
<https://deepblue.systems>

[*support@deepbluesystems.com*](mailto:support@deepbluesystems.com)

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Deep Blue CloudDMS

CloudDMS is a revolutionary DMS system deigned to deal with the demands of today's trading environment.

Overview

- Cloud based dealer management system
- Latest technology
- Secure encrypted communication
- Any device. Computer, Tablet, or Smartphone
- Anywhere. Break free of your desk.
- Automatic backups
- Automatic program updates
- Automatic price file updates
- Multi-site
- Multi-user
- Invoicing
- Stock control
- Workshop scheduling
- CRM
- Prospecting
- VRM & Postcode lookup
- DVLA & DVSA Integration
- Auditable
- Rest API for website/e-commerce integrations

Platform Technology

- Hosted in the Microsoft Cloud
- Written in Microsoft C#
- Data stored in Microsoft Azure SQL
- Geo-redundant hosting
- Secure SSL Communications

Convention's

Various conventions are used in CloudDMS.

Transaction type code

Transaction references consist of 2 letters and a unique number.

- SI Sales Invoice
- SO Sales Order
- PI Purchase Invoice
- PO Purchase Order
- PC Purchase Credit
- WO Work order
- ES Estimate
- SC Sales Credit
- SP Sales Proforma
- SA Receipt - money in
- PA Payment – money out
- JC Journalled entry
- BR Batch Receipt
- BP Batch Payment

Acronyms

- SKU Stock Keeping Unit. Equivalent to Part Number
- Nominal A group for transactions being posted to the accounting ledger.

Colour Coding

Each button in the DMS is colour coded to indicate the type of action which will occur if you press it.

- Green Add or Create
- Orange Change or Alter
- Red Delete or Remove
- Blue Navigation
- Black Filter

User Agents

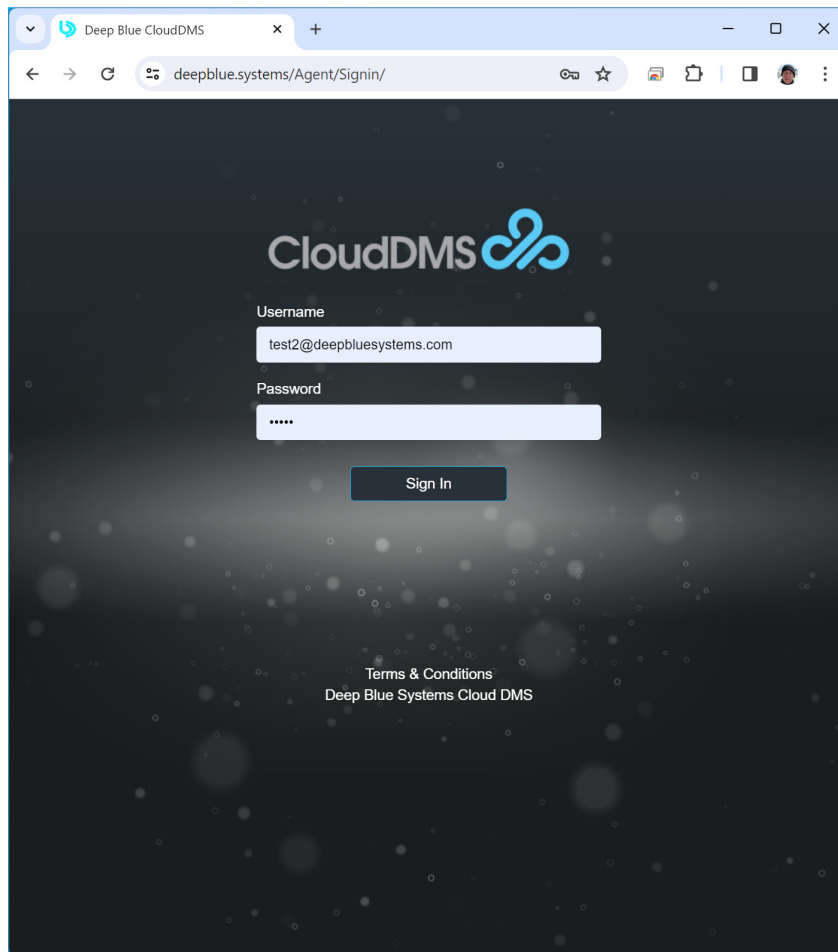
In order to access CloudDMS you will need to log in with a valid username and password. The initial administrator account will be created by Deep Blue.

Logging In

CloudDMS is accessed via any device with a web browser.

Go to the following URL:

- <https://deepblue.systems>

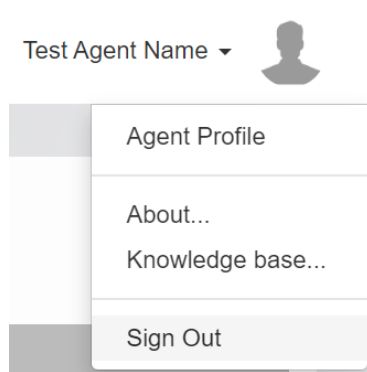


- Enter your email address as the username
- Enter your password
- press 'Sign In'

If you do not have a CloudDMS account, contact your system administrator or sales@deepbluesystems.com.

Logging out

To log out click on the Agent user menu in the top right of the screen and select 'sign out'



You can also log out from the 'Admin' section.

You will be automatically logged out after 180 minutes of inactivity or if you log-in on another device.

Adding User Agents

Accounts should be created for each member of staff by an administrator.

Agents can be created, deleted and permissions set from 'Manage agents' in the 'Admin' section.

'Manage Agents' displays a list of current agents.

The screenshot shows the 'Manage Agents' page in the CloudDMS application. The interface includes a sidebar with navigation links and a main content area with a table of agents. The table has columns for Name, Department, Depot, Level, and Extras. Each row represents an agent and includes action buttons for Edit, Reset Password, and Permissions. The agents listed are:

Name	Department	Depot	Level	Extras	Actions
jgheal2 jgheal2@clouddms.co.uk	dep test	Shop	User		Edit, Reset Password, Permissions
Neil Richardson neilrichardson@gmail.com	dep test	Shop	User	VRM. PostCode.	Edit, Reset Password, Permissions
test 3 test3@deepbluesystems.com	Department 2	Shop	User	VRM. PostCode.	Edit, Reset Password, Permissions
test agent name test2@deepbluesystems.com	Department 1	Shop	Administrator	VRM. PostCode.	Edit, Reset Password, Permissions
Test User test@deepbluesystems.com	Department 2	Shop	Administrator	VRM. PostCode.	Edit, Reset Password, Permissions
test@dgmotorcycles.com test@dgmotorcycles.com	Department 1	Shop to Supply	User	VRM. PostCode.	Edit, Reset Password, Permissions
test4 test4@deepbluesystems.com	Department 1	Shop	User	VRM. PostCode.	Edit, Reset Password, Permissions
trade test3 trade3@deepbluesystems.com	Department 1	Shop	Trade		Edit, Reset Password
Windcave test account dev@windcave.com	Department 1	Shop	Administrator	VRM. PostCode.	Edit, Reset Password, Permissions

To create a new user agent press '+Agent', then fill in the fields in the dialogue.

CloudDMS supports 6 classes of user agent. Permissions and restrictions can be applied to each agent.

- Administrator
- User
- Readonly
- Disabled
- Trade.
- API.

Administrator

Your initial administrator account will be created by Deep Blue when you sign up for CloudDMS. The administrator account has full access to all settings with the ability to add new users and configure the system.

User

Each member of staff should have a regular 'user' account. This provides access to all day to day functions. If required restrictions can be applied from the users 'Permissions' screen.

Read only

Readonly agents can view information in the DMS but can not create, edit or delete anything

Disabled

Agents can be disabled if they do not need to log into the system but need to have work allocated to them. i.e. workshop mechanics/engineers.

Trade

A trade level agent allows your customers to log into the DMS. This highly restricted login allows your customer to see their account balance, previous invoices, back order list and if required gives them the ability to raise new sales orders.

API

An API agent is a special login which is used by the CloudDMS Rest API for integration with 3rd party systems. This allows another system or website to access information in the DMS and enables ability for a 3rd party system to create transactions in the DMS.

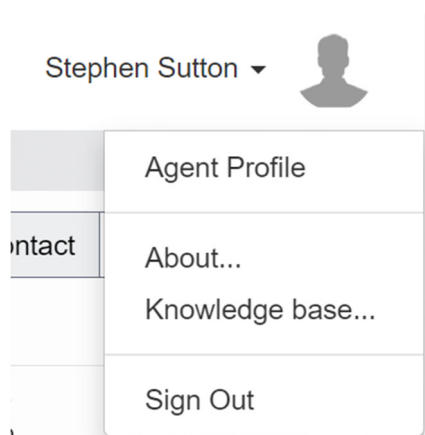
Quick start tutorials

On the following pages are several step-by-step tutorials which outline how to perform common functions within CloudDMS.

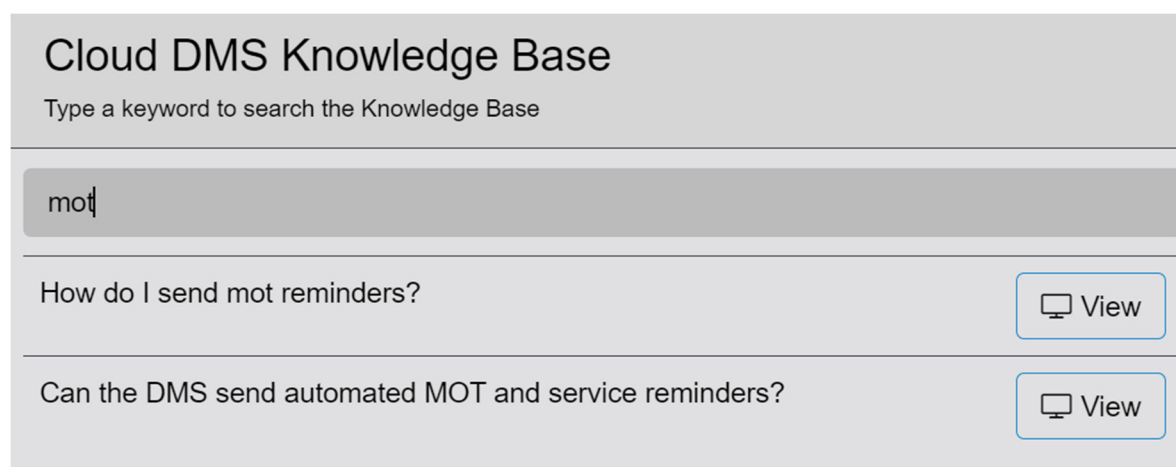
Further information regarding the specific operation of the system can be found further on in the manual, or by checking the knowledge base on the user menu in the DMS.

Knowledge base

You can access the knowledge base from any screen by clicking on the user menu in the top right and selecting 'Knowledge base...'



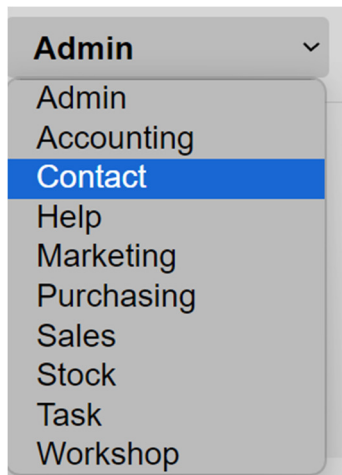
Enter your search term in the box and click on an article to display it on screen.



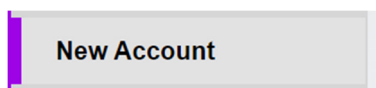
Adding a customer account

Each customer should have their own account. This allows you to keep track of the products/services they have purchased as well as how much money they owe you.

To add a new customer, start by navigating to the 'Contact' Section



Select 'New Account' on the main toolbar



The new account screen will then be displayed.

A screenshot of the 'New Account' screen in the CloudDMS application. The browser address bar shows 'localhost:51907/Customer/New'. The page title is 'New Account' with a subtitle 'Enter the new account details and press 'Save''. The left sidebar shows the 'Contact' menu expanded, with 'New Account' selected under the 'Accounts' section. The main form contains several fields: 'Account Code' (dropdown), 'Account Group' (dropdown with 'customer' selected), 'Account Status' (dropdown with 'Open' selected), 'Marketing Depot' (dropdown), 'Default Sales Department' (dropdown), 'Sales Agent' (dropdown), 'Account Name' (text input), 'Address' (text input), 'Post Code' (dropdown), 'Country' (dropdown with 'United Kingdom' selected), 'Web Site' (text input), and 'Phone' (text input).

Enter the customer's name in the 'account name' box

Account Name

ACCOUNT NAME

Then enter the customers post code

Post Code

POST CODE

Press the down arrow at the right-hand side of the post code box to look up the address



Post Code

W5 4UB

264 Northfield Avenue	Ealing	London	Select
266 Northfield Avenue	Ealing	London	Select
268 Northfield Avenue	Ealing	London	Select
270 Northfield Avenue	Ealing	London	Select
272 Northfield Avenue	Ealing	London	Select
274 Northfield Avenue	Ealing	London	Select

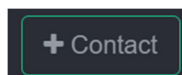
By pressing 'Select' beside the correct address the address information will be filled out for the new customer.

Press 'add new account' at the bottom of the page to create the customer record.

Add New Account

The customer will now be displayed.

To add contact information press '+Contact'



Add New Contact

Name

NAME

Position

POSITION

Department

DEPARTMENT

eMail

email

☒ No marketing email

Phone

PHONE

☒ No marketing calls

Mobile

MOBILE

☒ No marketing SMS

Close Save

Enter the contact details i.e. email address and press 'Save'. The contact details will then be added to the customer.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Contact

In Progress

Open Threads 82

Pending Threads

Thread

Last Thread

Search Threads

Schedule

Day

Month

Accounts

New Account

TEST CUSTOMER

STEVE SUTTON

Search Accounts

Reports

Account List

Activity

Emailed Invoices

Lead

Resolution

Vehicle List

Account

Contact

Document

TEST CUSTOMER

280A NORTHFIELD AVENUE
LONDON
W5 4UB

Open Status

Customer Group

Marketing Depot

Open Threads

Total Threads

Last Contact

Merge accounts? Similar accounts have been found on this postcode, you may want to merge them.

MY CUSTOMER

W5 4UB

Threads

All

Open

Pending

+ Thread

Contact

+ Contact

Online Booking

Open Department 2

Last Contact

Test User Agent

18/10/2022 12:00:00

Opened

View

Email Sent: S11392 From Test Account

Closed Department 2

Closed

test agent name Agent

06/11/2020 09:47:29

Opened

View

Online Booking Test Note

Closed Department 2

06/11/2020 08:55:50

Mike Agent

04/11/2020 13:00:00

Closed

View

Online Booking

Closed Department 1

07/09/2020 12:30:32

Mike Agent

26/08/2020 12:00:00

Closed

View

Online Booking

Open Department 2

Last Contact

Mike Agent

20/08/2020 12:00:00

Opened

View

Online Booking

Open Department 2

View

Steve Sutton

Email

steve@deepbluesystems.com

No marketing email

Phone

(020) 8541 4131

No marketing calls

Associated

+ Associated

Vehicle

SF04TRR

BMW

MAKE

R 1150 R ROCKSTER

MODEL

BLACK/ORANGE

COLOUR

WB10398A24ZJ50954

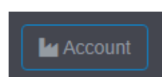
VIN NUMBER

Vehicle

LC67BTO

The customer's contact screen displays contact details and allows you to create and view 'Threads' based on conversations and/or contacts with the customer.

Pressing 'Account' at the top pf the screen will change to the customer's account view.



CloudDMS Universal Search... Department 2 | Warehouse Test Agent Name

Sales

- In Progress
 - Open Orders 5
 - Open Invoices 82
 - Open Proformas 1
 - Open Quotes
 - Recurring Invoices
- Transactions
 - New Invoice (SI)
 - New Order (SO)
 - New Pro-Forma (SP)
 - New Quote (SQ)
 - New Credit (SC)
 - SI2006
 - Search Invoices
- Accounts
 - New Customer
 - TEST CUSTOMER**
 - STEVE SUTTON
 - Search Customers
- Catalogue
 - Fitment EPC
 - Motorcycle EPC
- Reports
 - Day Totals (Basic)
 - Day Totals (Detail)
 - Day Totals (Summary)
 - Debtors
 - Loyalty Points

TEST CUSTOMER

280A NORTHFIELD AVENUE
LONDON
W5 4UB

Transactions

Date	Agent	Associated	Amount
17/10/2022 10:47:15	Test User	SF04TRR	£ 0.00
06/11/2020 08:55:50	test agent name	KT17HKH	£ 125.99
07/09/2020 12:30:32	test agent name	KT17HKH	£ 53.99
16/08/2020 20:07:14	Mike	LC67BTO	£ 0.00
16/08/2020 20:02:06	Mike	LC67BTO	£ 0.00

Account

Balance in debt	Credit Limit
£ 4,712.81	£ 0.00
£ 0.00	£ 6,432.80
£ 179.98	0

Product

Match Base Percent

Default Sell

Associated

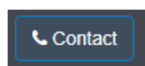
Vehicle

SF04TRR

BMW MAKE R 1150 R ROCKSTER MODEL

The account screen keeps track of invoices issued and money owed.

You can go back to the contact screen by pressing 'Contract' at the top.



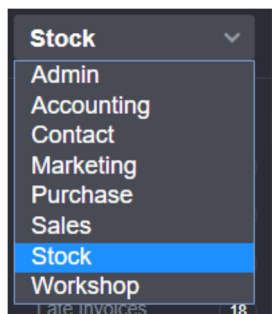
You can find an existing customer at any time by typing their name or postcode into the universal search box.



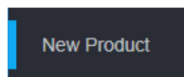
Creating a product record

Each product line you sell should have its own product record. For many industries we can provide this information (setup from 'admin'->'price files') for you. Alternatively, you can import excel files or create product records manually.

To create a new product record, navigate to the 'Stock' section.



Select 'New Product' from the main menu bar.



Start by entering the products SKU or part number. This must be a unique reference for this product line.

Enter the products description. This will be printed on your customer invoices.

Description

Description

Set the products tax code.

Tax Code

1 - Standard Rated

0 - Zero Rated

1 - Standard Rated

2 - Test

5 - Margin Scheme

9 - 9

Sales Nominal

Most products will be T1, Standard variable.

Set the product type.

Type

Normal

Normal

Non-Stockable

Kit

Vehicle

Most products will be 'normal' which means they are physical objects which you buy and sell.

Several different product types are supported.

- Normal. Buy and sell in whole units. Used for normal products like oil filters which must be purchased in order for you to sell them.
- Fractional. Products you need to purchase in whole units which you want to sell in fractional units. i.e. Oil.
- Non-stockable. Products which you can sell without purchasing a physical item first. Normally used for services like Labour, Collection, etc.
- Kit. This is a product which contains many other products allowing you to add multiple items to an invoice by adding a single part number. i.e. Service Kit.
- Custom type. i.e. Vehicle, Outboard, etc. You can setup special product types with custom fields for handling special items.

Press 'Add New Product' at the bottom of the screen to create the product record and display it.

Add New Product

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

STEVES-PRODUCT

USED-VEHICLE

Search Products

Catalogue

Fitment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

New Outboard

STEVES-PRODUCT

This a great product to buy

0 Warehouse

Normal Type

Standard Rated Tax Code

4000 - Sales General Sales Nominal

5000 - Purchases Purchase Nominal

Available Status

+ Image/PDF

Selling

SalesFitmentPriceSell

Group	Price	Inc.
Customer	100.00	120.00

Buying

SupplierOrder

0 Min Level	0 Max Level	1 Purchase Qty
-------------	-------------	----------------

Supplier

Test

Stock

Warehouse (0)

LabelsActivityPricing LogStock Take

You can further edit or amend the details by pressing the 'edit' button at the top right of the screen.

A small rectangular button with a blue border and a pencil icon, labeled 'Edit'.

30

Edit Product

SKU

STEVES-PRODUCT

Barcode

Barcode

Supersession SKU

Supersession SKU

Description

This a great product to buy

Brand

Brand

URL Link

URL Link

Individual Pricing

No

Tax Code

1 - Standard Rated

Type

Normal

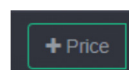
Sales Nominal

4000 - Sales

Purchase Nominal

5000 - Purchases

The next step is to add a default selling price for the product, you do this by pressing '+Price'



New Selling Price

Add new account group selling price

Account Group

Customer

Price

0

Price Inc

0

Cancel

Save

Select the account group the price will be applied for, the default is 'Customer'. You can define multiple account groups so different customer have different default prices for the same product i.e. customer, trade, club etc.

Enter the selling price and press 'save'

Save

The selling price will then be added to the product.

Group	Price	Inc.	
Customer	300.00	360.00	<div> <div></div> <div></div> </div>

Next add a supplier and buying price by pressing '+Supplier'

+ Supplier

New Buying Price

Add new supplier and purchase price

Supplier Account

Supplier SKU

Price

euroPrice

Cancel Save

Enter the suppliers name in the 'Supplier Account' box. As you type the nearest matches will be displayed.

Supplier Account

te

TEST Test

Open ,

Select

Price

If the required supplier is not displayed, you will need to add them to the system first. Use the same procedure as adding a new customer but change the account group to 'Supplier'.

Press 'Select' beside the required supplier.

Enter the buying price and press 'Save'

Save

You can adjust the stock level by pressing 'stock take' or using the up arrow. You can also book products into stock using a purchase order.

Stock Take

↑

You can sell the part to an existing open invoice by pressing '+Sell'. Alternatively, you can sell directly on an invoice by pressing '+Product' when displaying an open sales invoice.

+ Sell

Please note that you can only sell to an invoice which you have already started. You can start a new invoice by pressing 'new invoice (SI)' in the 'Sales' section.

Universal search

The universal search box is always visible at the top of the screen.



This search box lets you quickly find what you are looking for. Simply click in the box and start typing. The list of possibilities will be updated on each key press.

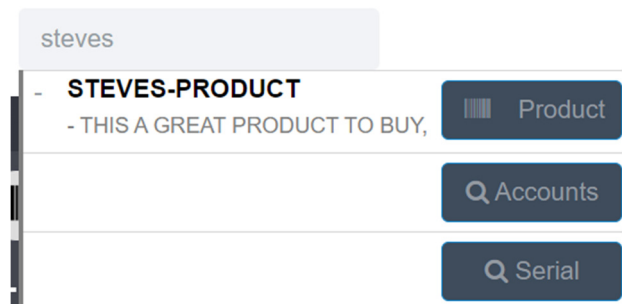
You can search on:

- Customer name
- Customer post code
- Product SKU
- Stock number.
- Vehicle registration number
- Vehicle frame number
- Transaction reference i.e. SI1223

Booking a product into stock

A product record must exist for the product before you can book one into stock.

Click in the universal search box and enter the part number.



Click on 'Product' to display the product record.



CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

STEVES-PRODUCT

USED-VEHICLE

Search Products

Catalogue

Fitment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

New Outboard

Used Outboard

STEVES-PRODUCT

This a great product to buy

0 Warehouse

Normal Type

Standard Rated Tax Code

4000 - Sales General Sales Nominal

5000 - Purchases Purchase Nominal

Available Status

+ Image/PDF

Selling

Sales

Fitment

Price

Sell

Buying

Supplier

Order

Group	Price	Inc.
Customer	100.00	120.00

Supplier

Test

Stock Warehouse (0)

Labels

Activity

Pricing Log

Stock Take

Press the up arrow to increase the stock level.

A small square button with a dark background and a light gray border. Inside the square is a white upward-pointing arrow.

35

Increase STEVES-PRODUCT Stock Level

Increase the stock level by Booking a product into stock

Qty

1

Serial

Auto

Purchase Price (unit)

50.0000

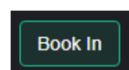
Purchase Reference/Note

Location

LOCATION

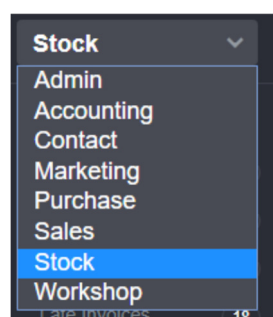
Close Book In

Enter the quantity and confirm the buy price then press 'book in'

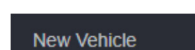


Adding a vehicle into stock

Go to the 'Stock' section.



Click on 'new vehicle'



The 'new vehicle' product window will then be displayed.

If the 'new vehicle' menu option does not exist, then you will have to setup a new vehicle product record. Create a new product record as normal but make sure you change the type to 'vehicle' and set 'individual pricing' to 'yes'.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

NEW-VEHICLE

Search Products

Catalogue

Filment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

New Outboard

Used Outboard

USED-VEHICLE

Used Vehicle

U

4 Warehouse

Vehicle Type

4055 - Sales Used Vehicle

Sales Nominal

Margin Scheme Tax Code

5055 - Purchase Used Vehicle

Purchase Nominal

Stock

Shop (56)

Sales

Labels

List

Up Arrow

File

Show 10 entries

Copy

CSV

PDF

Search:

	Age	Serial	Location	Sale	REG	MAKE	MODEL	COLOUR	SALVAGE CATEGORY	1ST REG DATE	MOT DUE
	2459	U5998	Shop SHOWROOM		STEVE	MOTO GUZZI	V9 ROAMER			01/01/2015	01/01/2017
	2466	U5996	Shop SHOWROOM		NEW123	VESPA	PX 125	WHITE		29/11/2016	
	2466	U5993	Shop SHOWROOM	8,333.33		KAWASAKI	ZX1400HGF	GREY		03/03/2016	15/01/2021
	2544		Shop SHOWROOM		EO61LRE	KAWASAKI	ZX1000HBF ABS	BLACK		17/10/2011	
	2739	U5984	Shop DUE IN	0.00	EA15WUO	VESPA	GTS SUPERSPORT 300 A	BLACK		30/04/2015	24/01/2021
	2750	U5948	Shop SHOWROOM	1,499.00	CJ55ANG	PIAGGIO	VESPA LX 125	RED		14/05/2009	
	2774	U5912	Shop SHOWROOM	999.00	Y258FDV	HONDA	NT650V DEAUVILLE	RED		16/03/2001	
	2780	U5872	Shop SHOWROOM	1,299.00	EX03WYU	HONDA	SES 125-3	SILVER		28/03/2003	

localhost:51907/Stock/Display/?ID=2067876&depot=Shop#

Press the up arrow



The vehicle booking in screen will then be displayed.

Increase USED-VEHICLE Stock Level

Increase the stock level by Booking a product into stock

Purchase Price (unit)

Purchase Reference/Note

Location

Group

REG

MAKE

MODEL

COLOUR

VIN NUMBER

ENGINE NUMBER

MILEAGE

SALVAGE CATEGORY

1ST REG DATE

MOT DUE

SERVICE DUE

WARRANTY DATE

MOVE DATE

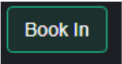
DESCRIPTION

HIRE NUMBER

Close

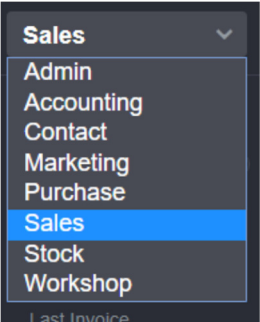
Book In

Enter the vehicle details and press ‘Book In’

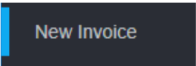


Selling a part

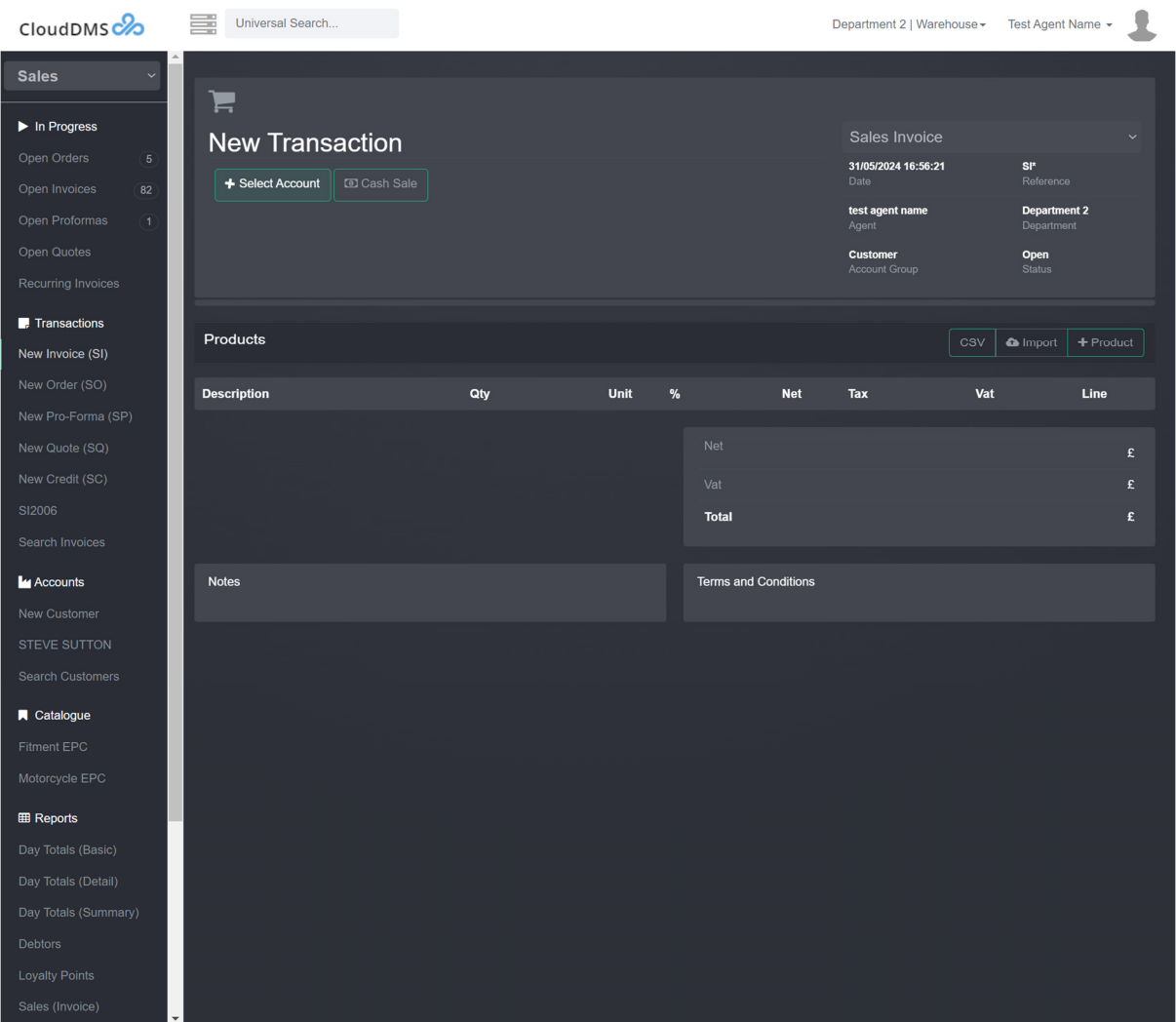
Go to the ‘Sales’ section of the DMS.



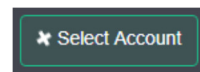
Then click on ‘new invoice’ on the main sales toolbar.



The new sales window will then be displayed.



Press 'Select Account'



Transaction

Account Name

Address

Post Code

Phone

Email

Account Code

Transaction

Enter the customer's name in the 'search by name or postcode box'

Account Name

As you type the nearest matches will be displayed.

Account Name

test

TEST	Test	Select
Open		
	Test 2 Customer	Select
Open		
	Test Customer	Select
Open	280a Northfield Avenue, W5 4UB	

Create a new account for 'test'

+ New Account

If the customer is on the list press 'select' beside it, if you have not dealt with them before press '+new account'

When you have the customer details correct press 'Save'

Save

To add a product to the invoice press '+Product'

+ Product

Sell Warehouse Product

Enter the SKU then select the part from the list

Qty

Warehouse SKU

Cancel

Enter the products part number in the SKU box. As you type the nearest matches will be displayed.

Sell Warehouse Product

Enter the SKU then select the part from the list

Qty

d0b5

D0B5000	Shad SH50 Top Box mpn	£ 228.80 Ex. 190.67	1 Warehouse	+	+ Add
D0B50KL	Brake Light for SH48, SH49, SH50 mpn	£ 43.12 Ex. 35.93	Back Order Warehouse		+ Add
D0B58106	SH58X Expandable 58 Litre Top Box shad	£ 280.00 Ex. 233.33	Back Order Warehouse		+ Add
D0B59100	TOP CASE SH59X ALU 2016 mpn	£ 299.99 Ex. 249.99	Back Order Warehouse		+ Add

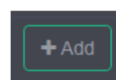
Cancel

✓ Finish SI

%

Commission

Press '+Add' to add the part to the invoice.



A green 'add' button means you have the part in stock, the orange add button means you don't have the product and it will be back ordered.

Edit REG FEE

Description

1st Registration fee

Serial

SERIAL

Location

LOCATION

Note

NOTE

Unit Price

55.0000

Calculate % discount from unit:

Discount (%)

0.00

Net

55.0000

Tax Code

zero rated

Vat

0.0000

Line

Calculate % discount from line:

55.0000

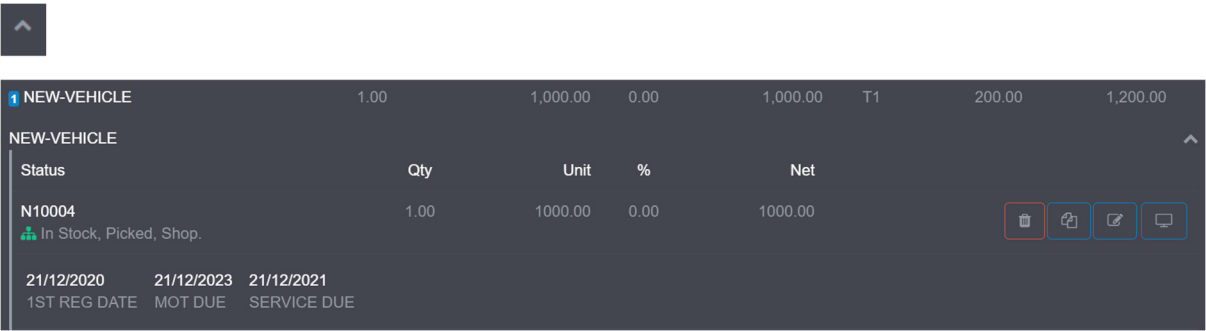
Cancel

Save

Make any changes required and press 'save'.

You can only edit lines on open sales invoices, once a sales invoice has been closed it cant be edited.

Click the small up/down arrow at the end of the product line to show/hide the product details and edit buttons.



When the invoice is complete press 'Finish SI' to display the finish dialogue and close the invoice.



Finish this Department 2 Sales Invoice

£ 1,255.00 Outstanding

Department

department 2

Account

card

Details

SI1407

Authorisation Code

Amount

0.00

Setup PDQ

Invoice Sub-Type

vehicle

Set status for 'in-stock' products. Backordered items will have a status of 'Backordered'

picked

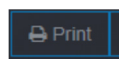
Close

Finish SI

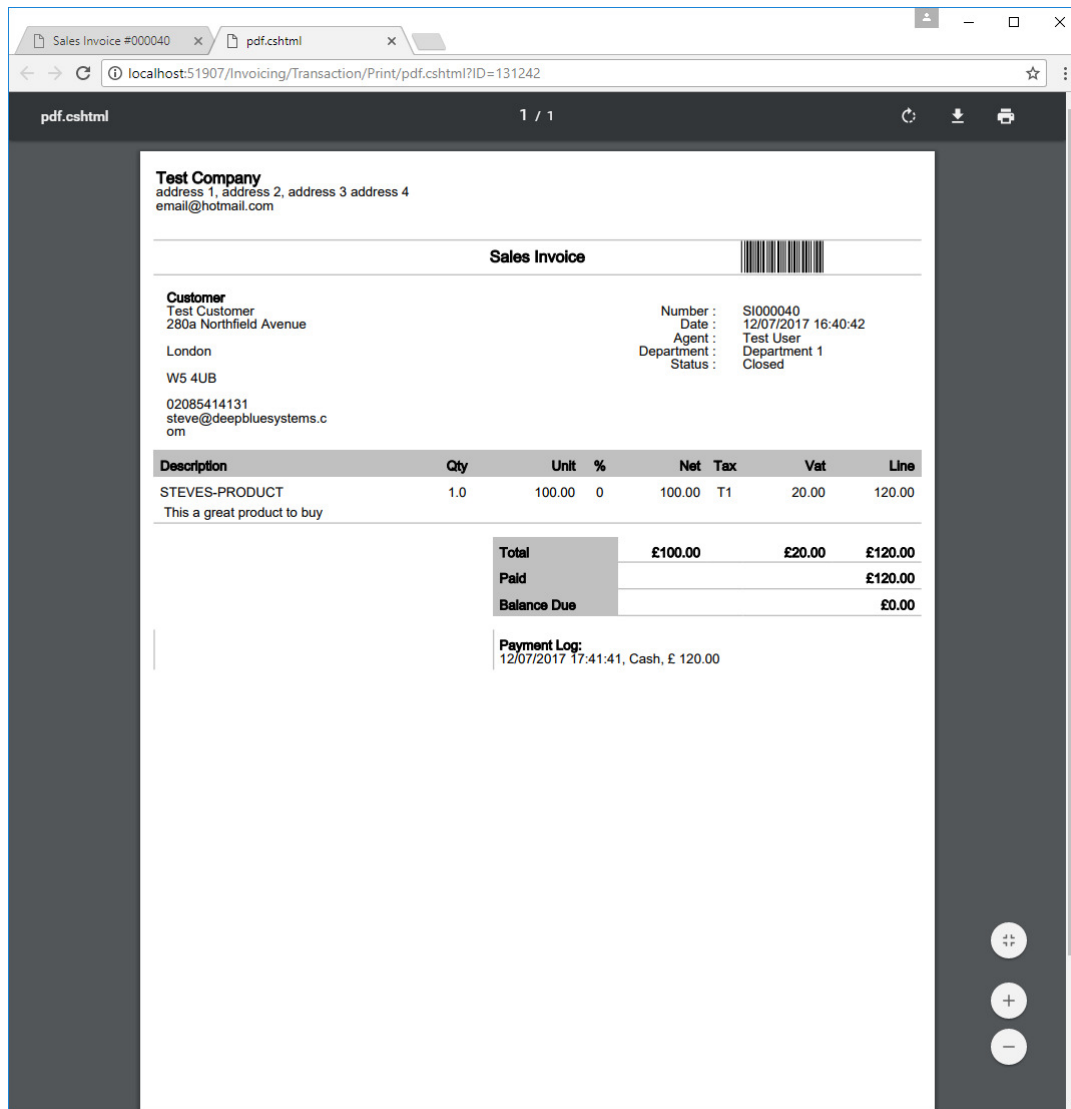
Select the payment method (if you are receiving a payment), enter the amount, and press 'Finish SI'.

The DMS also supports physical PDQ's for person payments and Payment links for online payments. To set this integration up please email sales@deepbluesystems.com.

If you want to print the invoice press 'Print'



A PDF copy of the invoice will then be displayed in your web browser.



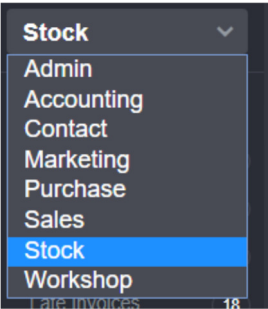
You can then print or download the PDF to your computer.

Alternatively, if you have entered an email address for the customer you can email the invoice directly to them by pressing the email button on the sales invoice.



Selling a vehicle

Go to the 'Stock' section.



Click on 'new vehicle' or 'used vehicle' to display the relevant vehicle stock list.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

STEVES-PRODUCT

Search Products

Catalogue

Fitment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

New Outboard

Used Outboard

Trailer

USED-VEHICLE

Used Vehicle

U

Warehouse

Vehicle Type

4055 - Sales Used Vehicle

Margin Scheme

5055 - Purchase Used Vehicle

Stock

Warehouse (4)

Sales

Labels

List

File

Show 10 entries

Copy

CSV

PDF

Search:

Age	Serial	Location	Sale	REG	MAKE	MODEL	COLOUR	SALVAGE CATEGORY	1ST REG DATE	MOT DUE	SERVICE DUE	WARRANT DATE
10	U6140	Warehouse		CE13PEO	MAZDA	2 VENTURE EDITION	RED		28/03/2013			
20	U6138	Warehouse		EU06VXN	KAWASAKI	ZR 750 K6F	BLACK		02/06/2006		10/05/2025	
80	U6136	Warehouse		SH67SR	BMW	R 1200 GS ADVENTURE	BLACK		13/12/2017		16/06/2022	
179	U6134	Warehouse		LR73RXA	YAMAHA	XSR 900 (MTM890)	BLUE		05/09/2023			
72			0.00 (0.00)		NaN (NaN)							4 results

Previous 1 Next

Find the vehicle you want to sell on the list, or click in the search box and enter the model name or frame number to filter the list.



Click on the required vehicles stock number (or display button) to display the vehicles stock record.

20

U6138

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

USED-VEHICLE

Search Products

Catalogue

Filment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

New Outboard

Used Outboard

USED-VEHICLE

Used Vehicle

U

Product

In Stock

U6138

Serial

Warehouse

Location

Vehicle

Type

4055 - Sales Used Vehicle

Sales Nominal

Margin Scheme

Tax Code

5055 - Purchase Used Vehicle

Purchase Nominal

Tag

Image

URL

Selling

Transfer

Edit

+ Sell

Vehicle

Label

Print

Activity

Edit

Sale Price

Price

Inc.

0.00

0.00

Also Sell Product Kit

Costs

Warranty

Internal

Debit

Credit

U6138

Serial

Group

SH67SRY

BMW

MAKE

R 1200 GS ADVENTURE

MODEL

BLACK

COLOUR

WB10A0201J2927562

VIN NUMBER

38170947

ENGINE NUMBER

1

MILEAGE

SALVAGE CATEGORY

13/12/2017

1ST REG DATE

01/01/1900 00:00:00

MOT DUE

16/06/2022

SERVICE DUE

01/01/1900 00:00:00

WARRANTY DATE

01/01/1900

MOVE DATE

DESCRIPTION

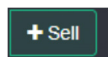
Transaction Details

Show 10 entries

Copy CSV PDF

Search

Press '+Sell' to start selling the vehicle.



The customer selection dialogue will now be displayed.

Sell Used Vehicle

New Invoice

Account Name

Search by Name or Postcode

Address

Address 1

Address 2

Address 3

Address 4

Post Code

POST CODE 

MarketingDepot

warehouse 

Phone

PHONE

Mobile

MOBILE

Email

email

Sales Price Inc

2000.0000

No Selling Price. Please edit the sales price above before selling the vehicle. The default value above is the buy price plus any internal costs.

test agent name Open Invoices 

Other Open Transactions 

Close

Click in the account name box and start entering the customer's name, as you type a list of possible matches will be displayed.

The screenshot shows a dark-themed interface titled "Sell Used Vehicle". Inside, there's a "New Invoice" section with an "Account Name" search box containing the text "smith". Below the search box, a list of suggestions is displayed:

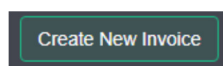
Status	Account Name	Address	Action
Open	Ian Smith	11 Crushton Place, CM14WH	Select
Open	Kevin Smith	48 New Road, CO111BU	Select

Below the list, there is a link "Create a new account for 'smith'" and a "+ New Account" button. A "Cancel" button is located at the bottom right of the interface.

If the customer is already in the system press 'select' beside their name, otherwise press '+New Account' and enter the customer details.

If you want to sell the vehicle to an existing open sales invoice you can select it by expanding the 'open' invoices section below the customer selection box.

When you have the customer details entered press 'Create New Invoice'



You could alternatively sell the vehicle to a new sales order by clicking the relevant button.

The sales invoice will now be displayed.

Sell Warehouse Product

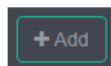
Enter the SKU then select the part from the list

D0B23100	SIDE CASE SH23 mpn	£ 360.00 Ex. 300.00	Back Order Warehouse ▾	+ Add
D0B26100	SH26 Top Box mpn	£ 53.99 Ex. 44.99	Back Order Warehouse ▾	+ Add
D0B2900	TOP CASE SH29 BLACK :TOP CASES mpn	£ 53.09 Ex. 44.24		→ Supersession
D0B2900EX	TOP CASE SH29 EXPLORER :TOP CASES	£ 32.74 Ex. 27.28	Back Order Warehouse ▾	+ Add

Cancel

As you type the part number (SKU) the nearest matches will be displayed.

Press '+Add' to sell the product to the invoice.



A green add button indicated that the product will be sold from free stock. An orange add button indicates that the product is not in stock and will be back ordered.

MPN SIDE CASE SH23					
Status	Qty	Unit	Discount	Net	
In Stock Awaiting Dispatch	1.0	204.00	0.00	204.00	

The invoice will be redisplayed with the product you have just added highlighted. You can expand or collapse the line pressing the small chevron arrow at the end of the line.

Press 'edit' to alter the price or discount the line, if required.



Edit D0B23100

Description
MPN SIDE CASE SH23

Serial
Serial

Location
Location

Note
Note

Unit Price
204.0000

Discount
0.00

Net
204.00

Tax Code
Standard Rated

Vat
40.80

Line
244.80

☒ Edit all 'D0B23100'

Cancel Save

Add all the products required to the invoice, this may include items such as road fund licence and any accessories.

With vehicle sales it is best to leave the sales invoice open (so it can be amended) until the customer has collected the vehicle.

The deposit can be recorded on the open invoice by pressing '+Payment'.

When you are ready and have finished altering the invoice press 'Finish SI'



The finish invoice dialogue will be displayed.

Finish this Department 2 Sales Invoice

£ 2,000.00 Outstanding

Department

department 2

Account

card

Details

SI2007

Authorisation Code	Amount
	0.00

Setup PDQ

Invoice Sub-Type

vehicle

Set status for 'in-stock' products. Backordered items will have a status of 'Backordered'

picked

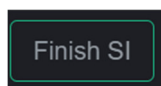
☐ Email copy invoice to: JOHN@ABC.COM

Find attached a copy of your invoice.

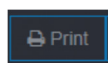
Find attached a copy of your invoice.

Close Finish SI

If an additional payment is being made select the payment type and enter the amount then press 'Finish SI'.



To print the invoice press 'Print'



The vehicle printing dialogue will be displayed which offers a choice of invoice layouts.

Sales Invoice #000041

pdf.cshtml

localhost:51907/InvoicingTransaction/Print/pdf.cshtml?ID=131252

pdf.cshtml

pdf.cshtml


1 / 1

Test Company

address 1, address 2, address 3 address 4

email@hotmail.com

Sales Invoice



IAN SMITH

11 CRUSHTON PLACE

CHELMSFORD

ESSEX

CM14WH

Number : SI000041

Date : 13/07/2017 08:11:57

Agent : Test User

Department : Department 1

Status : Closed

Description	Qty	Unit	%	Net	Tax	Vat	Line
D0B23100	1.0	204.00	0	204.00	T1	40.80	244.80
MPN SIDE CASE SH23							
USED-VEHICLE	1.0	0.00	0	0.00	T5	0.00	0.00
U Used Vehicle Location: SHOWROOM							
EK60VJE, KAWASAKI, ZZR1400, GREY, JKBZXT40CDA022927, ZXT40AE060774, 26/11/2010							

Total

£204.00

£40.80

£244.80

Paid

£244.80

Balance Due

£0.00

Payment Log:

13/07/2017 09:12:41, Cash, £ 244.80

Terms:

I certify that I am the buyer of the above vehicle at the price stated. I acknowledge receiving delivery. I am over 18 years of age.

1. Have you been shown the vehicle and controls? YES/NO

2. Has anything been said to you to suggest the mileage may be considered correct? YES/NO

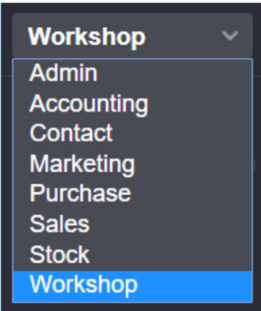
3. Was there a sticker adjacent to the mileage recorded to indicate the recorded mileage must be considered incorrect/ disregarded? YES/NO

I agree to the terms and conditions set out in this invoice.

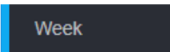
Customer's Signature

Date

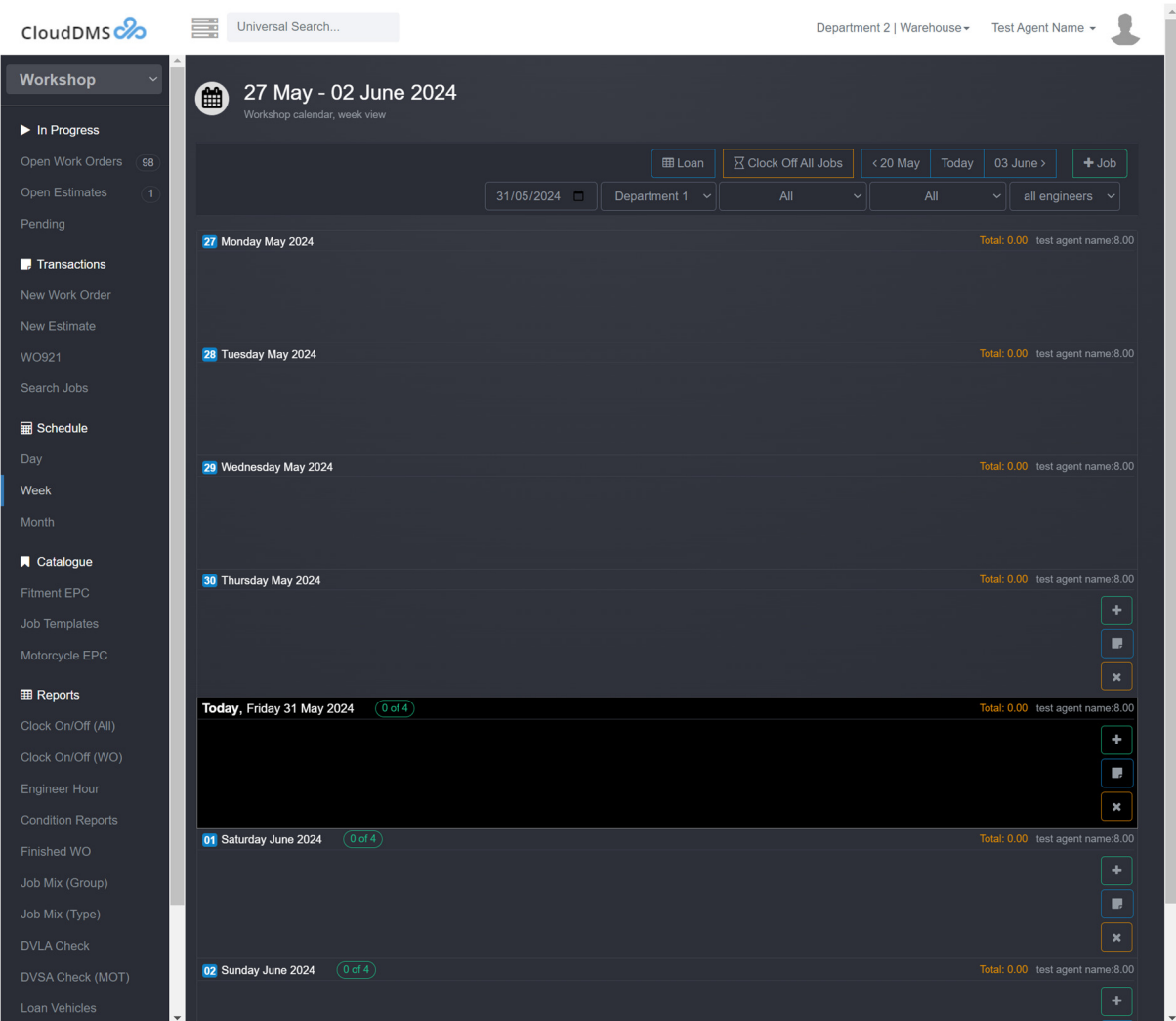
Booking a job into the workshop
Go to the 'Workshop' section.



Then select 'Week' from the main menu bar.



This week's workshop schedule will be displayed.



Press the '+' button on the day you want to book the work for



Or press ‘New Work Order’ on the menu bar.

