



CIM50

v2018 SP2 New Features Guide

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The purpose of this guide is to document all new features in Cim50 v2018 SP2, 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...

Colour Schemes & Font Options

Cim50 v2018 SP2 has the option for each user to pick a colour scheme and the font used throughout Cim50.

They can choose from Blue, Green, Grey, Orange or Yellow colour schemes, and Arial, Calibri, Century Gothic, Tahoma, Times New Roman or Verdana for the font type face.

To change the colour scheme and font settings:

- 1) Navigate to Settings > Cim50 Settings (Access right may need to be added in Cim50 Control Panel)
- 2) Select Colour & Font from the relevant drop-down boxes, and press 'Save'.
- 3) A message will popup informing the user they must close Cim50 and re-open for the colour and font changes to take place.
- 4) When they next login, they will find the colour scheme and font reflects their choices made.

Note: These settings are user specific and will apply to that user regardless of which PC they use to access Cim50.

Stock Control – New Features

[Delivery Notes & Invoicing](#) – An option has been added when raising invoices from delivery notes, whereby you can select whether delivery notes will be combined in to a single invoice, or separate invoices.

This was previously defined as a system setting in Settings > Stock Control, that could not be amended when raising invoices. This setting is now considered as the 'Default' when raising invoices.

You will find when updating delivery notes to invoices (Stock Control > External > Despatch > Update) that there is now a 'Combine deliveries into single invoice' check box at the bottom right hand side of the screen. This will be ticked or unticked by default based on the setting in Stock Settings.

We have had feedback from Cim50 users that some of their customers like a single invoice, whilst others prefer separate. Adding this option on to the screen gives the user flexibility to determine whether to combine deliveries or not for each invoice session.

Stock Control – New Features Continued...

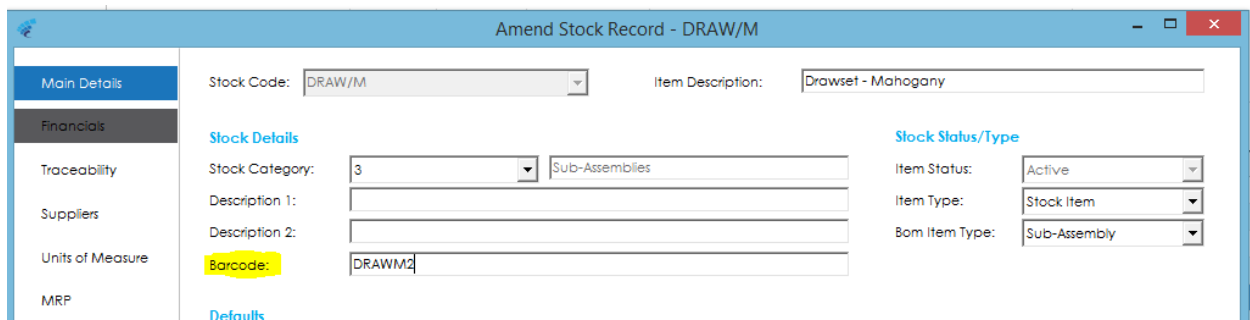
[View Works Orders](#) – You can now view works order details from the stock transaction history and the stock profile screens

Stock Record Screens: From the Amend or View Stock Record screen, navigate to the history tab, highlight any 'MI' (Works Order Completion) or 'MO' (Works Order Issue) transaction type and press 'View Details'. If the item is non-traceable, the relevant works order will be displayed. If it is traceable, then batch/serial number details screen will be displayed, from there you can then drill down to the works order from the traceable history.

Stock Profile Screen: From the 'Breakdown' tab, select either 'WO Demand' or 'WO Outstanding', highlight the relevant order from the list and press the 'View Order' button.

Barcode Field – An oversight from the original release of Cim50 was that the 'Barcode' field from Sage 50 Accounts was not available from the Cim50 stock record screen, this has now been added in.

