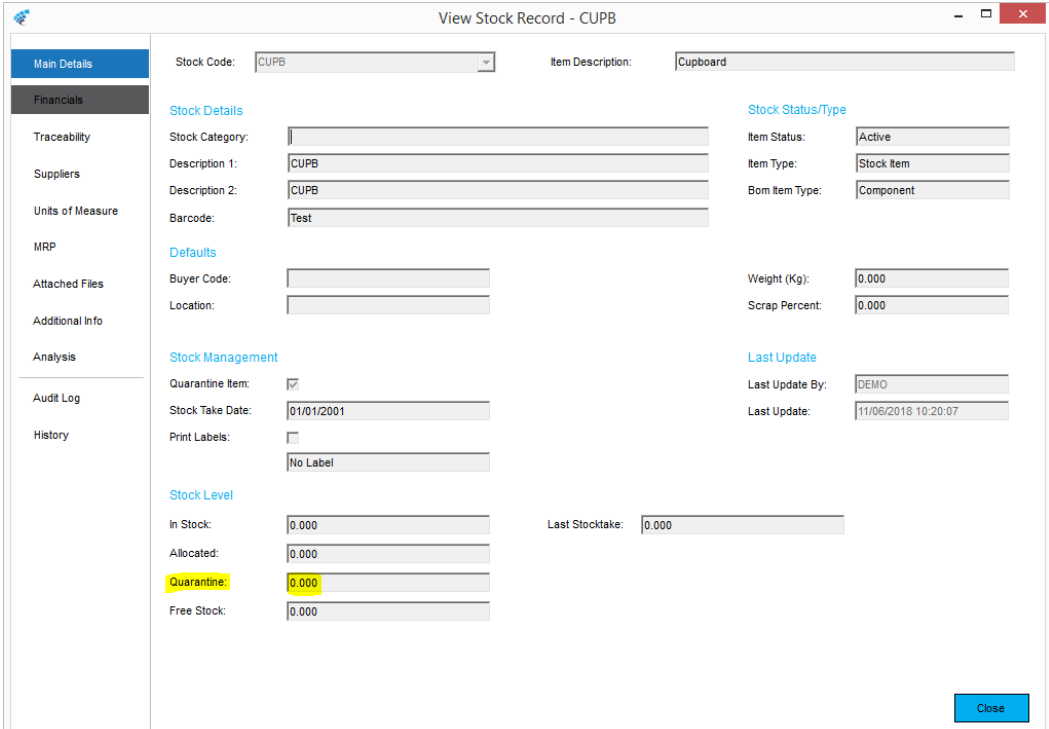
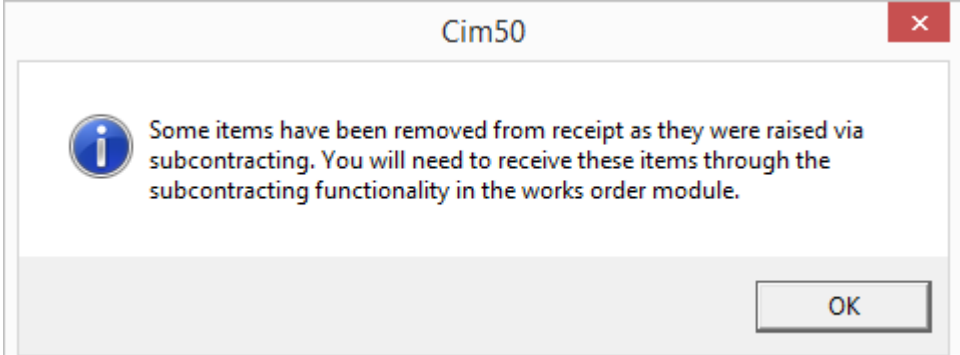
Minor Updates

Cim50 v2018 SP3 also includes the following minor updates to existing functionality.

Additional notes from release notes detailed in [blue](#).

| Module | Change Notes |
|---------------|--|
| Stock Control | <p>Stocktake transactions now detail the stocktake reference in transaction history, rather than simply 'Stocktake Adjustment In/Out'.</p> <p>When stocktake adjustment transactions are posted, the transaction history reference will now detail the stocktake reference field. This will be displayed in the 'Reference' field for non-traceable items, and 'Details' field for traceable items.</p>  |
| Stock Control | <p>Changed the wording used on invoice lines posted via Delivery Notes in Cim50. This now details more information in a simpler format.</p> <p>The wording used on invoices detailing which delivery note the items came from now matches the wording/format used previously in Sage 50 Manufacturing.</p> |
| Stock Control | <p>Changed Stock Traceability Enquiry to display newest batches/serial numbers at the top.</p> <p>Stock Control > Traceability screen used to detail the batches/serial numbers with the oldest batch/serial at the top, it is now sorted by default with the newest batch at the top.</p> |

Minor Updates Continued...

| | |
|---------------|--|
| Stock Control | <p>Added Quarantine Quantity field on to View Stock Record screen</p>  <p>The screenshot shows the 'View Stock Record - CUPB' window. The 'Stock Code' is CUPB and the 'Item Description' is Cupboard. The 'Quarantine' field under 'Stock Level' is highlighted in yellow, showing a value of 0.000. Other fields include Stock Category, Description 1, Description 2, Barcode, Buyer Code, Location, Weight (Kg), Scrap Percent, Last Update, and Stock Take Date.</p> |
| Works Orders | <p>Stopped users from being able to receive subcontract purchase orders through Stock Control > Receive Goods.</p> <p>If a user attempts to receive a subcontract purchase order through the Stock Control > Receive Goods screen, they will receive the following message after pressing 'Display':</p>  <p>The screenshot shows an error message dialog box titled 'Cim50'. The message reads: 'Some items have been removed from receipt as they were raised via subcontracting. You will need to receive these items through the subcontracting functionality in the works order module.' There is an 'OK' button at the bottom right.</p> |