The new work order screen will then be displayed.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Workshop

In Progress

Open Work Orders98

Open Estimates1

Pending

Transactions

New Work Order

New Estimate

WO921

Search Jobs

Schedule

Day

Week

Month

Catalogue

Fitment EPC

Job Templates

Motorcycle EPC

Reports

Clock On/Off (All)

Clock On/Off (WO)

Engineer Hour

Condition Reports

Finished WO

New Job

Select Account

Work Order

31/05/2024 17:07:32
Booked

WO*
Reference

test agent name
Agent

Department 1
Department

WO
Type

Open
Status

Job details

Associated

Products

Import

Description	Qty	Unit	%	Net	Tax	Vat	Line
Products		0		Net			£
Backorder				Vat			£
Stock				Total			£

Notes

Terms and Conditions

Press ‘+Select Account’ to choose the customer

Select Account

Transaction

Account Name

Account Name

Address

Address 1

Address 2

Address 3

Address 4

Post Code

Post Code

Phone

Phone

Email

Email

Account Code

Account Code

Transaction

Cancel

Save

Click in the 'Account Name' box and enter the customer's name, postcode or vehicle registration number. As you type possible matches will be displayed.

Transaction

Account Name

steve

Open

Alan Stevens

56 Haven Village, CO70LW

Select

A654TRY

Steve Suttom

4 Barnfield Avenue, W7 1BN

Select

Create a new account for 'steve'

+ New Account

Account Code

Transaction

Cancel

Save

Press 'Select' beside the relevant customer or '+New Account' if the customer is not already in the system.

When you have the customer entered press 'save'



The job dialogue will be displayed automatically, if it's not press 'Edit' in the job details frame

Job details

 Clock On ▾

 Edit

Friday 2024-05-31 17:07

Start

1.0

Estimated

Job Type

Friday 31/05/2024 17:07

Due

0.0

Actual

-

Engineer

Mileage

Work Order

Department 1 job.

Department

department 1

Engineer

unallocated

! No Engineer Set

Main Job Type

service

Start Date, Time

8 9 10 Noon

31/05/2024 17:07

Due Date, Time

1 2 3 Noon PM
Next AM Next Noon Next PM

31/05/2024 17:07

Job Details

Service Repair Tyres MOT PDI Warranty
Dyno Retification Collection Delivery
Service and MOT

Estimated Time

1.0

Actual Time

0.0

Mileage

On Site

No

Loan

No

Customer Waiting

No

☒ Email booking to: steve@deepbluesystems.com, calendar attachment

☒ Email booking to: steve@deepbluesystems.com, no calendar attachment

Select template...

Select template...

☒ SMS booking reminder one day before

(U1) scheduled (DATE) (TIME) at Test Dealer. Default for all

(U1) scheduled (DATE) (TIME) at Test Dealer. Default for all

Close

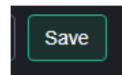
Save

Enter the job details pressing return after each item.

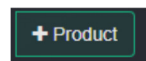
Select the relevant engineer who will carry out the work.

Confirm the start and end dates/times as well as the estimated hours and current vehicle mileage.

When you have everything filled out correctly press 'Save'.



You can add products to the job by pressing 'Product'. The part picker dialogue will then be displayed.



Sell Warehouse Product

Enter the SKU then select the part from the list

Qty

d0b36

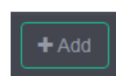
D0B36100	SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT mpn	£ 300.00 Ex. 250.00	🕒 Back Order Warehouse ▼	+ Add
D0B36100-C	SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER -	£ 329.99 Ex. 274.99	🕒 Back Order Warehouse ▼	+ Add

Warning. Your depot is set to Warehouse. The default depot for Department 1 is Shop

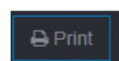
Cancel

Enter the part number (SKU), as you type the nearest matches will be displayed.

Press '+Add' to add the product



To print the job card press 'Print'



Work Order WO926

A654TRY
KAWASAKI
KLZ1000BFF
BLACK
JKALZT00BBA004768



Booked	test agent name
Engineer	-
Type	Service
Mileage	
On-Site	
Loan	

Start	31/05/2024 17:07:00
Estimated	1.0 hrs
Due	31/05/2024 17:07:00

[illegible]

Terms:
Tyres:

NSFmm	OSFmm	NSRmm	OSRmm
-------------	-------------	-------------	-------------

Brake Pads:

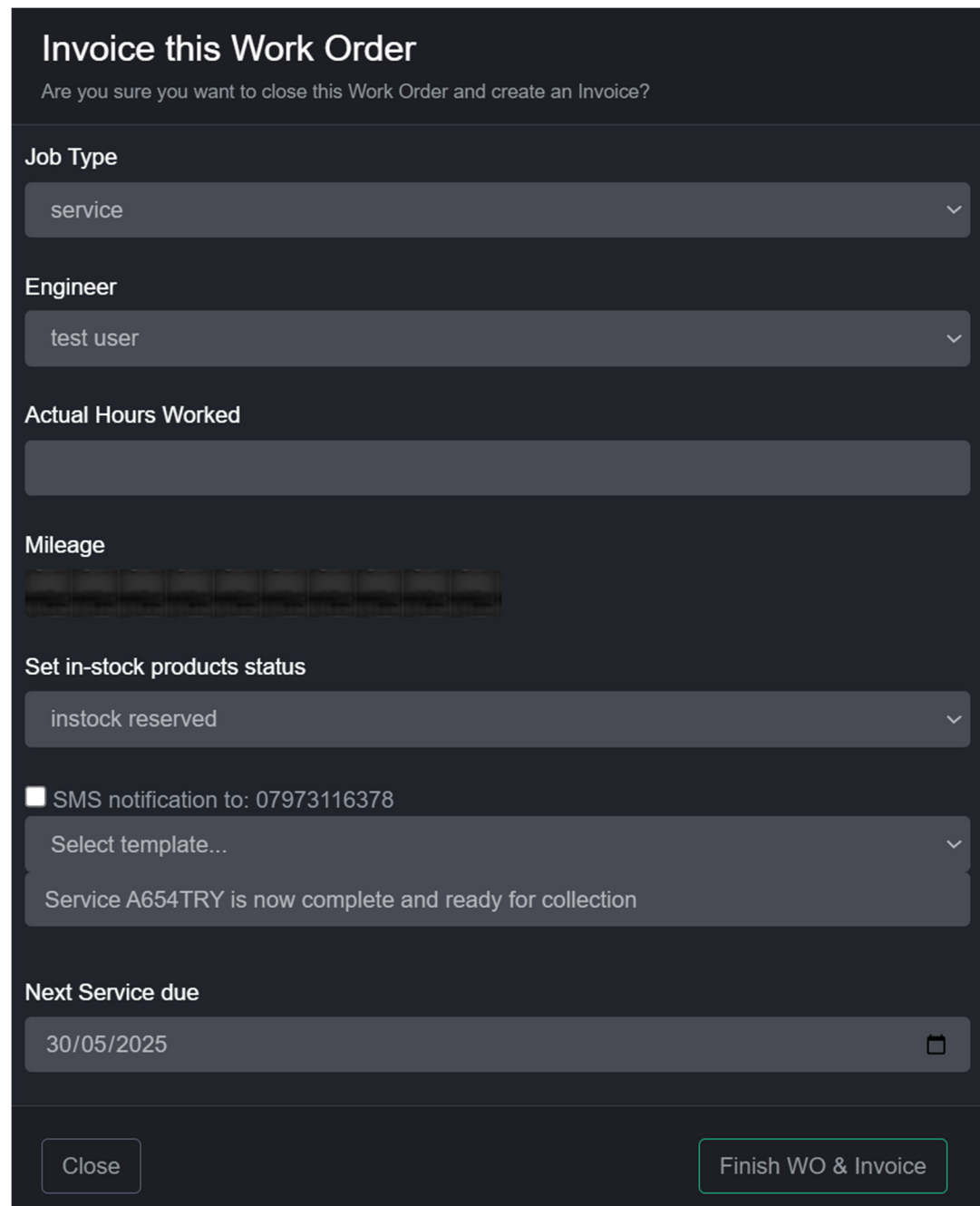
NSFmm	OSFmm	NSRmm	OSRmm
-------------	-------------	-------------	-------------

Service Book Stamped [] Service Light Reset []

When the job is complete, press 'Finish WO'



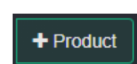
The finish dialogue will then be displayed.

A dark-themed dialog box titled 'Invoice this Work Order'. Below the title is a question: 'Are you sure you want to close this Work Order and create an Invoice?'. The dialog contains several form fields: 'Job Type' with a dropdown menu showing 'service'; 'Engineer' with a dropdown menu showing 'test user'; 'Actual Hours Worked' with an empty text input field; 'Mileage' with a row of seven small, dark square input fields; 'Set in-stock products status' with a dropdown menu showing 'instock reserved'; an 'SMS notification to: 07973116378' section with a checkbox and a dropdown menu showing 'Select template...' and a text area containing 'Service A654TRY is now complete and ready for collection'; and 'Next Service due' with a date input field showing '30/05/2025' and a calendar icon. At the bottom are two buttons: 'Close' and 'Finish WO & Invoice'.

Enter the actual hours worked and confirm the vehicle mileage.







Then press 'Finish WO & Invoice' to close the workshop job and start the sales invoice

On the sales invoice, you can add extra product, for example Labour by pressing '+Product'



You can change the price of a product by expanding the line using the down arrow at the end of each line



Description	Qty	Unit	%	Net	Tax	Vat	Line
D0B36100	1.0	249.99	0	249.99	T 1	50.00	299.99
MPN Shad Sh36 Side Cases (pair) - Black-carbon - Pannier - Requires Model Specific 3P Fitting Kit							^
Status	Qty	Unit	Discount	Net			
 In Stock Awaiting Dispatch	1.0	249.99	0.00	249.99	    		

Press the 'edit' button to change the price or discount



Edit D0B36100

Description

MPN Shad Sh36 Side Cases (pair) - Black-carbon - Pannier - Requires Model Specific 3P

Serial

Serial

Location

Location

Note

Note

Unit Price

249.9900

Discount

0.00

Net

249.99

Tax Code

Standard Rated

Vat

50.00

Line

299.99

☒ Edit all 'D0B36100'

Cancel

Save

When the invoice is finalised press 'Finish SI'. Normally its best to wait till the customer is collecting the vehicle before finishing the sales invoice.



Pressing 'Finish SI' will display the finish invoice dialogue.

Finish this Department 2 Sales Invoice

£ 300.00 Outstanding

Department

department 2

Account

card

Details

SI2008

Authorisation Code

Amount

0.00

Setup PDQ

Invoice Sub-Type

service

Set status for 'in-stock' products. Backordered items will have a status of 'Backordered'

picked

☐ Email copy invoice to: steve@deepbluesystems.com

Find attached a copy of your invoice.

Find attached a copy of your invoice.

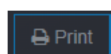
Close

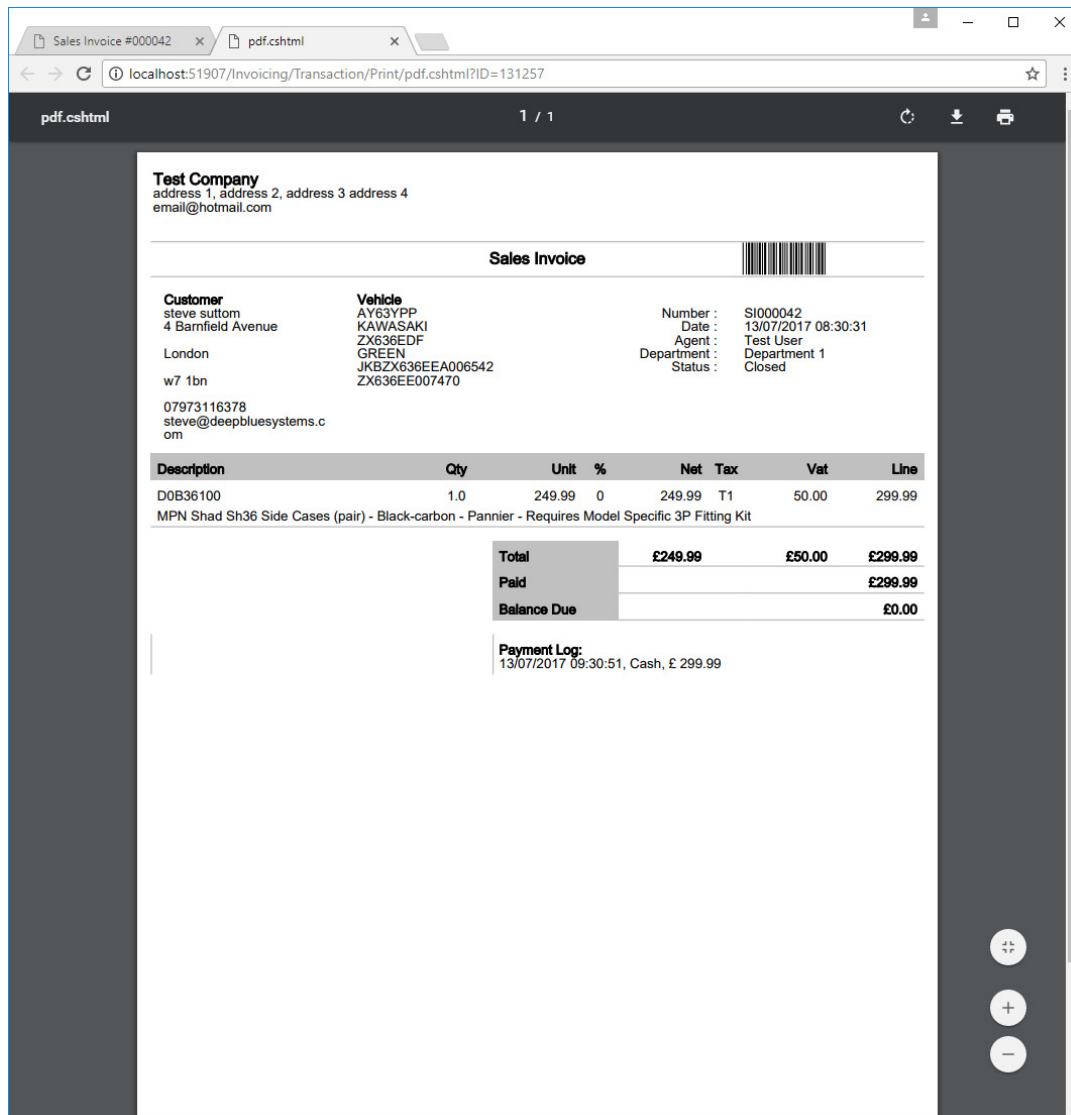
Finish SI

If the customer is paying select the payment method and amount.

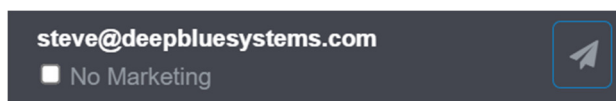
Press 'Finish SI' to close the invocie.

Press 'Print' to print the invoice.



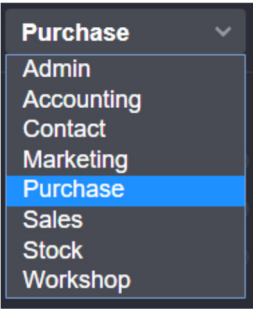


If the customer has an email address you could alternatively email the invoice directly to the customer.

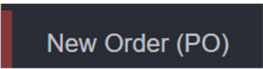


Creating a purchase order

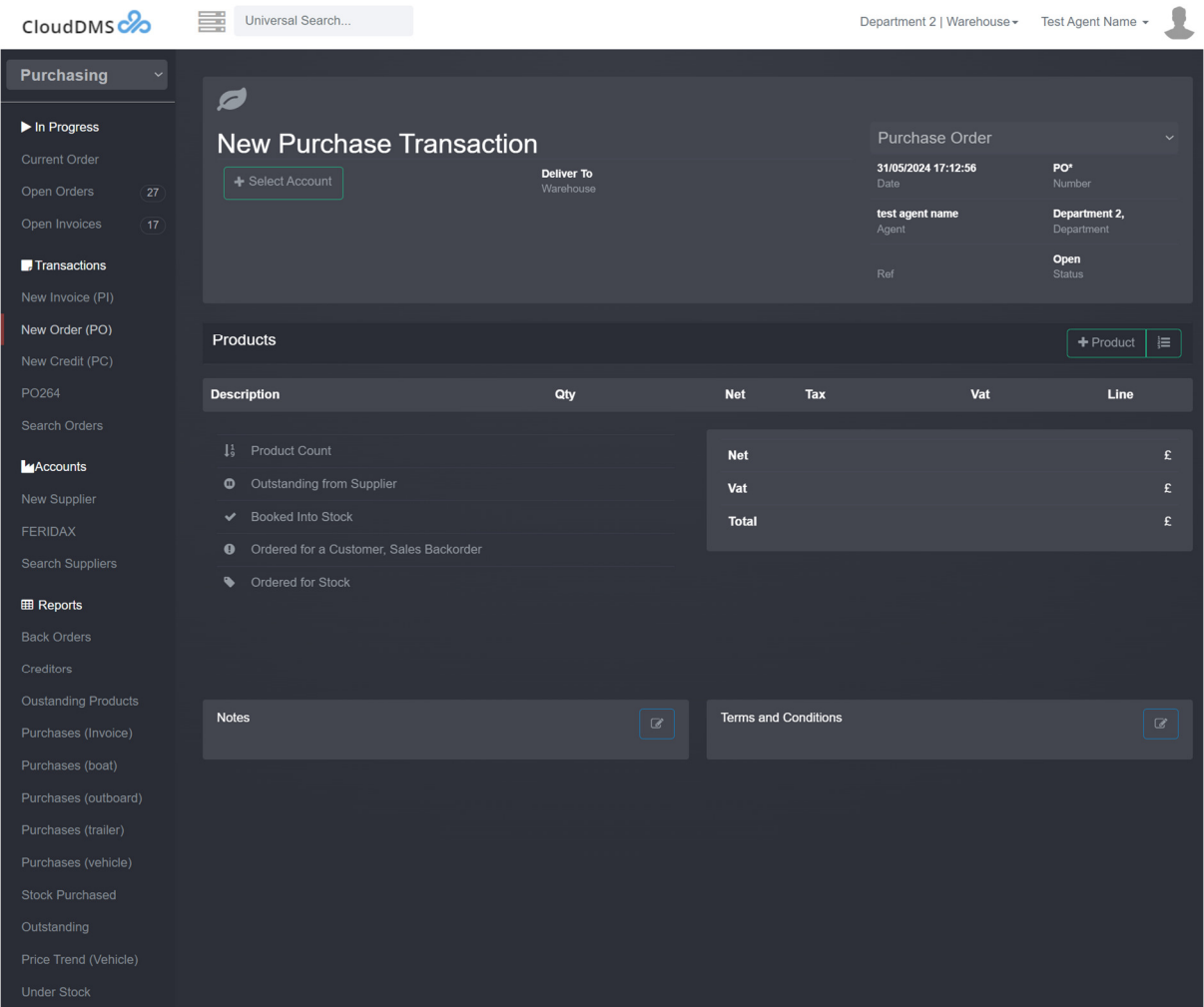
Go to the 'Purchasing' section



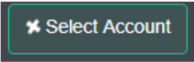
Then click on 'New Order' on the main toolbar



A blank purchase order will then be displayed.



Press '+Select Account' to choose the supplier



Transaction

Account Name

Account Name

MPN	Mpn	Select
Open		
TEST	Test	Select
Open		

Create a new account for 'all'

+ New Account

Account Code

Transaction

Cancel

Save

Enter the suppliers name, as you type the nearest matches will be displayed.

Press 'Select' beside the correct supplier, or '+New Account' to create a new supplier.

When you have the correct supplier details entered press 'Save'

Save

You can add products to the purchase order by pressing '+Product'

+ Product

Add Product

Enter the SKU then select the part from the list

Qty

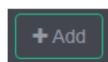
d0b

D0B23100	Side Case Sh23 Mpn	+ Add
D0B26100	Shad Sh26 Top Box Mpn	+ Add
D0B2900	Top Case Sh29 Black :Top Cases Mpn	+ Add
D0B2900EX	Top Case Sh29 Explorer :Top Cases Mpn	+ Add
D0B29100	Shad Sh29 Top Box Mpn	+ Add

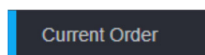
Cancel

As you type a part number the nearest matches will be displayed.

Press '+Add' to add the product.



If you have sold parts to customer which are not in stock, or a parts stock level has fallen below the min stock level they will be listed on the 'Current Order'. To display the list press 'Current Order' on the main toolbar



This will display a list of product the system thinks you need to order.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Purchasing

Awaiting Allocation to Purchase Order

Products which have not been allocated to a purchase order

All

All

All

Department

Warehouse

Go

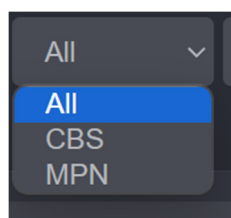
Auto Warehouse

Auto All

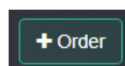
+ Order

SKU	Description	Type	Status
<input checked="" type="checkbox"/> IC-705		Backorder Warehouse	WO 05/11/2020 11:07:46
<input checked="" type="checkbox"/> LC-192		Backorder Warehouse	JACK JONES WO 05/11/2020 11:07:46
<input checked="" type="checkbox"/> MYDEL-QRAB		Backorder Warehouse	WO 05/11/2020 11:07:46
<input checked="" type="checkbox"/> 01-065-0770-0	-	Backorder Warehouse	Geoffrey Mcrae SI881 28/01/2019 Department 1
<input checked="" type="checkbox"/> 01-420-5561-0	-	Backorder Warehouse	Fred Walters WO 17/01/2019 10:15:12
<input checked="" type="checkbox"/> 00000000014	HONDA PAQ 100 OR MOTO/1FEU	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000015	HONDA VENTES AGENTS(25)	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000017	HONDA JEU 100 OR VOITURE	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000020	HONDA JEU 100 OR MOTOCULTU	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000024	HONDA JEU 100 OR JARDIN	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000025	HONDA O.R. MARINE 100X4FEU	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000030	HONDA JEU 20 DOSS CLIENTS	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 3450009	HONDA NIPPLE SPOKE	Backorder Warehouse	TEST CUSTOMER SI1392 13/01/2021

You can select the supplier filter to view product relevant to a specific supplier.



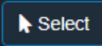
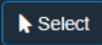
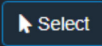
Check the box beside the parts you want to add to the purchase order and press '+Order'.




Alternatively you can press 'auto all' which will allocate all products to all relevant purchase orders. A list of open purchase orders will then be displayed.

Add to Purchase Order

Select an Open Department 1 Purchase Order to allocate the selected products to

Date	Reference	Supplier	Total	Lines	
08/04/2017 12:07:53	#000001	Mpn	£ 0.00	184	
15/06/2017 09:07:02	#000002	Chicken Soup	£ 0.00	3	
13/07/2017 09:33:02	#000003	Mpn	£ 29.99	1	

If the products are not moved to the Purchase Order make sure the supplier is listed on the Product Record.

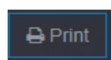


Press 'Select' beside the order you want to add the parts to.



If the parts are not added it will be because the supplier has not been added to the product in question as a possible supplier.

Press 'Print' to print the purchase order



Purchase Order #000003 x pdf.cshhtml x

localhost:51907/Purchasing/Transaction/Print/pdf.cshhtml?id=131258

pdf.cshhtml 1 / 1

Test Company
address 1, address 2, address 3 address 4
email@hotmail.com

Purchase Order

Supplier MPN	Account : Number : PO000003 Date : 13/07/2017 09:33:02 Agent : Test User Department : Department 1 Status : Open
------------------------	---

SKU	Qty	Description
120060	1.0	Demi-Jet helmet, Polycarbonate shell, double visor, Matte Anthracite Grey , XS/XL
500492R	1.0	ETIQ PVC NADSA SH 30 :RECAMBIOS TOP CASE SHAD
765N1	1.0	"Super-compact raincoat Nano Rain Jacket Plus. Black, 2XS"
D0B26100	1.0	MPN Shad SH26 Top Box
D0B36100	1.0	Shad Sh36 Side Cases (pair) - Black-carbon - Pannier - Requires Model Specific 3P Fitting Kit
H0A10T	1.0	Top Box Fitting Kit Honda A / NES 125 (00 - 07) - 150 (05 - 08)

Total	£297.48	£0.00	£297.48
--------------	----------------	--------------	----------------

Notes:

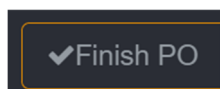
Terms:

÷

+

-

Once the order has been sent to your supplier close it by pressing 'Finish PO'



The close purchase order dialogue will then be displayed.

Close Purchase Order

Are you sure you want to close this Purchase Order and create a Purchase Invoice?

Reference

Close

Finish PO & Invoice

Press 'Finish PO & Invoice' again to close the purchase order and create a purchase invoice.



Finish PO & Invoice

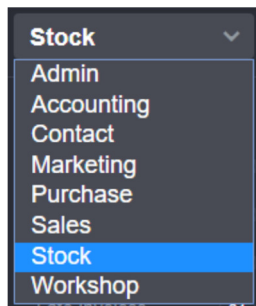
When you receive the invoice from your supplier you can check it against your purchase invoice and adjust any prices as required.

You can then close the purchase invoice.

When you pay your supplier you should record the payment against the purchase invoice.

Booking in a purchase order

Go to the 'Stock' section



Press 'book in' on the main menu bar



Book In

This displays a list of products you have ordered but not received.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

USED-VEHICLE

Search Products

Catalogue

Filiment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

New Outboard

Used Outboard

Trailer

Summary

Book In Stock

Outstanding supplier ordered products. 'Tag' the products you want to book-in.

Qty

Tag by SKU...

Tag All

Un-Tag

File

All

PI Allocated

Warehouse

On Order

Unavailable

Book In

test agent name

Description	Depot	Ordered	Price	Location	Serial	Status
<div>D0B36100</div> <div>Shad Sh36 Side Cases (Pair) - Black-Carbon - Paannier - Requires Model Specific 3p Fitting Kit</div>	Warehouse	<div>PI91</div> <div>PO81</div> <div>20/02/2018</div>	100.00	JAMES HEAL FIVE SI433	-	<div>Outstanding</div> <div>Awaiting stock</div>
<div>D0B36100</div> <div>Shad Sh36 Side Cases (Pair) - Black-Carbon - Paannier - Requires Model Specific 3p Fitting Kit</div>	Warehouse	<div>PI234</div> <div>PO161</div> <div>21/09/2019</div>	150.00	STEVE SUTTON	-	<div>Outstanding</div> <div>Awaiting stock</div>
<div>D0B26100</div> <div>Sh26 Top Box</div>	Warehouse	<div>PI326</div> <div>PO175</div> <div>13/01/2022</div>	50.00		-	<div>Outstanding</div> <div>Awaiting stock</div>
<div>D0B36100</div> <div>Shad Sh36 Side Cases (Pair) - Black-Carbon - Paannier - Requires Model Specific 3p Fitting Kit</div>	Warehouse	<div>SC195</div>	89.00	STEVE SUTTON	-	<div>Outstanding</div> <div>Awaiting stock</div>
<div>D1B23E08</div> <div>Cover Sh23 White</div>	Warehouse	<div>PI325</div> <div>PO213</div> <div>13/01/2022</div>	19.01	FIG SI1399	-	<div>Outstanding</div> <div>Awaiting stock</div>
<div>D1B23E08</div> <div>Cover Sh23 White</div>	Warehouse	<div>PI325</div> <div>PO213</div> <div>13/01/2022</div>	19.01	HONDA WARRNATY SI1686	-	<div>Outstanding</div> <div>Awaiting stock</div>
<div>D1B23E08</div> <div>Cover Sh23 White</div>	Warehouse	<div>PI325</div> <div>PO213</div> <div>13/01/2022</div>	19.01		-	<div>Outstanding</div> <div>Awaiting stock</div>
<div>D1B23E08</div> <div>Cover Sh23 White</div>	Warehouse	<div>PI325</div> <div>PO213</div> <div>13/01/2022</div>	19.01		-	<div>Outstanding</div> <div>Awaiting stock</div>
<div>D1B23E08</div> <div>Cover Sh23 White</div>	Warehouse	<div>PI325</div> <div>PO213</div> <div>13/01/2022</div>	19.01		-	<div>Outstanding</div> <div>Awaiting stock</div>
<div>D1B26CAR</div>	Warehouse	<div>PI326</div>	4.86		-	<div>Outstanding</div> <div>Awaiting stock</div>

Enter the Part number (SKU) of the product received in the 'Tag by SKU' box and press return

Tag by SKU...

The relevant part will then be tagged

☒

D0B36100

Shad Sh36 Side Cases (Pair) - Black-Carbon - Paannier - Requires Model Specific 3p Fitting Kit

Once you have tagged all the part received press 'Book In'

Book In

Book In Selected Products

Only 'tagged' products visible on the current screen will be booked in.

Are you sure you want to book in the selected products?

Purchase Reference/Note

Cancel
Book In

Press 'Book In' again to confirm the action.

Details of what has been booked in will then be displayed.

CloudDMS
Universal Search...
Department 2 | Warehouse
Test Agent Name

Stock
In Progress
Book In Products
Dispatch Products
Pick Invoices
Dispatch Invoices
Dispatch by Barcode
Late Invoices
Products
New Product
USED-VEHICLE
Search Products
Catalogue
Fitment EPC
Motorcycle EPC
Boat
Summary

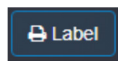
Book In Stock
Success. Stock Booked In

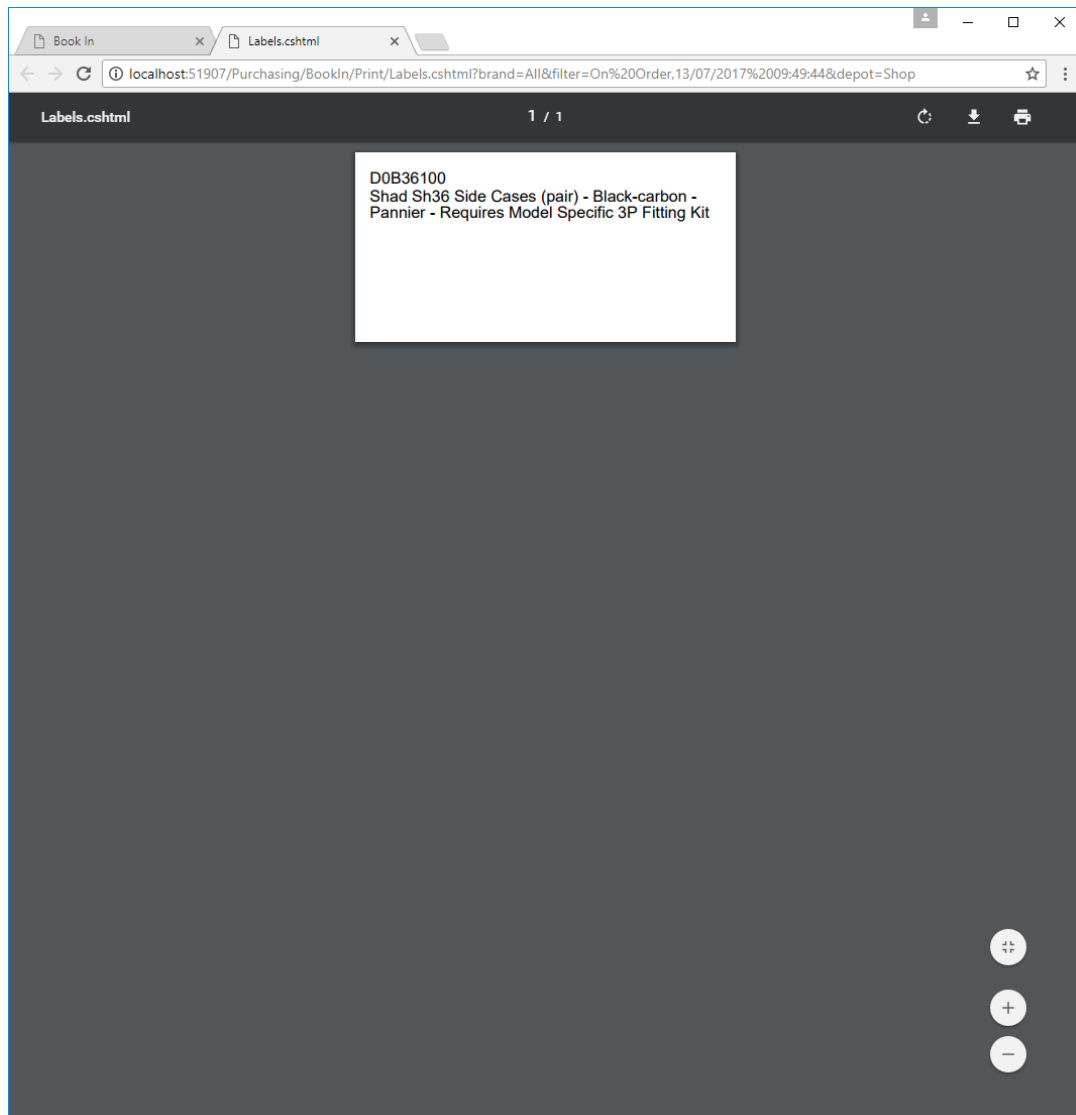
Outstanding supplier ordered products. 'Tag' the products you want to book-in.

Warehouse
Booked In 31/05/2024 17:15:35
test agent name
SMS
Email
Invoices
Label
Allocation

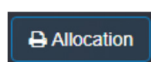
Description	Depot	Ordered	Location	Serial	Status
D0B36100 Shad Sh36 Side Cases (Pair) - Black-Carbon - Paannier - Requires Model Specific 3p Fitting Kit	Warehouse	PI234 PO161 21/09/2019	STEVE SUTTON		On Stock 31/05/2024 17:15:35 MPNSH36 By test agent name
D0B36100 Shad Sh36 Side Cases (Pair) - Black-Carbon - Paannier - Requires Model Specific 3p Fitting Kit	Warehouse	PI91 PO81 20/02/2018	JAMES HEAL FIVE SI000433		On Stock 31/05/2024 17:15:35 By test agent name

Press 'Labels' to print stock labels for the products





Press 'Allocation' for the stock allocation list



Book InAllocation.cshtmlLabels.cshtml

localhost:51907/Purchasing/Bookin/Print/Allocation.cshtml?brand=All&filter=On%20Order,13/07/2017%2009:49:44&depot=Shop

Allocation.cshtml1 / 1

Book in Stock

Filter : 2017-07-13 09:49:44
Brand :
Depot : Shop

Desc	Qty	Depot	BIN	Serial	Status
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	1.0	Shop			On Stock 13/07/2017 09:49:44 by Test User

Company Settings

All company configuration options are held in 'company settings' which can be found in the 'Admin' section. Only administrator level accounts have access to these settings.

The DMS will initially be setup with default values relevant for your industry. Make sure all settings are configured to your requirements before using the DMS.

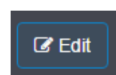
The screenshot shows the 'Test Account' settings page in the CloudDMS Admin interface. The page is organized into several sections, each with a list of settings and their respective counts in circles:

- Account**
 - Account Group (7)
 - Associated Types (9)
- Thread**
 - Documents (5)
 - Thread Activity (3)
 - Thread Categories (15)
 - Thread Leads (3)
 - Thread Resolution (5)
- Script**
 - Currency (2)
 - Departments (3)
 - Depots (5)
 - Dispatch Via (7)
 - Invoice Sub-Types (7)
 - Payment Methods
 - PDQ/Online Setup (1)
 - Script Values (21)
 - Statement
 - Tax Codes (7)
 - Terms (10)
 - Terms Allocation (8)
- Printing**
 - Headers (1)
 - Labels (2)
- Tag Labels**
 - Tag Labels (11)
- Workshop**
 - Close Days
 - Condition Report (32)
 - Job Types (11)
 - Online Booking

An 'Edit' button is located in the top right corner of the 'Test Account' header.

Company Details

Press 'Edit' in top right of the company settings screen to update your company details.



The 'edit agent company' dialogue will then be displayed.

Edit Agent Company Account

Company Name

TEST ACCOUNT

Address

Address

Post Code

POST CODE

Web Site

WEB SITE

Run Mode

Motorcycle

Currency

£

Loan Vehicle SKU

HIRE FLEET 2

Loyalty Point Value

0.0100

Close Save

Press 'Save' on the Edit dialogue to save any changes.

Enter your company's name, address, and website and press 'Save'.

Run Mode

The run enables extra functions for specific business types.

Motorcycle

- Motorcycle & scooter EPC (deprecated)
- VRM (Vehicle Registration Mark) lookup
- Motorcycle Parts Network stock sharing
- DVSA MOT history checking
- DVLA road tax checking

Marine

- Outboard & Jet ski EPC (deprecated)
- Marine Parts Network stock sharing

Car

- VRM (Vehicle Registration Mark) lookup
- DVSA MOT history checking
- DVLA road tax checking

Currency

Sets the billing currency used on invoices, statements, and orders.

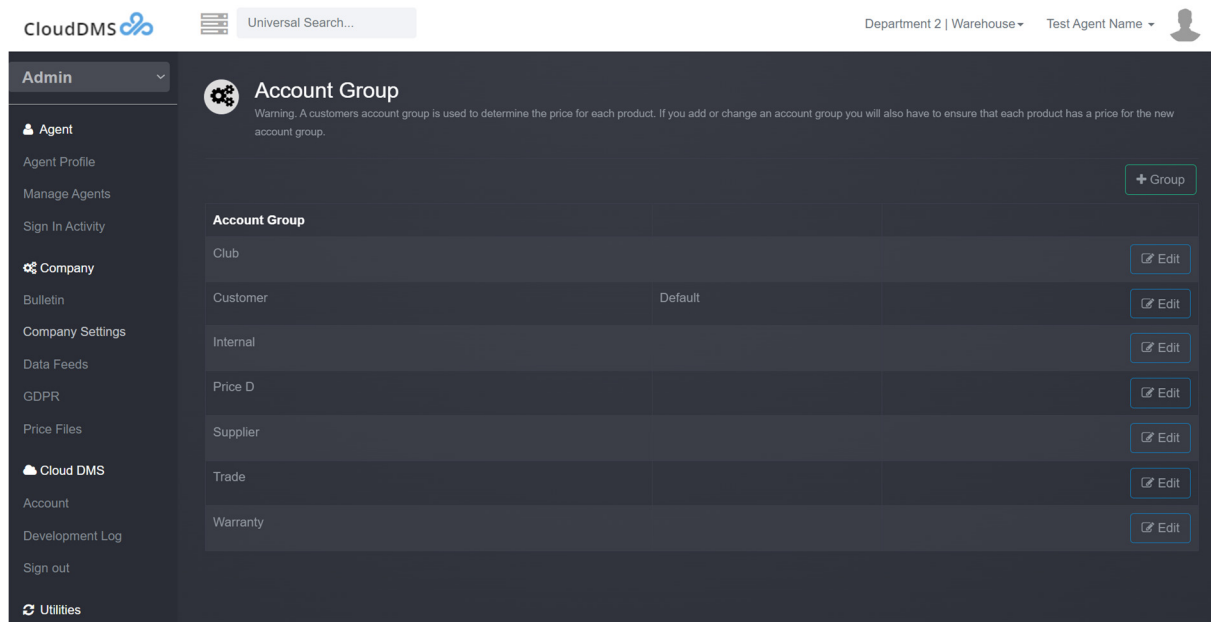
Supported currencies include.

- £
- E
- \$

Only one currency can be used in the DMS.

Account Group

Click on 'Account group' on the company settings screen.



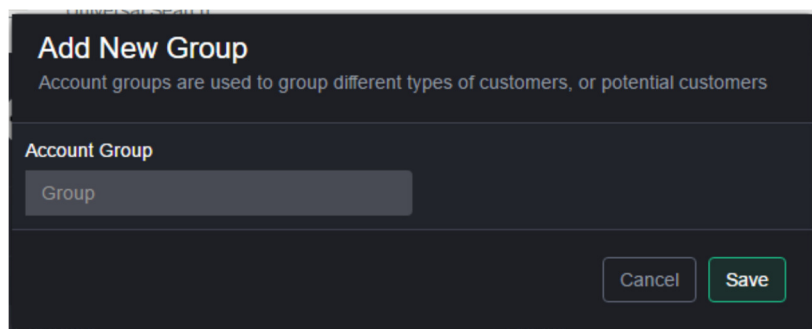
Account groups are used to classify and group accounts based on their relationship with you.

Default accounts groups are:

- Customer
- Internal
- Supplier

You can create additional groups as required.

Press '+Group' to create a new customer account group.



Enter the required account group and press 'save'.

Common examples would be:

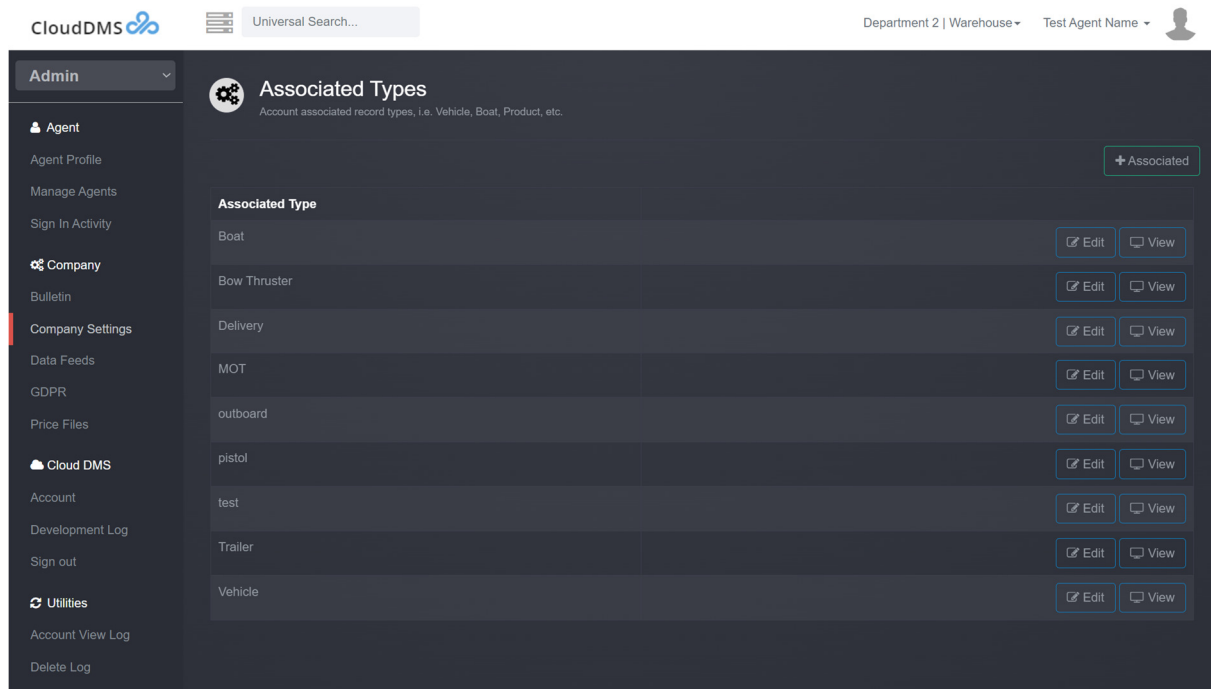
- Trade
- Prospect
- Insurance
- Warranty

Please note that each account group requires a separate base sales price for each SKU.

Associated Type

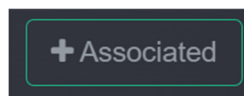
Associated types are used to define an object or product which can be sold and/or associated with a customer's account and/or invoice.

Click on 'Associated types' to display the configuration screen.



You can define 18 custom fields of information for each associated type.

To add a new type press '+Associated'



New Associated Type

Associated Type

ASSOCIATED TYPE

Text Fields

User 1

USER 1

The User 1 field **MUST** be the unique ID/Serial/Reg.

User 2

USER 2

User 3

USER 3

User 4

USER 4

User 5

USER 5

User 6

USER 6

User 7

USER 7

User 8

USER 8

Date Fields

User 9

USER 9

User 10

USER 10

User 11

USER 11

User 12

USER 12

User 13

USER 13

User 14

USER 14

Text Fields

User 15

USER 15

User 16

USER 16

User 17

USER 17

User 18

USER 18

Close

Save

You can define 12 custom text fields and 6 date/time fields for each associated type.

Common associated types are:

- Vehicles
- Delivery Address
- Drop ship address
- Outboard engines
- Trailers
- Equipment

The first U1 field should always be the unique identifier, normally this would be Reg, Serial, etc.

Once you have created the new associated type press 'save'

Product lines can also be of an associated type allowing you to store additional information and serials relating to products you are selling.

Currency

Customer and supplier accounts can be set to include transaction totals in a specific currency. This is useful if a suppliers pricing is in Euros.

The currency setup screen allows you add multiple currencies and specific an exchange rate.

CloudDMS can only operates on one internal currency for all transactions (normally GBP) ,the currency settings allows you to specify buy prices in a different currency as well as display transaction totals in a specific currency.

Departments

Departments are used to define business units, this allows you to report for a specific department i.e. Workshop, Clothing, etc.

Click on 'Departments' to display the configuration screen.

CloudDMS Universal Search... Department 2 | Warehouse Test Agent Name

Admin

- Agent
 - Agent Profile
 - Manage Agents
 - Sign In Activity
- Company
 - Bulletin
 - Company Settings
 - Data Feeds

Department
Configure Departments

+ Department

Department	Group	Account	Online Booking		
Department 1	CK	DEPARTMENT 1	Shepards Bush, 23 Goldhawk Rd.		Edit
Department 2	CK	DEPARTMENT 2	Ealing, 274 Northfield Ave		Edit
Department 3	LC	DEPARTMENT 3	Not Bookable Online		Edit

Each user agent must be allocated to a default department.

Press '+Department' to add a new department

New Department

Departments are used for different types of issues or worksgroups

Department Name

Department Group

Optional. Used to organise departments to make selection easier.

Depot

Header

Header Bottom

Footer

Footer Top

Receipt 3* Header

Part Label

Customer Label

Each department costs £10.00 per month. You require at least 1 department.

Department Image URL

Department Name for Online Booking

Default Depot

Vehicle Purchase Depot

Department SMS From ID

Department From Email

If set this overrides the agents 'From Email' when sending Email messages

Department Email Company Name

If set this overrides the company name used when sending Email messages

Auto Pick Back Orders

Mark back orders as picked when booking in

Confirm Department

Extra nag dialogues to confirm transaction/payment department at key stages

Auto Set Department

Automatically change the current department when opening an open transaction which is in a different department

Hide Department in Workshop Screens

Remove the department from scheduler, open WO list and edit dialogue on work orders

Close

Save

Common departments are:

- Sales
- Workshop
- Clothing
- Online

You also need to set which header /footer block to use on invoices as well as which label template to use for each department. Label and header/footer blocks must be configured first.

The header blocks can be configured in 'headers' in company settings

The customer & part labels can be configured in 'labels' in company settings.

Invoice Sub-Types.

Invoice sub types are used when you do not require a sperate department but need to be able to identify a specific subgroup of invoices.

Sales invoices can have a transaction sub type set, so you have 'vehicle sales invoices', 'service sales invoices', etc.


The invoice sub type can also be used for filtering sales reports allowing you focus on a specific type of transaction.



Payment Methods.

When you record payments or receipt in the DMS you can specify the type of payment. Common payment types are Cash, Card, BACS, etc.

Payment types are useful in day total reporting allowing you to more easily reconcile transactions.

 Payment Methods

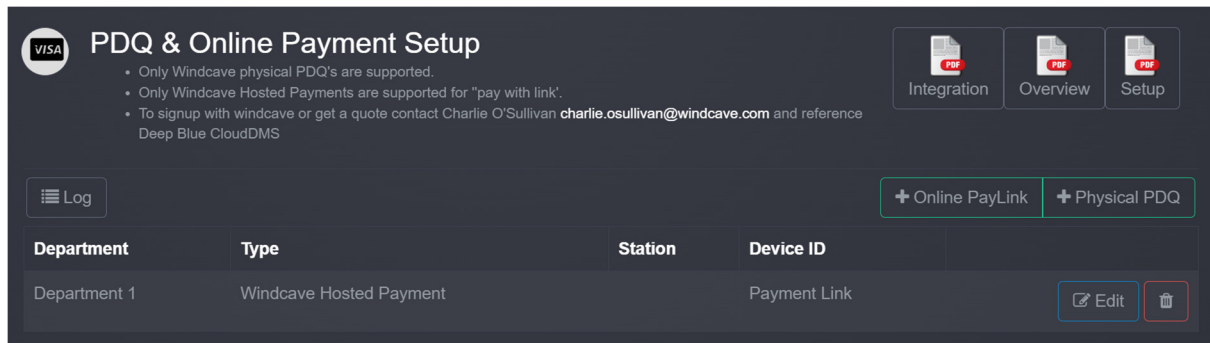
+ Payment Method

Method		
Black Horse Finance		<div><div></div>Edit</div>
Card	Default	<div><div></div>Edit</div>
Cash		<div><div></div>Edit</div>
Cheque		<div><div></div>Edit</div>
Customer Transfer		<div><div></div>Edit</div>
Finance Settlement		<div><div></div>Edit</div>
MotoNovo Finance		<div><div></div>Edit</div>
Part Exchange		<div><div></div>Edit</div>
PayPal		<div><div></div>Edit</div>
Supplier Return credit		<div><div></div>Edit</div>
Warranty		<div><div></div>Edit</div>
Windcave		<div><div></div>Edit</div>

PDQ.

CloudDMS can integrate with a physical PDQ machine for card holder present transactions as well as a payment gateway for online customer payments.

Currently only Windcave merchant accounts are supported. Email sales@deepbluesystems.com for more information.



PDQ Setup

- Go to 'Admin' and click 'Company Settings'
- Click on 'PDQ/Online Setup'
- Press '+Physical PDQ'. The new PDQ dialogue will then be displayed.

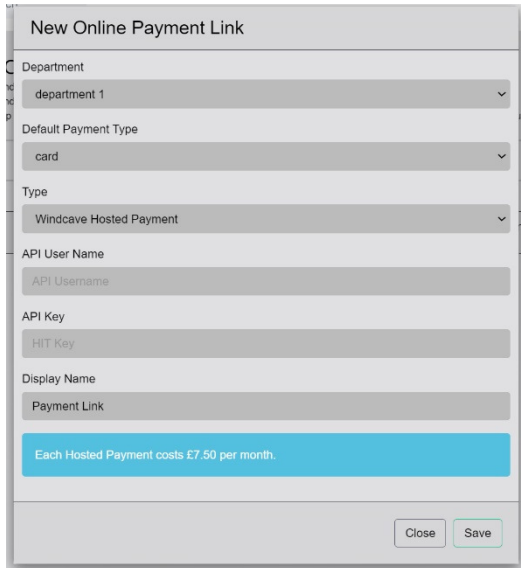
- Enter the required details (Windcave will email these) and press 'Save'

Paylink Setup

- Go to 'Admin' and click 'Company Settings'
- Click on 'PDQ/Online Setup'
- Press '+Online PayLink'

+ Online PayLink

- Enter the required details paying particular attention to the 'API Key'



A screenshot of a 'New Online Payment Link' form. The form has a title bar and several input fields: 'Department' (dropdown menu showing 'department 1'), 'Default Payment Type' (dropdown menu showing 'card'), 'Type' (dropdown menu showing 'Windcave Hosted Payment'), 'API User Name' (text input field showing 'API Username'), 'API Key' (text input field showing 'HIT Key'), and 'Display Name' (text input field showing 'Payment Link'). Below these fields is a blue informational box that says 'Each Hosted Payment costs £7.50 per month.' At the bottom right of the form are 'Close' and 'Save' buttons.