You will find this on the 'Main Details' tab of a stock record;



The screenshot shows the 'Amend Stock Record - DRAW/M' window. The 'Main Details' tab is selected. The 'Stock Code' is 'DRAW/M' and the 'Item Description' is 'Drawset - Mahogany'. Under 'Stock Details', the 'Stock Category' is '3' (Sub-Assemblies), 'Description 1' and 'Description 2' are empty, and the 'Barcode' field is highlighted in yellow and contains 'DRAWM2'. Under 'Stock Status/Type', 'Item Status' is 'Active', 'Item Type' is 'Stock Item', and 'Bom Item Type' is 'Sub-Assembly'. A 'Default' link is visible at the bottom.

It is also available as a column in the Stock Control list, and all stock related filters.

Quotations – New Features

Pricing – When adding items to a quotation in Cim50, it will now check for any relevant customer price lists setup in Sage 50 Accounts and use that price by default where applicable. If an item/customer is not configured on a price list in accounts, then the selling price will be calculated on cost plus markup, as it does currently.

Previously quotations calculated the cost for an item as it was added to the quote, either performing a BOM costing for built items, or last cost price for purchased items, and adding a markup percentage to calculate the default selling price on the quote.

This has now been changed to take Price Lists setup in Sage 50 Accounts into account.

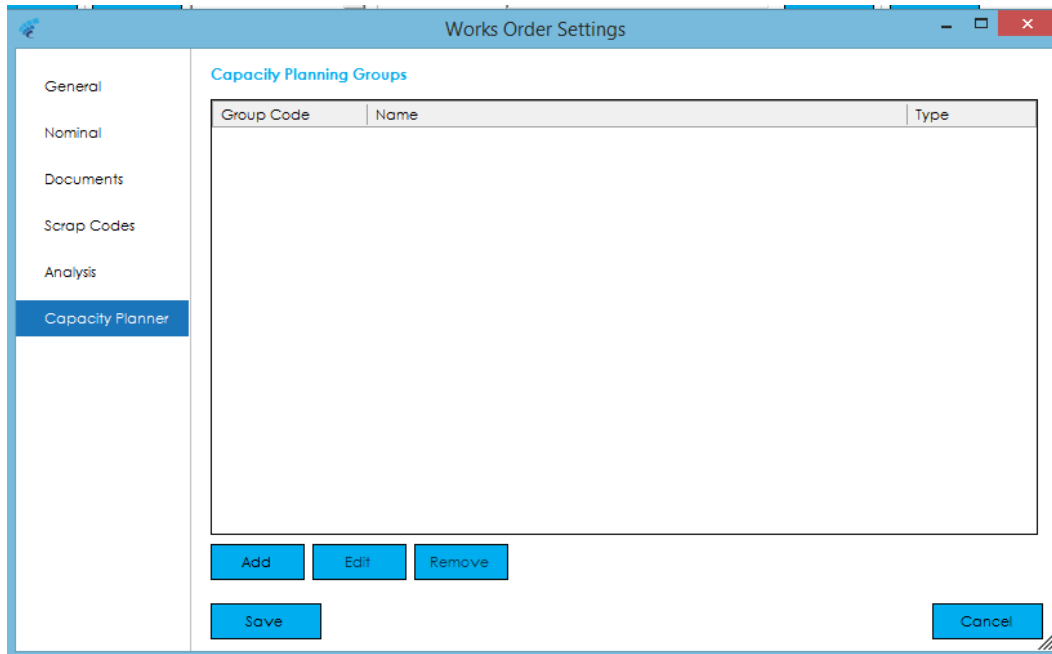
Now, when an item is added to a quotation, the system will go carry out the following:

- 1) Check to see if the customer has a price list defined in Accounts, if it does it will check that price lists for the relevant item and use the price from that price list.
- 2) If it is not present on that price list, or, the customer does not have a price list setup, then it will use the standard selling price defined on the relevant stock record.
- 3) If the result of the 2 checks above result in a zero price being used, it will calculate the cost price and add the default markup percentage to calculate a selling price, as it has done previously to this service pack.

Works Orders – New Features

Capacity Planning Groups – You can now group labour or machine resources together for capacity planning purposes, giving you more flexibility and control over resources, to ensure you have enough resources available to meet demand.

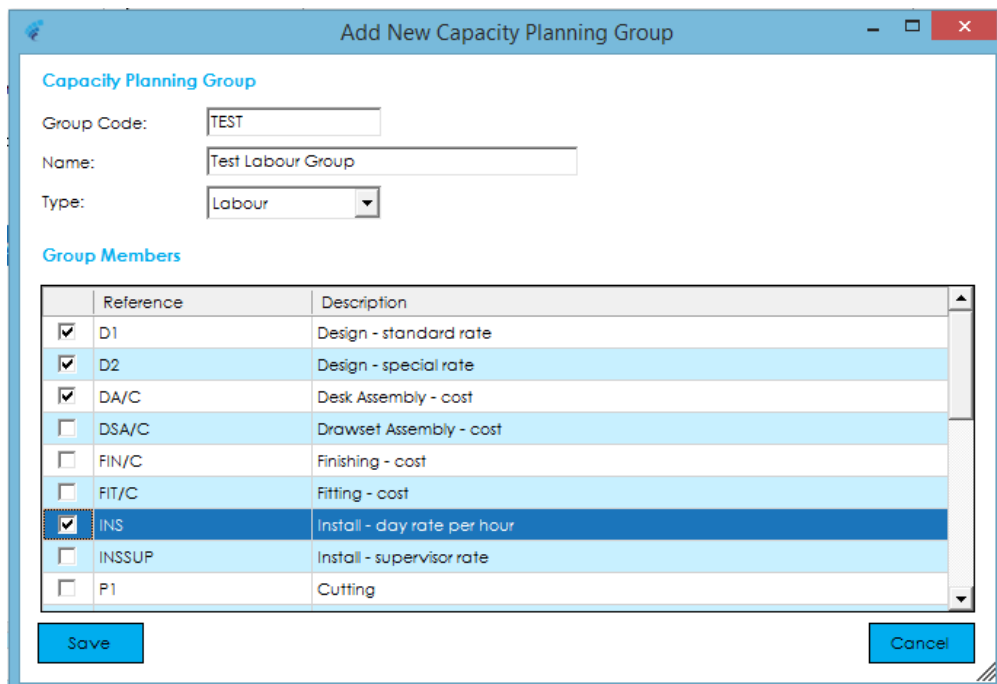
To setup a new capacity planning group, navigate to Settings > Works Orders > Capacity Planner.



You can add a group by pressing the 'Add' button beneath the capacity planning groups list.

On the screen that opens, define a unique group code and enter a name for the group, then define whether it is a 'Labour' group or 'Machine' group. Note: you cannot mix labour and machine resources within the same group.

In the grid, tick the resources you would like to add to the group, and once complete, press 'Save'.



Works Orders – New Features Continued...

Capacity Planning Groups Continued...

When you go to run the capacity planner in works orders, you will now see the option to select between Labour, Machine or Groups.