- Press 'Save'

Paylink Operation

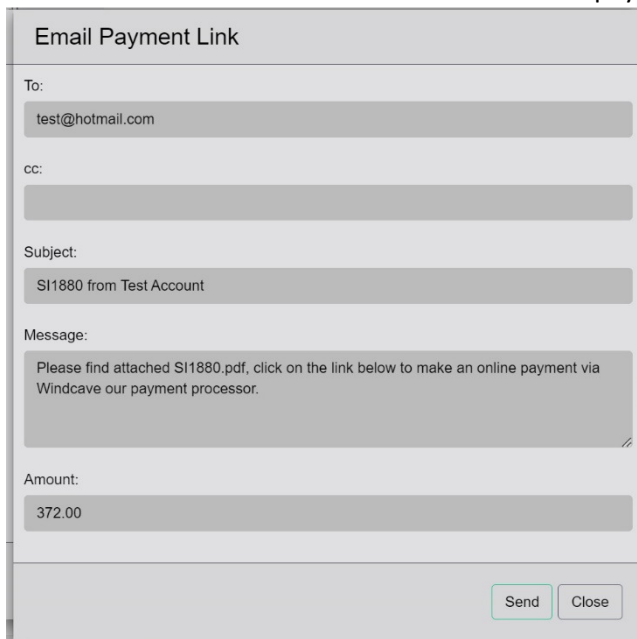
- On any transaction press '+Payment'

+ Payment

- On the payment dialogue press 'Payment Link'

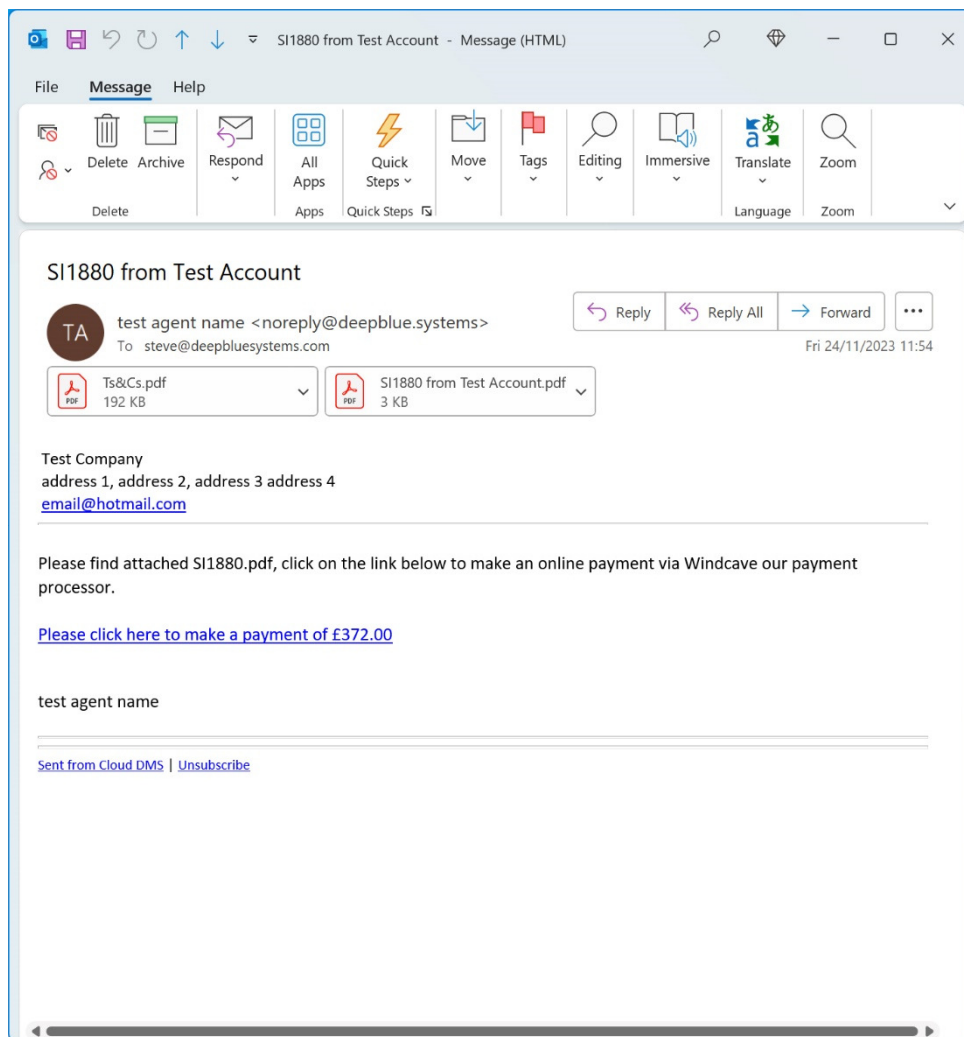
Payment Link

- Confirm the details and enter the amount on the payment link dialogue.



A screenshot of an 'Email Payment Link' form. The form has a title bar and several input fields: 'To:' (text input field showing 'test@hotmail.com'), 'CC:' (text input field), 'Subject:' (text input field showing 'SI1880 from Test Account'), 'Message:' (text input field showing 'Please find attached SI1880.pdf, click on the link below to make an online payment via Windcave our payment processor.'), and 'Amount:' (text input field showing '372.00'). At the bottom right of the form are 'Send' and 'Close' buttons.

- Press 'Send'
- The customer will then be emailed a payment link. The email will be styled in the normal company fashion with header.

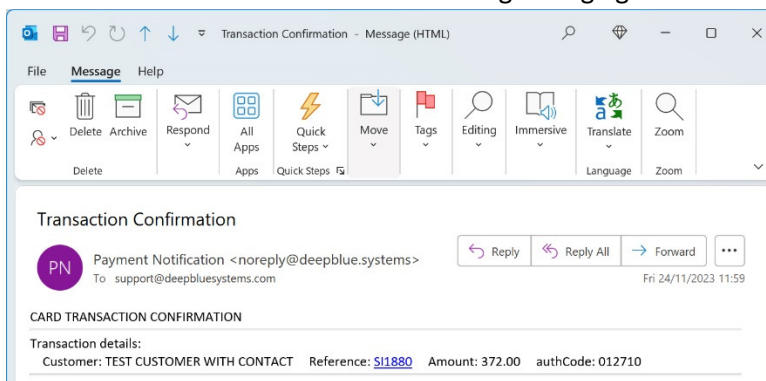


- The customer will then click on the link in the email and make payment.

- The payment screen can be configured within the WindCave setup portal.
- When payment is successfully made the payment will automatically be recorded against the relevant transaction in CloudDMS.

Date	Agent	Detail	Amount
24/11/2023 11:58:36	-	Card Online Windcave Payment	£ 372.00

- A notification email will be sent to the originating agent.



Statements.

This screen allows you to specify the account details and payment terms which will be included on any statements you print or email.

Terms

The terms settings screen allows you to specify blocks of text which can be used as terms printed on transactions raised in the DMS.

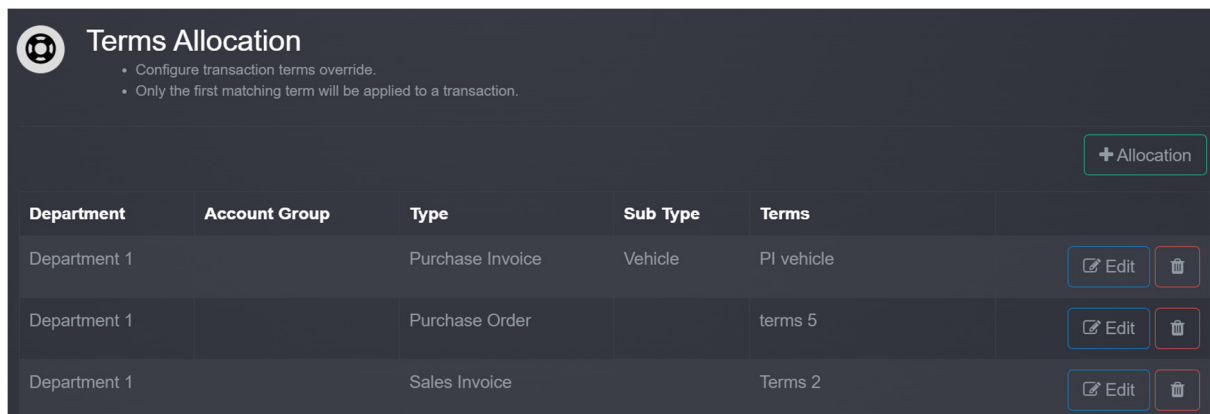
Terms Allocation.

The terms allocation screen allows you to specify when and how the terms will be applied to transactions.

Only one terms block will be applied to a transaction.

Standard straight forward schemes should be specified in the 'script' section for a specific transaction type. i.e. Sales Invoices.

Terms specified in the allocation screen override the standard terms from the script setting.



The screenshot shows the 'Terms Allocation' interface. At the top left is a circular icon with a robot head. To its right is the title 'Terms Allocation' followed by two bullet points: '• Configure transaction terms override.' and '• Only the first matching term will be applied to a transaction.' In the top right corner is a button labeled '+ Allocation'. Below this is a table with five columns: 'Department', 'Account Group', 'Type', 'Sub Type', and 'Terms'. The table contains three rows of data. Each row has 'Edit' and 'Delete' buttons to its right.

Department	Account Group	Type	Sub Type	Terms	
Department 1		Purchase Invoice	Vehicle	PI vehicle	Edit Delete
Department 1		Purchase Order		terms 5	Edit Delete
Department 1		Sales Invoice		Terms 2	Edit Delete

Job type

Job types are used to classify the type of work being carried out on work orders.

Click 'job types' to display the configuration screen.

CloudDMS Universal Search... Department 2 | Warehouse Test Agent Name

JobType
Configure JobTypes

+ JobType

Job Type	Time	Default	Booking Reminder	SMS Booking Reminder	Bookable Online	
Collection		No	No	No	No	
Delivery		No	No	No	No	
Dyno		No	No	No	No	
MOT	1	No	Yes	Yes	Yes	
PDI	1	No	No	No	No	
Repair		No	No	No	No	
Retification		No	No	No	No	
Service	2	No	Yes	No	No	
Service and MOT	2	No	No	No	No	
Tyres	1	No	No	No	No	
Warranty		No	No	No	No	

Press '+job type' to show the new job type dialogue box

New Job Type
JobTypes are used for different types of issues or workgroups

JobType

Type

Cancel Save


Common types are:

- Service
- Repair
- PDI
- Delivery

Close workshop days.

This screen allows you to close off days in the workshop schedule to prevent work being booked in.

A typical use would be to close Sunday in the schedule for all engineers for the next year.



Close Workshop Days


Close a specific day in the workshop schedule for a specific period of time. i.e. close every Sunday for the next 5 years.
*** Warning. Mass closure of days can only be un-done one day at a time from the workshop schedule.

Bookable days of the week


☐ Close Monday ☐ Close Tuesday ☐ Close Wednesday ☐ Close Thursday ☐ Close Friday ☐ Close Saturday ☐ Close Sunday

Note


Start Date

dd/mm/yyyy 


End Date

dd/mm/yyyy 

Engineer

all engineers 

Department

department 2 


Cancel

Save

Condition Reports.

Work orders can have a condition report added to them. This allows you to follow a standardised process for ensuring a vehicles condition is checked and graded, making your customers aware of any problems which need addressing.

Multiple condition reports can be defined containing yes/no or traffic light-based indicators.

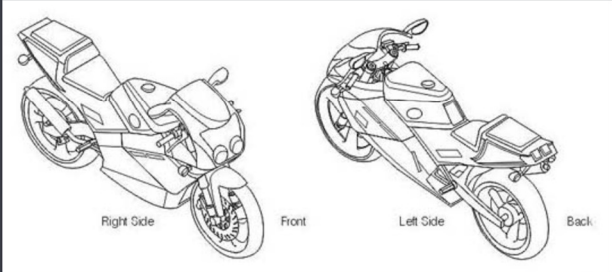


Condition Report

Configure workshop condition report fields

+ Item


+ Image

Report Name	Group	Item	
Health Check	-		<div><div></div></div>
Health Check	Brakes	Rear brakes	<div><div></div><div>Edit</div></div>
Health Check	Exhaust	Headers	<div><div></div><div>Edit</div></div>
Health Check	Exhaust	Mufflers	<div><div></div><div>Edit</div></div>
Health Check	Final Drive	Belt & drive system	<div><div></div><div>Edit</div></div>
Health Check	Final Drive	Chain & sprockets	<div><div></div><div>Edit</div></div>

Online workshop booking.

CloudDMS can create a customer facing workshop booking page which you can link to from your website. This is a quick and easy way to enable customers to book their vehicle into the workshop.

More complex workshop booking can be implemented use the CloudDMS Rest API.



Online Workshop Booking

Setup online workshop job booking.

Online booking status

Active

Headline

Test Company

Blurb

Our technicians are fully factory trained, giving you the confidence that faults will be diagnosed swiftly and servicing carried out with minimum downtime.

We are official service agents for KTM, Husqvarna, Moto Guzzi, Piaggio, Vespa, Fantic and Super Soco, stocking genuine parts. We also carry out repairs for many other manufacturers. From 50cc Scooter's to large capacity motorcycles.

Booking Agent

test user

Background Image URL

/onlinebooking/img/background.jpg

Bookable days of the week

☒ Close Monday ☐ Close Tuesday ☐ Close Wednesday ☐ Close Thursday ☐ Close Friday ☐ Close Saturday ☒ Close Sunday

Options

☒ While You Wait ☒ Loan Vehicle

Bookable Hours

8 To 16

Enabled Job types

- MOT

Script

Script values control the allocation of transaction and serial numbers. Transaction reference numbers are automatically incremented as they are issued.

Click 'script values' to display the configuration screen

CloudDMS Universal Search... Department 2 | Warehouse Test Agent Name

Admin

- Agent
 - Agent Profile
 - Manage Agents
 - Sign In Activity
- Company
 - Bulletin
 - Company Settings
 - Data Feeds
 - GDPR
 - Price Files
- Cloud DMS
 - Account
 - Development Log
 - Sign out
- Utilities
 - Account View Log
 - Delete Log
 - Merge Accounts
 - Payment Allocation Log

Script
Configure transaction reference numbers

+ Script

Type	Sales Nominal	Prefix	Number	
Estimate			55	Edit
outboard	4060	O	8	Edit
Purchase Credit			8	Edit
Purchase Invoice			414	Edit
Purchase Order			300	Edit
Sales Credit			278	Edit
Sales Invoice			2009	Edit
Sales Order			106	Edit
Sales Order			106	Edit
Sales Proforma			36	Edit
Sales Quote			33	Edit
Trailer	4500	T	9	Edit
Vehicle	4056	H	28	Edit

Serial numbers can also be automatically issued to products as they are booked into stock, with or without a prefix. i.e. N321 for a vehicle stock number. Serials can be controlled by associated type and/or sales nominal.

Press '+script' to display the new script dialogue

Add New Script

Scripts determine the next transaction reference number or stock serial number

Type

Type

SalesNominal

SalesNominal

Prefix

Prefix

Reference

1

Cancel

Save

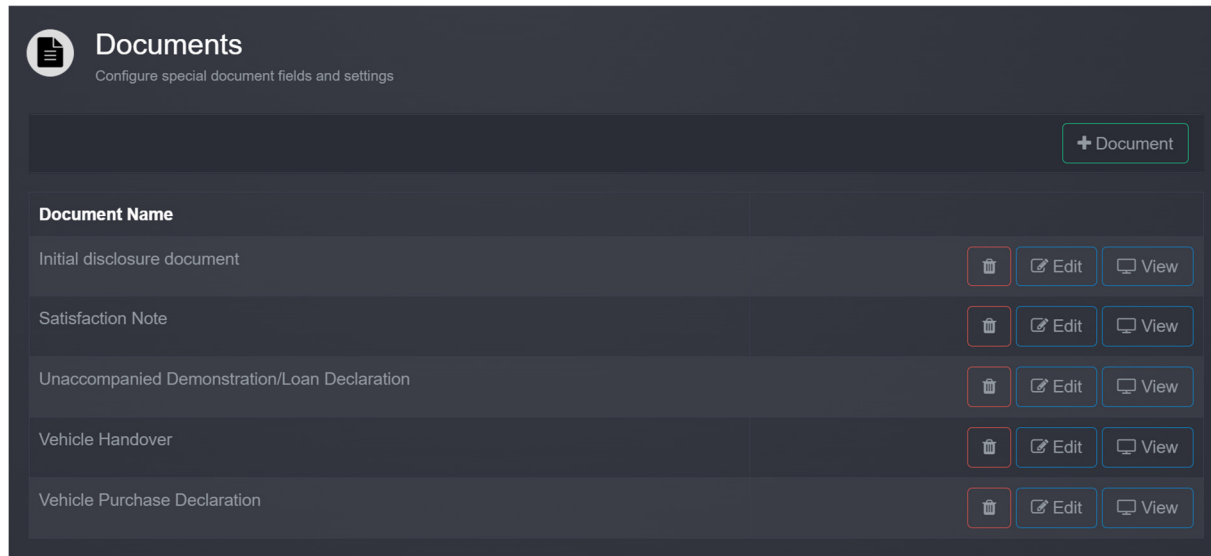
To issue new vehicle stock numbers you would use the following settings

Type	Vehicle
Sales Nominal	4002 (or whatever nominal you have create for new vehicle sales)
Prefix	N
Reference	1

Special Documents.

Special documents are standardised documents and consents which can be generated by the DMS and attached to threads or transactions.

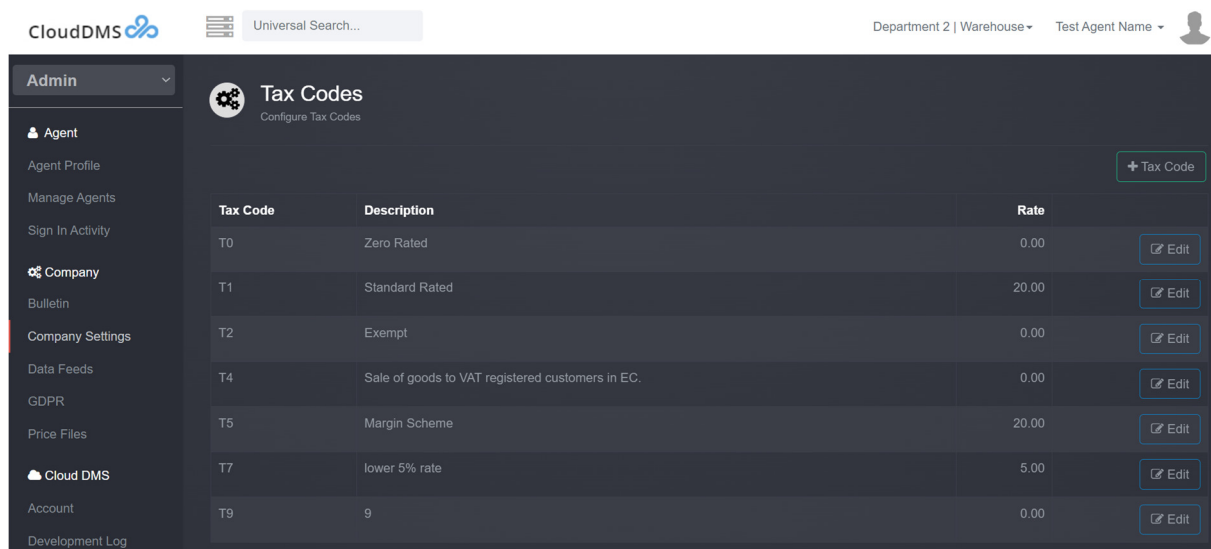
Typical uses are for satisfaction notes, indemnities or various standard disclosures.



Tax Code

Tax codes are used to control if an item should have VAT applied, what VAT scheme should be used and which rate is applicable.

Press 'Tax Codes' to display the configuration screen



The default tax codes are

- T0, Zero rated
- T1, Standard rated 20%
- T5, Used Vehicle sales
- T9, Outside VAT scheme

Press '+tax code' to create a new tax code.

Add New Tax Code

Account groups are used to group different types of customers, or potential customers

Code

Code

Description

Code

Rate

Code

Scheme

Normal

Cancel

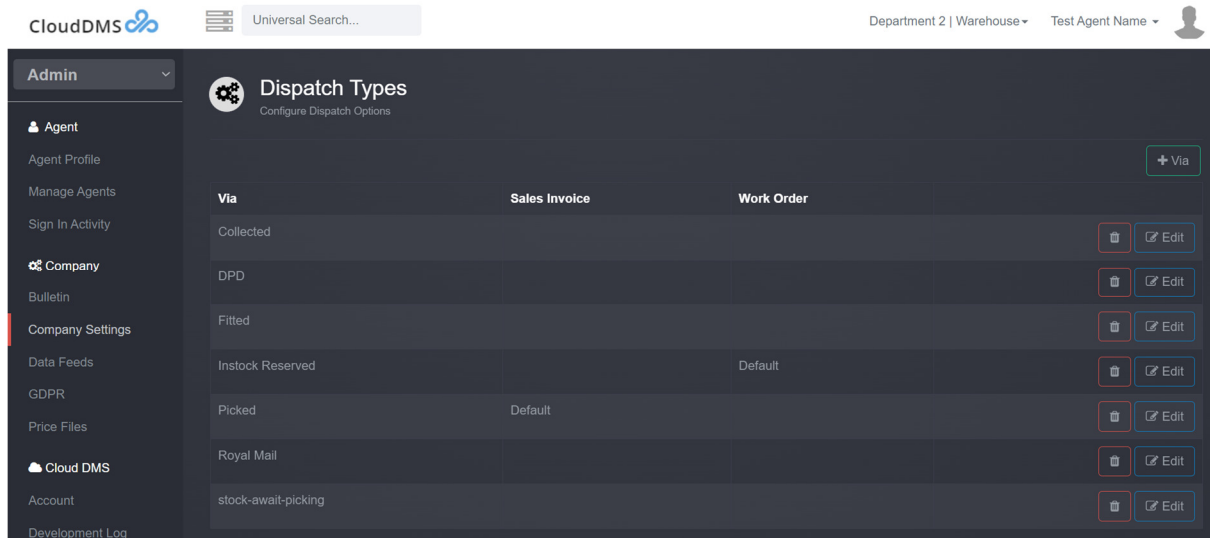
Save

Two vat schemes are supported. 'Standard' which applies VAT on the whole amount or 'Margin' which applies vat on the margin only.

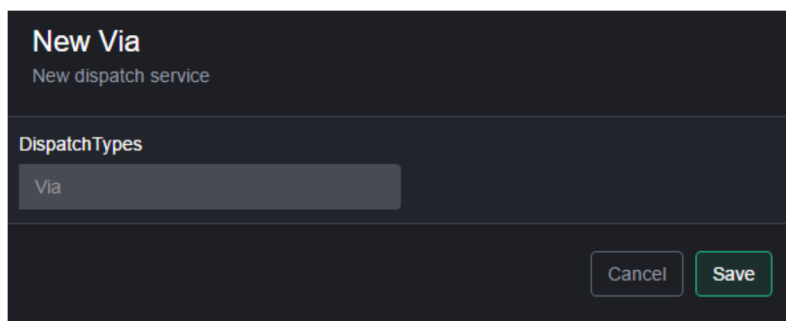
Dispatch

All products must be released from stock after they have been sold. 'Dispatch Via' lists predefined methods for releasing stock.

Click on 'via' to display the configuration screen



To add new a new dispatch/release method press '+via'



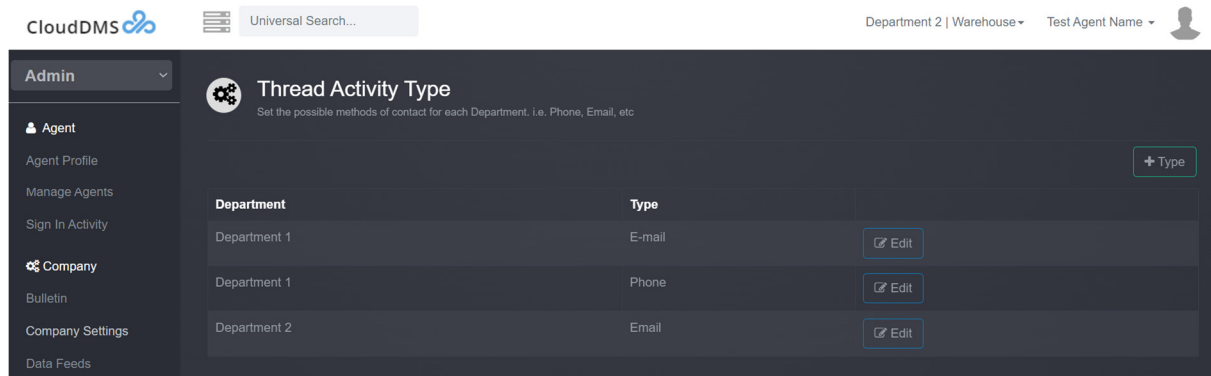
Common dispatch methods are:

- Collected
- Fitted
- Courier
- Royal Mail

Thread (Issue) Activity Type

Threads are used in the 'contact' section of the DMS. Thread contact activity types list the methods a customer might communicate with you via.

Click on 'issue activity' to display the configuration screen.



Press '+type+' to add a new type

The screenshot shows a modal form titled 'Add New Activity Type'. It has two main sections: 'Department' with a dropdown menu currently showing 'Software Support', and 'Activity Type' with a text input field containing the word 'Type'. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

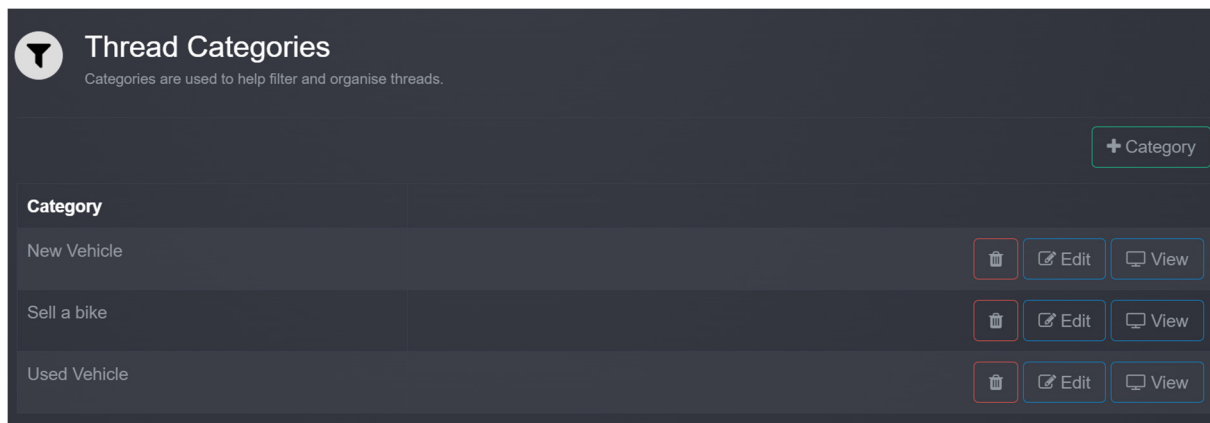
Common types are:

- Phone
- Email
- Showroom

Issued activity types are defined per department.

Thread Categories

Threads can be allocated a category and sub-category. This allows you to filter open threads to drill down to specific contacts. A typical use would be classifying contacts as sales enquiries, workshop requests etc.

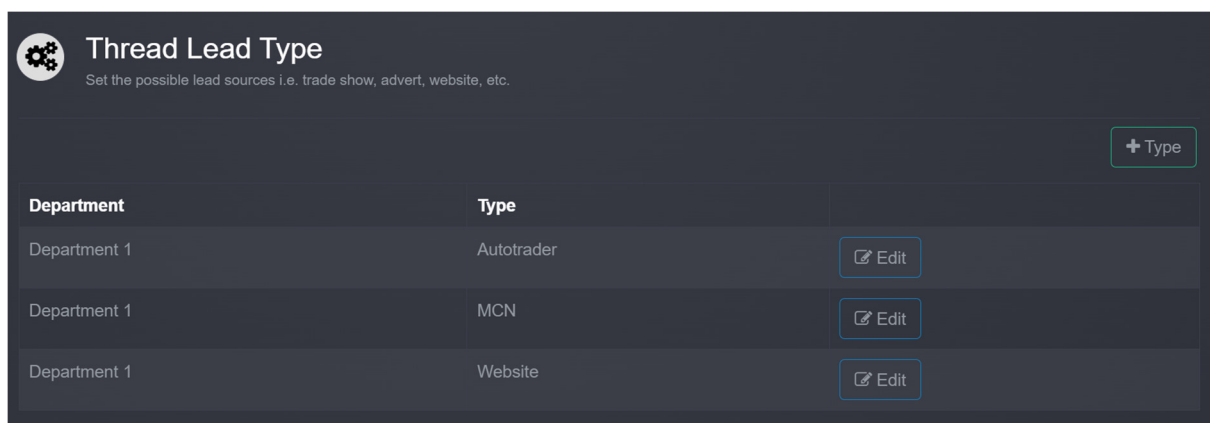


Thread Lead Types

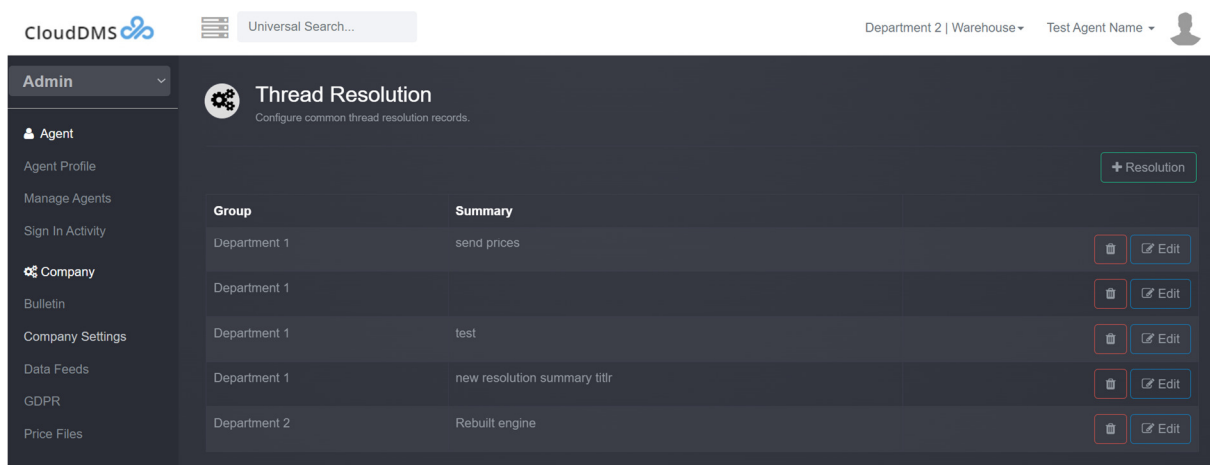
Lead types allow you to record how the customer found out about your business. This helps you track how effective different types of promotional activity have been for you.

Thread (Issue) Resolutions

When a thread is closed a thread resolution should be chosen, this allows you to track the outcome of interactions with your customers.



Press 'thread resolution' to view the configuration screen.



Press '+resolution' to display the dialogue box

Add New Resolution

Department
Software Support

Resolution Summary
Summary

Details

Cancel Save

Common resolutions are:

- Sale
- No-Sale
- Warranty
- Postage refunded
- Test ride
- Complaint

New resolutions can also be created on the fly when you close a thread.

Stock Depot

Stock depots are distinct storage areas or buildings. A different stock depot should be used for each shop in a dealer group.

Press 'depots' to display the configuration screen.



Press '+depot' to create a new storage depot

The screenshot shows the 'Add New Stock Depot' form. The form has fields for 'Name', 'Address' (Address1, Address2, Address3, Address4), and 'Post Code'. There are 'Cancel' and 'Save' buttons at the bottom.

You can define as many stock depots as required. These should represent a physical distinct location.

- Warehouse
- Shop
- Storage container

User agents must be allocated to a default stock depot which should represent their main place of work


Tag Labels

Tag labels are a powerful method of managing your workflow and adding structured notes. Tags can be applied to transactions, threads and stock records.












In the workshop tags can be setup to indicate that a vehicle needs cleaning, or that a job is stalled waiting for parts.

Vehicle stock records can be tagged with alarm details, condition reports, or problems.

Open sales invoices can be filtered by tag, so you could see which invoices are waiting for a specific event.

 **Tag Labels**
Tag labels can be applied to transactions and vehicle stock.

[+ Label Tag](#)

#	Type	Label	Colour	Unique	Force Mileage	
1	WO	Critical Fault Found	Red	No	Yes	 Edit
1	WO	WO Item		No	No	 Edit
1	SI	SI Tag		No	No	 Edit
1	Thread	Thread tag 1	Green	No	No	 Edit
1	Thread	Thread tag 2	Orange	No	No	 Edit
1	WO	road test	Blue	No	No	 Edit
2		Complete	Green	No	Yes	 Edit
3		Waiting for Parts	Orange	No	No	 Edit
4		Awaiting Cleaning	Blue	Yes	No	 Edit
5	Vehicle	Vehicle label tag	Orange	No	No	 Edit
10	ES	Note		No	No	 Edit

Price Files

For certain industries we provide shadow price files covering various suppliers. You can choose to subscribe to these price files allowing your pricing to be automatically updated when the supplier provides us with new information.

Press ‘price files’ on the main Admin menu bat to view the screen

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Admin

Agent

Agent Profile

Manage Agents

Sign In Activity

Company

Bulletin

Company Settings

Data Feeds

GDPR

Price Files

Cloud DMS

Account

Development Log

Sign out

Utilities

Account View Log

Delete Log

Price Files

Subscribe for automatic price file updates. Price files are updated overnight so will show as queued during working hours.

Subscriptions

+ PriceFile Sub

Type	Supplier	Overwrite	Supplier Code	Account Group	Sales Nominal	Purchase Nominal	Reduce Prices	Sell Prices	Buy Prices	Last Update	
Motorcycle	FERIDAX	No	FERIDAX	Club	4000	5000	Yes	Yes, sell	Yes, buy	Updated 17/03/2024	<div>%</div> <div></div> <div></div>

Uploaded

+ PriceFile Upload

File Name	Overwrite	Supplier Code	Account Group	Sales Nominal	Purchase Nominal	Reduce Prices	Sell Prices	Buy Prices	Last Update	
VETUS.tsv	No		Customer	4000	5000	No	Yes, sell	No	Loaded 18/11/2019	<div>%</div> <div></div> <div></div>
BEARMACH4.TSV	No		Club	4000	5000	No	Yes, sell	Yes, buy	Loaded 11/07/2019	<div>%</div> <div></div> <div></div>
YAMAHA.TSV	No	YAMAHA	Customer	4000	5000	No	Yes, sell	Yes, buy	Loaded 29/04/2019	<div>%</div> <div></div> <div></div>

Press ‘+price file sub’ to add a new price file

New Subscription

Selected price files will automatically be kept up to date

Price File

aprilia

Supplier Account

Account Name

Sales Account Group

club

Overwrite existing data

No

Sales Nominal

4000 - sales general

Purchase Nominal

5000 - purchases

Allow sales prices to be reduced

No

Calculate sell price

Plus/Minus Percentage

sell

0

Import purchase prices

No

Calculate buy price

Plus/Minus Percentage

buy

0

Default Supplier for:

☐ Shop

☐ Shop to PDI

☐ Shop to Supply

☐ Warehouse

☐ YATELY

Each price file update costs £41. Most suppliers update their pricing annually. Some such as Honda update monthly. When we receive new pricing information your prices will automatically be updated.

Close

Select the required price file, enter the supplier and confirm how you want the pricing information handled. Press 'Save' when you are done.

Subscribing to a price file which will allow the DMS to automatically update your prices as and when the supplier provides us with new information.

Once a price file has been subscribed to you can see the date it was last updated on your system. You can also configure if prices can be reduced and if buy prices should be imported.

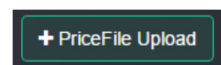
Uploading a Custom TSV

You can upload pricing information in bulk using tab separated text files. Price files you upload yourself do not incur any charge.

The first row must contain the column headers. PARTNO is a required field. Valid column headers are as follows:

- PARTNO
- DESC
- BRAND
- PRICE
- TRADE PRICE
- VAT
- REFERNO
- BARCODE
- COMMODITY CODE
- COUNTRY OF ORIGIN
- PRODUCT CODE
- SUPPLIERSKU
- EUROPRICE
- OBSOLETE
- TYPE
- SALESNOMINAL
- PURCHASENOMINAL

Press '+Price File Upload'



Price File Upload

Uploaded file must be a tab separated text file with the correct column headers No larger than 4Mb.

Supplier Account

Sales Account Group

Overwrite existing data

Sales Nominal

Purchase Nominal

Allow sales prices to be reduced

Calculate sell price

Plus/Minus Percentage

Import purchase prices

Calculate buy price

Plus/Minus Percentage

Default Supplier for:

☐ Shop☐ Shop to PDI☐ Shop to Supply☐ Warehouse☐ YATELY

Tab Separated Text File. (4Mb Max)

 No file chosen

Choose the file you want to upload.

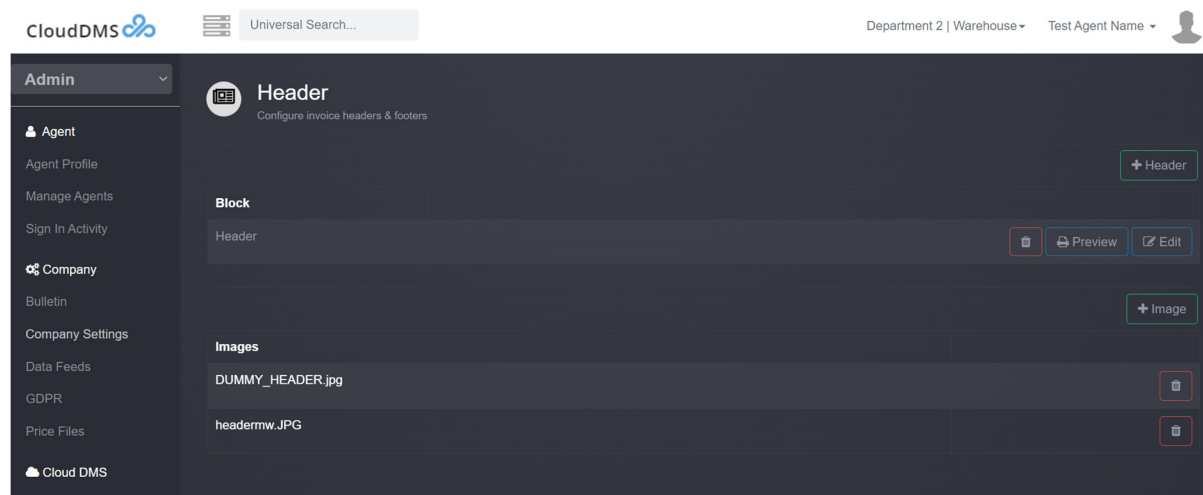
Set the various options and select the tab separated file then press 'save'

The file will be uploaded and added to the processing queue.

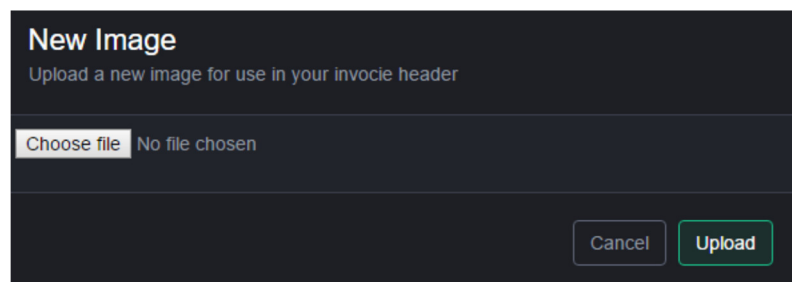
Headers

Header blocks define the text and images which will be printed on your invoices, statements, etc.

Click 'headers' to display the configuration screen.

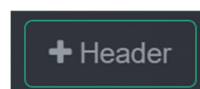


Press '+image' then 'choose image' to uploading an images or logos you want to include.



Uploaded images can be used on your header and footer blocks.

Press '+header' to define a new block.



New Header
Headers are printed on your invoices

Name

Page Size
A4

Height
0

Column 1

Span
1

Alignment
Left

Image
None

Image Scale
100

Text

Each header block is the full width of the page and must have 4, 8 or 12 columns. Each column can contain an image or text. You can set alignment and text sizes. The column spans must add up to a multiple of 4, i.e. 4,8,12.

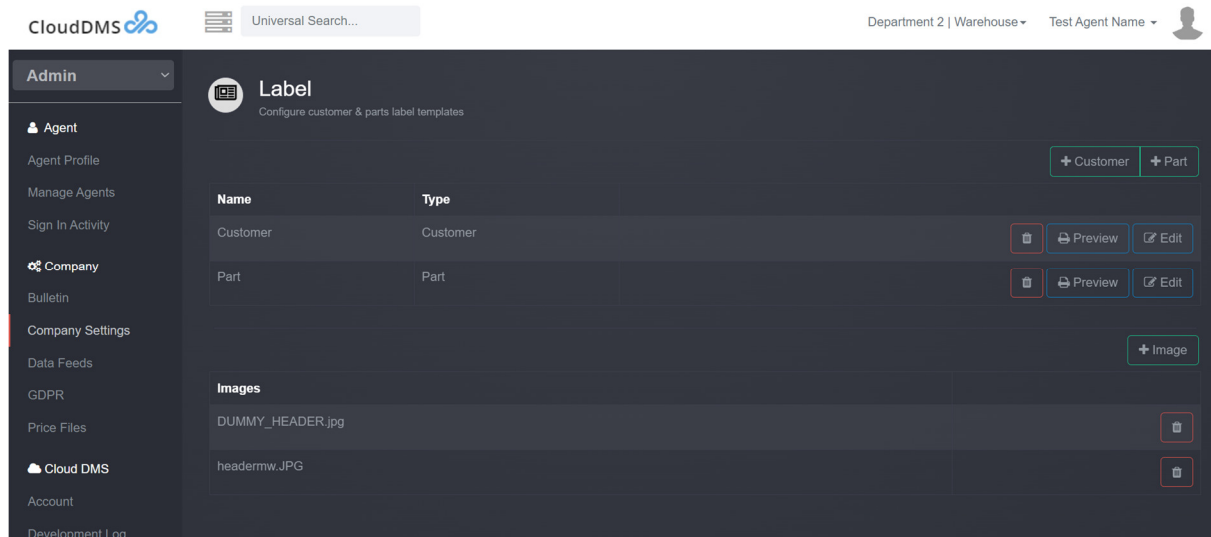
Set the font size by including it with the next in brackets. i.e. (12) would set 12-point text. (B) will create bold text.

You set which header and footer to use for each department in the 'department' settings.

Labels

Label templates define how part and customer labels will look.

Press 'labels' to view the configuration screen.

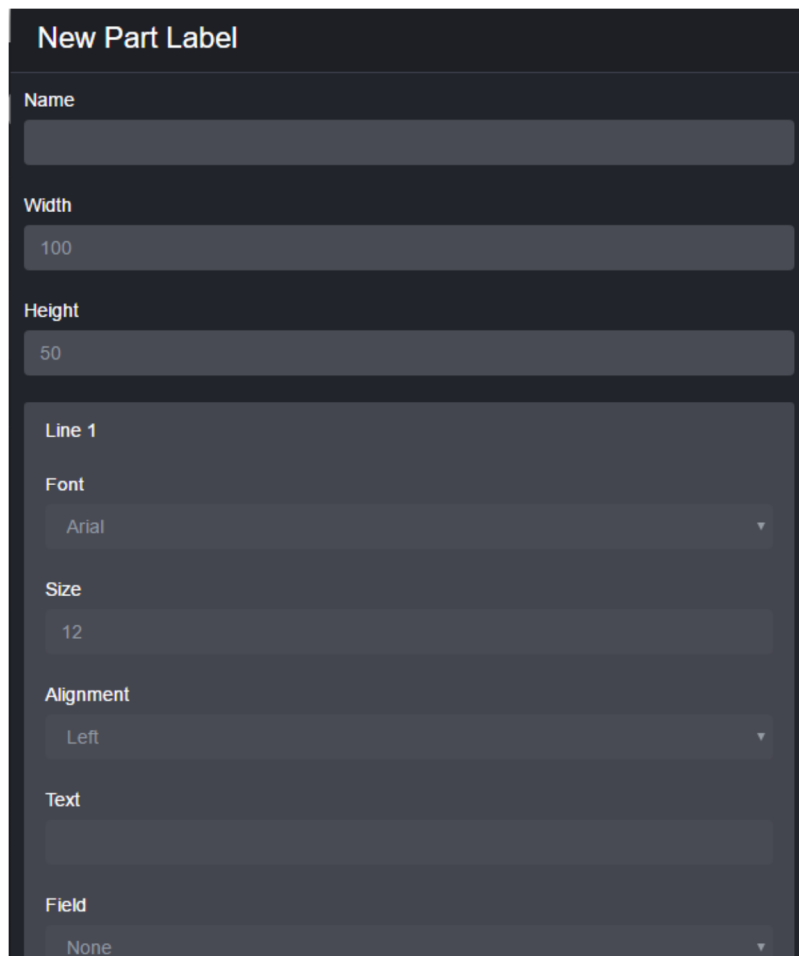


Press '+customer' to add a new customer label template.

The screenshot shows the 'New Customer Label' form. It has a dark theme. The form fields are: 'Name' (text input), 'Width' (text input with value 100), 'Height' (text input with value 50), 'Line 1' (text input), 'Font' (dropdown menu with 'Arial' selected), 'Size' (text input with value 12), 'Alignment' (dropdown menu with 'Left' selected), 'Text' (text input), and 'Field' (dropdown menu with 'None' selected).

You set the label dimensions as well as which field or text to print on each line. Each label can contain 6 lines of information.

Press '+part' to create a new part label template.

The image shows a dark-themed configuration window titled "New Part Label". It contains several input fields and dropdown menus. The "Name" field is empty. The "Width" field contains the value "100". The "Height" field contains the value "50". Below these is a section for "Line 1" which includes a "Font" dropdown set to "Arial", a "Size" dropdown set to "12", an "Alignment" dropdown set to "Left", a "Text" input field, and a "Field" dropdown set to "None".

New Part Label

Name

Width

100

Height

50

Line 1

Font

Arial

Size

12

Alignment

Left

Text

Field

None

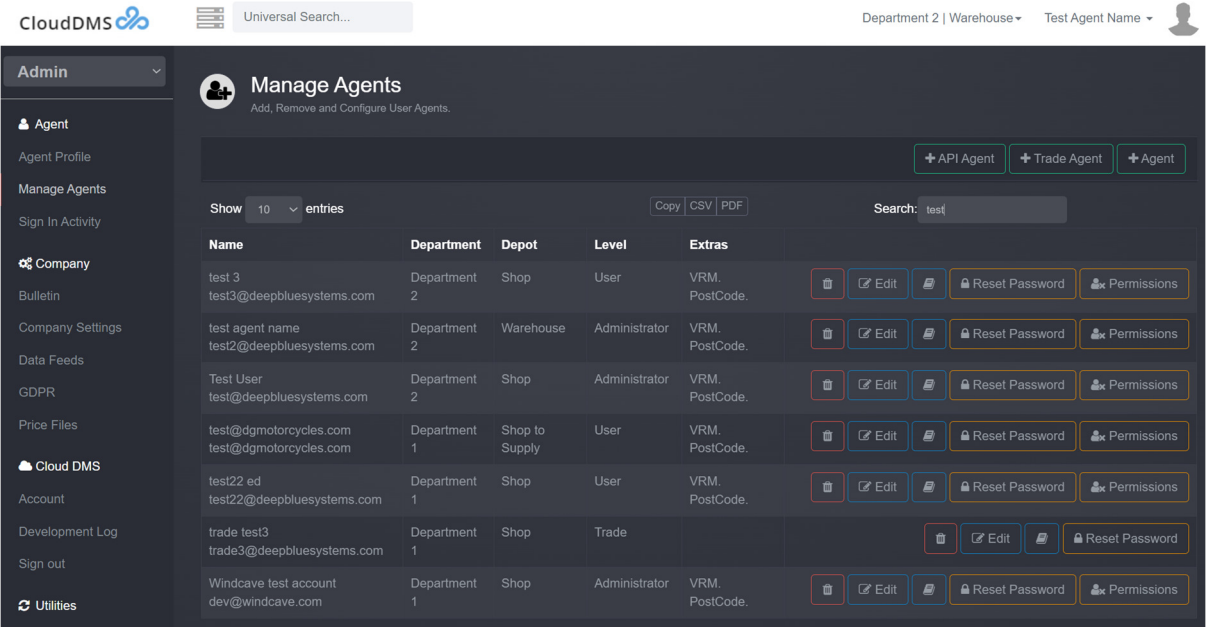
Each part label can contain 6 lines of information. Each line can be text or a data field.

Default labels can be set for each department in the department settings.

Managing User Agents

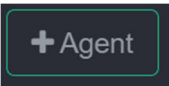
Every employee should be setup on the DMS as a user agent.

You can manage user agents from 'admin'->'Manage Agents'



Adding a New User Agent

To add a new user agent press '+agent'



The new agent dialogue will then be displayed.

Add New Agent

Create a new user agent

Name

Department

Workshop Department

Stock Depot

Level

VRM LookUp

Postcode LookUp

Engineer

BookableOnline

Hours

Company Image

Mobile

SMS From ID

Login Email

From Email

Enter the email address you want people to reply to from emails sent within the DMS

Phone

New Password

Confirm Password

Pricing Schedule

- 'Administrator' agents cost £ 30.0000 per month.
- 'User' agents cost £ 30.0000 per month.
- You will not be charged for 'Disabled' agents.
- You will not be charged for the Deep Blue Support login

Enter the agents name in the top box. You can also set the agents default department and stock depot.

The 'Level' field determines which options and settings will be available to them in the system.

There are 6 levels:

- Administrator
- User
- Read-only
- Disabled
- API
- Trade

Most agents will be users. Agents can then have additional permissions/restrictions added to fine tune the functionality available to the user.

The 'Engineer' field determines if the agent should be shown in the workshop schedule as a mechanic/engineer.

The 'Company Image' should be a URL pointing to the image you would like displayed in the top left of the DMS, typically this is the company logo. The image should be 200x60 pixels in size.

The 'SMS From ID' is used when the agent sends a SMS from the DMS. You can enter any 11-digit number or character string. You should only use numbers 0-9 and letters A-Z.

The 'From Email' is the reply to email address for any emails the agent send from within the DMS.

If you enter a valid mobile phone number the customer will be able to reply to you.

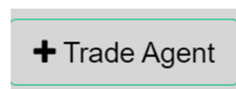
The email address is used to log into the system, a separate 'reply to' address can also be specified if the user sends and email via the DMS.

Passwords should be at least 8 characters long containing a mixture of letters and numbers.

[Adding a Trade Agent](#)

Trade login's can be issued to your customers, this will allow them to log into cloudDMS and check stock levels, print copy invoices, view their account balance and optionally raise purchase orders.

To create a trade agent press '+Trade'



The dialogue will then be displayed.

Add New Trade Agent

Create a login for your customers to view their account, print a statement, check stock levels, check back orders and raise sales orders.

Name

Name

Department

software

Stock Depot

warehouse

Mobile

mobile

Login Email

Steve@deepbluesystems.com

New Password

Confirm Password

Linked Account Name

Search by Name or Postcode

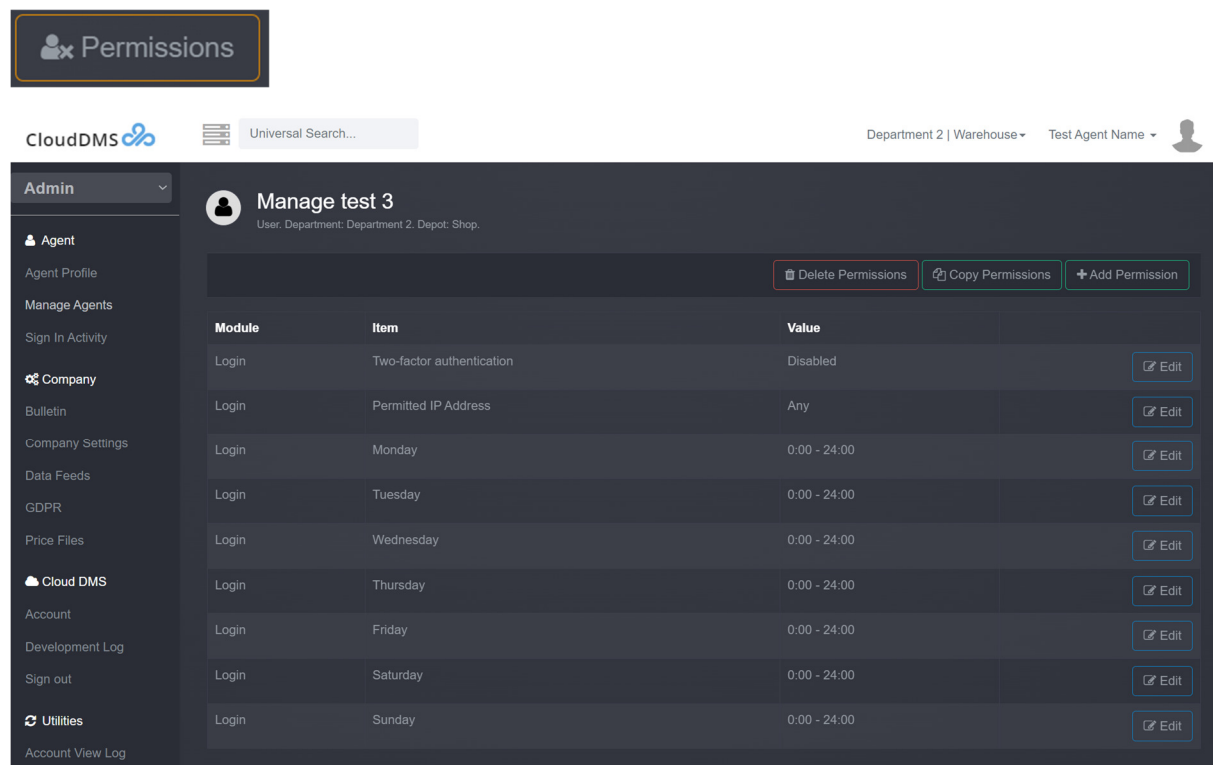
Fill in the relevant details. If you want your customer to be able to access their own account make sure you link the agent with an account.

Adding an API Agent.

API agents allow 3rd party systems such as ecommerce websites to integrate with CloudDMS via a Rest API interface. Please email support@deepbluesystems.com for a copy of the API documentation.

Permissions

Press 'Permissions' to configure the agent's access to the system.



CloudDMS Universal Search... Department 2 | Warehouse Test Agent Name

Admin

Agent

- Agent Profile
- Manage Agents
- Sign In Activity

Company

- Bulletin
- Company Settings
- Data Feeds
- GDPR
- Price Files

Cloud DMS

- Account
- Development Log
- Sign out

Utilities

- Account View Log

Manage test 3
User: Department: Department 2, Depot: Shop.

Delete Permissions Copy Permissions + Add Permission

Module	Item	Value	
Login	Two-factor authentication	Disabled	Edit
Login	Permitted IP Address	Any	Edit
Login	Monday	0:00 - 24:00	Edit
Login	Tuesday	0:00 - 24:00	Edit
Login	Wednesday	0:00 - 24:00	Edit
Login	Thursday	0:00 - 24:00	Edit
Login	Friday	0:00 - 24:00	Edit
Login	Saturday	0:00 - 24:00	Edit
Login	Sunday	0:00 - 24:00	Edit

Dashboard sales summaries can also be restricted to the agents own sales, there department or the whole company.

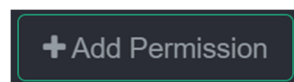
Access restrictions

Two factor authentication can be turned on/off and setup to use SMS and/or email.

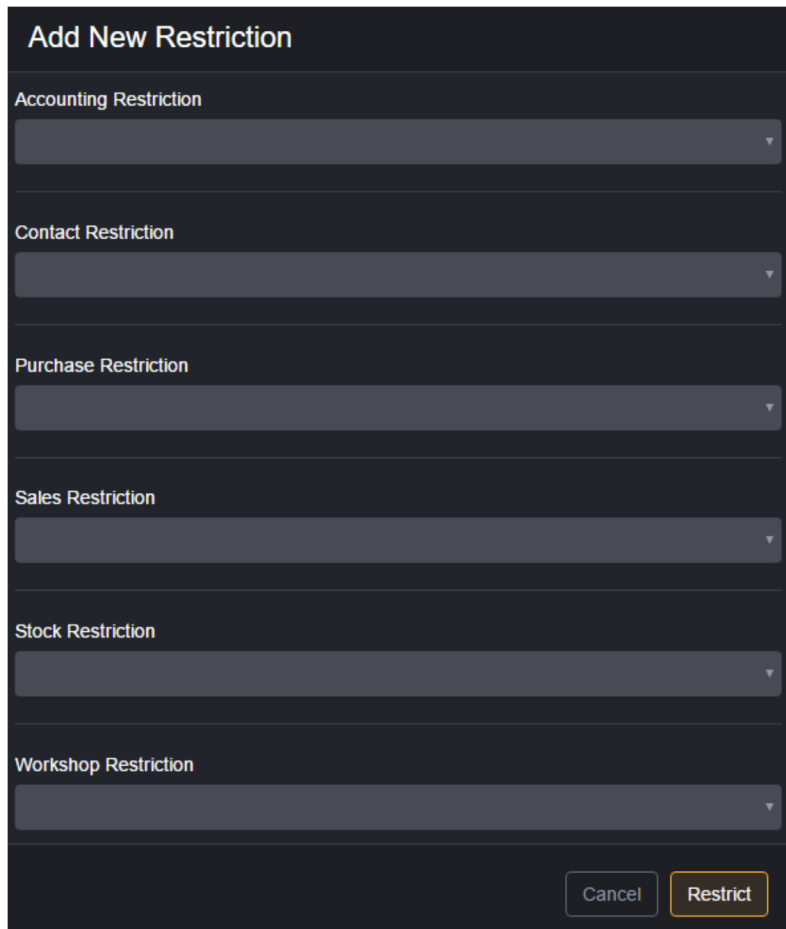
User logins can also be restricted to a specific IP address.

User login days and times can also be setup.

To add a restriction/permission press '+permission'



The permission dialogue will be displayed.

A dark-themed form titled "Add New Restriction". It contains six sections, each with a label and a dropdown menu: "Accounting Restriction", "Contact Restriction", "Purchase Restriction", "Sales Restriction", "Stock Restriction", and "Workshop Restriction". At the bottom right, there are two buttons: "Cancel" and "Restrict".

Add New Restriction

Accounting Restriction

Contact Restriction

Purchase Restriction

Sales Restriction

Stock Restriction

Workshop Restriction

Cancel Restrict

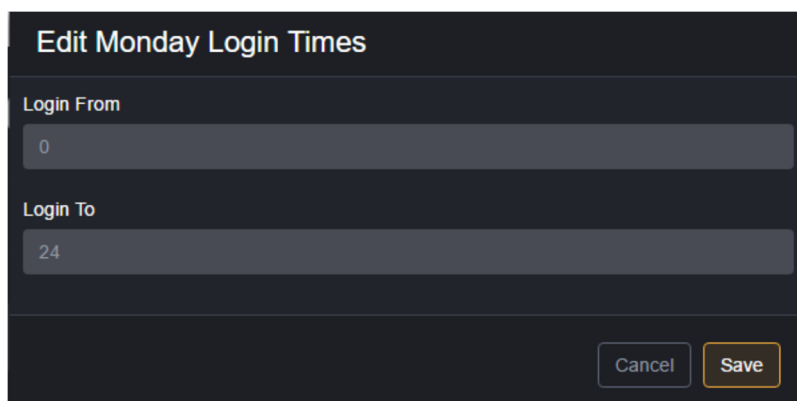
You remove/grant access to certain DMS functions by press the drop down arrow in the relevant section and selecting an option. The restriction/permission will be applied the next time the agent logs into the system.

Module refers to the entire module. Adding a Module restrictions on accounting will stop the agent accessing the entire accounting module.

Time restrictions

By default, an agent can log in at any time so it's important to apply any required restrictions.

Press 'edit' beside the required day.

A dark-themed form titled "Edit Monday Login Times". It has two input fields: "Login From" with the value "0" and "Login To" with the value "24". At the bottom right, there are two buttons: "Cancel" and "Save".

Edit Monday Login Times

Login From

0

Login To

24

Cancel Save

Enter the from and end times.

If no access is to be given on a certain day enter 0 in both the from and to fields.

Agent Profile

Each agent can edit some aspects of their own profile which contains contact details, and some settings.

The screen is accessed via the Agent menu in the top right of the screen.

The screenshot displays the CloudDMS Agent Profile interface. At the top, a user menu for 'Test Agent Name' is visible, with options for 'Agent Profile', 'About...', 'Knowledge base...', and 'Sign Out'. The main header area shows the agent's name 'test agent name' and thread counts: 80 Open Threads and 0 Pending Threads. A 'Change Password' button is present. The left sidebar contains a navigation menu with categories: Admin, Agent, Company, Cloud DMS, and Utilities. The main content area is divided into two sections: 'Details' and 'Recent Sign-In Log'. The 'Details' section includes an 'Edit' button and a table of agent information. The 'Recent Sign-In Log' section displays a table of login activity.

Details	
Name	test agent name
Department	Department 2
Workshop Department	Department 1
Level	Administrator
Stock Depot	Warehouse
Opening Screen	Sales
Default Contact Screen	Dashboard
Default Purchasing Screen	Current Order
Default Sales Screen	Dashboard
Default Stock Screen	Dashboard
Default Workshop Screen	Engineer Dashboard
CompanyImageURL	
smsFromID	
Mobile	07973116378
Login Email	test2@deepbluesystems.com
From Email	test2@deepbluesystems.com
Phone	
Colour Scheme	Dark

Recent Sign-In Log		
28/05/2024 10:54:32		176.252.139.37
28/05/2024 10:49:14		176.252.139.37
27/05/2024 15:13:05		176.252.139.37
27/05/2024 08:01:18		176.252.139.37
25/05/2024 19:08:02		176.252.139.37

Press 'edit' to display the edit dialogue

Edit Agent Details

Name

Stephen Sutton

Level

Administrator

Department

Software Support

Stock Depot

Warehouse

Opening Screen

Contact

Mobile

07973116378

Email

steve@deepbluesystems.com

Phone

02085414131

Cancel

Save

The opening screen determines which dashboard will be displayed when the agent logs in.

Resetting login password

Press 'change password' to display the dialogue box.

Reset Password

New Password

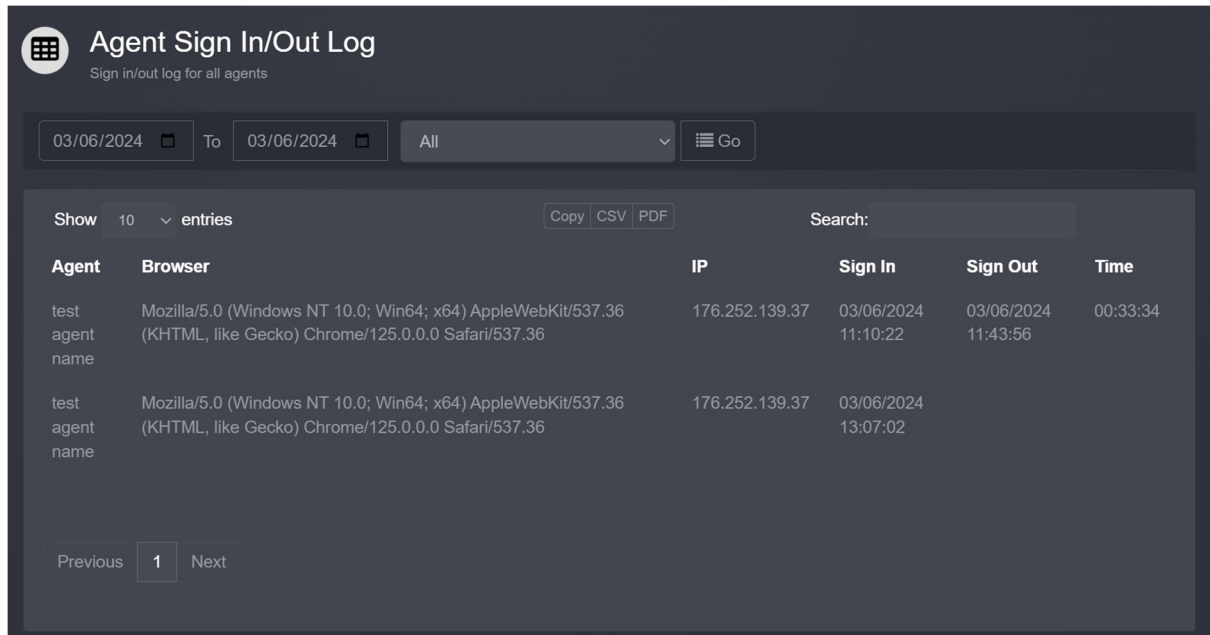
Confirm Password

Cancel

Update Password

Sign In Activity

The sign in activity screen shows all login/logout activity between two dates.



The screenshot shows the 'Agent Sign In/Out Log' interface. At the top, there's a header with a calendar icon and the title 'Agent Sign In/Out Log' with a subtitle 'Sign in/out log for all agents'. Below this is a date range selector showing '03/06/2024' to '03/06/2024' with a dropdown menu set to 'All' and a 'Go' button. The main content area has a 'Show 10 entries' dropdown, 'Copy', 'CSV', and 'PDF' buttons, and a search bar. The table below has columns: Agent, Browser, IP, Sign In, Sign Out, and Time. It lists two entries for 'test agent name' on '03/06/2024'. The first entry shows a sign in at 11:10:22 and sign out at 11:43:56. The second entry shows a sign in at 13:07:02. At the bottom, there are 'Previous', '1', and 'Next' navigation buttons.

Agent	Browser	IP	Sign In	Sign Out	Time
test agent name	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/125.0.0.0 Safari/537.36	176.252.139.37	03/06/2024 11:10:22	03/06/2024 11:43:56	00:33:34
test agent name	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/125.0.0.0 Safari/537.36	176.252.139.37	03/06/2024 13:07:02		

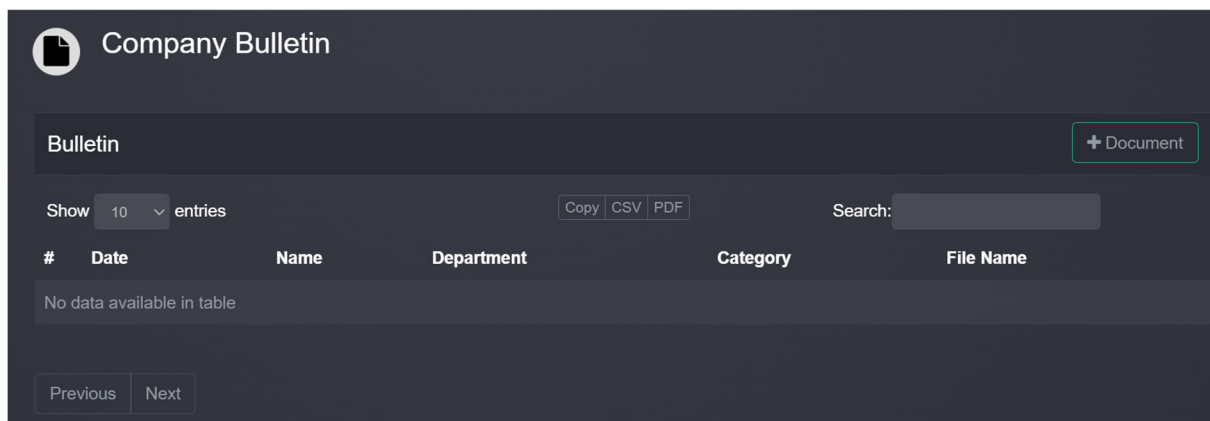
This screen is useful for checking staff login times/dates.

The screen can also be filtered to show a specific agents login activity.

Company Bulletin

The company bulletin screen gives you a central location to store and distribute company policy's as well as technical information and bulletins to your staff.

Administrators can add new documents, for everyone else the screen is read only.



The screenshot shows the 'Company Bulletin' interface. At the top, there's a header with a document icon and the title 'Company Bulletin'. Below this is a 'Bulletin' section with a '+ Document' button. The main content area has a 'Show 10 entries' dropdown, 'Copy', 'CSV', and 'PDF' buttons, and a search bar. Below this is a table with columns: #, Date, Name, Department, Category, and File Name. The table is currently empty, showing 'No data available in table'. At the bottom, there are 'Previous' and 'Next' navigation buttons.

#	Date	Name	Department	Category	File Name
No data available in table					

Data Feeds


Data feeds allow you to send specific information to an ftp server on a defined schedule.

The most common use for a data feed is to send a CSV file containing current vehicle/parts stock to a website on a regular automatic basis.

Data feeds have now been mostly superseded by the new Rest API functionality.

GDPR

The GDPR allows you to stay fully compliant by removing data which is no longer current or relevant for day-to-day operations.


 GDPR Configure Data retention policies of persistent data and records management for meeting legal and business data requirements	
Item	
Delete ALL transactions older than 7 Years, with a zero balance.	Edit Delete
Delete ALL accounts with no transactions in the last 6 Years and a zero account balance	Edit Delete
No customer details on job cards	Edit

CloudDMS Account

The account screen shows recent invoices issued by Deep Blue as well as your current pricing schedule. You can also download copy invoices as required and check your account balance.

Development Log.

The development log shows all development activity carried out on the DMS covering new functionality, alternations and bug fixes.

 **Development Log**
Any problems, issues or feature requests email support@deepbluesystems.com

Show	10	▼	entries	Copy	CSV	PDF	Search:	
Date	Category		Details					
30/05/2024 14:59:40	New Feature		Sales: Account. Transaction type filter added.					
30/05/2024 12:06:32	New Feature		Contact: Account. Thread filtering now executed in-place.					
30/05/2024 11:48:59	Alteration		Sales: Account. Transaction filtering now executed in-place.					
29/05/2024 17:02:57	New Feature		Stock: On order. Product specific on order screen now includes a delete button if the product has not been sold/allocated.					
28/05/2024 11:07:50	New Feature		Purchasing: Purchase orders. Purchase orders and invoices now have a linked thread inline with sales invoices and work orders.					
25/05/2024 19:03:21	Alteration		Workshop: Work order. Job card print-out improved for jobs with a long list of instructions.					
25/05/2024 19:02:49	New Feature		Sales: Pro-forma, Sales Quote, Estimate. Option added to exclude SKU's when emailing copy PDF					
25/05/2024 14:41:56	Bug Fix		Workshop: Work order. If a work order had a payment it was blocking you from deleting any job splits.					
25/05/2024 14:25:05	Bug Fix		Purchasing: Purchase Invoice. Allocating a sales invoice to an open purchase invoice as payment could fail.					
22/05/2024 09:22:47	Bug Fix		Purchasing: Purchase invoice. CSV export could fail if a product was not on the proceeding purchase order.					

Previous12345...299Next

Account View Log

Each time a customer's account is viewed the date/time and user is logged. The account view log allows you to check what accounts each agent has been viewing.

Delete Log

The delete log allows you to check which products have been removed from transactions as well as what transactions have been deleted.

Merge Accounts.

If you find a duplicate account whereby the same customer has one or more account records this option allows you to merge them into one account.

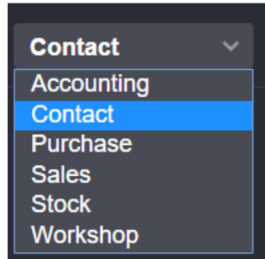
Payment Allocation Log

Each time a payment is allocated a record is kept. The payment allocation screen allows you to see how payments were previously allocated on a granular level.

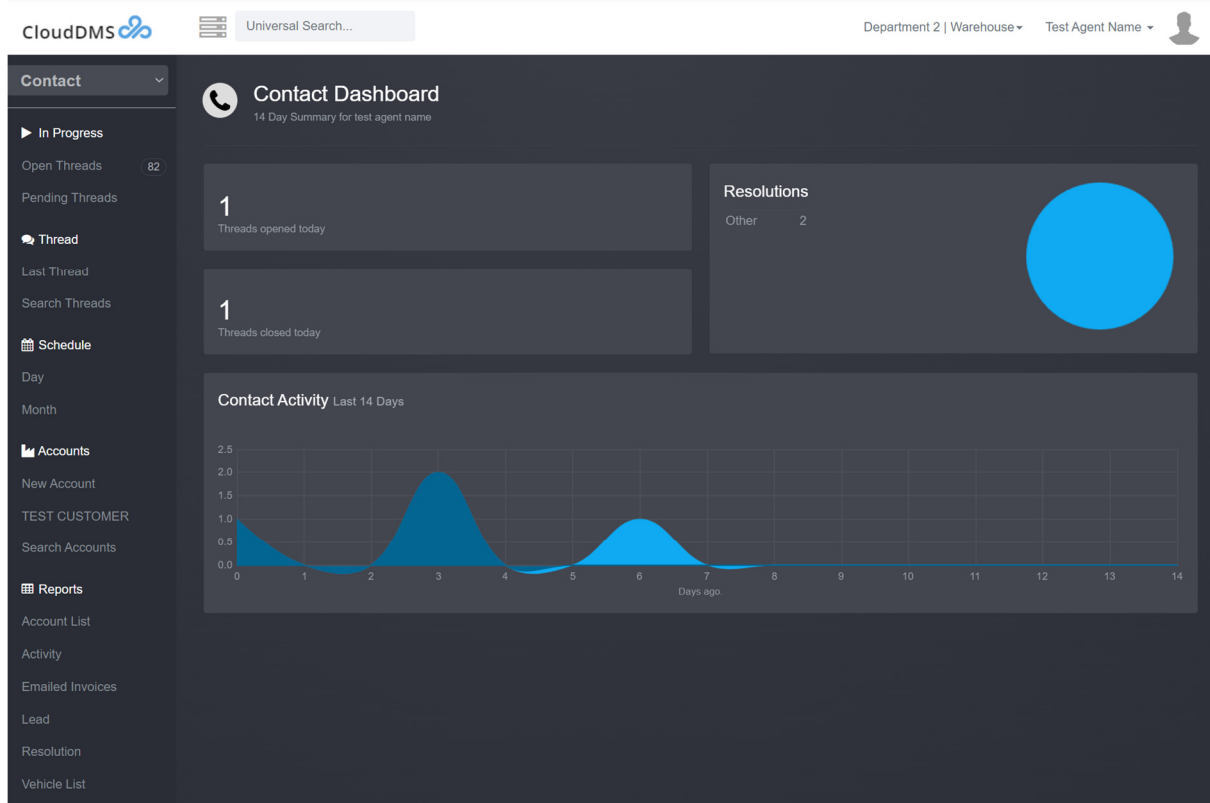
Contact

The DMS is split into several modules which can be accessed via the drop-down box in the top left of the screen.

Select 'Contact' to access the contact module.



The contact module tracks your communication and contact with your customers.

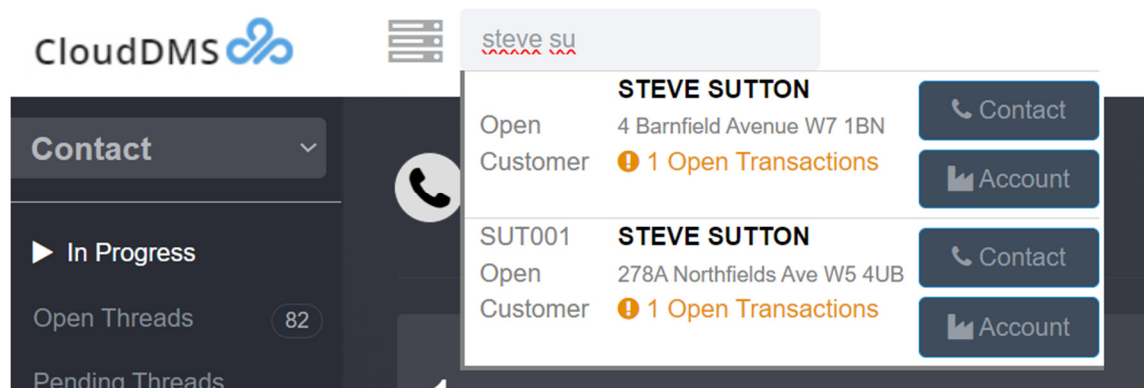


Each conversation or interaction whether it's a sales lead or a complaint is referred to as a 'Thread'. A thread is automatically created for each transaction and can be viewed by pressing 'thread' when viewing the transaction. Threads can contain many contacts, attachments and notes.

When accessing the contact section, a dashboard is initially displayed. This displays a summary of contacts and resolution during the last 2 weeks.

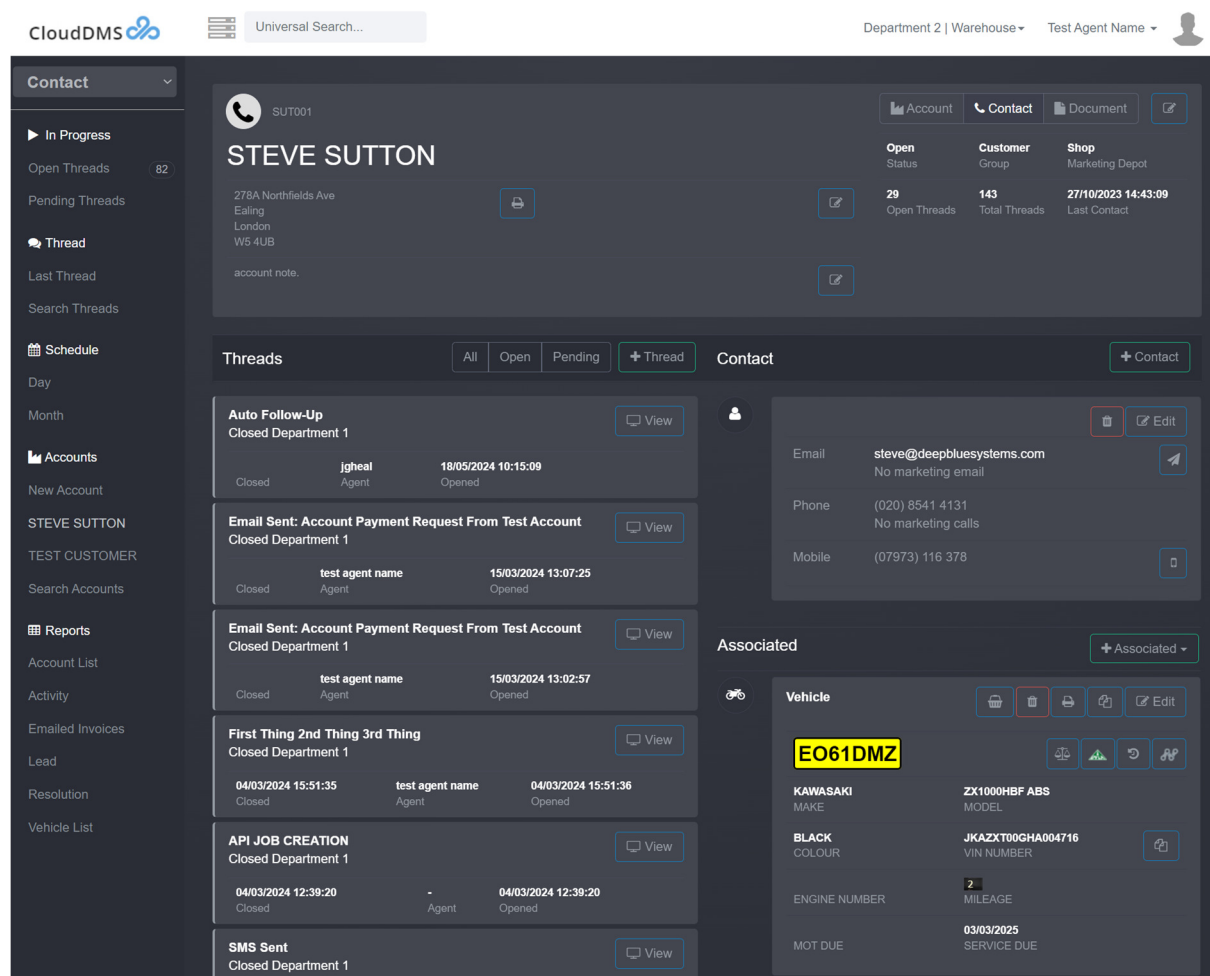
Creating a new thread

Before you can create a new thread, you need to find the correct customer account. You can do this by typing the customer's name or postcode into the 'universal search' box.



Press 'Contact' beside the customer's name to display the customers contact screen.

If the customer is not already in the database press 'new account' on the 'contact' screen to add them.




Press '+Thread' to create a new thread.

+ Thread


New Thread

Create a new thread for STEVE SUTTON


Date

31/05/2024 17:23:31 


Department

department 2 


Associated

n/a 


Lead

- 

Agent

test agent name 

Category

- 

Summary

Close

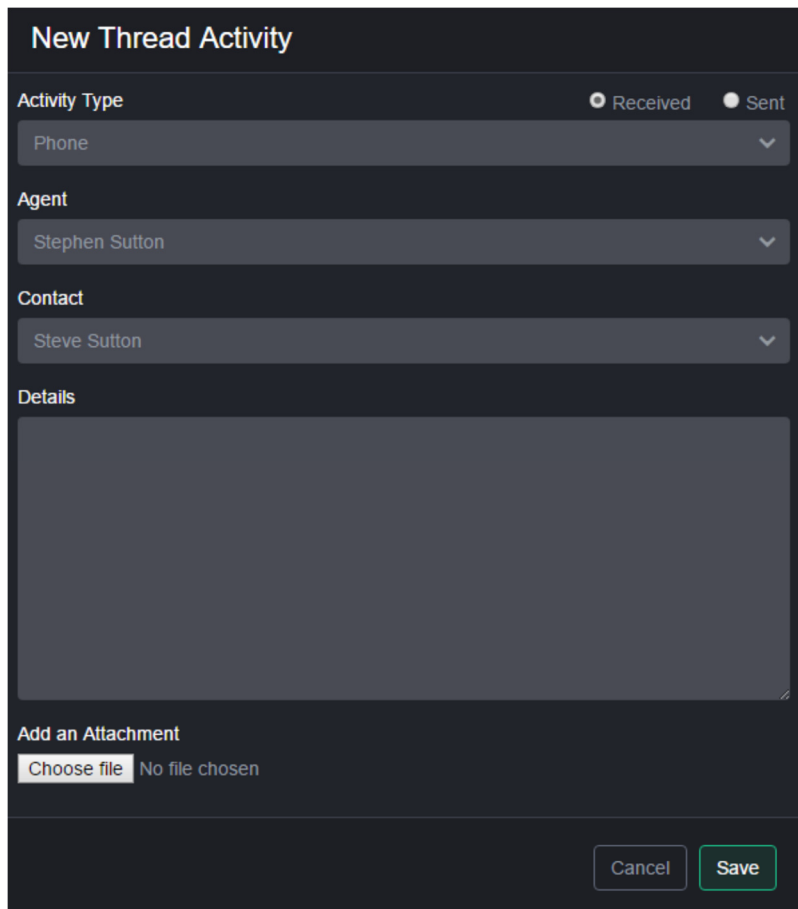
Create New Thread

If you change the date/time on the dialogue box (to a future date) you will create a pending thread, which will become open on the specified date/time.

If you allocate the thread to an agent other than yourself, they will receive a notification email informing them of the new thread.

Enter a summary of what the thread is about then press 'create new thread'.

The contact dialogue will now be displayed.

The screenshot shows a 'New Thread Activity' form with a dark theme. At the top, there's a title 'New Thread Activity'. Below it, the 'Activity Type' section has radio buttons for 'Received' (selected) and 'Sent'. A dropdown menu for 'Activity Type' shows 'Phone'. The 'Agent' section has a dropdown menu showing 'Stephen Sutton'. The 'Contact' section has a dropdown menu showing 'Steve Sutton'. Below these is a large text area for 'Details'. At the bottom, there's an 'Add an Attachment' section with a 'Choose file' button and the text 'No file chosen'. At the very bottom are 'Cancel' and 'Save' buttons.

Select the type of contact i.e. Phone, email, etc. You can configure extra contact types in the 'company settings' screen.

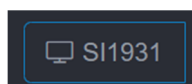
Select the contact you are talking to. You can add new contact in the main customer contact screen.

Threads can also be categories for later filtering. You can setup thread categories in 'Company Settings'.

Enter details of the conversation and press 'save'

Additional interactions can be recorded by pressing '+Activity' again.

If the thread is linked to a transaction, you can display the transaction by pressing the transaction display button.



Closing a Thread

When a thread is complete you should 'Close' it.

Display the thread then pressing 'Close Thread'.

Close Issue
Close this issue and record a resolution.

☒ Existing Resolution

Bluetooth Scanner

☐ New Resolution

Summary

Summary

Details

☐ No Resolution

Cancel Close Issue

Existing resolution allows you to choose a preset resolution. i.e. 'no sale'. You can create a new resolution by entering a summary and details of the resolution.

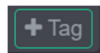
If there was no resolution or one is not applicable select 'no resolution'

Press 'Close Issue'

It's important to standardise the resolutions so you can report on how interactions with your customers were resolved.

Tagging Issues

You can add 'Label Tags' to an issue by pressing '+Tag'



The tag dialogue will then be displayed.

Add Tag Label

Tags can be setup from 'admin'->'Company Settings'->'Tag Labels'

Tag Label
Thread tag 1

Mileage

Comment

Add Image/PDF

Choose file No file chosen

Cancel

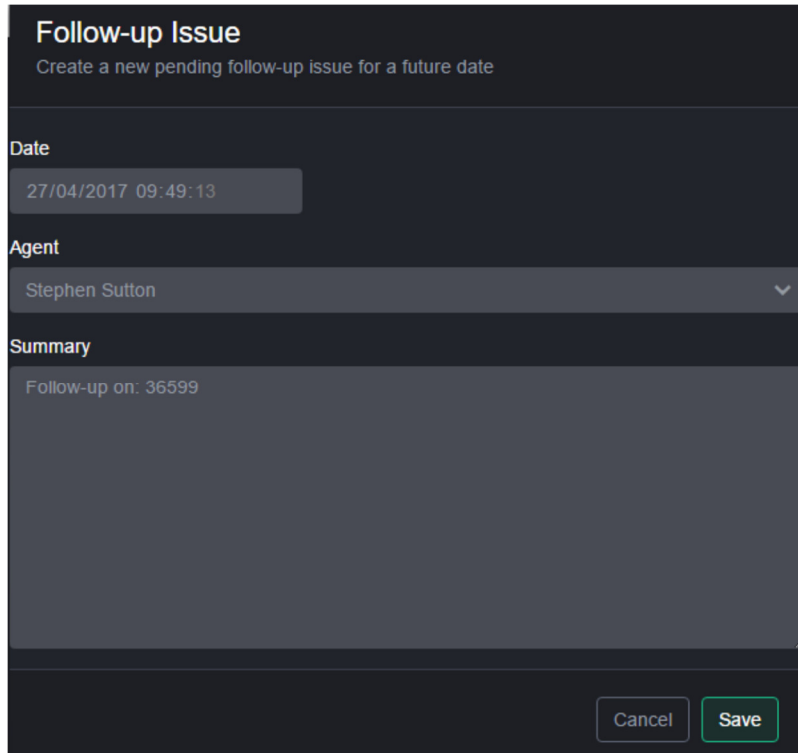
Add Tag

Tags are effectively a structured note which can include an attachment. Open threads can also be filtered by label tag.

Creating a follow-up

Once a resolution has been closed you can create a 'follow-up' pending thread for a future date.

Press '+follow-up' to do this.



The screenshot shows a 'Follow-up Issue' form with a dark background. The title 'Follow-up Issue' is at the top, followed by the subtitle 'Create a new pending follow-up issue for a future date'. The form has three main sections: 'Date' with a text input showing '27/04/2017 09:49:13', 'Agent' with a dropdown menu showing 'Stephen Sutton', and 'Summary' with a large text area containing 'Follow-up on: 36599'. At the bottom right are 'Cancel' and 'Save' buttons.

Follow-up Issue
Create a new pending follow-up issue for a future date

Date
27/04/2017 09:49:13

Agent
Stephen Sutton

Summary
Follow-up on: 36599

Cancel Save

Follow up threads will become 'Open' on the specified date and time.

Open Threads

Open threads are a list of unresolved leads, issues etc.

Press 'open threads' on contact menu bar to display the list.

The screenshot displays the 'Open Threads' section of the CloudDMS application. The interface includes a sidebar with navigation options like 'In Progress', 'Thread', 'Schedule', 'Accounts', 'Reports', and 'Activity'. The main content area shows a list of threads with the following details:

Thread Name	Department	Last Contact	Agent	Scheduled	Action
Mpn	Open Department 2	3 days ago	test agent name	3 days ago	View
A Brand New Customer 2	Open Department 2	17/04/2024 09:32:32	test agent name	17/04/2024 09:32:26	View
Yamaha	Open Department 1	29/01/2024 12:24:38	test agent name	29/01/2024 12:24:38	View
Yamaha	Open Department 1	29/01/2024 12:24:06	test agent name	29/01/2024 12:23:19	View
Steve Sutton	Open Department 1	test agent name	test agent name	21/11/2023 13:39:35	View
Bike Test Customer	Open Department 1	-	-	11/09/2023 14:45:06	View

By default, only your open threads will be displayed, but you can adjust the view using the filter buttons at the top of the screen.

Threads can be filtered by:

- Department
- Agent
- Category
- Label Tag

To display a thread, click 'view'.

Once a thread has been closed it will be removed from the open list.

Pending Threads

Pending threads are threads which have been scheduled for a future date. Once the date passes, they will move to the open thread list.

Click on 'pending threads' on the contact menu bar to display your pending threads.

Typically, you create a pending thread as a reminder to follow up with a customer about an issue at a future date. This can be used for vehicle sales curtesy calls or follow ups from workshop jobs etc.

Last Thread

This is a shortcut to take you back to the last thread you were looking at.

Search Threads

You can search all threads on all customers by selecting 'search threads' from the contact menu bar.

The screenshot shows the CloudDMS interface with the 'Thread Search' feature active. The top navigation bar includes the CloudDMS logo, a 'Universal Search...' input field, and user information: 'Department 2 | Warehouse' and 'Test Agent Name'. The left sidebar contains a 'Contact' menu with options like 'In Progress', 'Open Threads (82)', 'Pending Threads', 'Thread', 'Last Thread', 'Search Threads', 'Schedule', 'Day', 'Month', 'Accounts', 'New Account', 'TEST CUSTOMER', 'Search Accounts', 'Reports', 'Account List', 'Activity', 'Emailed Invoices', 'Lead', 'Resolution', and 'Vehicle List'. The main content area is titled 'Thread Search' and features a search bar with a magnifying glass icon. Below the search bar, there are three columns: 'Summary', 'Starting', and 'Keyword', each with a dropdown arrow and a 'Go' button. The search results are displayed in a table with columns for 'Thread' and 'Date'. The 'Thread' column lists various items such as 'Steve Sutton', 'Invoice: Po218 Mpn', 'Service Tyres Sdajfthsdkjthsdjth Seiofhgsiefh Seihfghsef Oil Service Tricia King', 'Carry Out Used Car Check Oil & Filter Mot Workshop', and 'Parts From Si1999 -1x D0b23100 Side Case Sh23 Workshop'. The 'Date' column shows timestamps and agent names, with 'View' buttons next to each entry. The interface is dark-themed.

Select the field and enter your search keyword and press 'enter' to start the search.

Scheduling a Thread

Threads can be schedule for a future date. These threads are known as pending threads.

Click 'month' on the contact screens menu bar to display the thread schedule window.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Contact

In Progress

Open Threads82

Pending Threads

Thread

Last Thread

Search Threads

Schedule

Day

Month

Accounts

New Account

TEST CUSTOMER

Search Accounts

Reports

Account List

Activity

Emailed Invoices

Lead

Resolution

Vehicle List

May 2024

Contact calendar, month view



test agent name


< Apr 2024TodayJun 2024 >+ Thread


		01 Wednesday	02 Thursday	03 Friday	04 Saturday	05
06 Monday	07 Tuesday	08 Wednesday	09 Thursday <div>Department 3)🗨️</div> <div>Department 2)🗨️</div> <div>one:two:three next line🗨️</div> <div>Workshop)🗨️</div> <div>x:D0B23100:SIDE🗨️</div> <div>Workshop)🗨️</div> <div>2.0000x:D0B23100:SIDE🗨️</div> <div>Workshop)🗨️</div> <div>Parts from SI1921 -2x🗨️</div> <div>Workshop)🗨️</div> <div>Parts from SI1921 -2x🗨️</div> <div>Workshop)🗨️</div> <div>Parts from SI1921 -2x🗨️</div> <div>Department 3)🗨️</div>	10 Friday <div>Department 3)🗨️</div> <div>line 01 line 02 line 03🗨️</div> <div>Department 1)🗨️</div> <div>Parts from SI1921 -2x🗨️</div>	11 Saturday	12
13 Monday <div>Allan Jones)🗨️</div> <div>Email Sent: SP35 from🗨️</div>	14 Tuesday	15 Wednesday	16 Thursday	17 Friday	18 Saturday	19
20 Monday	21 Tuesday	22 Wednesday	23 Thursday	24 Friday	25 Saturday	26
27 Monday	28 Tuesday <div>Feridax)🗨️</div> <div>Email Sent: Purchase🗨️</div> <div>Mpn)🗨️</div> <div>Invoice: PO218🗨️</div>	29 Wednesday	30 Thursday	Today <div>Steve Sutton)🗨️</div> <div>+🗨️</div>		

Each thread is displayed on the relevant day. By default, only your threads are displayed.


You can click on a specific day to switch to day view.

CloudDMS  Universal Search... Department 2 | Warehouse Test Agent Name 

Contact  **Friday 31 May 2024**
Contact calendar, day view

test agent name  < 30 May Today 01 Jun > + Thread

08:00
09:00
10:00
11:00
12:00
13:00
14:00
15:00
16:00

STEVE SUTTON  View

Closed Department 1

Closed test agent name
Agent

1 hour ago
Opened

17:00
18:00
19:00
20:00
21:00

+
+
+
+
+

In Progress
Open Threads (82)
Pending Threads

Thread
Last Thread
Search Threads

Schedule
Day
Month

Accounts
New Account
TEST CUSTOMER
Search Accounts

Reports
Account List
Activity
Emailed Invoices
Lead
Resolution
Vehicle List

You can create a new thread on the month or day view by pressing the '+' button on the required day/time



The new thread dialogue is then displayed.

New Thread

Create a new thread

Account Name

Date & Time

Department

Department 1

Agent

Test User

Summary

Cancel

Create New Thread

Type the customer's name or postcode in the 'account name' box to select the required customer. If the customer is not already in the database, then you will need to add them first.

Threads scheduled for a future date are 'Pending' threads.

Creating a New Customer Account

Each customer you deal with should have their own account. Their account will show all contacts and all invoices issued to them.

Press 'New Account' on the contact menu bar to create a new customer account.

The screenshot shows the 'New Account' form in the CloudDMS application. The interface has a dark theme. At the top, there's a header with 'CloudDMS' logo, a 'Universal Search...' bar, and user information: 'Department 2 | Warehouse' and 'Test Agent Name'. A left sidebar contains a 'Contact' menu with options like 'In Progress', 'Thread', 'Schedule', 'Accounts', 'Reports', and 'Vehicle List'. The main area is titled 'New Account' with a subtitle 'Enter the new account details and press 'Save''. The form fields are organized into two columns. The left column includes 'Account Code' (with a dropdown arrow), 'Account Status' (set to 'Open'), 'Default Sales Department' (set to '-'), 'Account Name' (text input), 'Address' (text input), 'Post Code' (text input), 'Country' (set to 'United Kingdom'), 'Web Site' (text input), 'Phone' (text input), 'Mobile' (text input), and 'Email' (text input). The right column includes 'Account Group' (set to 'customer'), 'Marketing Depot' (set to '-'), and 'Sales Agent' (set to '-'). At the bottom right, there are three checkboxes: 'No marketing calls' (checked), 'No marketing SMS' (checked), and 'No marketing email' (checked). At the very bottom, there are 'Cancel' and 'Add New Account' buttons.

Account Codes

You can issue an account code for the customer if required. These codes can be used to search for customer accounts quickly.

Pressing the down arrow in the account code box will generate some possible unique account codes based on the company name.


Account Groups

Accounts can be placed into groups allowing you to set pricing or report on customer groups. Typically, dealerships will split customers in several groups like 'Customer', 'Trade' etc.

You can manage Account group from the company settings screen.

Postcode lookup

If you enter a postcode then press the down arrow in the postcode box a list of matching addresses will be displayed for you to select.



The screenshot shows a dark-themed interface for a postcode lookup. At the top, a box labeled 'Post Code' contains the text 'W5 4UB'. Below this, a list of six addresses is displayed in a table-like format. Each row contains the full address, the town 'Ealing', and the post town 'London'. To the right of each row is a 'Select' button with a mouse cursor icon. A vertical scrollbar is visible on the right side of the list.

Post Code			
W5 4UB			
264 Northfield Avenue	Ealing	London	Select
266 Northfield Avenue	Ealing	London	Select
268 Northfield Avenue	Ealing	London	Select
270 Northfield Avenue	Ealing	London	Select
272 Northfield Avenue	Ealing	London	Select
274 Northfield Avenue	Ealing	London	Select

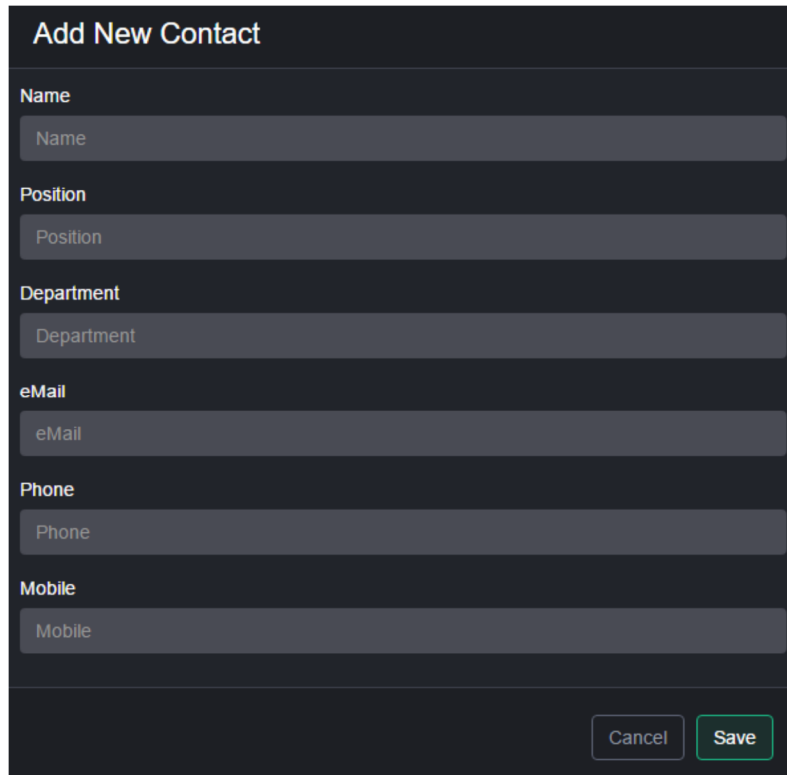
Saving the Account

Once you have filled out all the customer details press 'add new account', the details will be saved and then be displayed.

Adding a Contact

Customer accounts can have multiple contacts.

To create a new contact press '+Contact'



The screenshot shows a dark-themed form titled 'Add New Contact'. The form contains several input fields, each with a label above it: 'Name', 'Position', 'Department', 'eMail', 'Phone', and 'Mobile'. Each field has a placeholder text that matches the label. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

Add New Contact

Name
Name

Position
Position

Department
Department

eMail
eMail

Phone
Phone

Mobile
Mobile

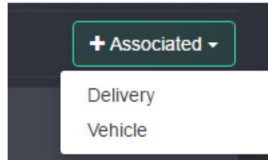
Cancel Save

Enter the contact details i.e. email address and press 'save'

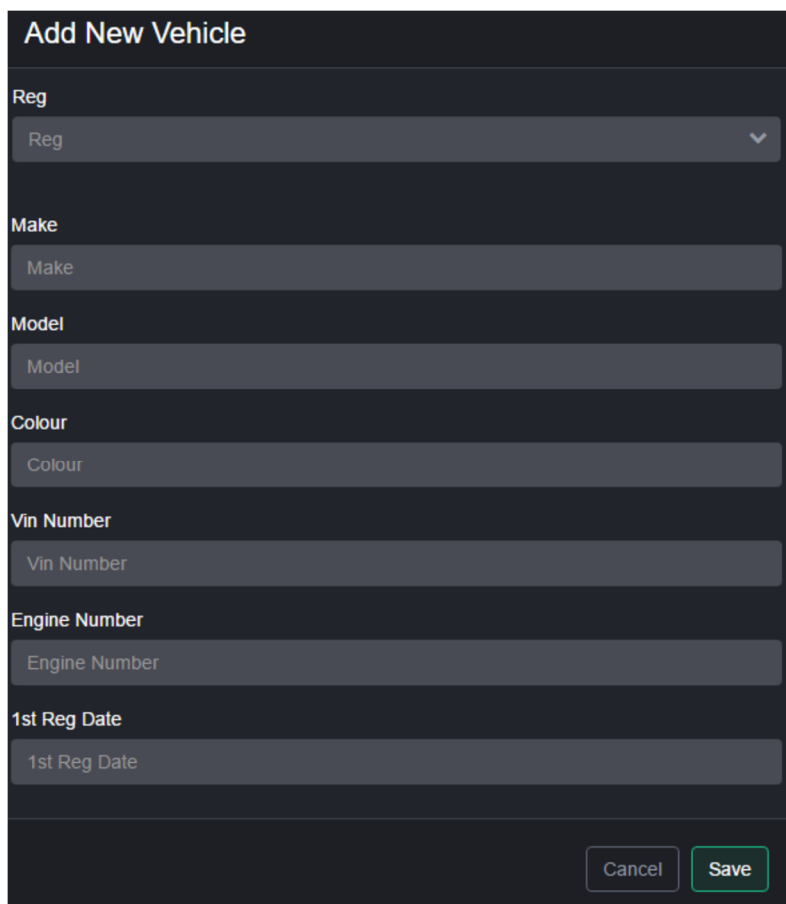
Adding associated

Customers can have multiple associated items. These could be delivery addresses, vehicles, or any custom types you have defined.

To add a new associated type, press '+associated' and select the type from the drop-down list.



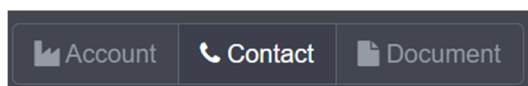
You can define new types in the company settings screen.

A screenshot of a form titled 'Add New Vehicle' in a dark theme. The form contains several input fields, each with a label above it: 'Reg' (with a dropdown arrow), 'Make', 'Model', 'Colour', 'Vin Number', 'Engine Number', and '1st Reg Date'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

Enter the details and press 'save'.

Switching between contact, account & document screens

When you are viewing the customer contact screen, pressing the 'account' button at the top of the screen to switch over to the customer's account screen.



The contact screen displays contact details and threads.

The account screen displays invoice, payments & discount schemes.

The document screen displays any attached documents.

Editing a customer's details.

Press 'edit' on the customer account to bring up the edit dialogue



Edit Account

Account Code

Account Code

Account Status

Open

Account Group

Customer

Name

steve suttom

Address

Address

Post Code

Post Code

Web Site

Web Site

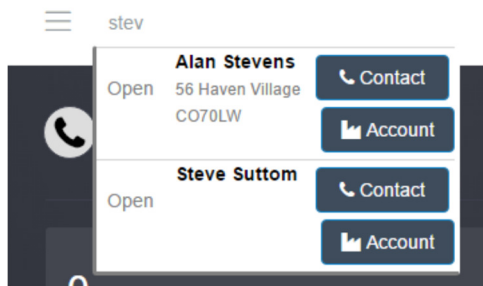
Cancel

Save

Alter and amend any details as required and press 'save'

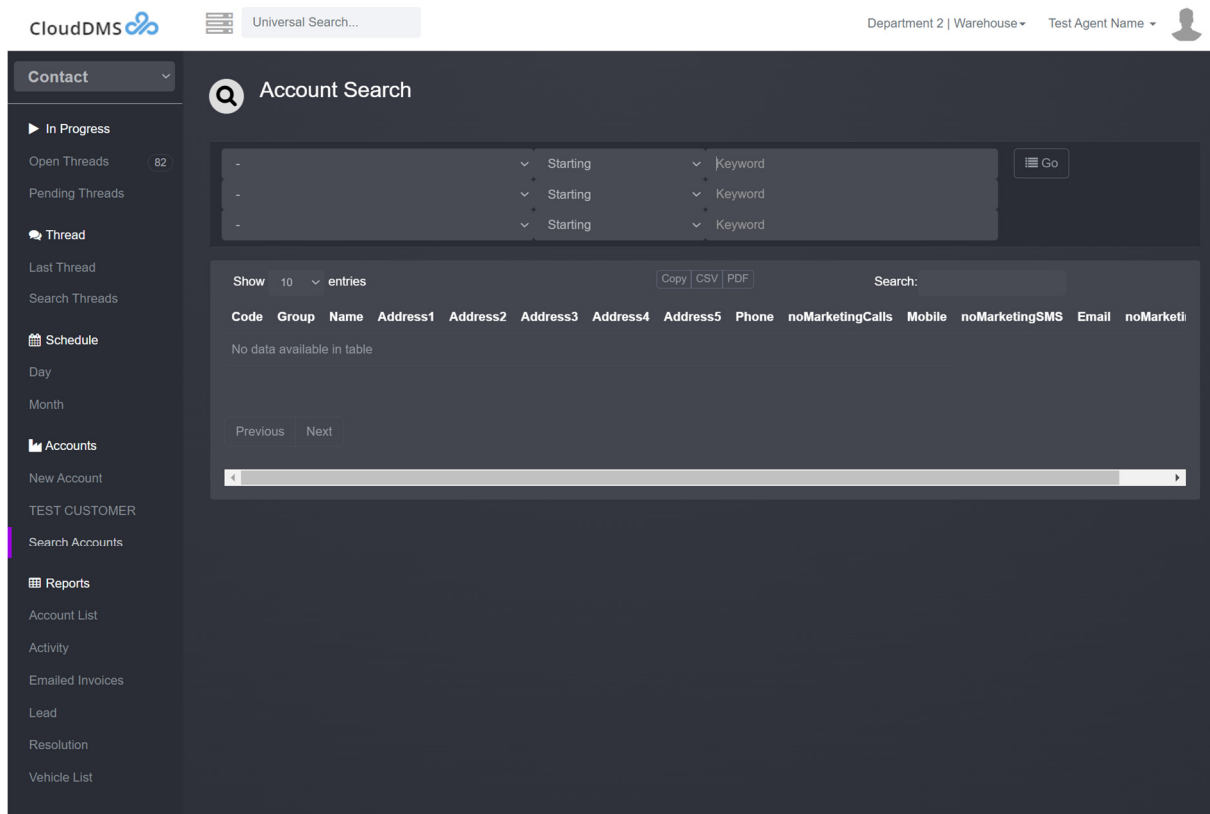
Finding customers

You can search for customer accounts by typing their account code, company name or postcode into the 'universal search' bar.