Reference	Description	Type
TEST	Test Labour Group	Labour

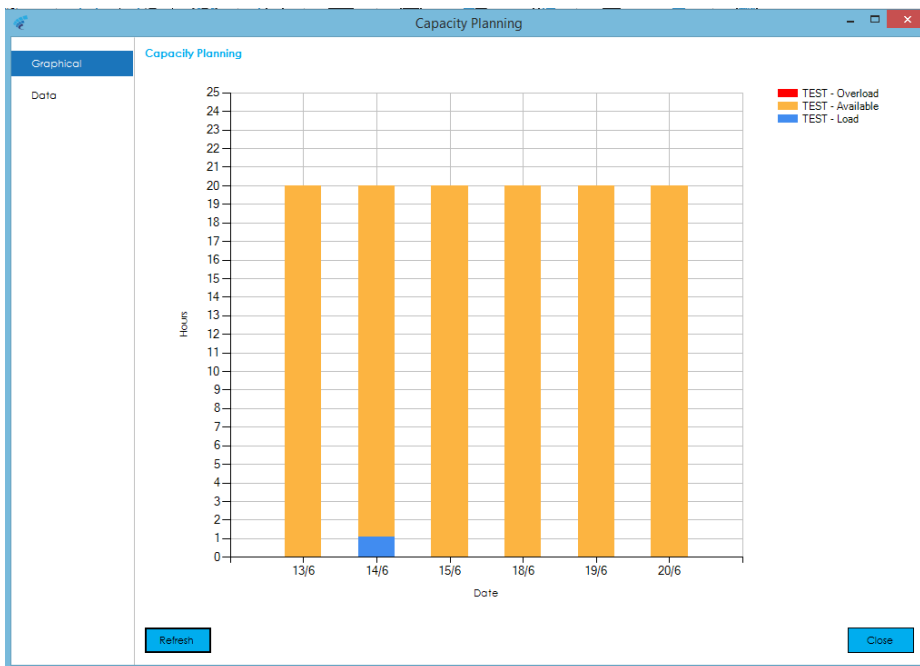
Select All

Date Range: 13/06/2018 - 20/06/2018

View: Daily

Confirm Cancel

When you press 'Confirm', you will then see the relevant capacity/loading for all resources within the selected groups, summarised under the group headings.

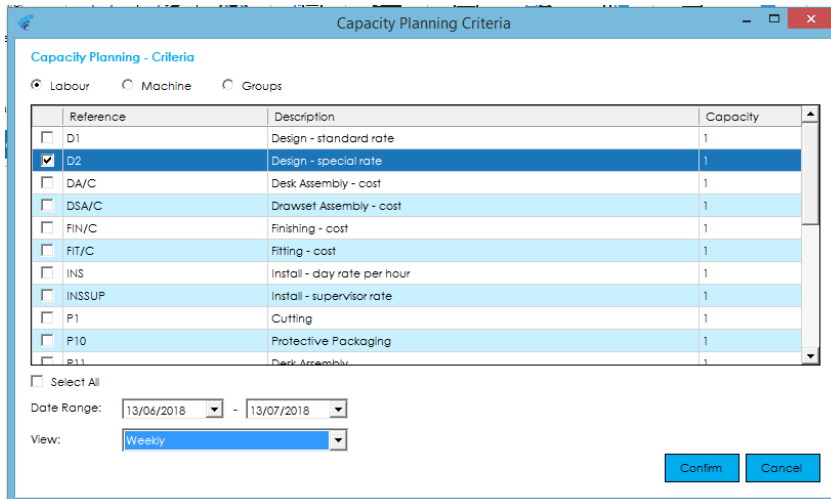


Note: Whilst you can't mix labour and machine resources within a single group, you can select a mix of labour and machine group types together when viewing capacity/load data.

Works Orders – New Features Continued...

[Capacity Planning Interface Improvements](#) – We have improved the capacity planning interface, allowing you to view capacity by day, week or month for a resource or group. We have also highlighted periods where you do not have enough resource capacity to meet demand by highlighting overloads in red.

From within the capacity planning criteria screen, you can now choose to view capacity/load data on a daily, weekly or monthly basis, within the date period range specified.



This setting determines whether you see 1 bar column on the graph per resource/group per day, per week or per month. If you select weekly the x-axis label will display the date on the Monday of the relevant week. If you select monthly, the x-axis label will display the 1st of the month.



You can also see in the screenshot above, that overloaded data is highlighted in red, making it much easier to see when your load goes above capacity.

Other

We have had issues with Cim50 trying to automatically setup the ODBC DSN connection to the Sage 50 Accounts database. This is usually due to user permissions over the registry and results in the consultant having to manually setup an ODBC DSN that Cim50 then uses.

We have changed this in SP2 onwards. Cim50 now uses the Sage ODBC driver and passes in the relevant parameters to that driver to read data from Sage, rather than relying on a DSN being setup.

Consequently, you should find, as long as Sage is installed on the PC, and the Cim50 user has access to the various reports permissions in Sage (as detailed in the deployment guide), then Cim50 will not have any issues connecting, and hopefully ODBC errors should be a thing of the past.