Click on 'Contact' to displays the customer contact screen, or 'account' to display the account screen.

Alternative you can use the 'search accounts' menu item on the 'contact' screen.






This screen allows you to search by:

- Email address
- Phone number
- Account code
- Postcode
- Company name

Account List Report

You can display a customer list by selecting 'Account List' from the main contact toolbar.

CloudDMS  Universal Search... Department 2 | Warehouse Test Agent Name 

Contact 

Account Search

Filters:

- eMail: -
- Containing: deepblue
- Starting: -
- Keyword: -

Show: 10 entries **Copy** **CSV** **PDF** **Search:**

Code	Group	Name	Address1	Address2	Address3	Address4	Address5	Phone	noMarketingCalls	Mobile	noMark
	Customer	ALLAN JONES	Maes Y Llyn	Maesyrcrugiau	Pencader		SA39 9DH	01559395485			
	Customer	BACK ORDER TEST CUSTOMER							0		0
	Customer	DAVE SMITH	120 Macfarlane Road		London		W12 7LA				
	Customer	DAVE SMITH1234	120 Macfarlane Road		London		W12 7LA		0		0
123456	Supplier	FERIDAX	PARK LANE	London			B63TNT		0		1
	Customer	JACK JONES	East Fulton House 18 Darluith Road	Linwood	Paisley	Renfrewshire	PA3 3TP		0		0
	Customer	JAMES SMITH	East Fulton House Darluith Road	Linwood	Paisley	Renfrewshire	PA3 3TP				
	Customer	JOHN SMITH	22 Barnfield Avenue		Kingston Upon Thames	Surrey	KT2 5RE		0	07973116378	0
	Customer	JOHN SMITH	80 CUCKOO AVENUE		LONDON		W7 1BN		0	07973116379	1
	Customer	JOHN SMITH							0		0

Previous 1 2 3 Next

The list can be filtered by default sales department and sales agent.

The list can also be exported to CSV or Clipboard.

Activity

The activity report allows you to specify a date range as see a summary of thread activity.

Emailed Invoices

The emailed invoices report allows you to specify a date range to see a list of finished invoices. Beside each invoice is the date and email address that invoice has been sent to.

This report is useful to check if you have forgotten to email a customer a copy of there invoice. The same information is also available in the thread linked to each transaction.

Contact Lead.

The contact lead report allows you to track how your customers found your details in order to contact you. This report is normally used to track the effectiveness of promotional activities.

Resolution.

The resolution report allows you to specify a date range and see a summary of how threads were closed. This is useful to see sales leads which resulted in 'no sale', or how problems/issues have been resolved.

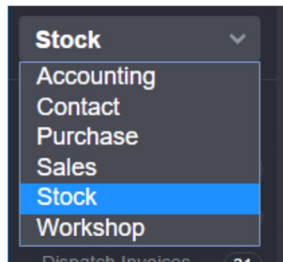
Vehicle List.

This report allows you find all vehicles in your database which match a specific criteria.

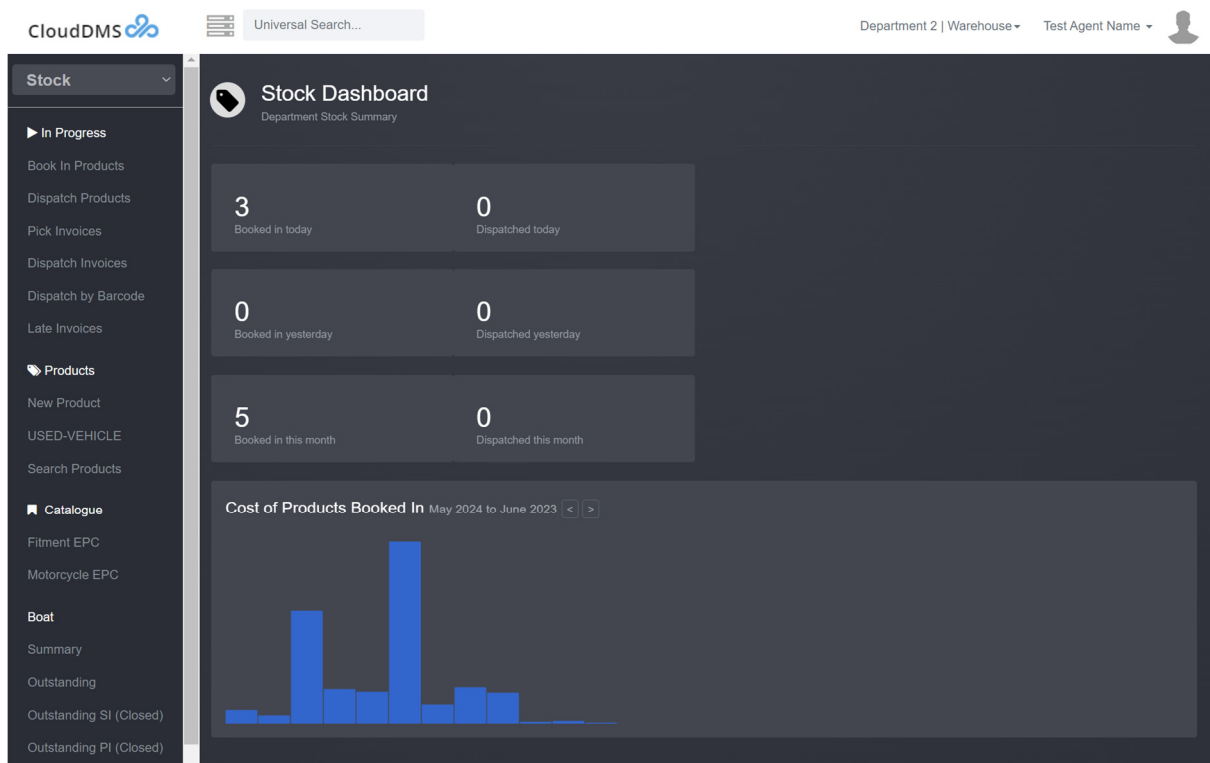
Stock

The stock section is where you manage your stock, booking in and booking out.

Select 'Stock' from the module selection drop down.



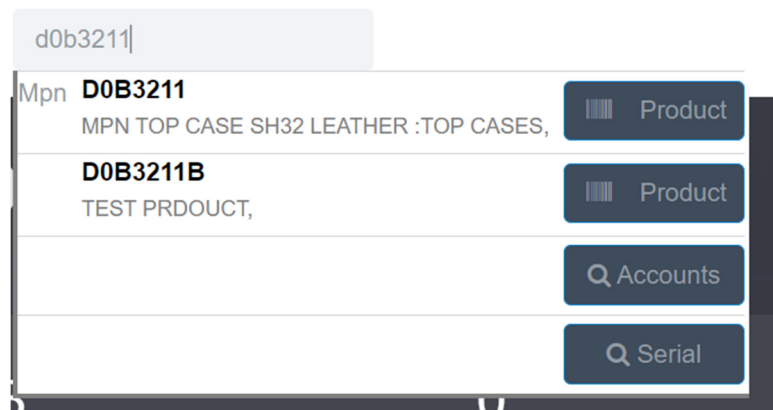
The main stock dashboard will then be displayed.



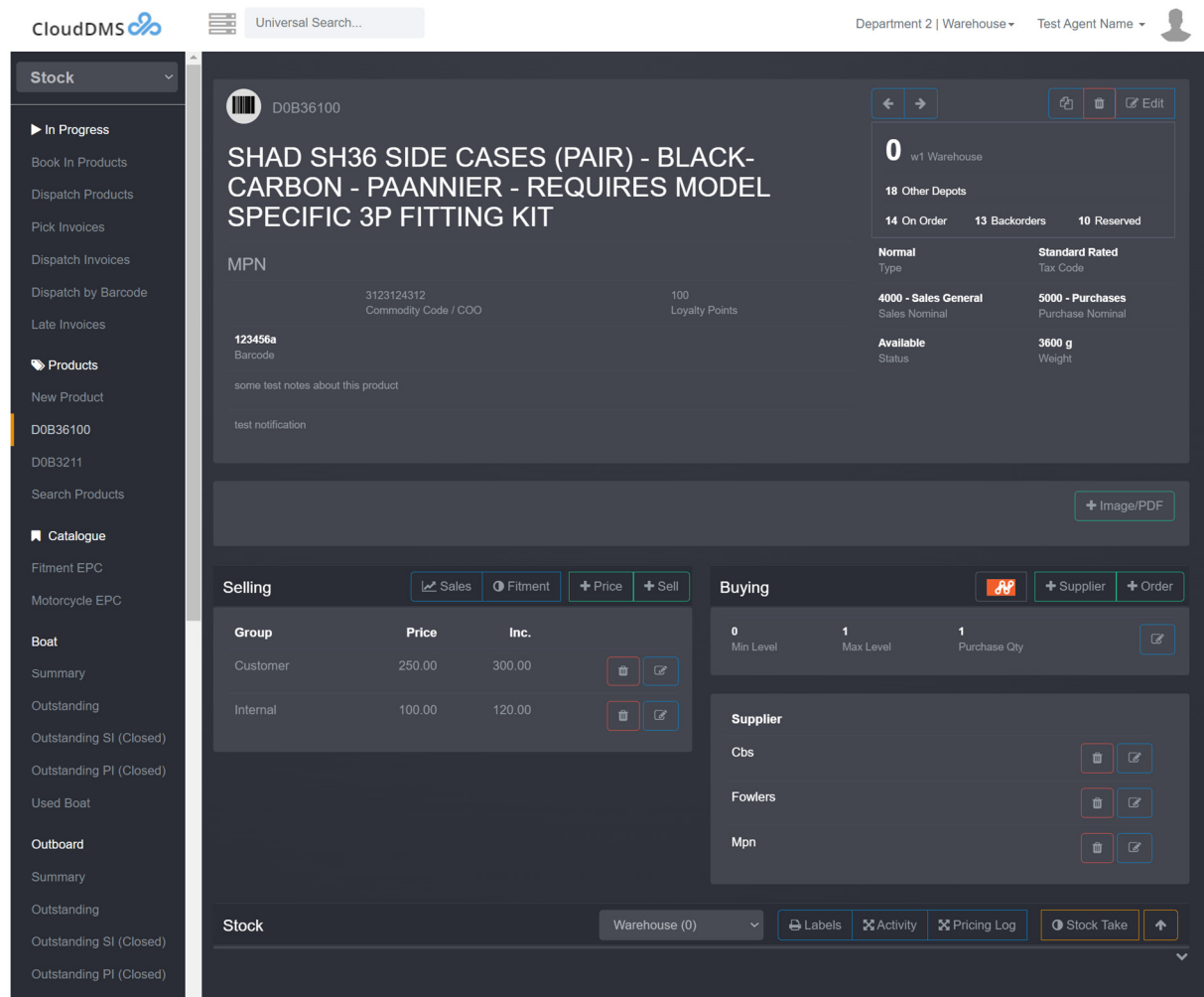
The dashboard gives you a quick summary of recent stock movements as well as stock values.

Finding a Product record

You can search for a product by typing the SKU into the 'universal search' box at the top of the screen, as you type possible matches are displayed.



Click on 'product' beside the relevant line to display the product record.



Alternately you can use the 'search products' menu item on the 'stock' screen which allows you to search on any field.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

D0B3211

Search Products

Catalogue

Fitment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Outstanding

Product Search

Enter a search keyword and press enter. Top 10,000 records only

Brand

Starting

mpn

Go

-

Starting

Keyword

-

Starting

Keyword

In Stock

Delete

Show 10 entries

Copy CSV PDF

Search:

SKU	Brand	Description	Supplier	Buy	Warehouse	Customer	Customer Inc
D0B23100 Normal	Mpn	Side Case Sh23	MPN	10.00	0	£ 300.00	£ 360.00
D0B3300 Normal	Mpn	Shad Sh33 Top Box. Red Reflector	MPN	1.00	0	£ 8.33	£ 10.00
D0B36100 Normal	Mpn	Shad Sh36 Side Cases (Pair) - Black-Carbon - Paannier - Requires Model Specific 3p Filling Kit	MPN	150.00	0	£ 250.00	£ 300.00
D0B37100 Normal	Mpn	Shad Sh37 Top Box	MPN	50.00	0	£ 100.00	£ 120.00
D0B5000 Normal	Mpn	Shad Sh50 Top Box	MPN	127.11	1	£ 190.67	£ 228.80
D1B33ER Nonstockable	Mpn	Unpainted Plate Sh33 :Acces. Top Case Shad	MPN	8.93	0	£ 14.30	£ 17.16

Previous

1

Next

You can search by:

- SKU
- Barcode
- Description
- Barcode
- Brand, etc.

Product records

Product records allow you to manage and track items you sell on sales invoice. Product records have many items of information (fields) including SKU, description, brand, stock level, selling price and buying price.

Each product has a sales and purchase nominal, this allows you to track how different segments of your stock are performing. Best practice is to group stock by profit centre i.e. Parts, Clothing, Labour, Oil, etc. You can create new nominal codes in the 'nominal ledger' on the 'accounting' screen.

Products can also be marked as obsolete or be superseded to a new replacement part number.

You can subscribe to 'shadow' price files which we provide and regularly update from many manufacturers/suppliers. It is also possible to upload CSV files containing product and pricing information. Price files can be managed from 'Admin' -> 'Price Files'.

Creating a New Product record

Go to the 'stock' section of CloudDMS and click on 'new Product'

New Product

The product screen will now be displayed.

New Product Line
Enter the new products details and press 'Save'. Please Note that SKU must be unique and the Barcode if present must be unique.

SKU
SKU (A-Z, 0-9, '-', ' ', '._')
SKU/part numbers can only contain the letters A-Z, numbers 0-9 or '-._'*

Barcode
BARCODE

Supersession SKU
SUPPERSESSION SKU

Description
DESCRIPTION

Brand
BRAND

Model
MODEL

URL Link
URL LINK

Commodity Code
COMMODITY CODE

Country Of Origin
United Kingdom

Product Code
PRODUCT CODE

Loyalty Points
LOYALTY POINTS

Tax Code
1 - standard rated

Individual Pricing
No

Type
Normal

Sales Nominal
4000 - sales general

Purchase Nominal
5000 - purchases

Reorder Level
0

Max Level
0

Weight (grams)
0

Notes
NOTES

Cancel Add New Product

Fill in the fields as required.

- The SKU field is critical and must be unique.
- The 'Type' field determines how the product is handled. Most products will be 'Normal', whilst Labour would be 'Non-stockable'

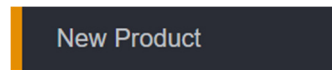
Once you have filled out the fields press 'add new product'. The product record will then be displayed.

The next step is to add selling and buying prices as well as setting the stock level.

Creating a New Product Kit

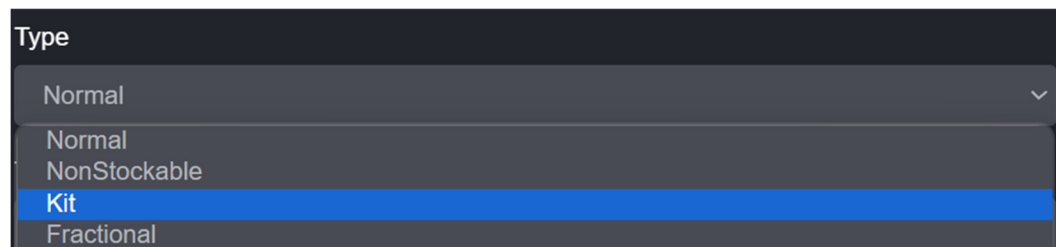
A product kit is one product record which sells a predetermined list of multiple products in one go. This saves time selling common combinations of products. i.e. a Service Kit.

To create a new kit go to the 'Stock' and press 'New Product'

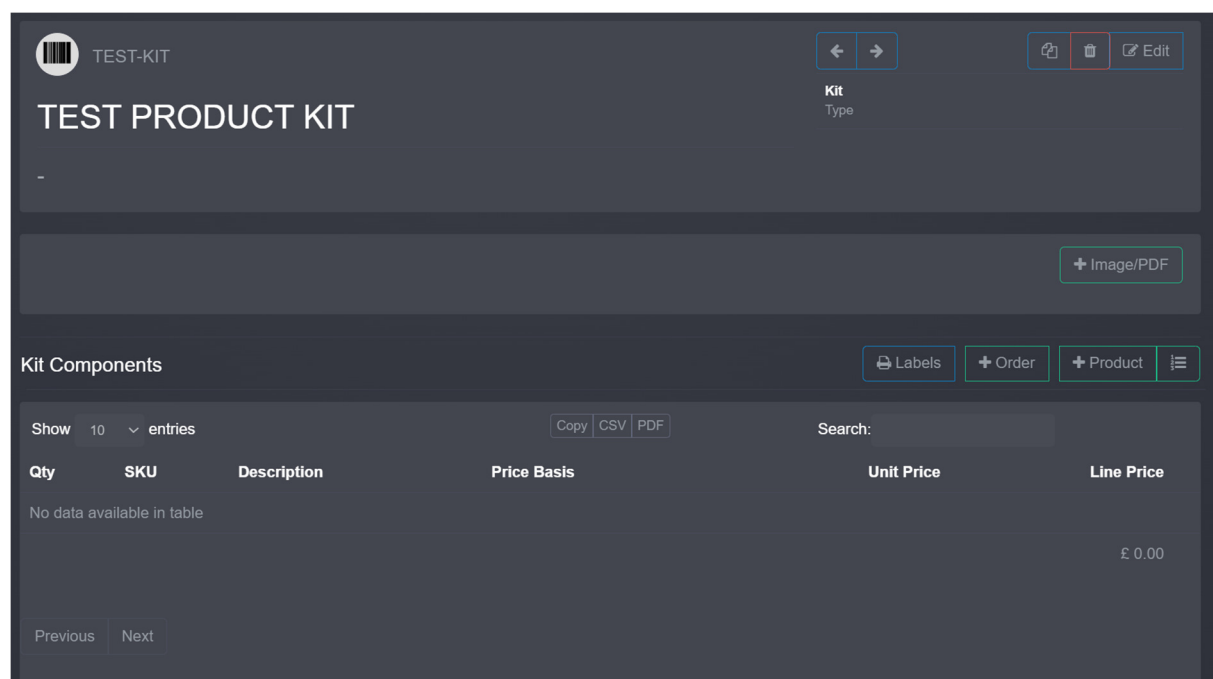


Give the Kit a new unique SKU and description.

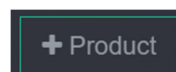
Make sure you change the 'Type' to Kit.



Press 'add new product' to create the product record. The product kit will then be displayed.



To add a product to the kit press '+Product'.



The SKU picker will be displayed.

Add Product

Add a product to the product kit

Qty	SKU

Enter the part number in the SKU box, press '+Add' beside the required part. Repeat this process for the products in the kit.

Add Product

Add a product to the product kit

Qty	SKU
	d0b3

D0B3211	Top Case Sh32 Leather :Top Cases Mpn	→ Supersession
D0B3211B	Test Product	+ Add
D0B3300	Shad Sh33 Top Box. Red Refector Mpn	+ Add
D0B3300AA	Description Brand	+ Add
D0B33100	Shad Sh33 Top Box. White Refector Mpn	→ Supersession
D0B33200	Shad Sh33 New 33 Litre Top Box	

Back

The product in the kit will be sold at the default price for that product. You can override the price by pressing the edit button and setting a price. If you set a price changing the price on the main product will not alter the kit price for the product.

You can remove a product from the kit by pressing the delete button beside the relevant product.

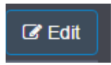


You can sell the product kit by adding it to an invoice in the same manner as any other product.

Selling a product kit to an invoice will add all the component parts at the relevant price for the invoice customer.

Editing a Product record

Once you have displayed the relevant product record press the 'edit' button in the top right of the screen to display the edit dialogue.



Edit Product

SKU

D0B36100

Barcode

8430358554825

Supersession SKU

Supersession SKU

Description

SIDE CASE SH36 CARBON :TOP CASES

Brand

Shad

URL Link

URL Link

Individual Pricing

No

Tax Code

1 - Standard Rated

Type

Normal

Sales Nominal

4006 - Shad Sales

Purchase Nominal

5006 - Shad Purchased

Obsolete

No

Purchase Quantity

24

Reorder Level

20

Max Level

44

Weight (grams)

0

Notes

Notes

Cancel

Save

The main fields for product record:

- SKU. The main stock keeping reference or part number.
- Barcode. The barcode number, or alternative part number.
- Supersession SKU. The new replacement part number.
- Description. Product description.
- Brand. Product brand.
- URL Link. URL for further product information.
- Individual pricing. If this is set to 'Yes' then each product in stock can have its own sales price. This is typically used for vehicle stock records.
- Tax code. Which rate of VAT to apply when selling the product.
- Type.
 - Normal. Part which you buy and sell. i.e. a nut or physical item
 - Non-stockable. An item which you can sell without purchasing i.e. labour, collection
 - Fractional. A part which you purchase in whole units and sell in fractional units. i.e. OIL.
 - Kit. A part which contains many parts, so be selling one part number you can add many part numbers to the transaction.
 - Associated. i.e. Vehicle. A physical product with an associated type so you can store extra information for each stock item.
- Sales nominal. Nominal code to record sales in the ledger.
- Purchase nominal. Nominal code to record purchases in the ledger
- Obsolete. Flag for product availability
- Purchase quantity. Specifies if the product is purchased in batches.
- Reorder level. Minimum stock level before product should be reordered.
- Max level. Ideal stock level to order up to.
- Weight. Product weight in grams
- Notes.

Press 'save' to save any changes made.

Product Images

For some products an MPN library image may be displayed.







Clicking on the image will zoom in.

You can upload your own images by clicking on '+image' and selecting a relevant jpg.

On smart phones you can also upload directly from the phone's camera.

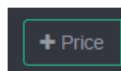
Product Selling Prices

Each customer account group has its own selling price.

Group	Price	Inc.		
Customer	268.45	322.14		
Trade	315.83	378.99		

You can add as many customer account groups as you require.

Press '+Price' to add a new account group selling price.



New Selling Price

Add new account group selling price

Account Group
Customer

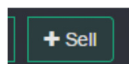
Price
0.00

CancelSave

Select the account group, enter the price excluding vat and press 'save'

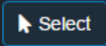
Booking out/Selling a Product

Display the relevant product then press '+Sell' to display a list of your open invoices



Sell Product

Book stock to an existing open sales invoice or sales order

Date	Reference	Account	Total	
12/04/2017 14:30:29	WO #000010	Steve Sutton	£ 0.00	

Other Open Transactions

Cancel

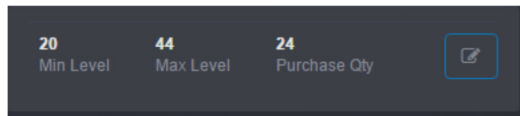
Pressing 'select' beside the required invoice to book the product out.

Pressing the down arrow on 'other open transactions' will show you other users transactions which you can book the part to.

You can also add the part directly to a transaction, when displaying the transaction press '+product' and enter the SKU.

Stock Control

For each product you can set a min, max and purchase quantity.

A dark-themed interface showing three input fields for stock control settings. The first field is labeled '20 Min Level', the second '44 Max Level', and the third '24 Purchase Qty'. To the right of these fields is a small square button with a pencil icon, used for editing the settings.

When a stock level falls to the min level the system will reorder up to the max level taking into account the purchase quantity.

Press 'edit' to adjust the levels.

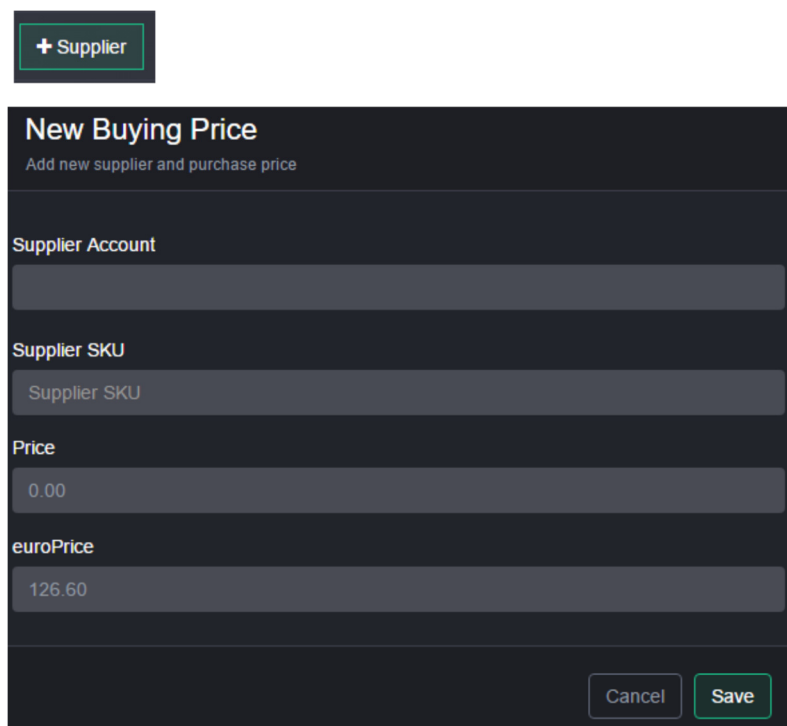


The reorder levels are only processed when you sell a product. If you have edited re-order levels you can run 'Purchasing' -> 'Under stocked' to see a list of products which are currently below their re-order levels.

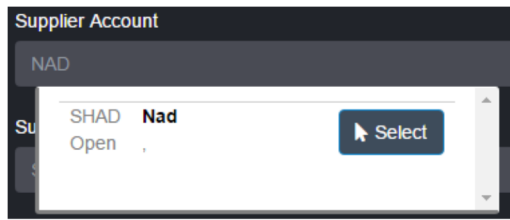
Adding a Supplier

You can have multiple suppliers for each product.

Press '+Supplier' to display the dialogue.

A dark-themed dialog box titled 'New Buying Price' with the subtitle 'Add new supplier and purchase price'. It contains four input fields: 'Supplier Account', 'Supplier SKU', 'Price' (with '0.00' entered), and 'euroPrice' (with '126.60' entered). At the bottom right, there are two buttons: 'Cancel' and 'Save'.

Click into the supplier account box and enter the suppliers account code or name. As you type a list of matches will be displayed.



Press 'select' to choose the correct account.

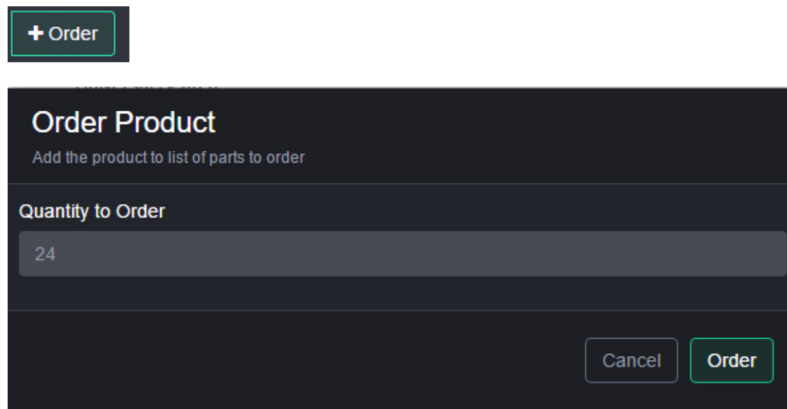
The supplier must already have an account setup on the system. To create a new supplier, go to the 'Purchase' window and press 'new supplier'.

You can specify the supplier's SKU and purchase price for the product.

Press 'save' to add the price.


Ordering a Product

To manually order press '+Order', the product will be added to the current un-allocated order list.



Enter the quantity to order and press 'order'. You can check the current order from 'Purchasing' -> 'Current Order'

Available Stock

A full list of free stock can be displayed by pressing the small down arrow in the stock section. 

Stock							Warehouse (7) ▼			Labels	List	Activity	Pricing Log	Transfer	Stock Take	↑
Age	Serial	Location	Sale	Sale Inc	Spent	Note										
0		w1 Warehouse														
0		w1 Warehouse														
0		w1 Warehouse														
0		w1 Warehouse														
0		w1 Warehouse														
0		w1 Warehouse														
0		w1 Warehouse														
0		w1 Warehouse														

You can view the detailed stock record for each item by pressing the small view button on the right-hand side of the table.



CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

D0B36100

Search Products

Catalogue

Fitment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

New Outboard

Used Outboard

D0B36100

Product

In Stock

Serial

Warehouse W1

Location

Normal

Standard Rated

Type

Tax Code

4000 - Sales General

5000 - Purchases

Sales Nominal

Purchase Nominal

123456a

Barcode

Transfer

Price

Sell

Group	Price	Inc.		
Customer	250.00	300.00		
Internal	100.00	120.00		

Transaction Details

Show 10 entries

Copy CSV PDF

Search:

	Date	Agent	Note	Price
Purchase Order	01/06/2024 12:16:25	-		
Purchase Invoice	01/06/2024 12:16:25	-		
Booked In	01/06/2024 12:16:25	test agent name		
Margin				

Previous

1

Next

By default, purchase prices are hidden from view, click the slider at the top of the stock record to display them.

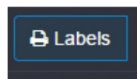
For each stock item the following is recorded:

- Purchase order details
- Purchase Invoice details
- Booking in details
- Sales order details
- Sales invoice details
- Dispatch details

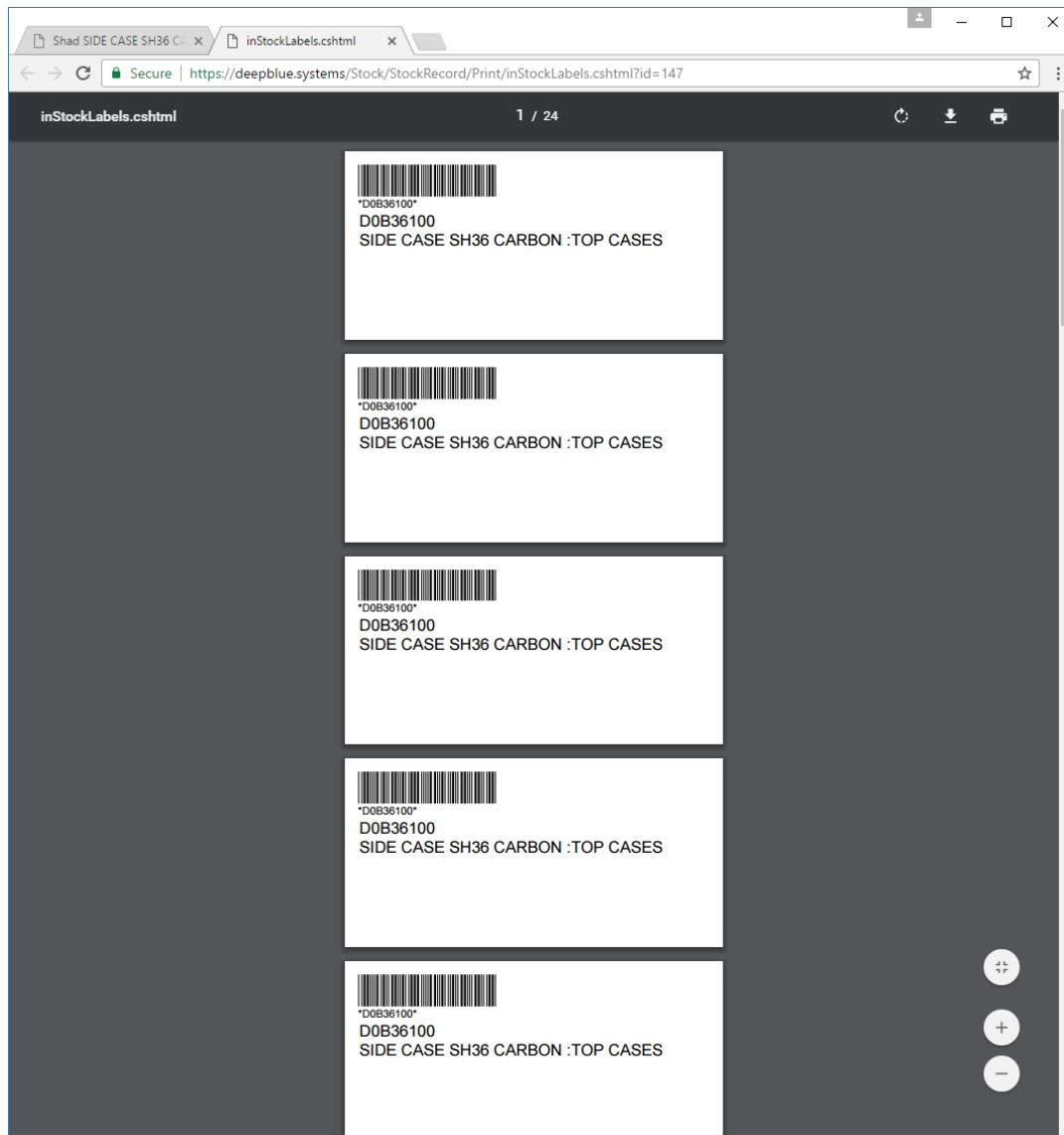
167

Part Labels

To print a part label press 'Labels' on the product or stock page.



A pdf will open containing stock labels for all items. You can also print a label from a specific items stock record.

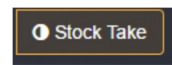


The layout and size of the label can be configured in company settings.

When booking in a purchase order there is an option to print labels for all products which have been booked in.

Stock corrections

If a stock level is incorrect, you can adjust it by pressing the 'stock take' button on the product screen.



The stock correction dialogue will then be displayed.

Stock Take

- Increasing the stock level will NOT allocate any parts to any outstanding back orders.
- Use the up-arrow if you want to ensure back orders are fulfilled
- To alter a bin location close this dialogue and press the edit button beside the relevant stock line below

Last stock take: 04/04/2024 13:19:00 by Test User

Corrected Stock Level
7

Bin Location
w1

Note
Stock Correction

Close

Save

Enter the corrected level and press 'save'

Please note that stock taking to a higher level will not allocate stock to any outstanding backorders. Backorders are only allocated when stock is booked in.

Product Sales summary

A sales summary for the last 3 years can be displayed by clicking on the ‘sales’ button.



Clicking on a specific month will display a list of the sales transactions for the current product in that period.

All

From01/04/2024To01/05/2024

Go

Show10entries

CopyCSVPDF

Search:

Qty	Type	Date	Department	Agent	Ref	Customer	Price	
2	Sales Order	05/04/2024 12:38:27	Department 1	Trade Agent		JOHN SMITH	250.00	
15	On Stock	04/04/2024 12:19:29		Test User		Stock Take		
2	Sales Invoice	04/04/2024 12:16:54		-		Stock Take		
2	Sales Order	04/04/2024 12:16:54		Test User		Stock Take	125.36	
2	Dispatch	04/04/2024 12:16:54		Test User		Stock Take		

Previous

1

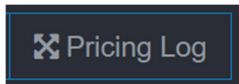
Next

Clicking on the 'view' button will display the stock record for the product.



Pricing Log

A log of selling and purchasing price changes can be displayed from the product record by pressing 'pricing log'



Show

10

▼

entries

Copy

CSV

PDF

Search:

Date	Agent	Account Group	Price
05/06/2024 09:05:51	test agent name	Customer	275.0000

Previous

1

Next

This screen allows you to see when and who altered pricing information for a specific product record.

Stock Activity

To view a list of all activity relating to a product line press ‘Activity’ on the product record.

Activity

Show 10 entries		Copy CSV PDF		Search:			
Qty	Type	Date	Department	Agent	Ref	Customer	Price
1	Sales Invoice	01/06/2024 12:53:18	Department 2	test agent name	SI2008	STEVE SUTTON	250.00
1	Dispatch	01/06/2024 12:34:51	Department 1	test agent name	PI91	TEST	
10	On Stock	01/06/2024 12:16:25		test agent name			
10	On Stock	01/06/2024 12:15:30		test agent name			
1	On Stock	31/05/2024 17:15:35	Department 1	test agent name	PO161	MPN	
1	On Stock	31/05/2024 17:15:35	Department 1	test agent name	PO81	TEST	
1	Sales Invoice	31/05/2024 17:11:55	Department 2	test agent name	SI2008	STEVE SUTTON	250.00
1	Sales Order	31/05/2024 17:09:55	Department 1	test agent name	WO926	STEVE SUTTON	250.00

Previous

1

Next

All product movements and activity for a specific time period will then be displayed.

On Order

If the product is currently on order, the number on order will be displayed below the free stock level.

6 w1 Warehouse
18 Other Depots
25 On Order 23 Reserved

You can click on ‘on order’ to display the on-order stock records.

Show 10 entries		Copy CSV PDF			Search:	
Depot	Age	Ordered	Age	Sold	Status	
Shop to PDI	874	CBS 13/01/2022 16:39:57	1234	NEW WO2 WO695 18/01/2021 13:29:35	On Order, Customer Back Order	
Shop to PDI	874	CBS 13/01/2022 16:39:57	1233	ALAN STEVENS 19/01/2021 14:09:04	On Order, Customer Back Order	
Shop to PDI	874	CBS 13/01/2022 16:39:57		ROGER WILLIAMS WO681	On Order, Customer Back Order	
Shop to Supply	1162	JIM HEAL 31/03/2021 08:36:15			On Order, Stock	
Warehouse		Awaiting Allocation to Purchase Order			On Order, Stock	
Warehouse		Awaiting Allocation to Purchase Order			On Order, Stock	
Warehouse		Awaiting Allocation to Purchase Order			On Order, Stock	
Warehouse		Awaiting Allocation to Purchase Order			On Order, Stock	

Reserved

If you have stock which is reserved for customers, you can see the stock records by pressing 'reserved' below the free stock level.

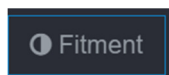
Ref	Serial	Date	Depot	Customer	On-Stock	
WO42		28/07/2017 15:31:30	Shop	JAMES HEAL FIVE	30/03/2017 18:10:51	
WO34		03/08/2017 16:10:42	Shop	ALAN FINLAYSON	02/08/2017 13:11:20	
WO75		16/08/2017 18:58:33	Shop	peter hasler	16/08/2017 18:52:27	
WO74		18/08/2017 10:46:38	Shop	STEVE SUTTON	14/08/2017 14:04:16	
WO89		15/09/2017 12:41:28	Shop	PETER HASLER	10/08/2017 13:39:41	
WO89		15/09/2017 12:41:28	Shop	PETER HASLER	10/08/2017 13:39:41	
WO89		15/09/2017 12:41:28	Shop	PETER HASLER	10/08/2017 15:59:41	
WO147		23/11/2017 18:02:14	Shop	test 2 custmer	16/11/2017 14:32:01	
WO178		11/01/2018 15:24:45	Shop	work order account	29/11/2017 21:39:52	
WO269		05/09/2018 17:18:12	Shop	JAMES MAY	13/08/2018 10:49:33	

Previous 1 2 3 4 5 ... 19 Next

Product Fitment

On each product you can add fitment records, this allows you to build a parts catalogue which can be used to help find products when selling.

Display the relevant product record then press 'Fitment'



The fitments for the current product will then be displayed.

1

D0B3300

Product

Product Fitment

+ Fitment

Show10▼entries

Copy

CSV

PDF

Search:

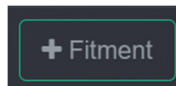
List	Group	Make	Model	Start Year	End Year	Description	
AUTOMATIC SCOOTER STANDARD PARTS & ACCESSORIES	GENERAL ENGINE PARTS	YAMAHA	YAMAHA 500 T MAX - XP500 - 2004-2007	1900	2100	SHAD SH33 TOP BOX. RED REFECTOR!	<div><div></div><div>Edit</div></div>
AUTOMATIC SCOOTER TUNING AND PERFORMANCE	ELECTRICAL PARTS MALOSSI	YAMAHA	SH125	1900	2100	SHAD SH33 TOP BOX. RED REFECTOR	<div><div></div><div>Edit</div></div>

Previous

1

Next

You can add a new fitment by press '+Fitment'



The fitment is categories by List, Group, Make, Model, Start & End Years.

New Fitment

List

Group

Make

Model

Start Year

1900

End Year

2100

Description

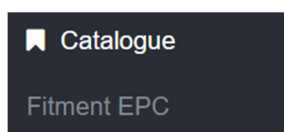
SHAD SH33 TOP BOX. RED REFECTOR

Close

Save

Press 'save' to save the fitment.

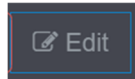
The fitment catalogue can be browsed by clicking 'Fitment EPC' on the stock, workshop or invoicing menu.



Loyalty Points

Each product can be allocated a loyalty points value. When the product is sold your customer will accumulate points which can be converted into an account credit.

To set the loyalty points for a product press 'edit' in the top right of the product screen.



On the dialogue enter the value in the 'loyalty points' field.

Loyalty Points


Press 'save'.

MPN Stock Search


If your normal supplier does not have a product in stock, you can press the 'MPN' button on the product record.



CloudDMS will then search the stock of all opted in cloudDMS users and display a list of dealerships which have the part in stock along with their contact details.



Test Product
Piaggio D0B3211B



↶ Product

Dealer	Phone	Email	Address
BRIGHTON MOTO	01273680900	kevin@cdscooters.com	85 LEWES ROAD, BN2 3HZ
MARK DAVALL MOTORCYCLES LTD		sales@markdavallmotorcycles.com	UNIT 3 SOUTH ROAD, CM20 2AP
HAYBALL MOTORCYCLES Ltd	01722322796	hayballmotorcycles@gmail.com	Brunel Road , SP2 7PU
DEARDEN MOTORCYCLES		admin@deardenmotorcycles.co.uk	Unit 5, Hardley Industrial Estate, SO45 3NQ
MOTO46		paul@moremoto.co.uk	High Street, IP23 8JD
DAVE DEATH MOTORCYCLES (IW) LTD		louise@davedeathmotorcycles.co.uk	9 PRIORY ROAD, PO30 5JS

Vehicle Stock

Vehicles (or individual stock items) are treated like any other stock item.

Generally, you should create a product record for each type of vehicle stock. i.e. 'New-vehicle', 'Used-vehicle', etc. The system will be pre-configured with the initial stock.

The screenshot shows the CloudDMS interface for managing vehicle stock. The main section is titled 'Used Vehicle' and displays a table of stock entries. The table has columns for Age, Serial, Location, Sale, REG, MAKE, MODEL, COLOUR, SALVAGE CATEGORY, 1ST REG DATE, MOT DUE, and SERVICE DUE. There are three entries listed:

Age	Serial	Location	Sale	REG	MAKE	MODEL	COLOUR	SALVAGE CATEGORY	1ST REG DATE	MOT DUE	SERVICE DUE
11	U6140	Warehouse		CE13PEO	MAZDA	2 VENTURE EDITION	RED		28/03/2013		
21	U6138	Warehouse		EU06VXN	KAWASAKI	ZR 750 K6F	BLACK		02/06/2006		10/05/2
180	U6134	Warehouse		LR73RXA	YAMAHA	XSR 900 (MTM890)	BLUE		05/09/2023		

The page also includes a sidebar with navigation options like 'In Progress', 'Products', and 'Catalogue'. The top of the page shows the CloudDMS logo and a search bar.

The product record type should also be set to associated type 'Vehicle' as this will allow you to enter additional vehicle details like make, model, vin etc.

For used vehicles make sure the vat scheme is set to 'Margin'

It's also critical that you set the 'individual pricing' flag for the product record. Press 'edit' on the product page to do this.

The screenshot shows the 'Individual Pricing' dialog box. It has a title 'Individual Pricing' and a dropdown menu with options 'Yes', 'No', and 'Yes' (highlighted). Below the dropdown is a text field containing '1 - Standard Rated'.

This lets the system know that each vehicle (or associated item) has its own sales price.

Selling a vehicle

Display the relevant product record. i.e. new-vehicle.

The screenshot shows the CloudDMS interface. On the left is a sidebar with navigation options: Stock, In Progress, Products, Catalogue, Boat, and Outboard. The main area is titled 'USED-VEHICLE' and 'Used Vehicle'. It displays a table of stock entries for vehicles. The table has columns for Age, Serial, Location, Sale, REG, MAKE, MODEL, COLOUR, SALVAGE CATEGORY, 1ST REG DATE, MOT DUE, and SERVICE DUE. Three vehicles are listed: a Mazda (CE13PEO), a Kawasaki (EU06VXN), and a Yamaha (LR73RXA). Below the table, there is a summary row showing '70' for Age, '0.00 (0.00)' for Sale, 'NaN (NaN)' for MAKE, and '3 results' for the search. At the bottom of the table, there are 'Previous', '1', and 'Next' buttons.

Age	Serial	Location	Sale	REG	MAKE	MODEL	COLOUR	SALVAGE CATEGORY	1ST REG DATE	MOT DUE	SERVICE DUE
11	U6140	Warehouse		CE13PEO	MAZDA	2 VENTURE EDITION	RED		28/03/2013		
21	U6138	Warehouse		EU06VXN	KAWASAKI	ZR 750 K6F	BLACK		02/06/2006		10/05/2
180	U6134	Warehouse		LR73RXA	YAMAHA	XSR 900 (MTM890)	BLUE		05/09/2023		
70			0.00 (0.00)		NaN (NaN)						

You can filter the stock list by typing in the 'search' box.

Search: xsr

To display the vehicles stock record, click on the stock number, or click on the blue display button at the end of line.



CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

USED-VEHICLE

Search Products

Catalogue

Fitment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

USED-VEHICLE

Used Vehicle

U

Product

In Stock

U6134

Serial

Warehouse

Location

Vehicle

Type

Margin Scheme

Tax Code

4055 - Sales Used Vehicle

Sales Nominal

5055 - Purchase Used Vehicle

Purchase Nominal

Tag

Image

URL

Selling

Transfer

Edit

Sell

	Price	Inc.
Sale Price	0.00	0.00
Also Sell Product Kit		

Vehicle

Label

Print

Activity

Edit

U6134

Serial

Group

LR73RXA

YAMAHA

MAKE

XSR 900 (MTM890)

MODEL

BLUE

COLOUR

JYARN801000001911

VIN NUMBER

N718E0051822

ENGINE NUMBER

MILEAGE

05/09/2023

1ST REG DATE

01/01/1900 00:00:00

MOT DUE

01/01/1900

SERVICE DUE

01/01/1900 00:00:00

WARRANTY DATE

01/01/1900

MOVE DATE

DESCRIPTION

Costs

Warranty

Internal

Debit	Credit
-------	--------

From the vehicle stock record press '+Sell' to display the customer picker dialogue

179

Sell Used Vehicle

New Invoice

Account Name

Search by Name or Postcode

Address

Address 1

Address 2


Address 3

Address 4

Post Code

POST CODE 

MarketingDepot

warehouse 

Phone

PHONE

Mobile

MOBILE

Email

email

Sales Price Inc

9000.0000

No Selling Price. Please edit the sales price above before selling the vehicle. The default value above is the buy price plus any internal costs.

test agent name Open Invoices 

Other Open Transactions 

Close

The top 'New Invoice' panel allows you to search for an existing customer or create a new customer. Click on the 'account name' box and type the customer's name, as you type possible matches will be displayed. If the customer is not already in the database press '+New Account'.

When the customer details are correct press 'create new invoice'. This will raise a new sales invoice and sell the vehicle to it.

Alternatively, you can use the 'open invoice' panel to select an existing open invoice to sell the vehicle to. Press 'select' beside the relevant open invoice to allocate the vehicle. You can book as many vehicles as required to one sales invoice.

You can then add any extra products and accessories to the sales invoice.

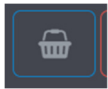
When you sell a vehicle to a customer the vehicle will also be added to the customer's account as an associated item.

Adding a Part Exchange

On some occasions when you sell a customer a vehicle you will also be taking in a part exchange.

Before you can link the part exchange you need to buy in the vehicle from the customer via a purchase invoice.

Add the vehicle as an associated vehicle on the customers account if it is not already present. Then press the buy button.



Select the stock category and the purchase invoice will be created. Enter the buy price and finish the purchase invoice.


Now display the open sales invoice and press the 'link' button. You can select the PI from the list and allocate it to the sales invoice.






Buying a vehicle from a customer

Display the customer's account screen and find the vehicle on their associated list. If the customer is not already present in your database you will need to add them.





Associated

+ Associated ▾

 **Vehicle**




EO61DMZ



KAWASAKI
MAKE

ZX1000HBF ABS
MODEL

BLACK
COLOUR

JKAZXT00GHA004716
VIN NUMBER

ENGINE NUMBER

2
MILEAGE

MOT DUE

03/03/2025
SERVICE DUE

If the vehicle is not listed, you will need to add it by pressing '+ Associated', entering the vehicle details and pressing 'save'.

To buy the vehicle into stock press the 'buy vehicle button'



The vehicle categories list will now be displayed.

Buy Vehicle

Create a Purchase Invoice, add to stock and remove from the customer

DEMO-VEHICLE	Demo Vehicle D	+ Buy
MOTOCROSS	Motocross M	+ Buy
NEW-VEHICLE	New Vehicle N	+ Buy
ON-ORDER	On Order Z	+ Buy
SALE-OR-RETURN	Sale Or Return S	+ Buy
TRANING	Traning T	+ Buy
USED-VEHICLE	Used Vehicle U	+ Buy

Cancel

Press '+Buy' beside the relevant category.

A vehicle purchase invoice will now be raised and displayed.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Purchasing

► In Progress

Current Order

Open Orders 27

Open Invoices 18

Transactions

New Invoice (PI)

New Order (PO)

New Credit (PC)

PI414

PO222

Search Orders

Accounts

New Supplier

FERIDAX

Search Suppliers

Reports

Back Orders

Creditors

Outstanding Products

Purchases (Invoice)

Purchases (boat)

Purchases (outboard)

Purchases (trailer)

Purchases (vehicle)

Stock Purchased

Outstanding

Price Trend (Vehicle)

Under Stock

SUT001

STEVE SUTTON

278A Northfields Ave
Ealing
London
W5 4UB

Deliver To
Warehouse

Account

Thread

Edit

Document

Purchase Invoice

01/06/2024 12:25:34
Date

PI414
Number

test agent name
Agent

Department 2,
Department

Ref

Open
Status

Products

Finish PI

Move

Product

Description	Qty	Net	Tax	Vat	Line
USED-VEHICLE	1.0	0.00	T2	0.00	0.00
Used Vehicle					
Status	Qty	Unit			
Awaiting Stock. Stock. Warehouse	1.0	0.00			
<div>EO61DMZ KAWASAKI ZX1000HBF ABS BLACK JKAZXT00GHA004716 2 03/03/2025</div> <div>REG MAKE MODEL COLOUR VIN NUMBER MILEAGE SERVICE DUE</div>					

Product Count 1

Outstanding from Supplier 1

Booked Into Stock 0

Ordered for a Customer, Sales Backorder 0

Ordered for Stock 1

Net £ 0.00

Vat £ 0.00

Total £ 0.00

Funds on Account

Allocate

Payment

Paid £ 0.00

Outstanding £ 0.00

Notes

Terms and Conditions

Signed..... Date

I Declare that I am the seller of the Vehicle accurately described above and I have sold the Vehicle for the price stated.

To enter the price you are buying the vehicle for press the edit button at the end of the line.



The edit dialogue will now be displayed.

Edit USED-VEHICLE

Description

Used Vehicle

Serial

SERIAL

Location

LOCATION

Note

NOTE

REG

EO61DMZ

MAKE

KAWASAKI

MODEL

ZX1000HBF ABS

COLOUR

BLACK

VIN NUMBER

JKAZXT00GHA004716

ENGINE NUMBER

ENGINE NUMBER

MILEAGE

2

SALVAGE CATEGORY

SALVAGE CATEGORY

1ST REG DATE

DD/MM/YYYY

MOT DUE

DD/MM/YYYY

SERVICE DUE

03/03/2025

WARRANTY DATE

DD/MM/YYYY

Net

Calculate unit net from 1 x line net of

0

Tax Code

exempt

Vat

0

Line

0

☒ Edit all 'USED-VEHICLE'

Close

Save

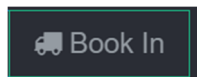
Set the purchase price in the 'line' box and press 'save'.


When all the details are correct press 'Finish PI' to close the purchase invoice.

If you are making a payment to the customer press '+Payment'. You can also record finance settlement amount via a 'money out' payment.

If the vehicle is going to be a part exchange against another vehicle you can link the PI on the new sales invoice. In this situation is clearer not to record any payments on the purchase invoice.

When the bike arrives at your dealership you will need to book it into stock. To do this press 'book in'





Steve Sutton

278a Northfields Ave
Ealing
London
W5 4UB

Transaction

Booking In

Date

PI414
PI Number

On Order

Go

Tagged Labels

All Labels

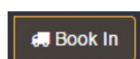
List

Book In

Description	Qty	Depot	Location	Serial	Status
<input checked="" type="checkbox"/> USED-VEHICLE Used Vehicle	1	Warehouse		Stock number will be auto allocated	Outstanding , Awaiting stock

1 displayed.

Check the vehicle the press 'book in'



Book In Selected Products

If there are more than 250 products to book-in only the first 250 will be booked into stock. You will then have to go back to 'on order' and press 'book in' again.

Are you sure you want to book in the selected products?

Purchase Reference/Note

CancelBook In

Confirm the action by pressing 'book in'.

The vehicle will now be in stock ready to sell to another customer.

Adding a vehicle to stock without using a Purchase Invoice.

To save time you can directly add a vehicle to stock without any purchase invoices.

First display the relevant product record. i.e. 'NEW-VEHICLE' then press the 'increase stock button'



Increase Stock Level

Book x1 into stock

Serial

Purchase Price

Location

Reg

Make

Model

Colour

Vin Number

Engine Number

1st Reg Date

Enter the vehicle details as required. Leave the serial field blank and a new stock number will automatically be generated from the series.

Press 'Book In' to add the vehicle to stock.

Vehicle Internal Costs

You can record re-conditioning work and other costs as an internal invoice against the stock record before a vehicle is resold.

Display the vehicles stock record then press '+internal'.

+ Internal

New Internal Invoice

Internal cost or credit against this stock record

WORKSHOP	Workshop	+ Invoice	+ Estimate
Open	,		+ Job
Open	Hire Workshop	+ Invoice	+ Estimate
	,		+ Job
Open	Department 3	+ Invoice	+ Estimate
	,		+ Job
Open	Department 2	+ Invoice	+ Estimate
	,		+ Job
Open	Department 1	+ Invoice	+ Estimate
	,		+ Job
Open	Dep2	+ Invoice	+ Estimate
	,		+ Job
Open	An Internal Account Customer	+ Invoice	+ Estimate
	,		+ Job

Close

A list of internal accounts is now displayed.

- Press ‘+Invoice’ to create a new invoice or credit
- Press ‘+Job’ to create a new workshop work order

A new internal transaction will then be created and displayed.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Sales

In Progress

Open Orders5

Open Invoices84

Open Proformas1

Open Quotes

Recurring Invoices

Transactions

New Invoice (SI)

New Order (SO)

New Pro-Forma (SP)

New Quote (SQ)

New Credit (SC)

SI2009

SI1998

Search Invoices

Accounts

New Customer

STEVE SUTTON

Search Customers

Catalogue

Fitment EPC

Motorcycle EPC

Reports

Day Totals (Basic)

Day Totals (Detail)

Day Totals (Summary)

WORKSHOP

+ Invoice to

Account

Thread

Document

Edit

MAKEKAWASAKI

MODELER850FGF

COLOURGREEN

VIN NUMBERJKAER650EFDA32638

1ST REG DATE23/03/2016

Sales Invoice

01/06/2024 12:30:56

SI2009

test agent name

Department 2

Internal

Open

Products

Finish SI

%

Commission

Print

CSV

+ Product

Description	Qty	Unit	%	Net	Tax	Vat	Line
Net							£ 0.00
Vat							£ 0.00
Total							£ 0.00

Payment

+ Payment

Paid

£ 0.00

Outstanding

£ 0.00

Credit Limit This transaction will take the account £ 2721.61 over its credit limit

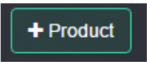
Notes

Internal job on: N5470

Terms and Conditions

default SI terms.

Press ‘+product’ to add a part to the invoice.



Sell Product

Enter the SKU then select the part from the list

Qty: d0b

D0A16T	Kit Top Dae.Advance 125/96 :Obsoletos Mpn	In Stock 07/04/2017 14:48:59	+ Add
D0A16T	Kit Top Dae.Advance 125/96 :Obsoletos Mpn	In Stock 07/04/2017 14:48:59	+ Add
D0A16T	Kit Top Dae.Advance 125/96 :Obsoletos Mpn	In Stock 07/04/2017 14:48:59	+ Add

Cancel

Press 'add' to book the product to the invoice.

When you are finished adding products press 'Finish SI'

✓ Finish SI

Finish this Department 2 Sales Invoice

Invoice Sub-Type

-

Set status for 'in-stock' products. Backordered items will have a status of 'Backordered'

picked

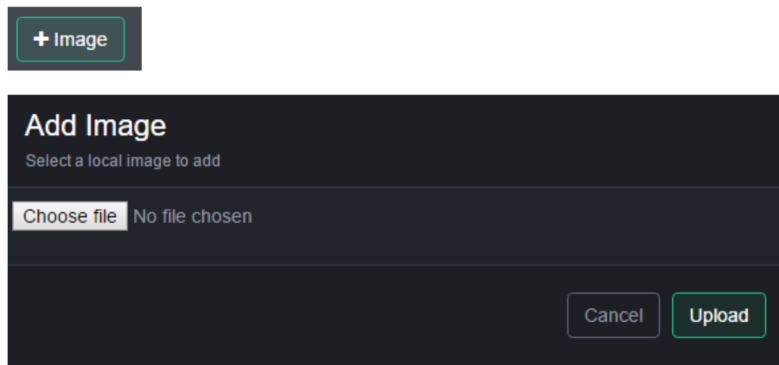
Close Finish SI

The costs will be allocated to the vehicle.

Normally you do not record payments on internal invoices.

Vehicle Images

On the vehicles stock record press '+image'



Press 'choose image' then 'upload'.

If you are using a tablet or phone with a camera you upload directly from the camera.

Vehicle Stock Numbers

Stock numbers are automatically allocated when a vehicle is booked into stock. You can configure how these re generated from the script section in company settings.

The number run can be determined by associated type and selling nominal.

Stock numbers are recorded in the serial field.

Stock Movement

Stock movements record when products physically enter or leave your business. Please note this is different to selling and buying products.

Booking in List

Items on the 'book in' list are products which have been ordered but have not arrived yet.

To display the list press 'book in' on the main stock screen menu bar.

CloudDMS Universal Search... Department 2 | Warehouse Test Agent Name

Stock Book In Stock
Outstanding supplier ordered products. 'Tag' the products you want to book-in.

Qty Tag by SKU... Tag All Un-Tag File

All PI Allocated Warehouse On Order x Unavailable Book In

test agent name

Description	Depot	Ordered	Price	Location	Serial	Status
D0B26100 Sh26 Top Box	Warehouse	PI326 PO175 13/01/2022	50.00		-	Outstanding Awaiting stock
D1B23E08 Cover Sh23 White	Warehouse	PI325 PO213 13/01/2022	19.01		-	Outstanding Awaiting stock
D1B23E08 Cover Sh23 White	Warehouse	PI325 PO213 13/01/2022	19.01		-	Outstanding Awaiting stock
D1B23E08 Cover Sh23 White	Warehouse	PI325 PO213 13/01/2022	19.01		-	Outstanding Awaiting stock
D1B23E08 Cover Sh23 White	Warehouse	PI325 PO213 13/01/2022	19.01	HONDA WARRNATY SI1686	-	Outstanding Awaiting stock
D1B23E08 Cover Sh23 White	Warehouse	PI325 PO213 13/01/2022	19.01	FIG SI1399	-	Outstanding Awaiting stock
D1B26CAR White Reflector Sh 26 09 :Recambios Top Case Shad	Warehouse	PI326 PO175 06/11/2022	4.86		-	Outstanding Awaiting stock
D1B29C1R Catadiopt.Grand Sh 29 :Recambios Top Case Shad	Warehouse	PO175 13/01/2022	0.00	DAVE SMITH SI1555	-	Outstanding Awaiting stock

Tagging products

The booking in screen works by you first tagging the required products and then booking them into stock.

You can either tag a product by checking the box beside its name

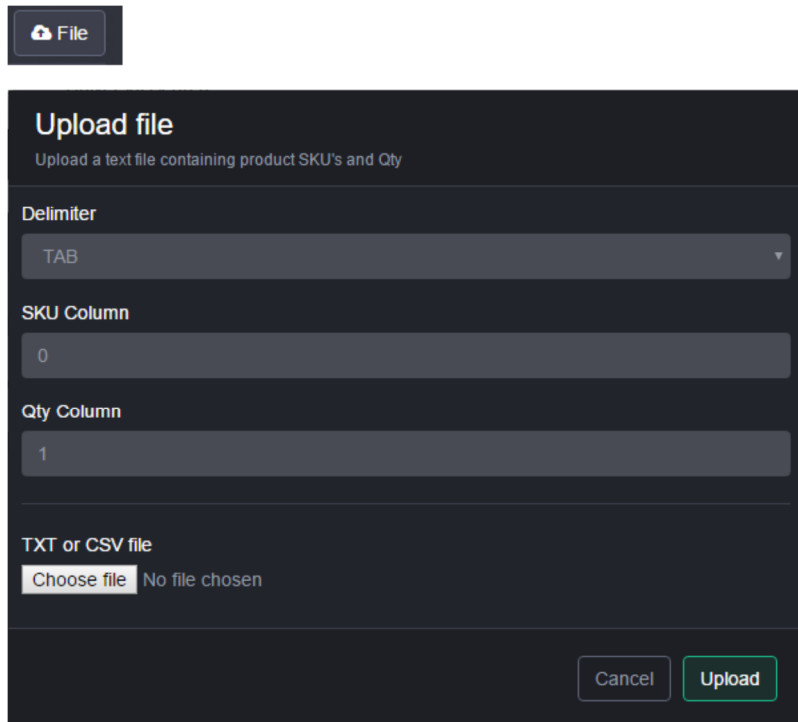
☐ D0B26100
Sh26 Top Box

or typing the SKU in the search box and pressing return.

DD1B48E06

You can also tag products by uploading a Text File containing SKU's and quantities.

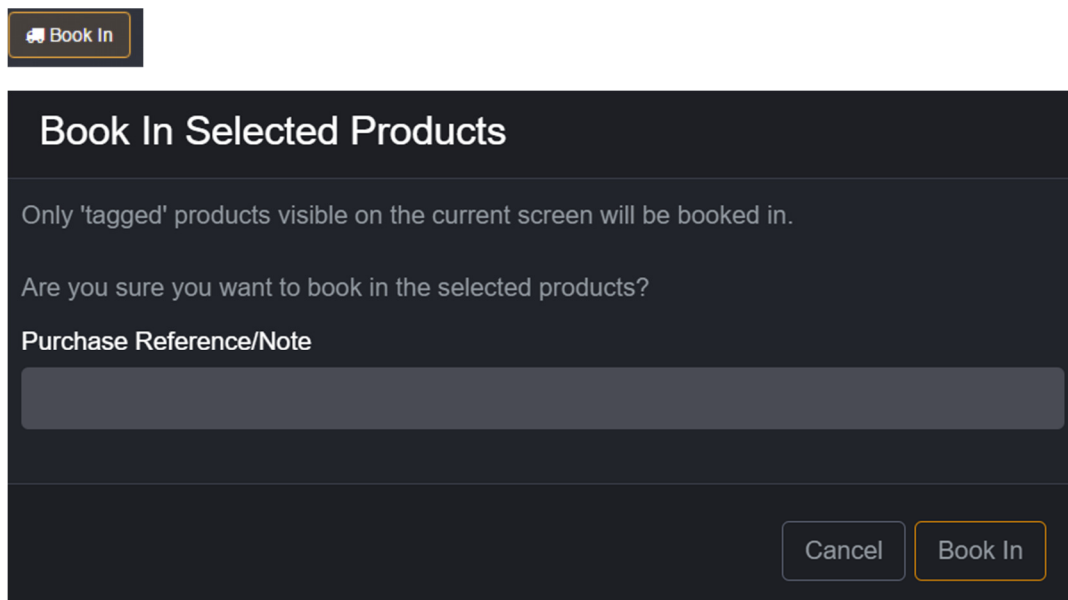
Press 'File'



The 'Upload file' dialog box is shown with a dark background. It has a title 'Upload file' and a subtitle 'Upload a text file containing product SKU's and Qty'. Below the subtitle, there are three input fields: 'Delimiter' with a dropdown menu showing 'TAB', 'SKU Column' with a text input showing '0', and 'Qty Column' with a text input showing '1'. At the bottom left, there is a section titled 'TXT or CSV file' with a 'Choose file' button and the text 'No file chosen'. At the bottom right, there are two buttons: 'Cancel' and 'Upload'.

Select the field separator, SKU & Qty position then upload the file. All products matched will be tagged.

Once you have all the products tagged you can book them in by pressing 'book in'



The 'Book In Selected Products' dialog box is shown with a dark background. It has a title 'Book In Selected Products'. Below the title, there is a message: 'Only 'tagged' products visible on the current screen will be booked in.' followed by a question: 'Are you sure you want to book in the selected products?'. Below the question, there is a text input field labeled 'Purchase Reference/Note'. At the bottom right, there are two buttons: 'Cancel' and 'Book In'.

Once you have booked in the products the booking in batch is displayed.

Book In Stock
 Outstanding supplier ordered products. 'Tag' the products you want to book-in.

✓ Success. Stock Booked In

Warehouse

Booked In 01/06/2024 12:33:11

test agent name

Invoices

Label

Allocation

Description	Depot	Ordered	Location	Serial	Status
D0B26100 Sh26 Top Box	Warehouse	PI326 PO175 13/01/2022			<div> <div>On Stock</div> <div>01/06/2024 12:33:11</div> <div>Via Auto</div> <div>By test agent name</div> </div>

You can print the stock allocation list by pressing ‘Allocation’

Allocation

Book In

Allocation.cshhtml

Secure | https://deepblue.systems/Purchasing/Bookin/Print/Allocation.cshhtml?brand=&filter=15/04/2017%2009:20:53&depot=

Allocation.cshhtml

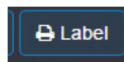
1 / 1

Book In Stock

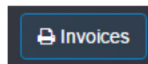
Filter : 2017-04-15 09:20:53
 Brand :
 Depot : Warehouse

Desc	Qty	Depot	BIN	Serial	Status
D1B48E06 COVER SH48 CARBON ACCES. TOP CASE SHAD	1.0	Warehouse	SR5		On Stock 15/04/2017 09:20:53 by Stephen Sutton

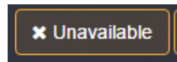
Product labels can be printed by pressing ‘labels’.



Copy invoices for all products in the batch can be re-printed by pressing 'invoice'



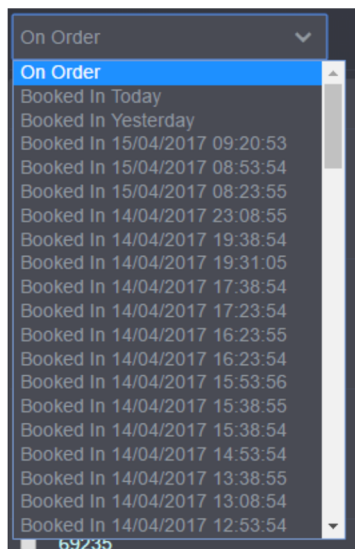
If a product will never turn up you need to tag it and press 'unavailable',



This will remove it from the book-in list. You will also need to credit the customer for the product.

Booking in batches

By default, the 'book in' screen displays 'On Order' products. You can view a specific batch by selecting it from the drop-down list.



Pressing the down arrow give you the following options:

- On Order
- Booked in Today
- Booked in Yesterday
- Individual booking in batches

You can print stock allocation lists and labels at any time for any batch.

Dispatch Stock

The 'book out' list shows products which have been sold and are in stock but not released to the customer.

Press 'Dispatch Products' on the main stock menu bar to display the list.

CloudDMS

Universal Search...

Department 2 | Warehouse Test Agent Name

Stock

- In Progress
 - Book In Products
 - Dispatch Products**
 - Pick Invoices
 - Dispatch Invoices
 - Dispatch by Barcode
 - Late Invoices
- Products
 - New Product
 - NEW-VEHICLE
 - Search Products
- Catalogue
 - Fitment EPC
 - Motorcycle EPC
- Boat
 - Summary
 - Outstanding
 - Outstanding SI (Closed)
 - Outstanding PI (Closed)
 - Used Boat
- Outboard
 - Summary
 - Outstanding
 - Outstanding SI (Closed)
 - Outstanding PI (Closed)
 - New Outboard
 - Used Outboard
- Trailer

Dispatch Stock
Products in stock, ready for dispatch/release. 'Tag' the products you want to dispatch.

Tag by SKU or Transaction...

In Stock Warehouse All Picking File Unavailable Dispatch

Description	Sale	Depot	Location	Note	Status
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	SI433 PO67 Open	Warehouse			kjkjk
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	SI433 Open	Warehouse			kjkjk
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	SI433 Open	Warehouse	w1		In Stock Awaiting Dispatch
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	SI433 Open	Warehouse	w1		In Stock Awaiting Dispatch
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	SI433 Open	Warehouse			In Stock Awaiting Dispatch
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT		Warehouse	w1		In Stock Awaiting Dispatch
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	02/03/2018	Warehouse	w1		In Stock Awaiting Dispatch
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	02/03/2018	Warehouse	w1		In Stock Awaiting Dispatch
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	02/03/2018	Warehouse	w1		In Stock Awaiting Dispatch
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	02/03/2018	Warehouse			In Stock Awaiting Dispatch
0000000003 JEU 250 FICHES STOCK	05/03/2018	Warehouse			In Stock Awaiting Dispatch
0000000009 JEU 100 SUITE FACTUR	05/03/2018	Warehouse			In Stock Awaiting Dispatch

Tagging products

Before you can release the stock you need to 'tag' the required products.

You can tag products by clicking the check box beside it.

☐ D0B36100
SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT

Or entering an invoice number or SKU in the search box and pressing enter.

Once you have tagged all the required products press 'dispatch'.

Dispatch

Dispatch Selected Products

Via

Collected

Tracking Number

Tracking Number

You can set how the products were released from the 'via' list. Common dispatch methods are

- Collected
- Fitted
- DPD
- Royal Mail

The 'via' list can be configured from the company settings screen.

Press 'dispatch' to release the product and display the dispatch batch.

Dispatch Stock
 Products in stock, ready for dispatch/release. Tag the products you want to dispatch.

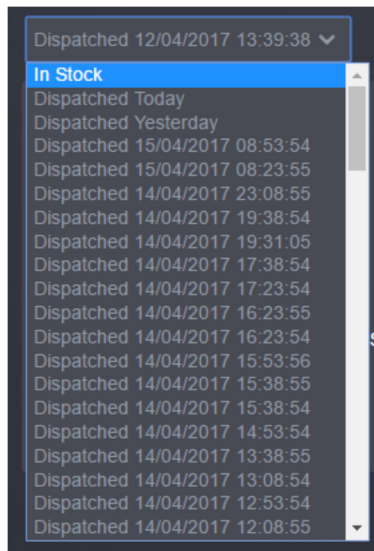
Success. Dispatch details updated

Dispatched 01/06/2024 12:34:51 Warehouse

Description	Sale	Depot	Location	Note	Status
D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	SI433 PO67 Open	Warehouse		Dispatched 01/06/2024 12:34:51 Via Picked Tracking By test agent name	

Dispatch batches

The default display is 'in stock' which displays products in stock awaiting dispatch (or release)

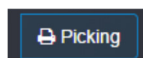


Other options on the drop down include

- In Stock
- Dispatched today
- Displaced yesterday
- Specific dispatch batch

Picking Lists

Clicking 'picking' to print a pdf picking list.



Allocation.cshhtml 1 / 1

Filter : 2017-04-12 13:39:38
Note :

Desc	Sale	Depot	BIN	Status
Y0M26T KIT TOP Y.MAYESTY 250 96 :KITS ACCES.TOP	SI201584 12/04/2017	Warehouse		Dispatched 12/04/2017 13:39:38 Via DPD Next Day Tracking By Paul Stratford
D0B37100 TOP CASE SH37 BLACK :TOP CASES	SI201584 12/04/2017	Warehouse	SR3	Dispatched 12/04/2017 13:39:38 Via DPD Next Day Tracking By Paul Stratford

DPD

The DMS can export a file containing details of the invoices dispatched in the correct format for DPD's systems.

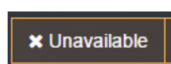
Select the relevant dispatch batch then press 'dpd' to download the file.



Only dispatch methods starting with DPD are included in the file.

Never dispatched

If a product will never be dispatched, check it, and then press 'unavailable'.



This removed the product from the list of products waiting to be dispatched. You will also have to credit the customer

Dispatching Invoices

You view a list of invoices where all products are in stock ready to dispatch by clicking on the 'dispatch invoices' item on the main stock menu bar.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

NEW-VEHICLE

Search Products

Catalogue

Fitment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Outboard

Summary

Dispatch Invoices

Invoices with all products in stock awaiting dispatch

Department 2

All

Go

Show 10 entries

Copy CSV PDF

Search:

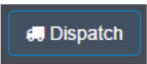
Age	Date	Reference	Customer	Note	Total	Dispatched	InStock	
2356	19/12/2017 16:55:12	SI358	WILLIAM APPLEFORD		1	0	1	<div>DispatchBarcode</div>
2326	18/01/2018 15:34:37	SI416	IAN SMITH		1	0	1	<div>DispatchBarcode</div>
2129	03/08/2018 07:58:12	SI699	DARYL BAGG		1	0	1	<div>DispatchBarcode</div>
2129	03/08/2018 10:47:32	SI708	CHRIS TAPLIN		1	0	1	<div>DispatchBarcode</div>
2129	03/08/2018 12:07:25	SI711	CHRIS TAPLINS		1	0	1	<div>DispatchBarcode</div>
2109	23/08/2018 08:54:33	SI740	JOE BLOGGS 3		1	0	1	<div>DispatchBarcode</div>
2109	23/08/2018 08:56:30	SI741	JOE BLOGGS 3		1	0	1	<div>DispatchBarcode</div>
1366	04/09/2020 14:09:57	SI926	DAVE SMITH		1	0	1	<div>DispatchBarcode</div>
34	28/04/2024 18:21:34	SI1378	JOHN SMITH		1	0	1	<div>DispatchBarcode</div>
1307	02/11/2020 14:09:59	SI1384	JOHN SMITH		1	0	1	<div>DispatchBarcode</div>

Previous

1234

Next

Press 'dispatch' at the right-hand side of the required invoice.



Details to products awaiting release are then displayed.

Transaction

Dispatch Note

28/04/2024 18:21:34

SI1378

Date

Ref

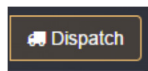
Dispatch

In Stock

DeliveryPickingRelease

Description	Depot	Location	Note	Status
<div>USED-VEHICLE (U6114)</div> <div>Used Vehicle</div>	Shop			<div>In Stock, Awaiting Dispatch</div>

To release the stock press 'Dispatch'



Dispatch Selected Products

Via

Collected

Tracking Number

Tracking Number

Cancel

Dispatch

Select the dispatch/release method then press 'dispatch'

Late Invoices

The late invoice list displays all invoices which have been closed but have products which are not marked as dispatched or released.

Press 'Late Invoices' on the stock screen to display the list.

CloudDMS

Universal Search...

Department 2 | Warehouse Test Agent Name

Stock

Late Invoices
Invoices which have not been dispatched

CSV


Age	Date	Reference	Department	Sub Type	Customer	Note	Outstanding	Last Contact	Email	
2593	26/04/2017 09:39:22	SI9	Department 1		Steve Sutton	note here about something off test	1	31/05/2024 16:11:56		Contact
2578	11/05/2017 10:27:49	SI14	Department 1		John Hodgkinson		14	11/05/2017 12:26:12	steve@deepbluesystems.com	Contact
2538	20/06/2017 10:26:18	SI28	Department 1		Chicken Soup		1			Contact
2536	22/06/2017 11:02:48	SI29	Department 1		Chicken Soup		2			Contact
2525	03/07/2017 16:03:56	SI7	Department 1		Chicken Soup		2			Contact
2521	07/07/2017 07:21:55	SI34	Department 1		James Brown		1	08/03/2022 09:00:00	undefined	Contact
2518	10/07/2017 10:31:22	SI36	Department 1		Barry Stockings		1	01/12/2017 11:32:01		Contact
2517	11/07/2017 07:42:41	SI37	Department 1		Workshop		1	21/05/2024 08:52:14		Contact
2517	11/07/2017 08:57:56	SI38	Department 1		Honda Warmaty		1	09/08/2022 11:40:00		Contact
2517	11/07/2017 10:52:34	SI39	Department 1		Honda Warmaty		1	09/08/2022 11:40:00		Contact
2516	12/07/2017 16:40:42	SI40	Department 1		Test Customer		1	18/10/2022 12:00:00	steve@deepbluesystems.com	Contact
2515	13/07/2017 08:11:57	SI41	Department 1	Vehicle	Ian Smith		2	19/07/2022 13:45:04		Contact
2515	13/07/2017 08:30:31	SI42	Department 1		Steve Sutton		1	31/05/2024 16:11:56	steve@deepbluesystems.com	Contact
2515	13/07/2017 11:49:08	SI45	Department 1		Melissa Stewart		1	19/12/2017 09:10:01		Contact
2515	13/07/2017 12:51:08	SI46	Department 1		Nick Coxon		1			Contact

The oldest invoice is displayed at the top of the list.

- Click on the invoice number to display the invoice.
- Click on 'contact' to go to the customer's customer screen to text or email them about the delay.

Pick Invoices.

The pick invoices screen shows you the summary status of un-dispatched/released products. Clicking on the picking button beside each invoice will take you to the relevant picking screen for that invoice.









Pick Invoices

Invoices with products in stock awaiting picking

Department 2

Warehouse

Go

Age	Date	Reference	Customer	Note	Total	Picked	InStock	
2329	19/01/2018 12:59:19	SI433	AN INTERNAL ACCOUNT CUSTOMER		6	4	2	 Picking
1367	07/09/2020 12:30:32	SI1368	STEPHEN SUTTON		1	0	1	 Picking
4	01/06/2024 12:54:04	SI2008	STEVE SUTTON		2	0	2	 Picking

Dispatch by Barcode

The dispatch by barcode screen is a dispatch screen optimised to work with barcodes.

- The first step is to scan the sales invoice bar code or enter the transaction reference. A summary of the invoice details will be displayed.
- The next step is to scan the barcode on each product you are going to dispatch.
- When all the expected products have been scanned the invoice release dialogue is displayed.

Dispatch Products via Barcode

Qty

SKU

1

Go

Clear Selected Invoice

All instock reserved products tagged

Via

picked

Tracking Number

TRACKING NUMBER

☐ Email copy invoice to: steve@deepbluesystems.com

☐ Email copy invoice & tracking to: steve@deepbluesystems.com

☐ SMS release notification to: 07973116378

Your order will be dispatched/released today with (DispatchVia). (DispatchTracking).

Release

Current Invoice

Invoice

SI2008

Date

01/06/2024 12:54:04

Customer

STEVE SUTTON

Product Count

2

Awaiting Dispatch

2

Tagged Products

D0B36100

SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT

D0B36100

SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT

205

Stock Reports

The CloudDMS includes a comprehensive suite of stock reports with more being added every month.

Vehicle Summary

The vehicle summary report gives you a break down of number of vehicles in stock from each make and category.

Show	10	▼	entries	Copy	CSV	PDF	Search:
HIRE Fleet 1				All	Shop	Warehouse	
HONDA				26	26		
Total				26	26	0	
Hire Fleet 2				All	Shop	Warehouse	
KAWASAKI				2	1	1	
PIAGGIO				2	2		
YAMAHA				1	1		
Total				5	4	1	
NEW-VEHICLE				All	Shop	Warehouse	
KAWASAKI				15	15		
Previous	1	2	3	4	Next		

Vehicle Outstanding

The outstanding vehicle sales report lists all sales which are not yet fully complete

Outstanding vehicle Sales Invoices

List of vehicles which have been sold but not finished

All

Department 1

Department 2

Department 3

All

test agent name

List

Show

10

▼





















entries

Copy

CSV

PDF

Search:

	Date	Handover Date	Ref	Agent	Department	Customer	Type	Serial	REG	MAKE	MODEL	COLOUR	VIN NUMBER	SALVAGE CATEGORY	vehicle Buy	Buy Date	Age	Paid	Linked	Total	Outstanding	
	31/05/2024 17:05:08		SI2007	test agent name	Department 2	IAN SMITH	USED-VEHICLE	U6136	SH67SR	BMW	R 1200 GS ADVENTURE	BLACK	WB10A0201J2927562		2,000.00	12/03/2024 12:07:22	80	0.00	0.00	2,000.00	2,000.00	
	10/05/2024 17:45:02		SI2001	Test User	Department 2	JOHN SMITH	USED-VEHICLE	U6125	SY67BHX	POLARIS	RANGER	GREEN	TAPRTED11JK005648		10,000.00	08/06/2023 13:28:24	337	0.00	0.00	7,500.00	7,500.00	
	10/05/2024 13:57:53		SI1999	Test User	Department 2	JOHN SMITH	NEW-VEHICLE	H26	RE14TUJ	HONDA	CBF 1000 FA-C	BLACK	ZDCSC64B0CF034083		0.00	25/06/2020 17:37:17	1415	0.00	0.00	6,587.60	6,587.60	
	11/04/2024 13:54:47		SI1994	Test User	Department 2	OMEGA YAMAHA	USED-VEHICLE	U6137	LF15VTA	YAMAHA	XJ 6 S DIVERSION	GREY	JYARJ22500000864		3,500.00	11/04/2024 13:54:25	0	0.00	0.00	4,995.00	4,995.00	
	01/12/2023 11:44:36		SI1921	Test User	Department 2	JAMES SMITH	NEW-VEHICLE	N5652		KAWASAKI	ZR1000GGF	WHITE	JKAZRT00FGA020750		6,357.54	30/06/2016 10:798.80	2710	0.00	0.00	11,198.38	399.58	
	30/11/2023 16:41:49		SI1918	Test User	Department 2	JOHN KERR	NEW-VEHICLE	N5696		KAWASAKI	VN900CGF	WHITE	JKAVN900CCA065372		4,813.75	01/07/2016 2709	0.00	0.00	5,995.00	5,995.00		
	06/11/2023 11:41:06		SI1902	Test User	Department 2	ADRIAN ILES	NEW-VEHICLE	N5698		KAWASAKI	VN900CGF	WHITE	JKAVN900CCA065369		4,813.75	01/07/2016 2684	0.00	2,000.00	7,000.00	5,000.00		
	06/11/2023 11:26:28		SI1901	Test User	Department 2	ADRIAN ILES	USED-VEHICLE	U6129	WD19YUG	ROYAL ENFIELD	HIMALAYAN	BLACK	ME3DMFT5JK031509		2,000.00	06/11/2023 11:23:46	0	500.00	0.00	5,000.00	4,500.00	
	07/10/2023 00:16:59		SI1883	Test User	Department 2	FABIO R	USED-VEHICLE	U6128	HONDA GROOM						1,400.00	07/10/2023 00:15:33	0	0.00	0.00	2,600.00	2,600.00	
	17/07/2023 11:02:31		SI1811	Test User	Department 2	JOHN SMITH	USED-VEHICLE	U6122	JB19TCH	BMW	F900XR	PEARL NEBULAR	JH2SC76A1988981		1,000.00	05/01/2023 15:14:44	193	0.00	0.00	10,000.00	10,000.00	

Vehicle Outstanding SI (Closed)

Lists vehicle sales invoices which are finished but not fully paid.

Vehicle Outstanding PI (Closed)

List vehicle purchase invoices which are finished but booked into stock.

Bin History

The bin history report allows you to specify a bin location and date range to see activity relating that that location.

Dead Stock

The dead stock report displays which products have been sitting in stock for a given period.

Press 'dead stock' on the main stock toolbar.

The screenshot shows the CloudDMS interface with the 'Dead Stock' report selected. The report title is 'Dead Stock' with the subtitle 'Slowest moving products'. The interface includes filters for 'Min Age' (0), 'Max Age' (30), 'Warehouse' (dropdown), and 'All' (dropdown), with a 'Go' button. Below the filters, there are options to 'Show 10 entries', 'Copy', 'CSV', and 'PDF'. A search bar is also present. The main table displays the following data:

Qty	SKU	Description	Brand	Purchase Nominal	Bin	On Stock	Age	Buy
1	D0B5000	Shad Sh50 Top Box	Mpn	5000: Purchases		31/05/2024	1	127.11
7	D0B36100	Shad Sh36 Side Cases (Pair) - Black-Carbon - Paannier - Requires Model Specific 3p Fitting Kit	Mpn	5000: Purchases	w1	01/06/2024	0	100.00
1	D0B26100	Sh26 Top Box	Mpn	5000: Purchases		01/06/2024	0	50.00
								877.11

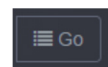
At the bottom of the table, there are 'Previous', '1', and 'Next' navigation buttons.

Enter the minimum number of days a product must have been in stock in the 'min age' box.

Select the stock depot. This defaults to your current depot.

Select the product brand.

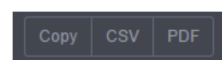
Press 'Go' to run the report.



You can filter the report by typing a keyboard into the 'search' box.



The report can be exported to the clipboard, CSV, or PDF by pressing the relevant button.



Fast Stock

The fast stock report allows you to specify a date range and display a list of products sold in that period.

Press ‘fast stock’ on the main stock toolbar.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

NEW-VEHICLE

Search Products

Fast Stock

Most popular products report. Sell and buy price are the current prices. Only invoiced products.

01/06/2024

To

01/06/2024

All

All

All

Go

Show 10 entries

Copy CSV PDF

Search:

SKU	Description	Brand	Sales	Sell	Sell Total	Buy	Buy Total	Level	Reorder	Max
D0B37100	Shad Sh37 Top Box	Mpn	2.00	100.00	200.00	50.00	100.00	0	0	1
					200.00		100.00			

Previous

1

Next

+ Order

Select the date range and brand filter.

Press ‘run report’ to update the report.

You can sort the report on any column by clicking on the up and down arrows.



You can filter the report by typing a keyboard into the ‘search’ box

Search: SH

The report can be exported to the clipboard, CSV, or PDF by pressing the relevant button.

Copy CSV PDF

Price List

The price list reports lists all SKU’s along with its selling price. The report can be filtered by product brand. You can also select which account group price to use.

To display the report, click ‘price list’ on the main stock menu bar.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

NEW-VEHICLE

Search Products

Catalogue

Fitment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Price List

Product List

AllcustomercustomerGo

Show 10 entriesCopyCSVPDFSearch:

SKU	Description	Brand	Tax Code	Customer Ex	Customer Inc	Customer Ex	Customer Inc
			T1	0.00	0.00	0.00	0.00
			T1	0.00	0.00	0.00	0.00
	Genuine Gillera Runner 50/125/180/200 Graphic Sticker Set 62447000a1		T1	0.00	0.00	0.00	0.00
54CM X 14CM X 50CM (100 PCS)	0	Mpn	T1	0.00	0.00	0.00	0.00
PASSENGER BLACK (LAP COVER/APRON)	41.6583	Mpn	T1	0.00	0.00	0.00	0.00
*010, 020, 050, 065,	Helmet Ears Bear, Pinkie Pig, Leopard, Sheep, Donkey, Mouse	Mpn	T1	142.99	171.59	142.99	171.59
*080, 090"	Helmet Ears Cat Tails And Ears, Devil Horns And Tail	Mpn	T1	142.99	171.59	142.99	171.59
00-70351	Bronze Skin Fitting Body 2bsp - 2hose	-	T1	65.72	78.86	65.72	78.86
00000000003	Jeu 250 Fiches Stock	Honda	T1	0.00	0.00	0.00	0.00
00000000009	Jeu 100 Suite Factur	Honda	T1	0.00	0.00	0.00	0.00

Previous12345...1000Next

Press ‘Copy’ or ‘CSV’ to export the list.

SKU Creation

This report lists when new product lines were created.

SKU Creation

New product lines created

29/05/2023To 05/06/2024AllGo

Show 10 entriesCopyCSVPDFSearch:


Date	Agent	SKU	Brand	Description	Sales Nominal	Purchase Nominal	Customer	Tax Code	Customer Inc
06/11/2023 11:18:49	Test User	123454	-	Nolan Helmet Special	4000	5000	0.00	0	0.00
09/02/2024 11:37:16	test agent name	KIT 99	-		4000	5000	0.00	1	0.00
11/04/2024 12:21:32	test agent name	645645HGHF	-		4000	5000	0.00	1	0.00
03/04/2024 16:49:30	Test User	HIRES FLEET 2	H	Hire-Vehicle	4056	5000	0.00	1	0.00

Stock Corrections

Lists all stock corrections for a given period.

Stock Age

Summaries all free stock by days in stock.



Stock Age

Parts stock purchase value by age

Show 10 entries

Copy CSV PDF

Search:

Age	Count	Value
0 - 30 days	8	£ 777.11
30 - 90 days	86	£ 1,426.60
90 days - 1 year	16	£ 823.99
1 year - 2 years	0	£ 0.00
2 years - 3 years	0	£ 0.00
More than 3 years	0	£ 0.00

Previous

1

Next

Stock List (Basic)

The stock list report displays your current stock list and value. You can also specify a previous date and calculate the stock holding at that point in time.

To display the report, click ‘stock list (basic)’ on the main stock menu toolbar.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Stock

In Progress

Book In Products

Dispatch Products

Pick Invoices

Dispatch Invoices

Dispatch by Barcode

Late Invoices

Products

New Product

NEW-VEHICLE

Search Products

Catalogue

Fitment EPC

Motorcycle EPC

Boat

Summary

Outstanding

Outstanding SI (Closed)

Outstanding PI (Closed)

Used Boat

Stock List (Basic)

Basic stock list for Warehouse

01/06/2024 Warehouse Go

Show 10 entries Copy CSV PDF Search:


Qty	SKU	Barcode	Description	Brand	BIN	Nominal	Purchase	Customer	Margin (%)	Purchase Date	Supplier	Line Purchase	Line Customer
1	D0B26100		Sh26 Top Box	Mpn		4000	50.00	44.99	-11.1%	06/11/2022	MPN	50.00	44.99
1	D0B5000		Shad Sh50 Top Box	Mpn		4000	127.11	190.67	33.3%	31/05/2024	MPN	127.11	190.67
7	D0B36100	123456a	Shad Sh36 Side Cases (Pair) - Black- Carbon - Paannier - Requires Model Specific 3p Fitting Kit	Mpn	W1	4000	100.00	250.00	60.0%	01/06/2024	CBS	700.00	1,750.00
9	12300268060		Cover, Cyl. Head	Honda		4000	1.00	0.00	0.0%	28/03/2024	FOWLERS	9.00	0.00
18.0000									55.4%			886.11	1,985.66

Previous 1 Next

The current ‘normal’ product stock list is displayed.

Stock List (Bin)

Displays a summary of your current stock holding by bin location. Clicking on a bin location displays the contents of that location.

**Stock List, Warehouse**
Purchase stock value by Bin Location

Shop

Go

Show 10 entries

Copy CSV PDF

Search:

BIN Location	Count	Value
[No BIN]	3	£ 24.00
9a1	20	£ 327.08
A1	10	£ 500.00
A111	4	£ 1,000.00
A145	1	£ 1.00
B28	10	£ 20.79
B38	15	£ 31.19
B42	12	£ 37.55
D	18	£ 300.00

Previous

1

Next

Stock List (Brand)

Displays a summary of your current stock holding by brand.

Stock List (Nominal)

Displays a summary of your current stock holding by purchase nominal. Clicking on the amount displays a breakdown.

Stock List (Reserved)

Displays all sold products which are in-stock reserved and not displayed/released.

Stock List (Supplier)

Displays a summary of your current stock holding by supplier. Clicking on the amount displays a breakdown.

Stock List (No Stock).

Displays a list of products which have currently been in stock but are not in stock at this moment.

Stock List (Vehicle)

Displays a list of your current vehicle stock by stock category.

05/06/2024

USED-VEHICLE

All

Go

List

Show 10 entries

CopyCSVPDF

Search:

Purchase Date	Age	Sale Date	Serial	Depot	Location	REG	MAKE	MODEL	VIN NUMBER	1STREGDATE
03/03/2016	3016		U5396	Shop	SHOWROOM	EJ65UDS	KAWASAKI	ZX1000MFF	JKAZXT00LMA011621	11/12/2015
19/03/2016	3000		U5449	Shop	SHOWROOM	EN61VMP	KAWASAKI	ZG1400CBF	JKBZGT40CCA009943	10/02/2012
23/04/2016	2965		U5572	Shop	SHOWROOM	AY55HXS	HONDA	PAN EUROPEAN	JH2SC51AX4M203844	08/02/2006
22/06/2016	2905		U5641	Shop	SHOWROOM	AK14HXP	KAWASAKI	ZX 1400 FEF ABS	JKBZXT40EFA014334	05/01/2014
23/06/2016	2904		U5644	Shop	SHOWROOM	AX62BKV	SUZUKI	GW 250 L3	LC6DC111101100659-	26/01/2013
01/07/2016	2896		U5704	Shop	SHOWROOM	EG03NXA	HONDA	HORNET 600	JH2PC34E11M303352	11/07/2003
05/07/2016	2892		U5708	Shop	SHOWROOM	AY15XXS	KAWASAKI	ZX 1000 JFF	JKAZXT00JJA025547	03/03/2015
22/07/2016	2875		U5730	Shop	SHOWROOM	AV09FYF	KAWASAKI	ZX 1400 D8F ABS	JKBZXT40CDA003159	26/03/2009
28/07/2016	2869		U5748	Shop	SHOWROOM	AY12ZDL	YAMAHA	XC 125 E VITY	LYMSE421000024134	30/07/2012
30/07/2016	2867		U5759	Shop	SHOWROOM	LX07CXE	PIAGGIO	MP3 125	ZAPM4730100003585	19/05/2007
2345										2,

Previous

1

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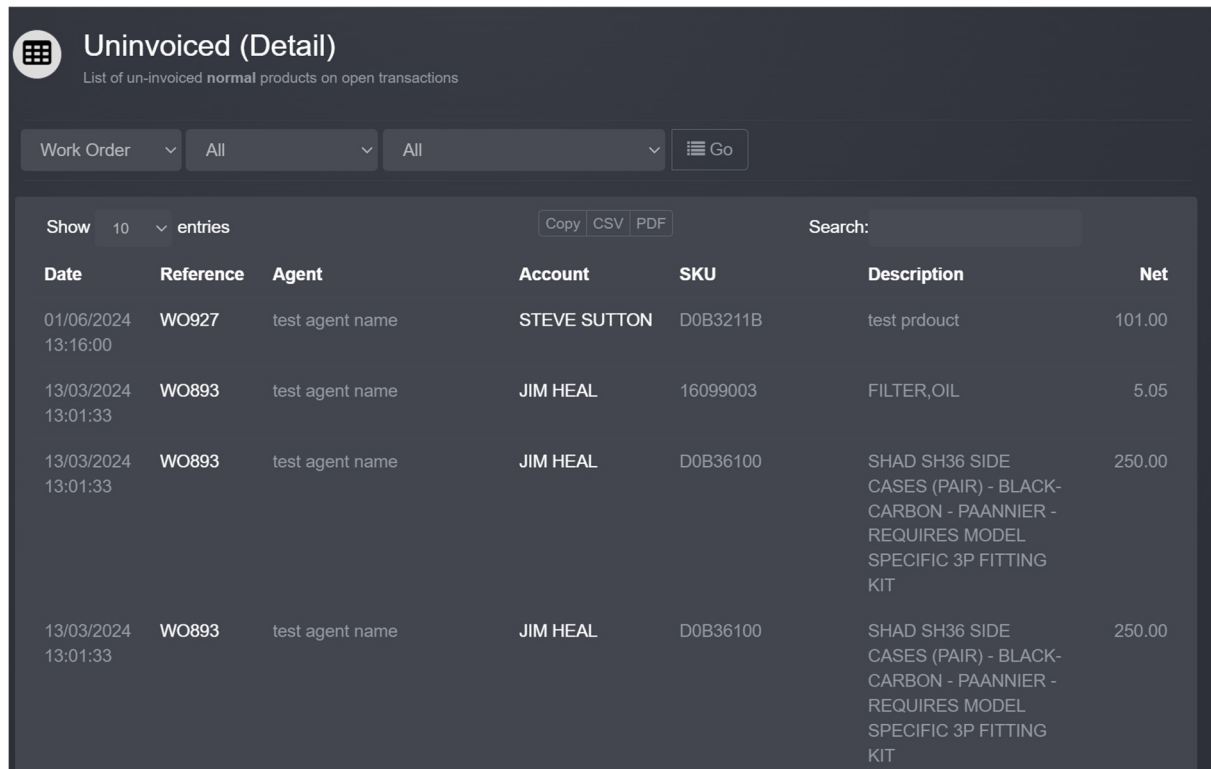
5

6

Next

Un-invoiced (Detail)

Displays a list of products which have been taken out of stock but not yet invoiced.



The screenshot shows a web interface titled "Uninvoiced (Detail)" with a subtitle "List of un-invoiced normal products on open transactions". Below the title are filters for "Work Order", "All", and "All", along with a "Go" button. A "Show 10 entries" dropdown and "Copy", "CSV", and "PDF" buttons are also present. A search bar is on the right. The table below lists products with columns for Date, Reference, Agent, Account, SKU, Description, and Net.

Date	Reference	Agent	Account	SKU	Description	Net
01/06/2024 13:16:00	WO927	test agent name	STEVE SUTTON	D0B3211B	test prdouct	101.00
13/03/2024 13:01:33	WO893	test agent name	JIM HEAL	16099003	FILTER,OIL	5.05
13/03/2024 13:01:33	WO893	test agent name	JIM HEAL	D0B36100	SHAD SH36 SIDE CASES (PAIR) - BLACK- CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	250.00
13/03/2024 13:01:33	WO893	test agent name	JIM HEAL	D0B36100	SHAD SH36 SIDE CASES (PAIR) - BLACK- CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	250.00

Un-invoiced (Nominal)

Displays a summary of products which have been taken out of stock but not yet invoiced by sales and purchase nominal.

Adjust Field.

Allows you to adjust product record field values (on mass) based on specific selection criteria.

Adjust Pricing

Allows you to increase or decrease product pricing based on specific selection criteria.

Delete SKU's

Allows you to mass delete SKUs based on specific selection criteria.

Export

Exports your current stock holding as a CSV file suitable for use with eBay.

Merge Bins.

Allows you to combine two existing bin locations across your current stock.

Min/Max Upload.

Allows you to set re-order and max stock levels via an uploaded CSV file.

Stock Take

Formulised screen for stock taking. You can also upload a CSV file with stock corrections.

Stock Upload

Add products to stock on mass from a CSV file.

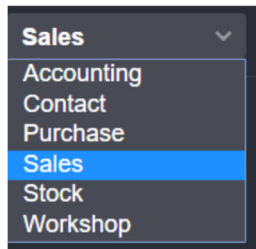
Zero Stock

Clear down your stock based on specific criterial to zero. USE WITH CAUTION!

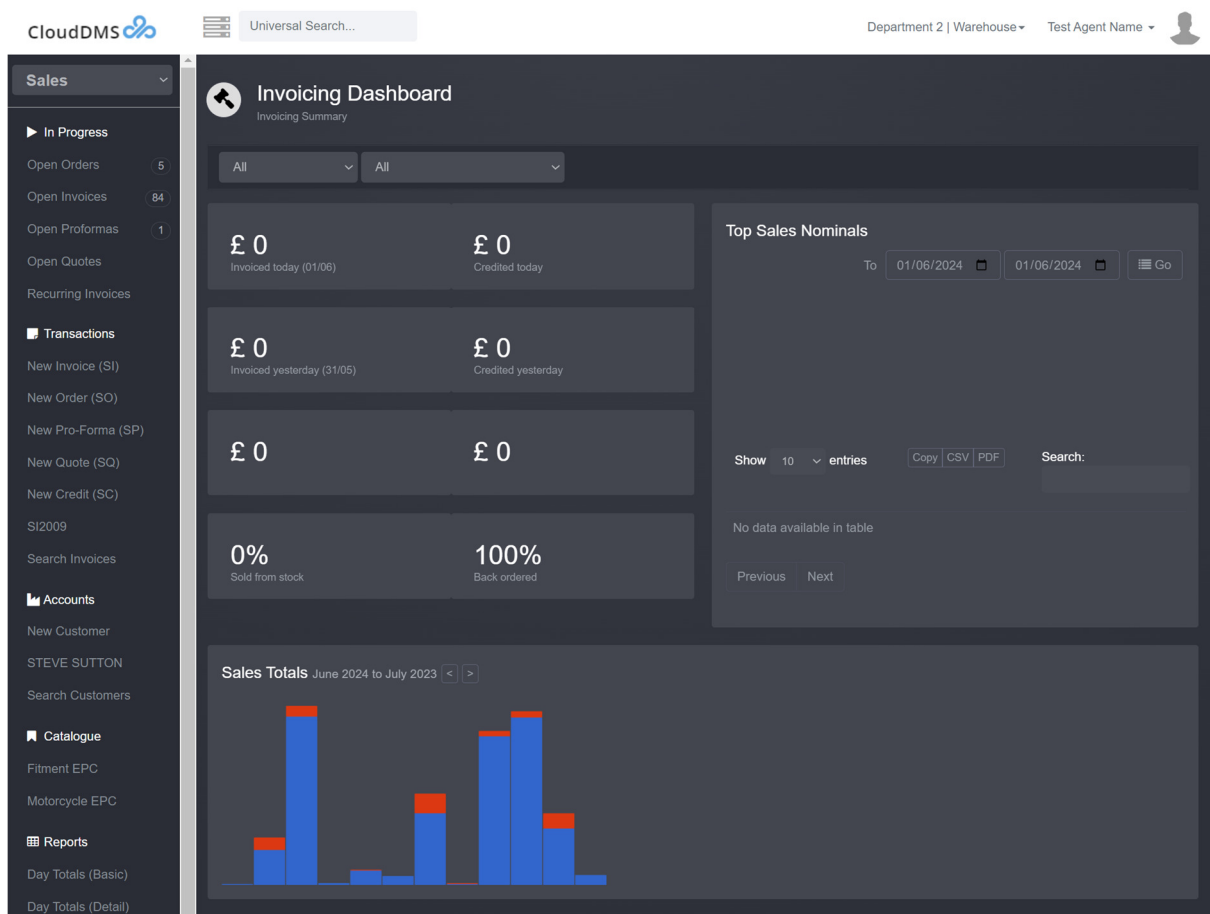
Sales

The sales section manages all sales activity and sales reporting.

Select 'Sales' from the main menu bar.



The sales summary dashboard is then displayed.



The sales dashboard shows a summary of sales and credits today, yesterday and the month so far.

Clicking on the value will display the detailed sales report for the relevant period.

You can adjust the summary display by department and user agent from the relevant drop downs.



The sales figures include VAT and are taken from the sales invoice totals.

A breakdown of the top sales nominals is also displayed in the top right, these figures exclude VAT.

Open Sales Invoices

The open sales invoices list shows all the sales invoices you are currently in-progress. Press 'open invoices' on the main sales menu bar to display the list.

CloudDMS
Universal Search...
Department 2 | Warehouse
Test Agent Name

Sales

In Progress
Open Orders: 5
Open Invoices: 84
Open Proformas: 1
Open Quotes
Recurring Invoices
Transactions
New Invoice (SI)
New Order (SO)
New Pro-Forma (SP)
New Quote (SQ)
New Credit (SC)
SI2009
Search Invoices
Accounts
New Customer
STEVE SUTTON
Search Customers
Catalogue
Fitment EPC
Motorcycle EPC
Reports
Day Totals (Basic)
Day Totals (Detail)
Day Totals (Summary)
Debtors
Loyalty Points

Open Sales Invoices

Department 2
All
test agent name
All
List

Show 10 entries
Copy CSV PDF
Search:

	Date	Sub	Ref	Agent	Department	Customer	Note	Handover	Tag Labels	Total	Paid	
	01/06/2024		SI2009	test agent name	Department 2	WORKSHOP				0.00	0.00	
	31/05/2024	Service	SI2008	test agent name	Department 2	STEVE SUTTON				300.00	0.00	
	31/05/2024	vehicle	SI2007	test agent name	Department 2	IAN SMITH				2,000.00	0.00	
	23/05/2024		SI2006	test agent name	Department 2	MARK SADLER DERBYSHIRE MOTORBIKE SCHOOL				0.00	0.00	
	10/05/2024	Vehicle	SI2001	Test User	Department 2	JOHN SMITH Deliver: MR TEST1				7,500.00	0.00	
	10/05/2024	vehicle	SI1999	Test User	Department 2	JOHN SMITH				6,587.60	0.00	
	29/04/2024		SI1998	test agent name	Department 2	JOHN HAMILTON				346.00	0.00	
	29/04/2024		SI1997	test agent name	Department 2	OLLY WEBSTER				489.98	0.00	
	11/04/2024	vehicle	SI1994	Test User	Department 2	OMEGA YAMAHA				4,995.00	0.00	
	27/03/2024		SI1983	Test User	Department 2	CASH SALE 3-2024				228.80	0.00	
										172,470.42	16,008.80	

Previous
1
2
3
4
5
...
9
Next

You can filter the list by user agent, department and label tag.

Once an invoice is closed it is removed from the open list.

To display an invoice, click on the ‘view’ button to the right of the transaction, or on the actual transaction reference.



Open Sales Orders

The open sales order list is similar to the open invoices list, except it displays sales orders.

Press ‘open orders’ on the main sales menu toolbar to display the list.

Open Sales Orders

Department 2

All

test agent name

All

List

Show

10

entries

Copy

CSV

PDF

Search:

	Date	Sub	Ref	Agent	Department	Customer	Note	Handover	Tag Labels	Total	Paid	
	01/11/2022		SO57	Test User	Department 2	JOHN SMITH				274.32	0.00	
	05/11/2020		SO51	test agent name	Department 2					184.00	0.00	
	05/11/2020		SO50	test agent name	Department 2					34.95	0.00	
	05/11/2020		SO48	test agent name	Department 2					1,559.94	0.00	
	05/11/2020		SO49	test agent name	Department 2	JACK JONES				516.00	0.00	
										2,569.21	0.00	

When you close a sales order, it creates a sales invoice, when you close the sales invoice, the transaction is posted to the account and nominal ledgers.

Open Proformas

The open sales proformas screen shows a list open proformas.

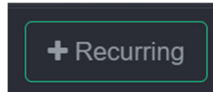
Open Quotes

The open sales quotes screen shows a list of open sales quotes.

Recurring Invoices.

This screen lets you configure automatic recurring invoices, ideal if you want raise automatic storage invoices or vehicle rental invoices.

To create a new recurring invoice press '+Recurring'



The setup dialogue will then be displayed.

New Recurring Invoice

Setup and configure a new recurring invoice series

Name

Department

Product Kit SKU

Stock Depot

Invoice Note

Email Invoice

Email Message

Schedule

Monthly Settings

Recur Every (months)

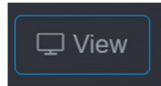
Day Of Month

CloseSave

Fill out the dialogue with the product kit you want to sell as the schedule you want the invoices raised to and then press 'save'.

You specify an end date for invoices or the number of invoices to be raised.

Once the schedule has been setup press 'View' beside the new schedule.



All customers included in the schedule will then be displayed along with details of how many invoices have been raise, the date of the last invoice etc.

Day based
Customers included in this recurring invoice schedule

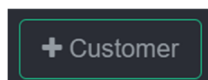
Every 2 day(s) + Customer

Show 10 entries Copy CSV PDF Search:

Name	Email	Last	End	Remaining	Issued	
STEVE SUTTON	steve@deepbluesystems.com	19/10/2023 13:35:17	-	0	5	

Previous 1 Next

To add a new customer to the schedule press '+Customer'



The customer setup dialogue will then be displayed.

Add customer

Account

Email

End Date, leave blank for no end date

Number Of Invoices, leave blank for unlimited

Close Save

- Click in the account box and enter the customers name or postcode, as you type possible matches will be displayed.
- Enter the email address the invoices are to be sent to, this is critical.
- Enter the end date or the number of invoices to issue.
- Press 'Save'

Creating a New Sales Invoice

Sales invoices are used to sell products to a customer.

Press ‘New invoice (SI)’ on the main sales menu bar.

The screenshot shows the 'New Transaction' form in the CloudDMS application. The left sidebar contains a 'Sales' menu with options like 'In Progress', 'Transactions', 'Accounts', and 'Catalogue'. The main area is titled 'New Transaction' and includes a 'Sales Invoice' dropdown menu. Below this, there are fields for 'Date' (01/06/2024 12:41:15), 'SI#', 'test agent name', 'Department 2', 'Customer', and 'Open Status'. A 'Products' table is visible with columns for Description, Qty, Unit, %, Net, Tax, Vat, and Line. The table has a 'Net' row with a value of £, a 'Vat' row with a value of £, and a 'Total' row with a value of £. There are also 'Notes' and 'Terms and Conditions' sections at the bottom.

Setting the transactions type

Proving you have not added any products you can change the transaction type from the drop-down box.

The screenshot shows a dropdown menu for selecting the transaction type. The options are: Sales Invoice (selected), Sales Invoice, Sales Order, Sales Credit, and Sales Proforma.

Your options are:

- Sales invoice
- Sales order
- Sales credit
- Sales proforma. Proformas do not reduce stock levels.

Setting the sales account

Start by selecting customer’s account for the invoice. Press ‘+select account’ to display the dialogue box.

The screenshot shows a button labeled '+ Select Account' with a plus icon.

Transaction

Account Name

Search by Name or Postcode

Address

Address 1

Address 2

Address 3

Address 4

Post Code

Post Code

Phone

Phone

Email

Email

Account Code

Account Code

Transaction

Cancel

Save

To find a customer type the customer's name, account reference or postcode into the 'account search' box. As you type the nearest account matches will be displayed.

The screenshot shows a 'Transaction' form with a dark theme. At the top, there's a header 'Transaction'. Below it, a section titled 'Account Name' contains a search bar with the text 'ste'. Below the search bar, there's a list of three accounts, each with a status 'Open' on the left, the account name and address in the middle, and a 'Select' button on the right. The accounts are: Alan Stevens (56 Haven Village, CO70LW), Stephen R Hullett (8 Station Road, PE316PP), and Steve Suttom. Below the list, there's a link 'Create a new account for 'ste'' and a '+ New Account' button. At the bottom of the form, there's an 'Account Code' field, a 'Transaction' dropdown menu, and 'Cancel' and 'Save' buttons.

Status	Account Name	Address	Action
Open	Alan Stevens	56 Haven Village, CO70LW	Select
Open	Stephen R Hullett	8 Station Road, PE316PP	Select
Open	Steve Suttom		Select

Create a new account for 'ste' + New Account

Account Code

Transaction ▼

Cancel Save

If you see the account you are looking for press 'select', otherwise press 'new account' to create a new customer.

You can if required create a generic 'cash sales' account although this not recommended.

If you are creating a new account press the down arrow in the postcode box will displaying a list of matching addresses for the entered postcode.

Post Code

W5 4UB

264 Northfield Avenue	Ealing	London	Select
266 Northfield Avenue	Ealing	London	Select
268 Northfield Avenue	Ealing	London	Select
270 Northfield Avenue	Ealing	London	Select
272 Northfield Avenue	Ealing	London	Select
274 Northfield Avenue	Ealing	London	Select

Expanding the 'transaction' setting allows you to set the department, user agent and order no.

Transaction

Department

Department 1

Agent

Test User

Reference

Reference

Account Group

Customer

Dispatch Note

Dispatch Note

You cannot change or back-date a transactions date unless you account has the relevant permission.

Press 'save' when you have the customer selected.

Adding a product

Press '+Product' to display the dialogue.



Sell Product

Enter the SKU then select the part from the list

Qty

SKU

Cancel

As you type the SKU the system will display the nearest matches.

Sell Product

Enter the SKU then select the part from the list

Qty

D0B3

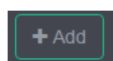
D0B3211	Top Case Sh32 Leather :Top Cases Mpn	Back Order	+ Add
D0B3300	Shad Sh33 Top Box. Red Refector Mpn	Back Order	+ Add
D0B33100	Shad Sh33 Top Box. White Refector Mpn	Back Order	+ Add
D0B33200	Shad Sh33. New 33 Litre Top Box Mpn	Back Order	+ Add
D0B3321	Top Case Sh33 Metal Black :Top Cases Mpn	Back Order	+ Add

Cancel

If a product is obsolete or supersede this will be displayed in the part picker.

You can also select which item/serial you want to sell from stock if required. You do this by pressing the small down chevron arrow beside the relevant line.

Press '+add' beside the required product to add it to the invoice.



If the product was not in stock it is also added to the 'Current Order' in the purchasing screen.

Adding multiple products or barcode scanning

You can add up to 10 products to an invoice in one go, this is especially useful when using a barcode scanner.

Press the multi-add button to display the dialogue



Sell Multiple Product

Enter the SKU's you want to add to the transaction

Qty	SKU
1	
1	
1	
1	
1	
1	
1	
1	
1	
1	

CancelAdd All

Enter or scan each SKU then press 'add all'

After each SKU is entered the system will check it and display if the SKU is valid, in stock or a back order.

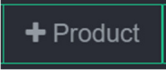
1	D0B36100	✓ 13 in stock
---	----------	---------------

Pressing enter after each SKU will move to the next SKU entry box.

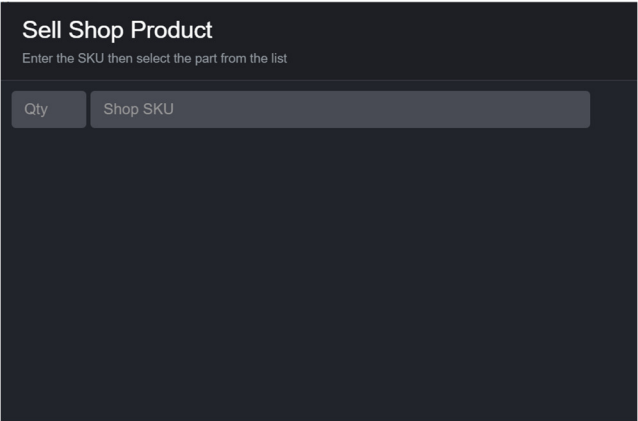
Adding a free text line

You can add a free text invoice line to an invoice, this works in a similar way to a non-stockable product.

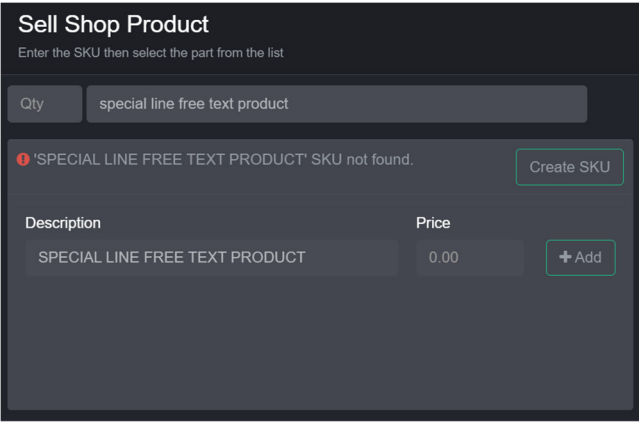
On an open sales order or sales invoice press ‘+Product’



The part picker dialogue will then be displayed.



Click in the SKU box and start typing the text you want to add to the invoice, when there is no SKU match the dialogue will switch over to free text.



Enter the selling price for the line and then press ‘+add’. The line will then be added to the transaction.

2 LINE004		1.00	10.00	0.00	10.00	T0	0.00	10.00
SPECIAL LINE FREE TEXT PRODUCT								
Status		Qty	Unit	%	Net			
<div><div><div></div></div><div>Dispatched, Shop</div><div>13/06/2024 11:02:26</div></div>		1.00	10.00	0.00	10.00			
		<div><div></div><div></div><div></div></div>						

Removing a part

If the product line is not already expanded press the down arrow to see the stock status information.

Description	Qty	Unit	%	Net	Tax	Vat	Line
D0B3300	1.0	109.16	0	109.16	T 1	21.83	130.99
MPN Shad Sh33 Top Box. Red Refector							
Status	Qty	Unit	Discount	Net			
On Back Order	1.0	109.16	0	109.16			

If the part has not been marked as dispatched/released, you can press the red waste basket button to remove the part from the invoice.



A confirmation dialogue will then be displayed

Remove D0B3300

Are you sure you want to remove this product from the Transaction?

Cancel

Remove

Press 'remove' to confirm the action.

If the waste basket button is not present, the product has been marked as dispatched/released. You should then credit the part on a separate transaction or if you have permission remove the stocks dispatch date.

If the invoice has been closed, or the product, marked as 'dispatched' it cannot be removed.

Editing a Part

If the invoice has been closed it cannot be edited.

If the product line is not already expanded press the down arrow to see the stock status information.

Press the blue edit button beside the product to display the edit dialogue box,



Edit D0B3300

Description

MPN Shad Sh33 Top Box. Red Refector

Serial

Serial

Location

Location

Note

Note

Unit Price

109.1583

Discount

0

Net

109.16

Tax Code

Standard Rated

Vat

21.83

Line

130.99

Cancel

Save

You can alter the description, price, discount, and tax code.

Press 'Save' to save the changes.

You can set different prices and discounts for each product being sold, even if they have the same SKU

Stock Level Error

If there is a stock error and the product in question is not in stock (and the system thinks it is) press the 'recycle' button.



The reorder dialogue will be displayed.

Reorder D0B3300

Do you want to reorder the part and clear the 'in stock awaiting dispatch' status?
This should only be used if the stock level was incorrect.

Cancel

Reorder

Press 'reorder' to add the part to the un-allocated stock order. Effectively reordering it.

Stock record

To display a products stock record, press the small blue display button.



This will display all the ins and outs and date for the product.

Cancelling a back order

If the product is marked as 'on back order' and you do not want to order the product press the yellow contrast button.



Cancel D0B3300 Backorder

If the part is on a open order it will be removed from the order. If the part has already been ordered it will be marked as free stock.
The current stock level will not be altered.
You will need to raise a separate credit for the customer.

Cancel

Clear Backorder

Pressing 'cleat backorder' will cancel the back order. The current stock level will not be changed.

Closing a Sales Invoice

When you have added all the products required by the customer to the transaction press 'Finish SI'.



The finish dialogue will then be displayed.

Finish this Department 2 Sales Invoice

£ 125.99 Outstanding

Department
department 2

Account
card

Details
SI1392

Authorisation Code

Amount
0.00

Setup PDQ

Invoice Sub-Type
MOT

Set status for 'in-stock' products. Backordered items will have a status of 'Backordered'
picked

☐ Email copy invoice to: steve@deepbluesystems.com

Find attached a copy of your invoice.

Find attached a copy of your invoice.

Close

Finish SI

If the customer is making a payment select the relevant payment method and enter the amount. Clicking on the 'Amount' label will enter the full amount into the box.

If the customer has an email address you can also choose to email a copy invoice to the customer.

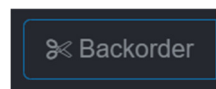
Press 'Finish SI' to close the invoice and post it to the account and nominal ledgers. You can also release in stock products at this point.

Once an invoice has been closed it cannot be edited.

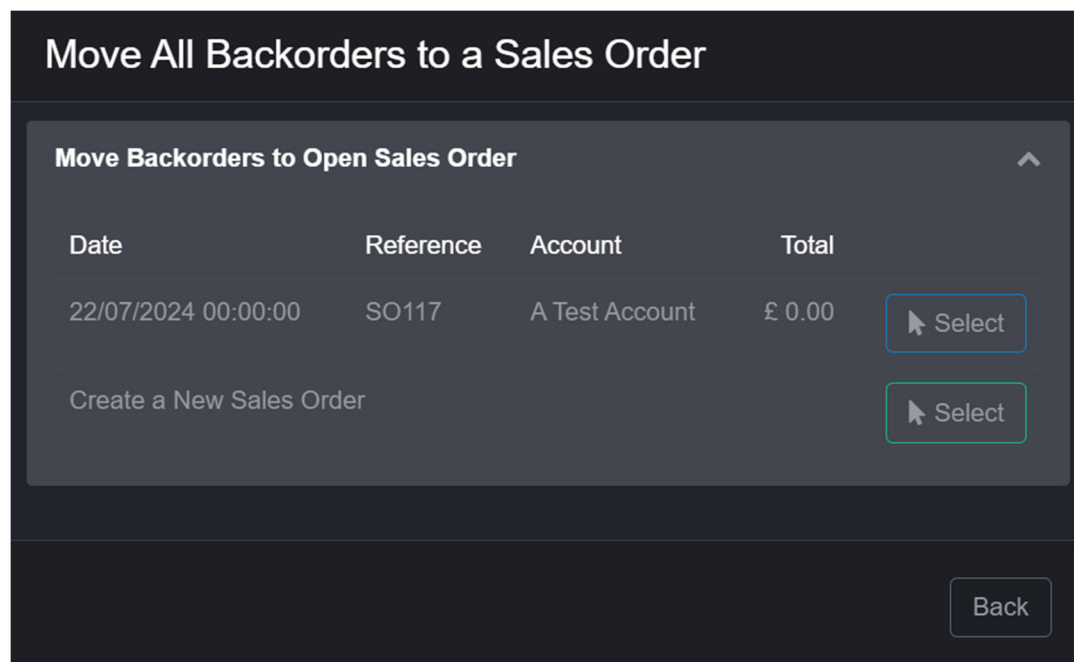
Invoice in Stock Products Only

If your sales invoice includes back ordered products and you only want to invoice the in-stock products you can move the back ordered products to an existing open sales order or to a new sales order.

If the open sales invoice includes back ordered products an extra 'Backorder' button will be displayed on the toolbar.



Press 'Back order' to display the 'Move back order' dialogue.



Press 'Select' beside any open sales orders to move the back ordered products to the existing sales order.

Press 'Select' beside 'Create a New Sales Order' to move the back ordered products to a new sales order.

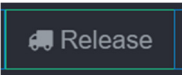
If you leave the sales order open, you can add any additional products to it the next time the customer wants to place an order. Any outstanding or new back orders can be moved to another new sales orders whilst in-stock products are invoiced.

Once the back ordered products come into stock you can finish the sales order to a sales invoice and dispatch/release to the customer.

Dispatching/Releasing stock

All products sold on an invoice (or sales order) are marked as in-stock reserved until you release them.

Press ‘Dispatch’ on the invoice to display the stock release screen. The invoice must be finished before products can be dispatched.



STEVE SUTTON
4 Barnfield Avenue
London
W7 1BN

Transaction

Dispatch Note

01/06/2024 12:54:04
Date

SI2008
Ref

Dispatch

In Stock

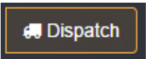
Delivery

Picking

Release

Description	Depot	Location	Note	Status
<input checked="" type="checkbox"/> D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	Warehouse	w1		In Stock. Awaiting Dispatch
<input checked="" type="checkbox"/> D0B36100 SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	Warehouse	w1		In Stock. Awaiting Dispatch

Tag the required stock and press ‘dispatch’



Dispatch Selected Products

Via
Collected

Tracking Number
Tracking Number

Cancel

Dispatch

Select how the stock is being released and press ‘dispatch’

The products status will change from ‘in stock reserved’ to ‘dispatched’.

Recording a payment

You can only record a payment against an open or closed invoice

Scroll down to the Payment section of the invoice and press '+Payment'.

+ Payment

Payment. Closed transaction

£ 600.00 Outstanding

Department

department 2

Type

Receipt (Money In)

Account

card

Details

SI2008

Authorisation Code

Amount

0.00

Close

Save

Select the payment method and amount, then press 'save'.

You can add extra payment methods on the nominal ledger screen in accounting.

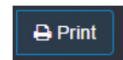
The payment will default to the same department as the sales invoice.

You can also integrate the DMS with physical PDQ machines for card holder present transaction or PayLinks for online payments. Email sales@deepbluesystems.com for more information.

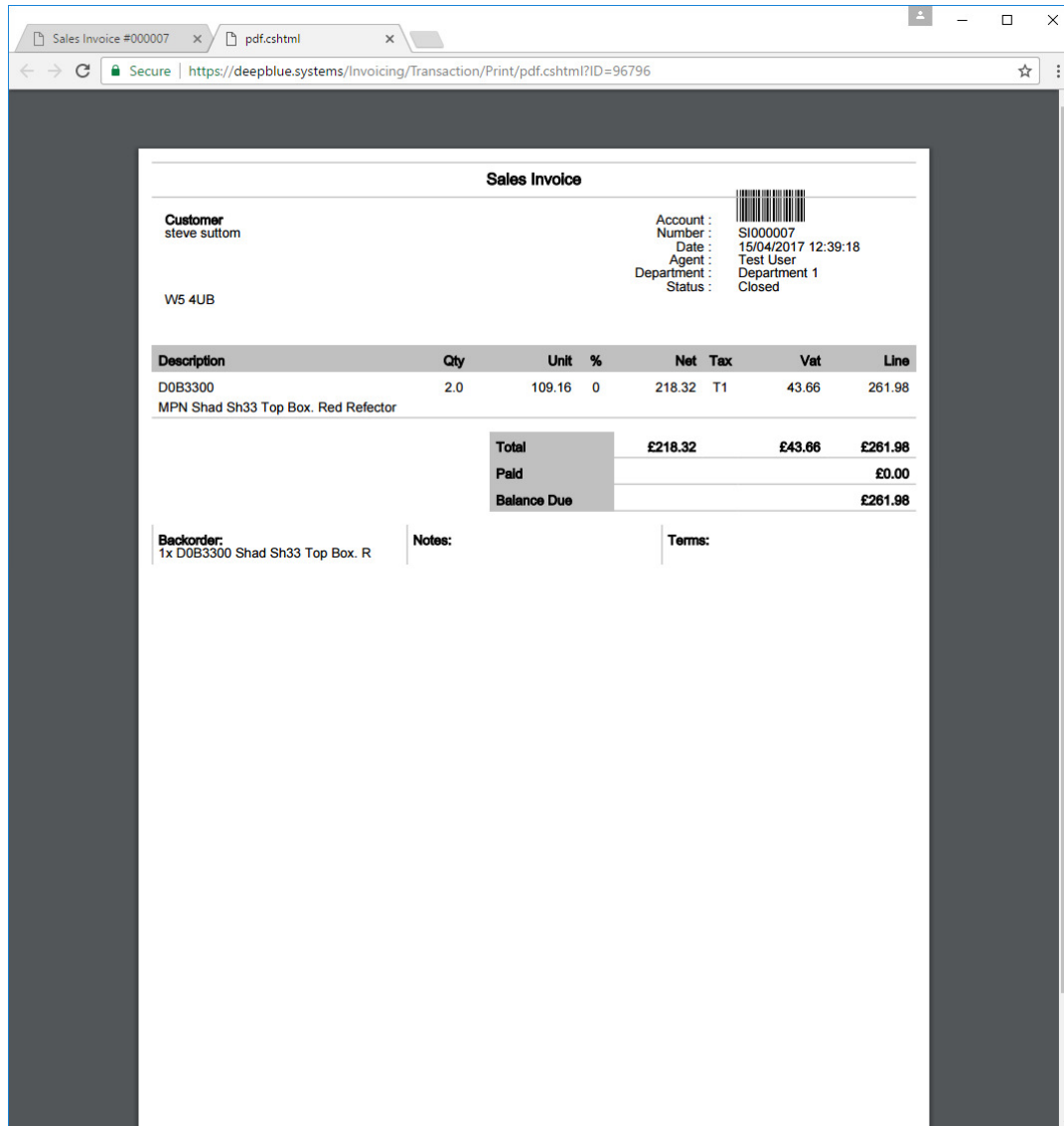
Printing an Invoice

All printing is done via a PDF.

Display the required invoice and press 'print'



The invoice will be previewed in a new tab



You can configure the invoice header and footer in the company settings screen.

Printing a 3" receipt

A 3" layout suitable for receipt printers can be printed by pressing the receipt button.



www.ajutton.co.uk
services@ajutton.co.uk

Deep Blue Systems Ltd to A.J Sutton
Unit 4 Millbrook Court
Stokebridge
Milton Keynes
MK14 5FH

Sales Invoice

BEN DEBLE
TEN TONS
TOTTEN ROAD
IPPLING
NORTHAMPTON, DEVON
TQ12 5TD

Number SI202644
Date 17/05/2017
Agent Auto
Department A.J. Sutton
Status Closed
Reference : 500934132

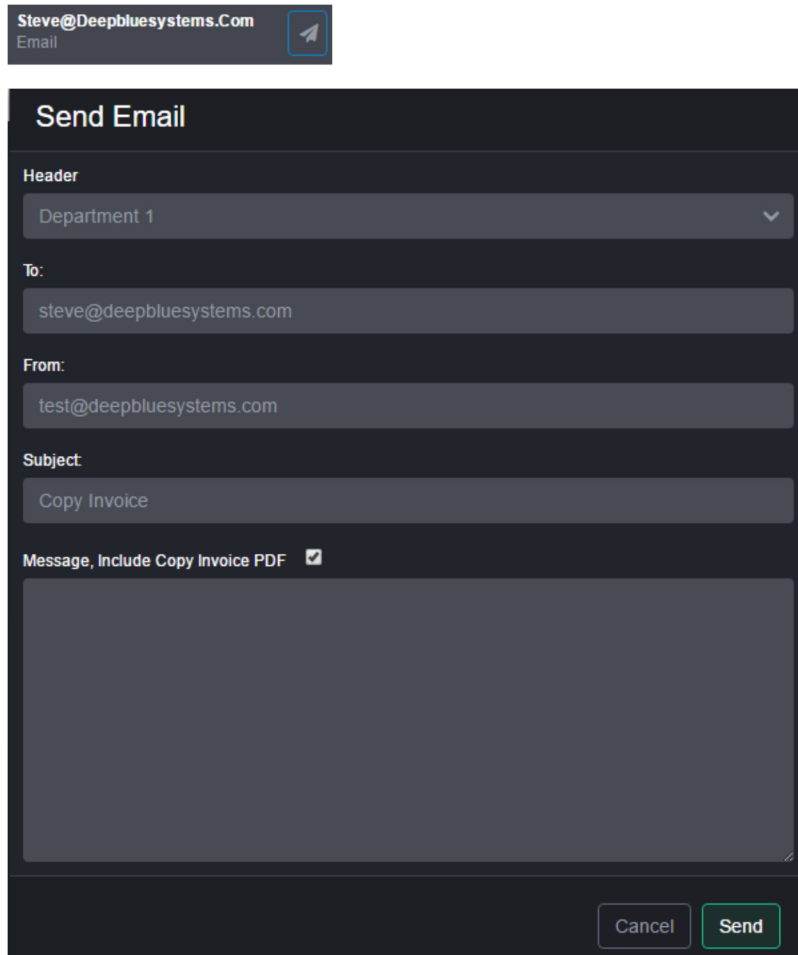
Desc	Qty	Line
90183061A 000	1.0	7.09
NUT, SPRING		
ROYAL MAIL	1.0	4.80
Shipping		
Total		£11.89
Paid		£11.89
Due		£0.00

Backorders will be forwarded as soon as possible. Parts returned to us that were supplied correctly will be charged a 20% handling/restocking fee. Your credit card will be charged in the name Deep Blue Systems Ltd.

Emailing an invoice

If the customer has an email address you can email a pdf copy of the invoice directly to the customer from the DMS.

Press the email button beside the email address in the top frame of the invoice.



The screenshot shows a 'Send Email' dialog box with a dark theme. At the top, there is a header bar with the text 'Steve@Deepbluesystems.Com' and 'Email' next to a small blue icon. Below this, the dialog has several input fields: a dropdown menu for 'Department 1', a 'To:' field with 'steve@deepbluesystems.com', a 'From:' field with 'test@deepbluesystems.com', and a 'Subject:' field with 'Copy Invoice'. There is also a checkbox labeled 'Message, Include Copy Invoice PDF' which is checked. Below these fields is a large text area for a message. At the bottom right, there are two buttons: 'Cancel' and 'Send'.

You can add a note to the email.

The invoice will be emailed as a PDF via the CloudDMS mail server. The sending address will be set to your login email address

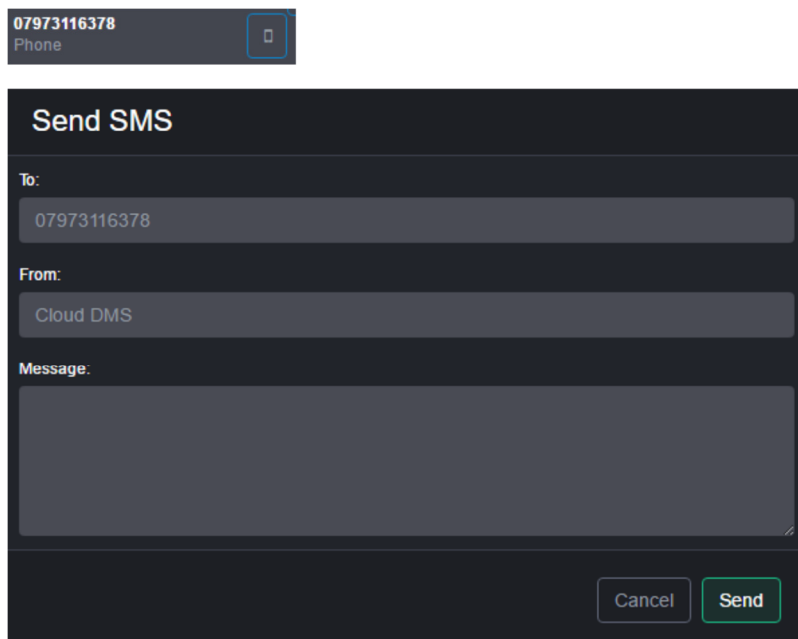
The email will include a HTML version of your header.

Press 'Send' to send the email.

The email will also be logged in the customers contact screen.

Sending a SMS to the customer

If you have included a mobile phone number press the SMS button beside the customers phone number.



07973116378
Phone

Send SMS

To:
07973116378

From:
Cloud DMS

Message:

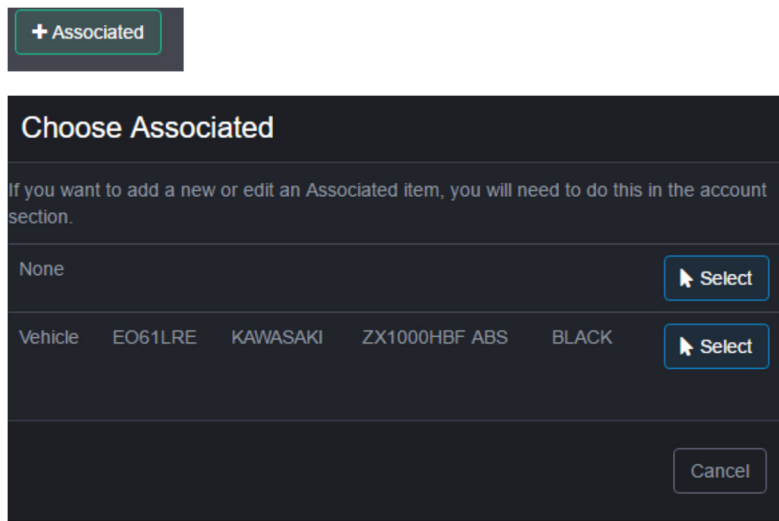
Cancel Send

Enter the message and press 'send'

You can set the 'From ID' in the company settings screen.

Adding a delivery address or vehicle

Press the '+associated' button and select the relevant associated item.



+ Associated

Choose Associated

If you want to add a new or edit an Associated item, you will need to do this in the account section.

None	Select
Vehicle EO61LRE KAWASAKI ZX1000HBF ABS BLACK	Select

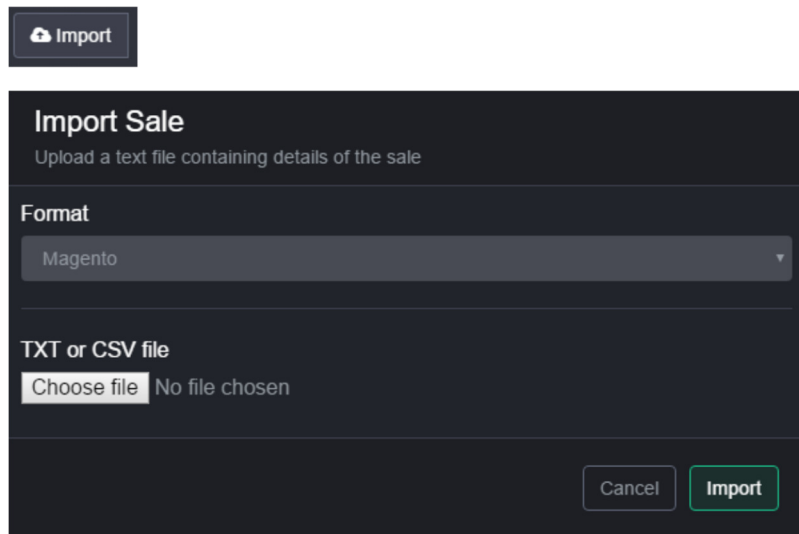
Cancel

If the address is not present, you will need to first add it the customer associated list in the contact and account window.

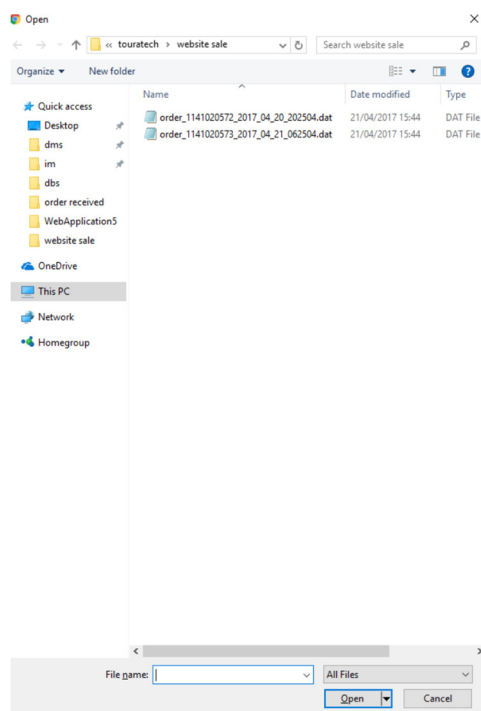
You can also add vehicles, drop shipping or any customer associated item you have defined.

Importing a Magento Order

Press 'New Invoice (SI)' on the menu bar, then press 'Import' on the 'new invoice' screen.



Make sure the format is set to 'Magento' and press 'choose file'




Select the correct order file then press 'import'

The Sales Order Import button is only visible on a 'new invoice'. Once a customer account has been selected or a product added you cannot import a sales order.

Importing a Bluepark Order

Press 'New Invoice (SI)' on the menu bar, then press 'Import' on the 'new invoice' screen.

 Import

Import Sale

Upload a text file containing details of the sale

Format
Bluepark

Reference

TXT or CSV file. (4Mb Max)
Choose file No file chosen


Close

Import

- Set the format to 'Bluepark'
- Press 'choose file'
- Select the correct order file then press 'import'

Importing a Shopify Order

Press 'New Invoice (SI)' on the menu bar, then press 'Import' on the 'new invoice' screen.

 Import

Import Sale

Upload a text file containing details of the sale

Format

Shopify

Reference

TXT or CSV file. (4Mb Max)

Choose file No file chosen

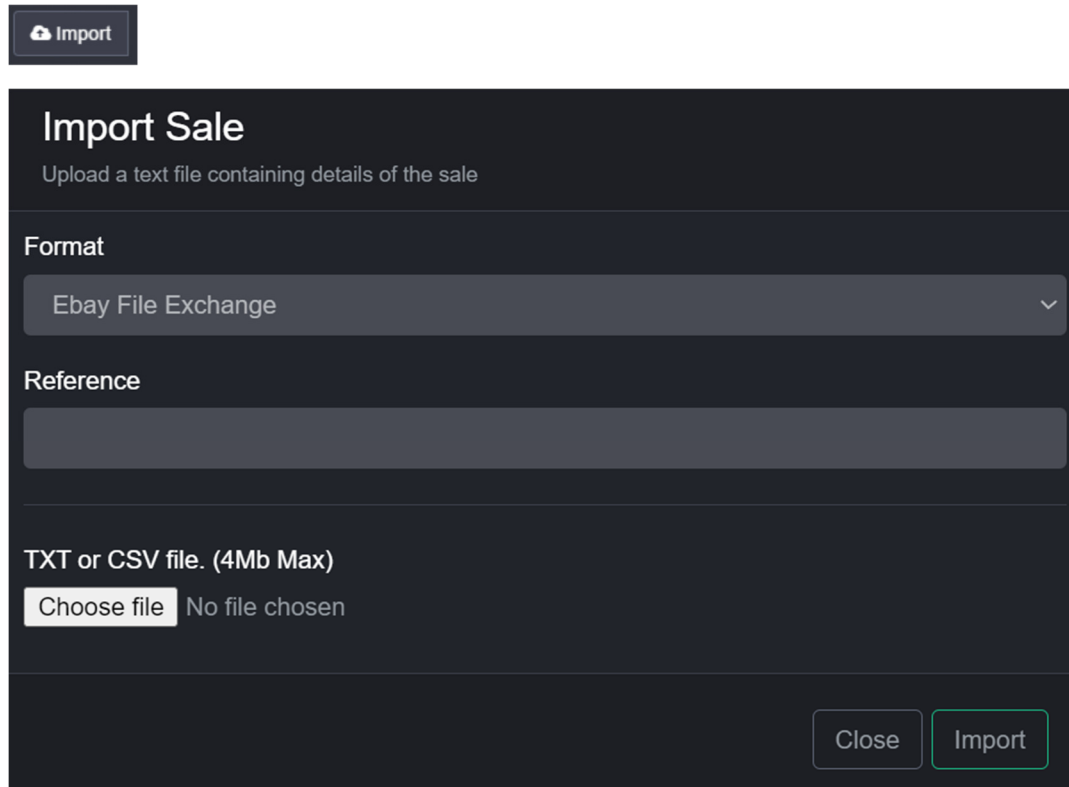
Close

Import

- Set the format to 'Shopify'
- Press 'choose file'
- Select the correct order file then press 'import'

Importing Ebay Orders

Press 'New Invoice (SI)' on the menu bar, then press 'Import' on the 'new invoice' screen.



Import Sale
Upload a text file containing details of the sale

Format
Ebay File Exchange

Reference

TXT or CSV file. (4Mb Max)
Choose file No file chosen

Close Import

- Export the 'File Exchange' CSV file from ebay and save it your desktop.
- Set the format to 'Ebay File Exchange'
- Press 'choose file'
- Select the correct order file then press 'import'

Rest API Order Import

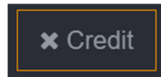
CloudDMS can import orders from any 3rd part system by utilising the Rest API. Email support@deepbluesystems.com for the developer documentation.

Crediting an Existing Sales Invoice.

Invoices cannot be cancelled or altered after they have been finished unless your agent account has the necessary permission. Products can only be removed from an open sales invoices providing they have not been dispatched.

If a customer returns a product, you will need raise a sales credit.

You can do this from original invoice by displaying it and press 'credit'.



You will then be given the choice to credit the whole invoice or just a specific product.

Credit this Service Sales Invoice

Any back orders will be cancelled. Any products in stock reserved will be marked as cancelled.

☒ **Entire Sales Invoice**

☐ **Selected lines:**

☐ 1 x D0B36100

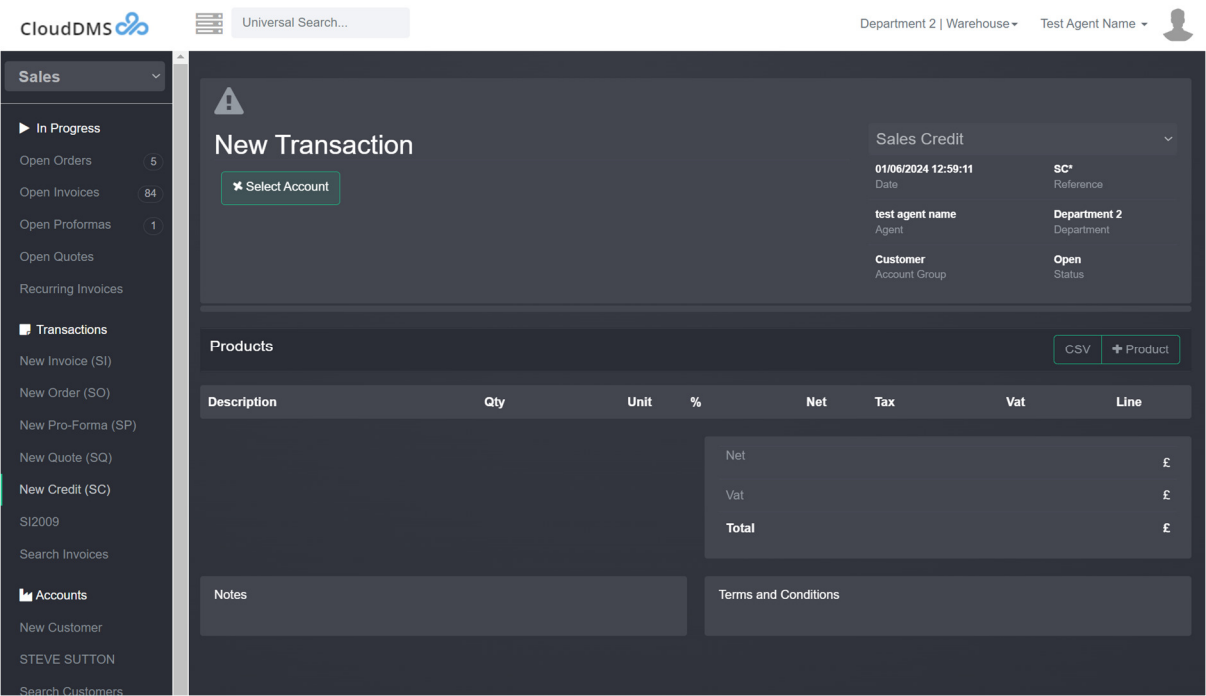
☐ 1 x D0B36100

CloseCredit

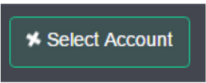
Press 'credit' to raise the sales credit.

Raising a Sales Credit

Press ‘new credit (SC)’ on the main sales menu bar to raise a new manual sales credit.



Press ‘+select account’



Transaction

Account Name

Search by Name or Postcode

Address

Address 1

Address 2

Address 3

Address 4

Post Code

Post Code

Phone

Phone

Email

Email

Account Code

Account Code

Transaction

Cancel

Save

Enter the customer's name, account code or postcode into the 'account name' box,

Transaction

Account Name

steve

Open	Alan Stevens 50 Haven Village, CO 80120	Select
Open	Steve Sullivan 100 Main St	Select

Create a new account for 'steve'

+ New Account

Account Code

Transaction

Cancel Save

'select' the required customer from the list and press 'save'

Adding a product to the sales credit

Press '+product'

+ Product

Sell Product

Enter the SKU then select the part from the list

Qty	SKU
-----	-----

Cancel

Enter the SKU

Sell Product

Enter the SKU then select the part from the list

Qty

D0B23100	Side Case Sh23 Mpn	+ Add
D0B26100	Shad Sh26 Top Box Mpn	+ Add
D0B2900	Top Case Sh29 Black :Top Cases Mpn	+ Add
D0B2900EX	Top Case Sh29 Explorer :Top Cases Mpn	+ Add
D0B29100	Shad Sh29 Top Box Mpn	+ Add

Cancel

Press '+add+' to add the product to the credit.

Description	Qty	Unit	%	Net	Tax	Vat	Line
D0B23100	1.00	300.00	0.00	300.00	T1	60.00	360.00
MPN SIDE CASE SH23							
Status	Qty	Unit	Discount	Net			
Awaiting Stock, Warehouse	1.00	300.00	0.00	300.00			

Product will never be received

If the product will never be received by you press 'never' received' beside the relevant product



Confirm this on the next dialogue box

D0B23100 Never Received

Are you sure you want to mark this product as never received?

Cancel

Not Received

Finishing a Sales Credit

When you are ready to finish the credit press 'Finish SC'



The finish dialogue will then be displayed.

Finish this Department 2 Sales Credit

Are you sure you want to close this Sales Credit?

Once a credit is finished it can not be changed

CloseFinish SCFinish SC & Book In

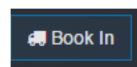
Click 'Finish SC'.

Refunding

If you are refunding the customer press '+Payment' on the sales credit and record the payment.

Booking in the product

When you physically receive the product press 'book in'



The booking in screen will then be displayed

Steve Sutton
4 Barnfield Avenue
London
W7 1BN

Transaction

Booking In

DateSC278
SC Number

On Order

Go

Tagged Labels

All Labels

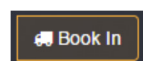
List

Book In

<input checked="" type="checkbox"/>	Description	Qty	Depot	Location	Serial	Status	
<input checked="" type="checkbox"/>	D0B23100 MPN SIDE CASE SH23	1	Warehouse		-	Outstanding Awaiting stock	

1 displayed.

Tag the required products by checking the box beside the SKU and press 'book in'



Book In Selected Products

If there are more than 250 products to book-in only the first 250 will be booked into stock. You will then have to go back to 'on order' and press 'book in' again.

Are you sure you want to book in the selected products?

Purchase Reference/Note

Cancel

Book In

Confirm the action by press 'book in'

The product will then be added to stock and available to sell to another customer.

Raising a Sales Proforma or Sales Quote

Press 'new Pro-forma (SP)' on the main sales menu bar to start the process.

New Transaction

✱ Select Account

Sales Proforma

06/06/2024 11:42:30

Date

test agent name

Agent

Customer

Account Group

SP*

Reference

Department 2

Department

Open

Status

Products

CSV+ Product

Description	Qty	Unit	%	Net	Tax	Vat	Line
				Net			£
				Vat			£
				Total			£

Notes

Terms and Conditions

Press '+select account'

✱ Select Account

The customer picker dialogue will now be displayed.

Transaction

Account Name

Search by Name or Postcode

Address

Address 1

Address 2

Address 3

Address 4

Post Code

Post Code

Phone

Phone

Email

Email

Account Code

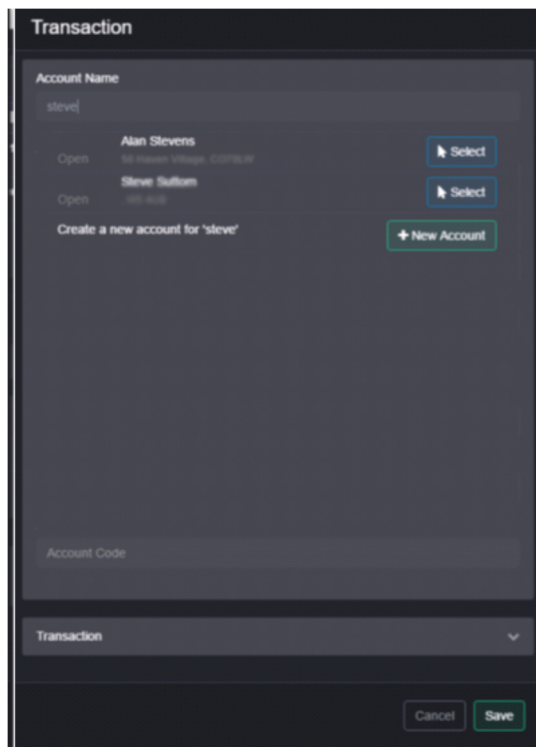
Account Code

Transaction

Cancel

Save

Enter the customer's name, account code or postcode into the 'account name' box. As you type the nearest match will be displayed, if it's a new customer press '+ New Account'

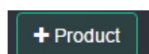


The screenshot shows a 'Transaction' form. At the top, there's a header 'Transaction'. Below it, a section titled 'Account Name' contains a search bar with 'steve' entered. Below the search bar, there are two entries: 'Alan Stevens' with address '50 Haven Village, CO 80108' and 'Steve Sullivan' with address '100 1st St'. Each entry has a 'Select' button. Below these is a button labeled '+ New Account' with the text 'Create a new account for 'steve'' above it. At the bottom of the form, there's an 'Account Code' field, a 'Transaction' dropdown menu, and 'Cancel' and 'Save' buttons.

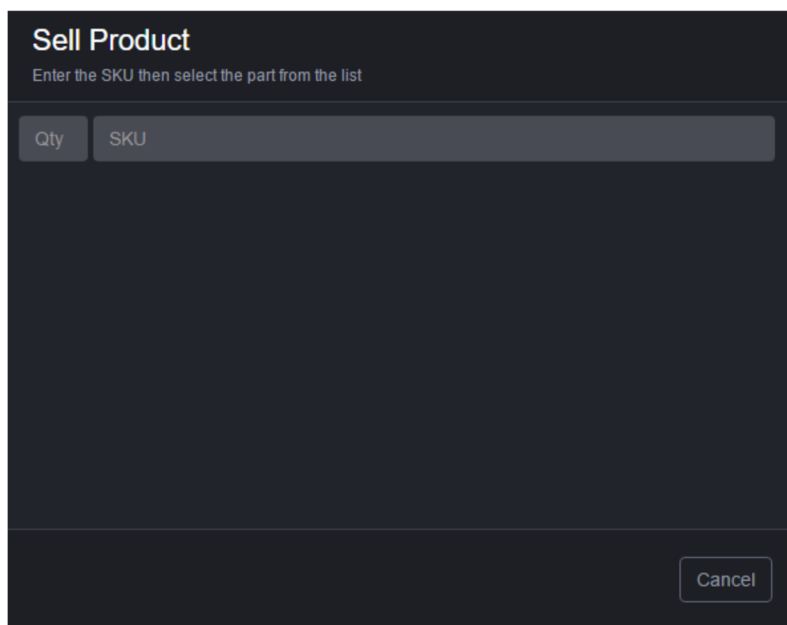
Press 'select' beside the required customer on the list and press 'save'

Adding a product to the pro-forma

Press '+product'



A button with a green border and a green plus icon, labeled '+ Product'.



The screenshot shows a 'Sell Product' form. The title 'Sell Product' is at the top, followed by the instruction 'Enter the SKU then select the part from the list'. Below this is a search bar with 'Qty' and 'SKU' labels. The rest of the form is empty, and there is a 'Cancel' button at the bottom right.

Enter the SKU, as you type the nearest match will be displayed.

Sell Product



Enter the SKU then select the part from the list

Qty:

D0B23100	Side Case Sh23 Mpn	+ Add
D0B26100	Shad Sh26 Top Box Mpn	+ Add
D0B2900	Top Case Sh29 Black :Top Cases Mpn	+ Add
D0B2900EX	Top Case Sh29 Explorer :Top Cases Mpn	+ Add
D0B29100	Shad Sh29 Top Box Mpn	+ Add

Cancel

Press '+add' to add the product to the pro-forma. Stock levels will not be reduced.

Description	Qty	Unit	%	Net	Tax	Vat	Line	
✓ D0B3300	1.00	8.33	0.00	8.33	T1	1.67	10.00	 
SHAD SH33 TOP BOX, RED REFLECTOR								

Finishing a Sales Pro-forma

When you are ready to finish press 'Finish SP'

✓ Finish SP

The finish dialogue will then be displayed.

Close this Sales Proforma

Are you sure you want to close this Sales Proforma?

Close Finish SP

Click 'Finish SP'.

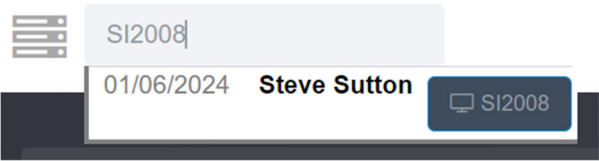
Turning a Sales Pro-forma or Quote into a Sales Invoice or Work Order

Display the relevant Pro-forma then press '+SI' or '+WO' to turn the Pro-forma into a sales invoice or work order.

+ SI + SO + WO

Searching for an Invoice

You can enter the transaction reference i.e. SI23412 into the universal search box to find an invoice.



You can also search by customer order number.

Click on ‘sales invoice’ reference to display the transaction.

Alternatively, you can use the ‘search invoices’ menu item in the sale screen to search for a specific invoice.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Sales

In Progress

Open Orders5

Open Invoices84

Open Proformas1

Open Quotes

Recurring Invoices

Transactions

New Invoice (SI)

New Order (SO)

New Pro-Forma (SP)

New Quote (SQ)

New Credit (SC)

SI2008

Search Invoices

Accounts

New Customer

STEVE SUTTON

Search Customers

Catalogue

Fitment EPC

Motorcycle EPC

Reports

Day Totals (Basic)

Day Totals (Detail)

Day Totals (Summary)

Debtors

Loyalty Points

Sales (Invoice)

Sales (Product)

Sales (Salesman)

Sales (Summary)

Search Transactions

Transaction Ref

Starting

Keyword

Go

Copy Invoice

Show10entries

CopyCSVPDF

Search:

Reference	Date	Account	Status	
SI2008	01/06/2024 12:54:04 test agent name Department 2	Steve Sutton 4 Barnfield Avenue W7 1BN	£ 600.0000 2 items	<div>View</div>
SI2009	01/06/2024 12:30:56 test agent name Department 2	Workshop	£ 0.0000 0 items	<div>View</div>
SC278	01/06/2024 00:00:00 test agent name Department 2	Steve Sutton 4 Barnfield Avenue W7 1BN	£ 360.0000 1 items	<div>View</div>
SI2007	31/05/2024 17:05:08 test agent name Department 2	Ian Smith Altered 3 CM14WH	£ 2000.0000 1 items	<div>View</div>
SI2006	23/05/2024 00:00:00 test agent name Department 2	Mark Sadler Derbyshire Motorbike School Unit 8 Block 13 DE55 4BR	£ 0.0000 0 items	<div>View</div>
SI2005	21/05/2024 10:11:58 Test User Department 2	Tricia King 63 Heol Fawr CF46 6NP	£ 331.6166 5 items	<div>View</div>
SI2004	21/05/2024 10:04:30 Test User Department 2	Tricia King 63 Heol Fawr CF46 6NP	£ 11990.0000 1 items	<div>View</div>
SI2003	21/05/2024 09:52:30 Test User Department 2	Workshop	£ 60.0000 1 items	<div>View</div>
SI2002	18/05/2024 10:41:37 test agent name Department 2	Dave Smith1234 120 Macfarlane Road W12 7LA	£ 121.2000 1 items	<div>View</div>
SI1987	18/05/2024 10:14:35 Test User Department 2	Hire Fleet 2	£ 211.6200 4 items	<div>View</div>

Previous

1

2

3

4

5

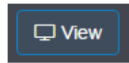
...

10

Next

Enter the invoice number, order no, etc. and press ‘return’. A list of matching invoices will be displayed.

Click ‘View’ to display the required invoice.



Transactions are also displayed on the relevant customers account.

Creating a new Account

Pressing 'new customer' on the sales screen starts the process of creating a new customer account.

CloudDMS Universal Search... Department 2 | Warehouse Test Agent Name

Sales

New Account
Enter the new account details and press 'Save'

Account Code
Account Code

Account Group
customer

Account Status
Open

Marketing Depot
-

Default Sales Department
-

Sales Agent
-

Account Name
ACCOUNT NAME

Address
Address

Post Code
POST CODE

Country
United Kingdom

Web Site
WEB SITE

Phone
PHONE

Mobile
MOBILE

Email
email

☒ No marketing calls

☒ No marketing SMS

☒ No marketing email

Cancel Add New Account

- Account code. Optional. You can enter an account code for the customer. If you have already entered the account name pressing the down arrow will generate a selection of unique account references.
- Account status
 - Open
 - Closed
 - Stop
 - Liquidation
- Account group. Select the accounts group. You can add new groups in the company settings screen.

- Default tax code. If selected the products tax code will be overridden by the customer's default code. This is used when selling internally or to a EU customer.
- Default Sales agent. Setting this will allocate the default agent as the salesman for all sales to this customer.
- Credit limit. The account balance will change to red if they owe more than the credit limit.

Enter the customer details as required a press 'save'

Customer Accounts

The customer account window contains the customer billing details and previous transactions.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Sales

In Progress

Open Orders5

Open Invoices84

Open Proformas1

Open Quotes

Recurring Invoices

Transactions

New Invoice (SI)

New Order (SO)

New Pro-Forma (SP)

New Quote (SQ)

New Credit (SC)

SI2008

Search Invoices

Accounts

New Customer

STEVE SUTTON

STEVE SUTTON

Search Customers

Catalogue

Fitment EPC

Motorcycle EPC

Reports

Day Totals (Basic)

Day Totals (Detail)

Day Totals (Summary)

Debtors

Loyalty Points

Sales (Invoice)

Sales (Product)

Sales (Salesman)

Sales (Summary)

Sales (Vehicle)

SUT001

Account

Contact

Document

STEVE SUTTON

278A Northfields Ave
Ealing
London
W5 4UB

account note.

Open Status

Customer Group

Shop Marketing Depot

None Tax Code

25/05/2024 Last Transaction

Agent

Transactions

Account

View

Allocate

Payment

All

All

All

New Transaction

Vehicle Purchase Invoice

Open Department 2

38 minutes ago

test agent name

EO61DMZ

Associated

£ 1000.00

PI414

Vehicle Purchase Invoice

Closed Department 2

25/05/2024

test agent name

EY65UBB

Associated

£ 1002.20

Outstanding £ 822.20

PI410

Service Sales Invoice

Closed Department 1

18/05/2024 10:01:55

test agent name

EO61DMZ

Associated

£ 46.00

SI1971

Sales Invoice

Closed Department 1

12/03/2024 23:07:00

API Agent

Associated

£ 64.00

Outstanding £ 54.00

SI1968

Vehicle Sales Invoice

Open Department 1

04/03/2024 15:51:35

test agent name

Associated

£ 8654.92

SI1972

Service Work Order

Closed Department 1

WO885

Service Work Order

Closed Department 1

WO877

Sales Invoice

Closed Department 1

12/12/2023 10:27:25

test agent name

Associated

£ 180.00

SI1935

Sales Invoice

Closed Department 1

10/12/2023 10:22:47

test agent name

Associated

£ 100.00

SI1934

Account

£ -10,952.20

Balance in credit

£ 25.00

Credit Limit

£ 541.19

YTD Sales

£ 541.19

Lifetime Sales

£ 8,654.92

Open Balance

3120

Loyalty Points

Product

Back Orders

Sales

Discount

Discount

Match

Base

Percent

Default

Sell

50

Product Code: AA

Sell

- 15 %

Associated

Associated

Vehicle

EO61DMZ

KAWASAKI

MAKE

ZX1000HBF ABS

MODEL

BLACK

COLOUR

JKAZXT00GHA004716

VIN NUMBER

ENGINE NUMBER

2

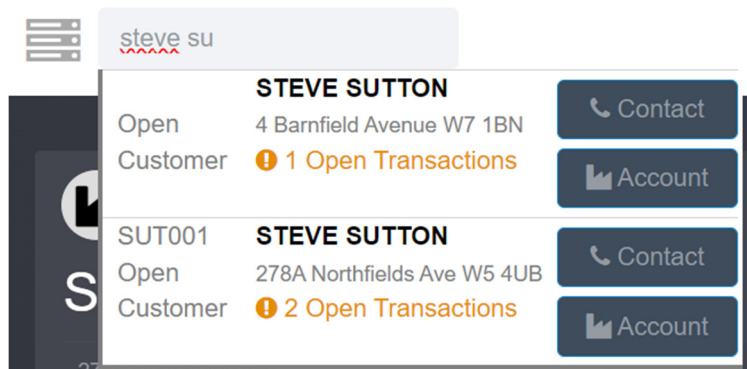
MILEAGE

01/01/1900

03/03/2025

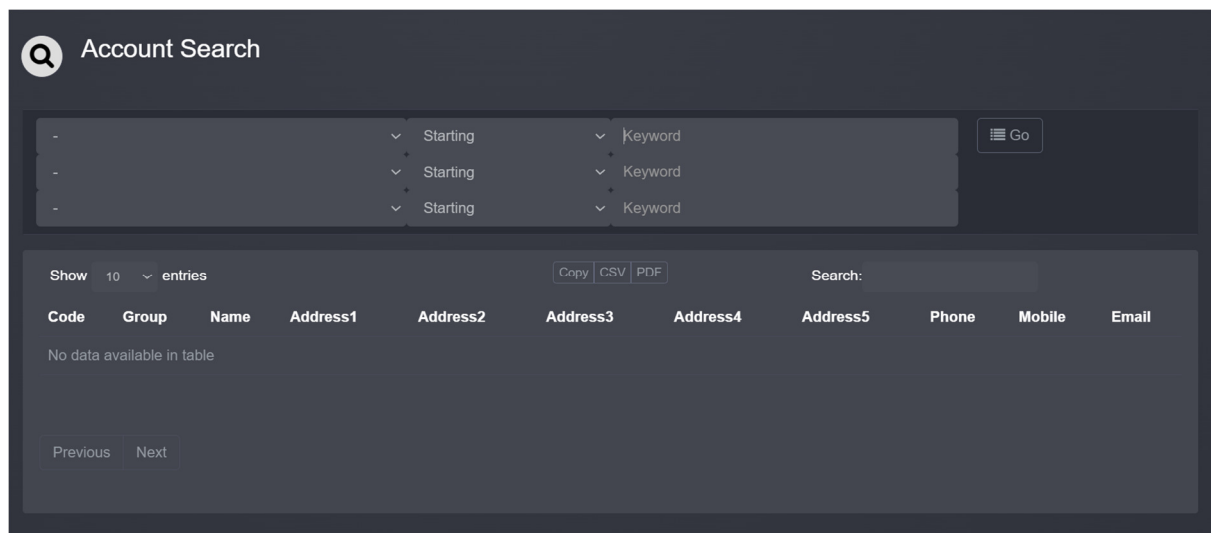
Find a customer account

You can search for a customer account by typing the customer account code, postcode or name in the 'universal search' box



Clicking on 'account' next to the correct name will display the customer's account.

Alternatively, you can click on 'search customers' in the 'sales' screen.



Enter the customer's postcode, name or account code and enter.

You can display the customer's account by clicking 'view'

Making an account payment

On the customer's account screen press the '+Payment' button.

+ Payment

Payment On Account

Department

department 2

Type

Receipt (Money In)

Account

card

Details

Account Payment

Authorisation Code

Amount

0.00

Setup PDQ

Close

Save

Select the payment type:


1. 'Receipt' this is when you receive a payment from the customer. i.e. money in
2. 'Payment' this is when you pay money to a customer i.e. money out

Enter the payment method and amount, then press 'save'

The payment is recorded on the customer's account.

Allocating account payments.

On the customer's account screen press 'Allocate'.

 Allocate

A list of outstanding invoices, credits and payments will then be displayed.

Allocate Payments				
Please select 1 debit amount and 1 matching credit amount then press 'Allocate'				
Date	Type	Details	Outstanding	Receipt
25/05/2024 14:12:17	PA	Account Payment	50.00	0
25/05/2024 00:00:00	PI	PI410	822.20	0
22/11/2023 13:33:26	SA	Online Windcave Payment	91.00	0
06/12/2023 16:54:02	SA	Account Payment	9.00	0
10/12/2023 10:17:38	SA	Online Windcave Payment	21.00	0
15/03/2024 13:03:45	SA	(WindCave)	1.00	0
15/03/2024 13:08:27	SA	AC (WindCave)	2.00	0
18/05/2024 10:03:14	SA	Account Payment	10000.00	0
06/12/2023 17:08:48	SC	SC273	72.00	0
06/12/2023 17:10:13	SI	SI1931	26.00	0
12/03/2024 23:07:00	SI	SI1968	54.00	0
			Balance	0.00
Close				

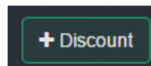
Enter the amount beside each payment and press 'allocate' at the bottom of the dialogue.

If you cannot see the 'allocate' button, then the payments do not balance.

Please note that amounts must balance. i.e. invoices – receipts = 0

Adding a discount scheme

On the customer's account press '+Discount'



The 'new sales discount' dialogue will be displayed.

New Sales Discount

Brand

Sales Nominal

Purchase Nominal

Based On

Percentage

Discount are applied to the customer's account group price.

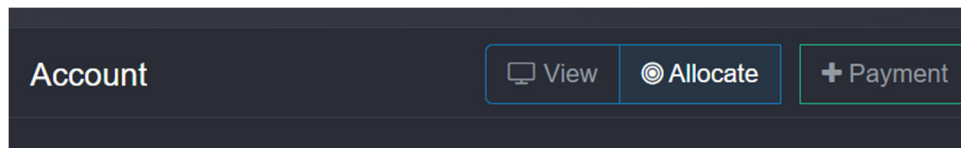
Enter the brand and/or nominals then the percentage and press 'save'

Active discounts are listed on the customer account page.

Match	Base	Percent		
SHAD	Sell	- 50 %		
MAX	Sell	- 40 %		
Tucano Urbano	Sell	- 35 %		

Account statements

On the customer's account screen press 'View' in the account section.

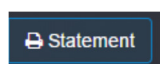


This displays the customer account ledger showing all the invoices, credits, payments etc.

The screenshot displays a customer account ledger. At the top, there are filters for dates (02/06/2023 to 02/06/2024), a dropdown for "All", and a "Go" button. On the right, there are buttons for "Statement" and "Print Statement". Below the filters, there are options to "Show 10 entries" and buttons for "Copy", "CSV", and "PDF". A search bar is also present. The main table has columns: Date, Type, Department, Agent, Details, Outstanding, Debit, Credit, and Balance. The table lists several transactions, including payments and allocations. At the bottom, there is a summary row and a pagination control.

Date	Type	Department	Agent	Details	Outstanding	Debit	Credit	Balance
21/11/2023 14:52:45	SA	Department 1	-	Card. Online Windcave Payment	0.00		60.00	-60.00
21/11/2023 14:53:03	SI	Department 1	test agent name	SI1912	0.00	60.00		0.00
21/11/2023 15:12:56	SA	Department 1	-	Card. Online Windcave Payment	0.00		70.00	-70.00
22/11/2023 12:13:39	SI	Department 1	test agent name	SI1913	0.00	70.00		0.00
22/11/2023 12:22:11	SC	Department 1	test agent name	SC:271	0.00		120.00	-120.00
22/11/2023 12:28:16	PA	Department 1	test agent name	Card. SC271	0.00	120.00		0.00
22/11/2023 13:33:26	SA	Department 1	-	Card. Online Windcave Payment	91.00		101.00	-101.00
	- Split	08/03/2024 19:07:08		£ 10.00 allocated to SI1916				
22/11/2023 13:38:46	SA	Department 1	-	Card. Online Windcave Payment	0.00		20.00	-121.00
22/11/2023 13:39:39	SA	Department 1	-	Card. Online Windcave Payment	0.00		24.00	-145.00
					903.20	11855.40		-10952.20

Press 'Print Statement' to generate a PDF statement.



Statement.html

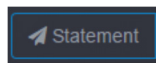
1 / 2

MOTORCYCLE PARTS NETWORK
www.motorcyclepartsnetwork.co.uk
sales@motorcyclepartsnetwork.co.uk
Deep Blue Systems Ltd t/a MPN
Unit 4 Midbrook Court, Bletchley, Milton Keynes, MK14 5FH

Account Statment

Date	Order No	Reference	Outstanding	Balance
27/03/2017	1065669753947	SI 201076	303.48	11622.38
28/03/2017	205753391782	SI 201118	138.49	441.90
29/03/2017	419561702829	SI 201142	264.26	706.16
29/03/2017	419561805308	SI 201143	293.98	1000.14
29/03/2017	419564331223	SI 201152	207.48	1207.62
29/03/2017	419564331393	SI 201153	450.97	1658.59
30/03/2017	633363023245	SI 201177	115.49	1774.07
29/03/2017		SC 201138	29.66	1744.42
31/03/2017	63336382898	SI 201205	136.69	1881.11
31/03/2017	633363828794	SI 201206	120.49	2001.59
31/03/2017	633366106291	SI 201207	128.98	2130.57
31/03/2017	847139673370	SI 201211	188.00	2318.57
31/03/2017	847139673151	SI 201215	235.99	2554.56
31/03/2017	847141734147	SI 201223	61.80	2616.36
03/04/2017	201061297968	SI 201279	437.97	3054.32
03/04/2017	201061297374	SI 201280	379.97	3434.29
03/04/2017	201061305935	SI 201278	29.30	3463.59
03/04/2017	201067077847	SI 201289	117.99	3581.57
03/04/2017	201067077728	SI 201288	135.99	3717.56
03/04/2017	201070198459	SI 201298	278.98	3996.54
04/04/2017	414853981578	SI 201310	121.99	4118.52
04/04/2017	414853981214	SI 201309	340.48	4459.00
04/04/2017	414856744295	SI 201314	378.98	4837.98
05/04/2017		SC 201338	101.50	4736.48
05/04/2017	629643954741	SI 201340	200.99	4937.47
06/04/2017	629665149529	SI 201363	160.00	5097.47
06/04/2017	62967264972	SI 201374	371.98	5469.44
07/04/2017	842470547755	SI 201409	293.49	5762.93
07/04/2017	842474579773	SI 201416	159.49	5922.42
10/04/2017	410134170774	SI 201503	72.79	5995.21
10/04/2017	410134170758	SI 201502	460.48	6455.69

Alternatively, you can press Email Statement'



The email dialogue will then be displayed.

Email Account Statment

Header

Mpn

To:

From:

steve@deepbluesystems.com

Subject:

Account Statment

Message:

This statement is correct as of 15/04/2017 16:26:56

Cancel

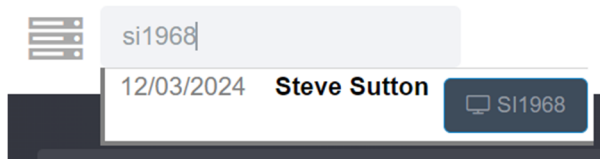
Send

Make sure a email address is selected in 'to' and press 'send'

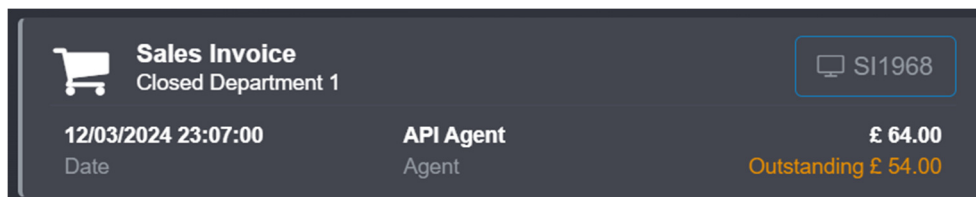
A statement will be emailed to the customer via the CloudDMS email servers. The statement also includes links to pdf copy invoices.

Displaying an Invoice

You can search for an invoice by typing the transactions reference into the universal search box. i.e. SI45511



Alternatively, you can display an invoice by clicking the transactions reference in the customer's account window.

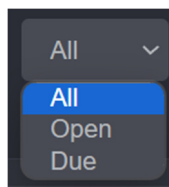


Customer account activity

The customers summarised account activity is displayed at the bottom of the customer account window.

On the customer's account window 'orange' invoice is open.

There are various filter options:



Customer backorders

The customers back-order list is displayed by pressing the ‘back orders’ button.

Back Orders

Show	10	entries	Copy	CSV	PDF	Search:
SKU	Description	Ordered	Sold	Status		
USED-VEHICLE	Used Vehicle	10/09/2016 00:00:00	06/03/2024 11:30:30	In Stock Awaiting Dispatch		
USED-VEHICLE	Used Vehicle	01/10/2016 00:00:00	10/11/2017 10:46:59	In Stock Awaiting Dispatch		
NEW-VEHICLE	NEW-VEHICLE	29/11/2016 00:00:00	19/10/2017 16:59:18	In Stock Awaiting Dispatch		
NEW-VEHICLE	NEW-VEHICLE	29/11/2016 00:00:00	19/10/2017 16:58:21	In Stock Awaiting Dispatch		
D0B36100	SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	30/03/2017 18:10:51	25/09/2017 12:32:58	In Stock Awaiting Dispatch		
D0B26100	SH26 Top Box	14/05/2017 15:09:34	26/11/2017 16:26:05	In Stock Awaiting Dispatch		
D0B23100	SIDE CASE SH23	14/07/2017 15:45:03	26/11/2017 16:03:39	In Stock Awaiting Dispatch		
D0B23100	SIDE CASE SH23	14/07/2017 15:49:25	19/11/2017 10:33:44	In Stock Awaiting Dispatch		
NEW-VEHICLE	NEW-VEHICLE	10/08/2017 10:56:49		In Stock Awaiting Dispatch		
USED-VEHICLE	Used Vehicle		10/11/2017 19:25:04	In Stock Awaiting Dispatch		

Previous12345...10Next

Adding vehicles or associated items to a customer.

You can associate vehicles delivery addresses etc. with a customer.

From the customer’s account press ‘+Associated’

+ Associated

Boat

Bow Thruster

Delivery

MOT

outboard

pistol

test

Trailer

Vehicle

Select the required type from the drop-down list.

Enter the details and press 'save'.

Electronic Parts Catalogues (** Depreciated)

For motorcycle and marine customers, the DMS includes a EPC converting over 20,000 models.

Select 'Motorcycle EPC' from the sale menu

The screenshot shows a web browser window with the URL <https://deepblue.systems/EPC/?Type=Motorcycle>. The page title is "Motorcycle EPC". The header includes the "MOTORCYCLE PARTS NETWORK" logo, a "Universal Search..." bar, and a user profile for "Stephen Sutton".

The main content area is titled "Motorcycle Parts Network" and "Motorcycle Electronic Parts Catalogue". It features a search bar and a table of motorcycle models.

Model	Year	VIN	
KAWASAKI ER6F ECS	2012	JKAEX650E	View
Vespa GTS125 4T (Euro 3) (UK)	2007-11	ZAPIM31300	View

The left sidebar contains a menu with the following sections:

- Sales** (selected)
- In Progress**
 - Open Invoices
- Transactions**
 - New Invoice
 - Last Invoice
 - Search Invoices
- Accounts**
 - New Customer
 - Last Customer
 - Search Customers
- Catalogue**
 - Motorcycle EPC (selected)
- Reports**
 - Sales
 - Day Totals
 - Debtors

The footer includes the "Cloud DMS" logo, "© Copyright 2017", and "Deep Blue Systems".

Enter a model name or registration number and press 'enter'. A list of matches id then displayed.

Motorcycle EPC x

Secure | https://deepblue.systems/EPC/?Type=Motorcycle&searchText=MT09+TRACER

MOTORCYCLE PARTS NETWORK MT09 TRACER Stephen Sutton

Sales

In Progress

Open Invoices

Transactions

New Invoice

Last Invoice

Search Invoices

Accounts

New Customer

Last Customer

Search Customers

Catalogue

Motorcycle EPC

Reports

Sales

Day Totals

Debtors

Motorcycle Parts Network
Motorcycle Electronic Parts Catalogue

MT09 TRACER

Model	Year	VIN	
YAMAHA MT09 TRACER ABS	2017		View
YAMAHA MT09 TRACER ABS	2016	JYARN29F	View
YAMAHA MT09 TRACER ABS	2015	JYARN29F	View

Cloud DMS
© Copyright 2017
Deep Blue Systems

Press 'view' beside the required model.

YAMAHA MT09 TRACER x

https://deepblue.systems/EPC/Display/?ID=26039&pageID=13

MOTORCYCLE PARTS NETWORK Universal Search... Stephen Sutton

Sales

YAMAHA MT09 TRACER ABS
2015 (JYARN29F)

Section Crankcase

+ Sell

#	SKU	Image	Description
1	1RC151000900		Crankcase Assembly Mt09
2	5EB151550000		Nozzle 3 Crankcase
3	932100409200		O-Ring (210)
4	995301001400		Pin, Dowel
5	903381626200		Plug

Cloud DMS
© Copyright 2017
Deep Blue Systems

Select the required page from the drop-down list.

Selling from the EPC

You can check the parts you want to sell

☒ 1 65323000A7 Floorboard Platinum 686

Then press '+Sell' to add them to an open invoice with a single click.

+ Sell

Sell Product

Book stock to an existing open sales invoice or sales order

Date	Reference	Account	Total	
12/04/2017 14:30:29	WO #000010	Steve Sutton	£ 0.00	Select

Other Open Transactions

Cancel

Sales reports

The sales section has a large selection of reports covering all aspects of invoicing as well as day totals.

Sales (Invoice)

Press 'sales (invoice)' on the 'sales' screen to see a report on invoices issued.

CloudDMS Universal Search... Department 2 | Warehouse Test Agent Name

Sales

Sales Report
Closed sales invoice report

01/06/2024 To 01/06/2024 Basic All Customer All Sub Type

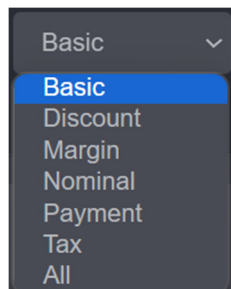
Go Copy Invoice

Show 10 entries Copy CSV PDF Search:

Date	Department	Agent	Ref	U1	U2	Invoice Type	Account	Country	Debit	Credit	Outstanding
01/06/2024	Department 2	test agent name	SI2008	N5068	KAWASAKI	Service	Steve Sutton		600.00	0.00	600.00
Total									600.00	0.00	

Previous 1 Next

There are 7 versions of the sales invoice report:



- Basic. Lists invoice details and the total amount including VAT
- Tax. Breaks down each invoice to its tax amounts
- Nominal. Breaks down each invoice by product sales nominal
- Discount. Shows amount discounted
- Margin. Shows Margin
- All. Includes everything.

You can also click on sales dashboard summary figures to run the report over a common range,

You can filter the report by department and user agent.

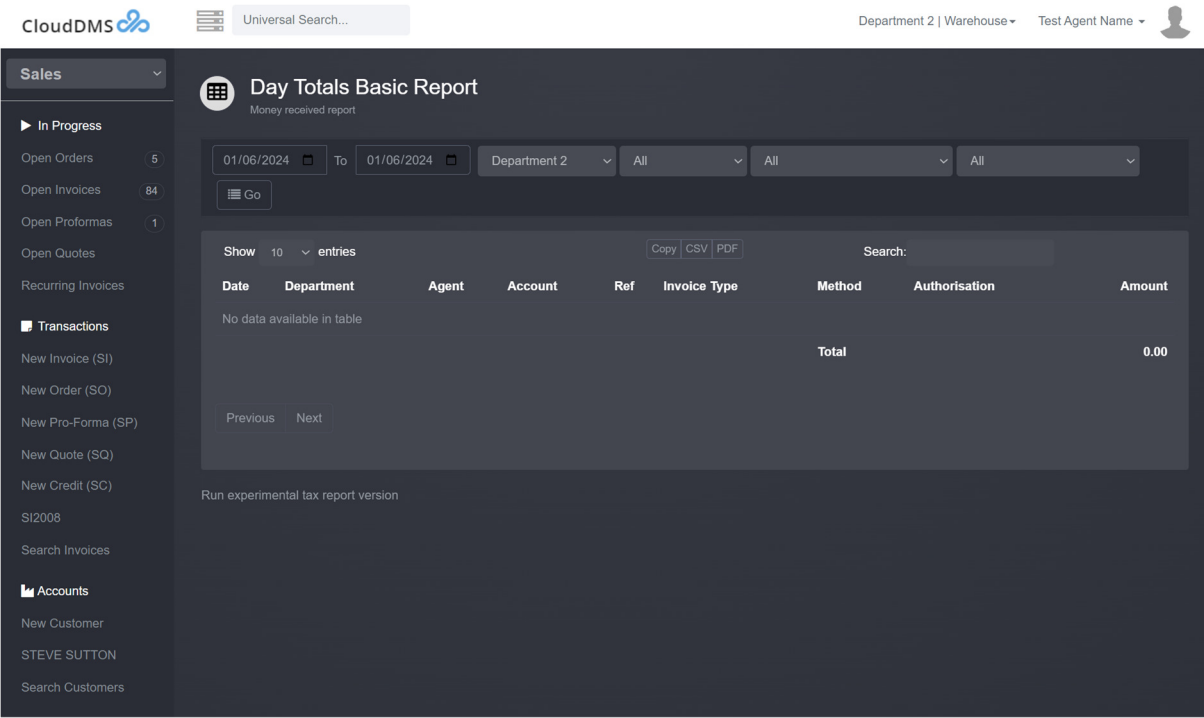
Press 'Go' to run the report



Day totals (basic)

The day totals report shows you a list of monies received broken down by payment. Each payment receives its own line on the report.

Press ‘day totals (basic)’ on the ‘sales’ screen



Select the required date period and press ‘go’ to run the report.



You can also filter the report by department, account group, payment type and user agent.

Day totals (detail)

Similar to ‘day totals (basic)’ but each payment method is given its own column in the report.

Press ‘day totals (detail)’ on the ‘sales’ screen to run the report.

Day Totals Detail Report

Money received report

06/06/2024

To

06/06/2024

Department 2

All

All

All

Go

Show

10

entries

Copy

CSV

PDF

Search:

Date	Department	Agent	Account	Ref	Invoice Type	Authorisation Code	Debit	Credit	Card	PayPal
06/06/2024 11:25:47	Department 2	test agent name	John Smith	SI1380	Service		0.00	8.34	8.34	-
06/06/2024 11:30:57	Department 2	test agent name	Joe Bloggs	SI738	Vehicle		0.00	1.00	1.00	-
06/06/2024 11:34:44	Department 2	test agent name	Andrew Webster	SI812	Service		0.00	2.00	2.00	-
06/06/2024 12:17:41	Department 2	test agent name	Joe Bloggs	SI738	Vehicle		0.00	10.00	10.00	-
06/06/2024 12:19:27	Department 2	test agent name	Joe Bloggs	SI738	Vehicle		0.00	5189.00	-	5189.00
Total							0.00	5210.34	21.34	5189.00

Previous

1

Next

Day totals (summary)

The summary report summarises the total amount taken during the specified period by payment type. Used for reconciliation.

Press ‘day totals (summary)’ on the ‘sales’ screen to run the report.

Day Totals Report, Summary

Summary of money received report

06/06/2024

To

06/06/2024

Department 2

All

Go

Show

10

entries

Copy

CSV

PDF

Search:

		06/06/2024
Cash		0.00
Card		21.34
Customer Transfer		0.00
Black Horse Finance		0.00
MotoNovo Finance		0.00
PayPal		5,189.00
Cheque		0.00
Warranty		0.00
Supplier Return credit		0.00
Finance Settlement		0.00
Total		5,210.34

Previous

1

2

Next

Debtors

Press ‘Debtors’ on the ‘sales’ screen to run the debtors report. This report will list all accounts who are in debt.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Sales

In Progress

Open Orders5

Open Invoices84

Open Proformas1

Open Quotes

Recurring Invoices

Transactions

New Invoice (SI)

New Order (SO)

New Pro-Forma (SP)

New Quote (SQ)

New Credit (SC)

SI2008

Search Invoices

Accounts

New Customer

STEVE SUTTON

Search Customers

Catalogue

Filment EPC

Motorcycle EPC

Reports

Debtors Report

Customer who owe money

01/06/2024

Customer

Go

Statements

Statements

Show 10 entries

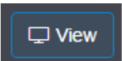
Copy CSV PDF

Search:

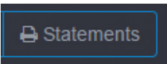
Account Code	Customer	Balance	<30	30-60	60-90	Older	
	Radek Losos	200.00				200.00	View
	STEPHEN SUTTON DEEP BLUE SYSTEMS	21,490.50				21,490.51	View
	A TEST ACCOUNT	81.60				81.60	View
	KEVIN DODSWORTH	2,100.36				2,100.36	View
	JAMES HEAL FOUR	483.29				483.29	View
	TEST44	216.00				216.00	View
	Nick Coxon	9.00				9.00	View
	JOHN DALTON	9.41				9.41	View
	OMEGA YAMAHA	7,995.60		7,995.60			View
	JAMES BROWN	23,940.70				23,940.70	View
Total		629,944.04	3,350.00	83,674.03	-1,780.00	545,100.50	

Previous12345...18Next

Pressing ‘view’ beside each name will take you to the sales account activity



Press ‘print statements’



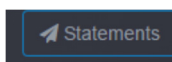
This will create a pdf document with a statement for each debtor.

Deep Blue Systems Ltd
Unit 4 Midbrook Court
Stakehurst
Milton Keynes
MK14 5FH
sales@deepbluesystems.com
www.deepbluesystems.com

Account Statement

Date	Order No	Reference	Outstanding	Balance
01/03/2017	884532930872	SI 200004	16.91	89.72
06/03/2017	666037566620	SI 200221	66.29	156.01
06/03/2017		SC 200257	4.80	151.21
06/03/2017		SC 200240	61.74	89.47
24/03/2017	651936673323	SI 200993	35.09	124.56
27/03/2017	1065670133621	SI 201079	69.54	194.11
12/04/2017	623958487864	SI 201581	126.75	248.06
Payment Account Details			Amount Due	£248.06
Account Name : Deep Blue Systems Ltd				
Account Number : 80790966				
Account Sort Code : 20-27-48				

Press 'Email Statements'



This will display the email statements dialogue

Email All Statements

From:
steve@deepbluesystems.com

Subject
Account Statement

Statement Header
Software Support

Cancel Email

Press 'email' to send all the statements.

Loyalty Points Report.

Product lines can be allocated a number of loyalty points. The value of a loyalty point can be configured in ‘company settings’. Your customers will then accumulate loyalty points as the spend money with you.

The loyalty points report allows you to see the current point balance for all your customers.

Loyalty Points Report

Customer who have uncredited loyalty points

06/06/2024

Customer

Go

Show 10 entries

Copy CSV PDF

Search:

Account Code	Customer	Balance		
	mark james	10	View	Redeem
	OVERSEAS	100	View	Redeem
	SMITHY 21	10	View	Redeem
	EDIT TEST 5	200	View	Redeem
	DAVE SMITH	310	View	Redeem
	NEIL MUTCH	10	View	Redeem
	MATT AITKEN	10	View	Redeem
	STEPHEN SUTTON	110	View	Redeem
	JOHN SMITH	100	View	Redeem
	LEWIS HAMILTON	100	View	Redeem
Total		10,160		

Previous

1

2

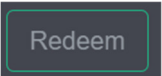
3

4

5

Next

When your customer wants to redeem their points press ‘redeem’ beside the relevant account.



A special credit marked ‘Points Redeem’ will then be added to their account. This credit can be allocated against an invoice as payment.

Allocate Payments

Please select 1 debit amount and 1 matching credit amount then press 'Allocate'

Date	Type	Details	Outstanding	Receipt
16/08/2021 12:32:18	PI	PI277	1.00	0
06/06/2024 12:26:52	SA	110 Loyalty Points Redeem	1.10	0
31/07/2022 13:15:30	SI	SI1676	3105.07	0
			Balance	0.00

Close

Sales (product)

The product sales report lists all Normal products sold during a specified period. The date a product was added to a transaction is used, NOT the transaction date.

Sales (Product).

• Do NOT use this report to find out the value of your sales. Use 'Sales (Invoice)'

• Only products of type 'normal' are included

• Nonstockables and vehicles are not included

• The date a product was added to a transaction is used, NOT the transaction date.

• Credited parts are not included

01/06/2024

To

06/06/2024

Department 2

Warehouse

All

All

All

All

Go

Show 10 entries

Copy CSV PDF

Search:

SKU	Description	Brand	Sales	Ave Buy	Buy Line	Ave Sell	Sell Line	Margin	Margin %
D0B37100	Shad SH37 Top Box	MPN	2.00	50.00	100.00	100.00	200.00	100.00	50.0%
D0B36100	SHAD SH36 SIDE CASES (PAIR) - BLACK-CARBON - PAANNIER - REQUIRES MODEL SPECIFIC 3P FITTING KIT	MPN	1.00	100.00	100.00	250.00	250.00	150.00	60.0%
D0B3211B	Test Prduct		1.00	0.00	0.00	101.00	101.00	101.00	100.0%
			4.00		200.00		551.00	351.00	63.7%

Previous 1 Next

Sales (Salesman)

This report shows the number of products sold, sales total and margin for each agent over a specified period.

Sales (Salesman)

Sales by salesman. Report is based on the date a products was added to a sales invoices, not the invoice date. Open and Closed invoices are included.

01/06/2024

To

06/06/2024

Go

Show 10 entries

Copy CSV PDF

Search:

Agent	Product Count	Sales Total	Margin Total	Margin (%)
test agent name	5.00	601.50	346.50	57.6%
Total	5.00	601.50	346.50	57.6%

Previous 1 Next

Sales (Summary)

Summarises sales by tax code over a specified period.

Sales Summary Report

Closed sales invoice report

06/06/2024

To

06/06/2024

All

Customer

All

Go

Show

10

entries

Copy

CSV

PDF

Search:

Date	Debit	Credit	Outstanding	Zero Rated Net (T0)	Zero Rated Tax (T0)	Standard Rated Net (T1)	Standard Rated Tax (T1)	Exempt Net (T2)	Exempt Tax (T2)	Sale of goods to VAT registered customers in EC. Net (T4)	Sale of goods to VAT registered customers in EC. Tax (T4)	Margin Scheme Net (T5)	Margin Scheme Tax (T5)	lower 5% rate Net (T7)	Ion
06/06/2024	5.87	0.00	3.87	0.00	0.00	4.89	0.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	C
Total	5.87	0.00													

Previous

1

Next

Sales (Vehicle)

Vehicle sales report including sold vehicle details, margin, internal costs and commissions. The report can be run over a specified period and filtered by department, account group and agent.

Vehicle Sales Report

Closed vehicle sales invoice with nominal breakdown report

01/05/2024

To

06/06/2024

Basic

All

Department 2

All

Go

Show

10

entries

Copy CSV PDF

Search:

Date	Department	Agent	Ref	Category	Account	Post Code	Serial	Reg	Make	Model	Colour	VIN	Total	Paid	Part Ex / Linked	Outstanding	Vehicle Buy	Vehicle Sell	Vehicle Margin	Commission	Internal Costs	Sale Margin Net	Days On Stock	Motorcycle Unit	Motorcycle Buy	Motorcycle Sell
10/05/2024	Department 2	Test User	SI2000	USED-VEHICLE	Mr Test	U6018	EU00VXN		KANASAKI	ZN 755 RSP	BLACK	JKAZR75JUKA072477	1,000.00	1,000.00	0.00	0.00	1,000.00	1,000.00	0.00	0.00	0.00	0.00	2247			
21/05/2024	Department 2	Test User	SI2004	USED-VEHICLE	Tricia King	c16 Imp	U6139	MTSRNP	SKODA	FABIA MONTE CARLO TSI	BLUE	TMBFRGNURKZ094924	11,990.00	11,990.00	4,000.00	0.00	9,000.00	11,990.00	2,990.00	0.00	60.00	2,431.67	0	1	9,000.00	11,990.00
													12,990.00				10,000.00	12,990.00	2,990.00	0.00	60.00	2,431.67		1	9,000.00	11,990.00


Previous

1

Next

Sales (V Summary)

Summarises vehicle sales over a specific period by vehicle category and make.



Vehicle Sales Summary

06/03/2024

To

06/06/2024

Customer

Go

Show 10 entries

Copy CSV PDF

Search:

NEW-VEHICLE	Shop	2023	2022
KAWASAKI		1	
YAMAHA	2		
Total	2	1	0

USED-VEHICLE	Shop	2023	2022
AUDI		1	
KAWASAKI	2		
KEEWAY	1		
KTM	1	1	
SKODA	1		

Previous


1

2

Next

Outstanding Sales Invoices

Lists all finished sales invoices which have an outstanding balance over a specified period.



Outstanding Sales Invoice Report

Closed sales invoices which have not been paid in full.

06/05/2024

To

06/06/2024

Sales Invoice

Department 2

Customer

All

Go

Copy Invoice

Show 10 entries

Copy CSV PDF

Search:

<input checked="" type="checkbox"/>	Date	Department	Agent	Ref	Invoice Type	Account	Debit	Credit	Outstanding
<input checked="" type="checkbox"/>	01/06/2024	Department 2	test agent name	SI2008	Service	Steve Sutton	600.00	0.00	600.00
<input checked="" type="checkbox"/>	06/06/2024	Department 2	Test User	SI812	Service	Andrew Webster	5.87	0.00	3.87
						Total	605.87	0.00	603.87


Previous

1

Next

Sales Stock/back orders

Displays the ratio of sales from stock over a specified period.


Products Sold from Stock Ratio

06/05/2024

To

06/06/2024

Go

Show

10

entries

Copy

CSV

PDF

Search:

Date	Total Sold	From Stock	%	Back Ordered	%
06/05/2024	0	0	0%	0	100%
07/05/2024	0	0	0%	0	100%
08/05/2024	0	0	0%	0	100%
09/05/2024	3	2	67%	1	33%
10/05/2024	4	4	100%	0	0%
11/05/2024	0	0	0%	0	100%
12/05/2024	0	0	0%	0	100%
13/05/2024	0	0	0%	0	100%
14/05/2024	0	0	0%	0	100%
15/05/2024	1	0	0%	1	100%
	24	13	54%	11	46%

Previous

1

2

3

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Next

Top Customers

Lists customer account turnover over a specified period.



Top Customers

Most profitable customers over the period. Based on invoice value including open invoices.

06/03/2024 To 06/06/2024 Go

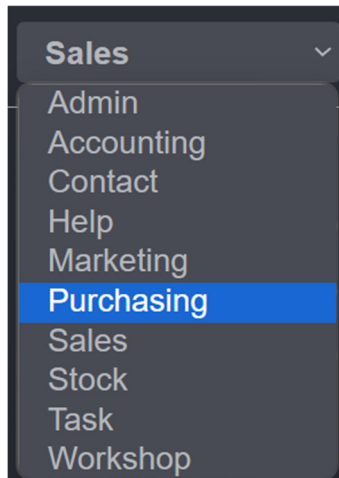
Search:

Phone	Mobile	Email	U1	U2	U3	Last Invoice	Credit Limit	Turnover	Margin	Margin %
	07973116378	jeff@deepbluesystems.com	A123BCD	KAWASAKI	ER650EFF	11/11/2024 11:11:42	2,000.00	32,782.69	18,656.98	56.9%
02038901050		sales@omegayamaha.com		yamaha	MT07A 2023	29/04/2024 08:13:44	0.00	11,843.83	2,917.08	24.6%
		tricia_king@hotmail.co.uk	MT69NVP	SKODA	FABIA MONTE CARLO TSI	21/05/2024 10:11:58	0.00	11,768.01	2,690.04	22.9%
02085414131	07973116378	steve@deepbluesystems.com	EO61LRE	KAWASAKI	ZX1000HBF ABS	18/05/2024 10:01:55	25.00	8,527.94	-3,900.58	-45.7%
			SY67BHX	POLARIS	RANGER	10/05/2024 17:36:39	0.00	8,500.00	-2,500.00	-29.4%
						06/03/2024 15:51:27	0.00	5,011.67	4,936.67	98.5%
						11/03/2024 15:53:01	0.00	4,373.59	968.40	22.1%
						08/03/2024 18:54:32	0.00	4,122.50	977.50	23.7%
	07712345678	JOHN@ABC.COM	EK60VJE	KAWASAKI	ZZR1400	31/05/2024 17:05:08	0.00	2,000.00	0.00	0.0%
		jeff@deepbluesystems.com		KAWASAKI	ZR1000GGF	01/12/2023 15:00:39	0.00	833.33	477.78	57.3%

Purchasing

The purchasing screen manages purchase orders and purchase invoices.

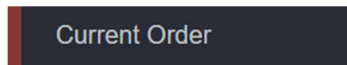
Select 'Purchase' from main section menu.



Current Orders

The current order list shows products which you need to order, either they have been sold or the stock level has fallen below the re-order level.

Select 'current order' from the main purchase menu bar to display the screen.



CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Purchasing

Awaiting Allocation to Purchase Order

Products which have not been allocated to a purchase order

All

All

All

Department

Warehouse

Go

Auto Warehouse

Auto All

+ Order

SKU	Description	Type	Status
<input checked="" type="checkbox"/> IC-705		Backorder Warehouse	WO 05/11/2020 11:07:46
<input checked="" type="checkbox"/> LC-192		Backorder Warehouse	JACK JONES WO 05/11/2020 11:07:46
<input checked="" type="checkbox"/> MYDEL-QRAB		Backorder Warehouse	WO 05/11/2020 11:07:46
<input checked="" type="checkbox"/> 01-065-0770-0	-	Backorder Warehouse	Geoffrey Mcrae SI881 28/01/2019 Department 1
<input checked="" type="checkbox"/> 01-420-5561-0	-	Backorder Warehouse	Fred Walters WO 17/01/2019 10:15:12
<input checked="" type="checkbox"/> 00000000014	HONDA PAQ 100 OR MOTO/1FEU	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000015	HONDA VENTES AGENTS(25)	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000017	HONDA JEU 100 OR VOITURE	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000020	HONDA JEU 100 OR MOTOCULTU	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000024	HONDA JEU 100 OR JARDIN	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000025	HONDA O.R. MARINE 100X4FEU	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 00000000030	HONDA JEU 20 DOSS CLIENTS	Backorder Warehouse	STEVE SUTTON SI 05/03/2018
<input checked="" type="checkbox"/> 3450009	HONDA NIPPLE SPOKE	Backorder Warehouse	TEST CUSTOMER SI1392 13/01/2021 Department 2
<input checked="" type="checkbox"/> D0B37100	MPN Shad SH37 Top Box	Backorder Warehouse	John Hamilton SI1998 01/06/2024 Department 2
<input checked="" type="checkbox"/> D0B37100	MPN Shad SH37 Top Box	Stock Warehouse	Re-Order Level

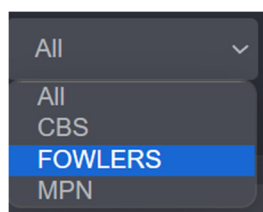
All the parts listed are waiting to be allocation to an open purchase order.

You can filter the list by:

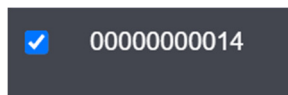
- Product brand
- Product Supplier
- Back orders, Stock orders
- Stock Depot

The first step to allocate the products is to check the parts you want to move to a purchase order by ticking the box beside the part number. The check box at in the column header will check or on check the whole column.

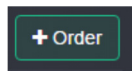
Best practice is to select a supplier from the drop-down menu, then press 'Go' to filter the list.



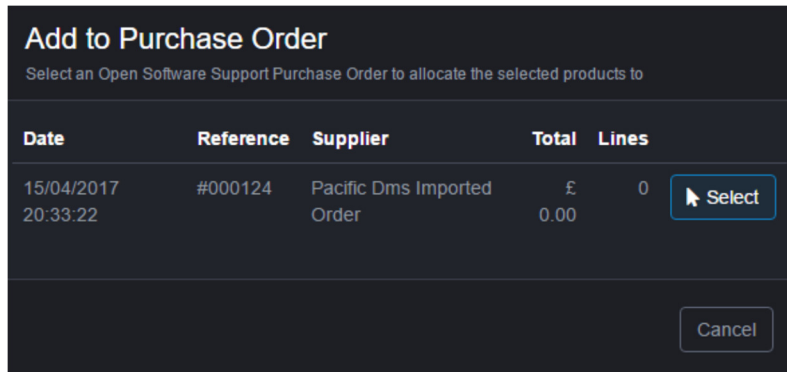
Make sure all the parts you want to order are checked.



Once you have checked the required parts press '+order'.



The purchase order allocation window will be displayed listing suitable open purchase orders.



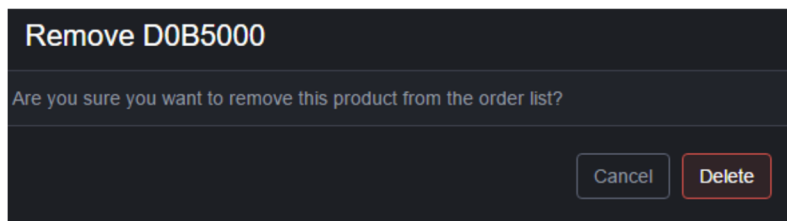
Press 'select' beside the required purchase order to move the checked products to the order.

The purchase order must already exist and be 'open'.

If a product is on order for stock, you can press the 'trash' can button to remove it.



Then conform the deletion.



If the product is for a customer, it cannot be removed. Pressing the 'display' button beside the line will display the stock record.



Once you have moved all the waiting parts to the purchase order you can then send the purchase order to your supplier and close it.

Open Purchase Orders

The open orders screen shows all open purchase orders which have not been closed.

Press ‘open orders’ on the main purchase menu bar to display the list.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Purchasing

In Progress

Current Order

Open Orders27

Open Invoices18

Transactions

New Invoice (PI)

New Order (PO)

New Credit (PC)

PI414

Search Orders

Accounts

New Supplier

FERIDAX

Search Suppliers

Reports

Back Orders

Creditors

Outstanding Products

Purchases (Invoice)

Purchases (boat)

Open Purchase Orders

Department 2Alltest agent name

Show10entriesCopyCSVPDFSearch:

	Date	Ref	Agent	Department	Supplier	Total	
	11/03/2024 13:03:51	PO295	Test User	Department 2,		£ 0.00	
	16/10/2023 13:22:57	PO262	test@dgmotorcycles.com	Department 2, Shop to Supply		£ 211.08	
	16/10/2023 13:22:57	PO264	test@dgmotorcycles.com	Department 2, Shop to Supply	FERIDAX	£ 0.30	
	16/10/2023 13:22:57	PO265	test@dgmotorcycles.com	Department 2, Shop to Supply	MPN	£ 0.00	
	16/10/2023 13:22:57	PO267	test@dgmotorcycles.com	Department 2, Warehouse	CBS	£ 0.00	
	06/04/2022 20:12:20	PO235	Test User	Department 2, Shop	T2 SUPPLIER	£ 0.00	
	13/01/2022 16:39:54	PO222	Test User	Department 2, Shop to Supply	SUPPLIER (SHOP TO SUPPLY)	£ 18.57	
	13/01/2022 16:39:53	PO218	Test User	Department 2, Shop to PDI	MPN	£ 166.66	
	13/01/2022 16:39:53	PO219	Test User	Department 2, Shop to PDI	MPN	£ 0.00	
	13/01/2022 16:39:52	PO215	Test User	Department 2, Shop to PDI	T2 SUPPLIER	£ 95.05	

Previous123Next

You can display a purchase order by pressing ‘view’ button or clicking on the transaction reference.



Open Purchase Invoices

Lists all open purchase invoices.

Press ‘open invoices’ on the purchase screens menu bar to display the list.

Open Purchase Invoices

Department 2

All

test agent name

Show

10

entries

Copy

CSV

PDF

Search:

	Date	Ref	Agent	Department	Supplier	Total	
	10/05/2024 17:33:30	PI411	Test User	Department 2,	JOHN SMITH	£ 3000.00	
	28/04/2024	PI407	Test User	Department 2, Shop to Supply	PIAGGIO	£ 30.31	
	21/03/2024	PC7	test agent name	Department 2, Shop	JONES TRANSPORT	£ 0.00	
	04/12/2023 10:54:17	PI393	Test User	Department 2,	LUCAS MASSONE	£ 5101.80	
	07/11/2023 11:47:13	PI388	test agent name	Department 2, Shop to Supply	MPN	£ 380.29	
	06/11/2023 11:40:11	PI387	Test User	Department 2,	ADRIAN ILES	£ 2000.00	
	10/03/2022 13:04:59	PI312	jgheal	Department 2, Warehouse	KAWASAKI UK	£ 486.23	
	14/07/2021 15:46:18	PI302	Test User	Department 2,	JOHN DOE	£ 5999.00	
	20/05/2021 17:35:07	PI287	test agent name	Department 2, Shop	MPN	£ 289.80	
	16/07/2020 17:49:29	PI260	jgheal	Department 2, Warehouse	KAWASAKI UK	£ 294.61	

Previous

1

2

Next

You can display a purchase invoice by pressing ‘view’ button or clicking on the transaction reference.



Purchase invoices remain open until you receive an invoice from your supplier. Once you receive the invoice you can check and adjust you buy prices for each product.

Closing a Purchase invoice posts the transaction to your account and nominal ledgers.

Once a purchase invoice has been closed it cannot be altered.

Creating a new Purchase Order

Press 'new order (po)' on the 'purchase' screen.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Purchasing

In Progress

Current Order

Open Orders27

Open Invoices18

Transactions

New Invoice (PI)

New Order (PO)

New Credit (PC)

PI414

Search Orders

Accounts

New Supplier

FERIDAX

Search Suppliers

Reports

Back Orders

Creditors

Outstanding Products

Purchases (Invoice)

Purchases (boat)

New Purchase Transaction

Select Account

Deliver To Warehouse

Purchase Order

01/06/2024 13:13:36
Date

test agent name
Agent

Ref

PO*
Number

Department 2,
Department

Open
Status

Products

+ Product

Description	Qty	Net	Tax	Vat	Line
Product Count		Net			£
Outstanding from Supplier		Vat			£
Booked Into Stock		Total			£
Ordered for a Customer, Sales Backorder					
Ordered for Stock					

Notes

Terms and Conditions

First select the suppliers account by press '+select account'

+ Select Account

A list of existing suppliers will be displayed. You can click in the account name box and type to filter the list.

Transaction

Account Name

Account Name

BICKERS1	Bickers	Select
Open		
BIKEIT2	Bikeit	Select
Open		
LUCAS	Lucas Oil	Select
Open		
MAX	Max Helmets	Select
Open		
MOTAD	Motad	Select
Open		
SHAD	Nad	Select
Open		
OEM	Oem	Select
Open		
TESTSUP	Pacific Dms Imported Order	Select
Open	Test Address,	
REEVU	Reevu	Select
Open		
ROBHUNT	Rob Hunter	Select
Open		

Account Code

Transaction

Cancel

Save

Press 'select' beside the required supplier.

If it is a new supplier, you will need to create a supplier account for them first.

Adding products to a purchase order

Press '+Product' to display the dialogue box.



Add Product

Enter the SKU then select the part from the list

Qty

Cancel

Enter the SKU

Add Product

Enter the SKU then select the part from the list

Qty

D0B3211	Top Case Sh32 Leather :Top Cases Shad	+ Add
D0B3300	Top Case Sh33 Black :Top Cases Shad	→ Supersession
D0B33100	Top Case Sh33 Black/Black :Top Cases Shad	→ Supersession
D0B33200	New Sh33 Top Box Shad	+ Add
D0B3321	Top Case Sh33 Metal Black :Top Cases Shad	+ Add

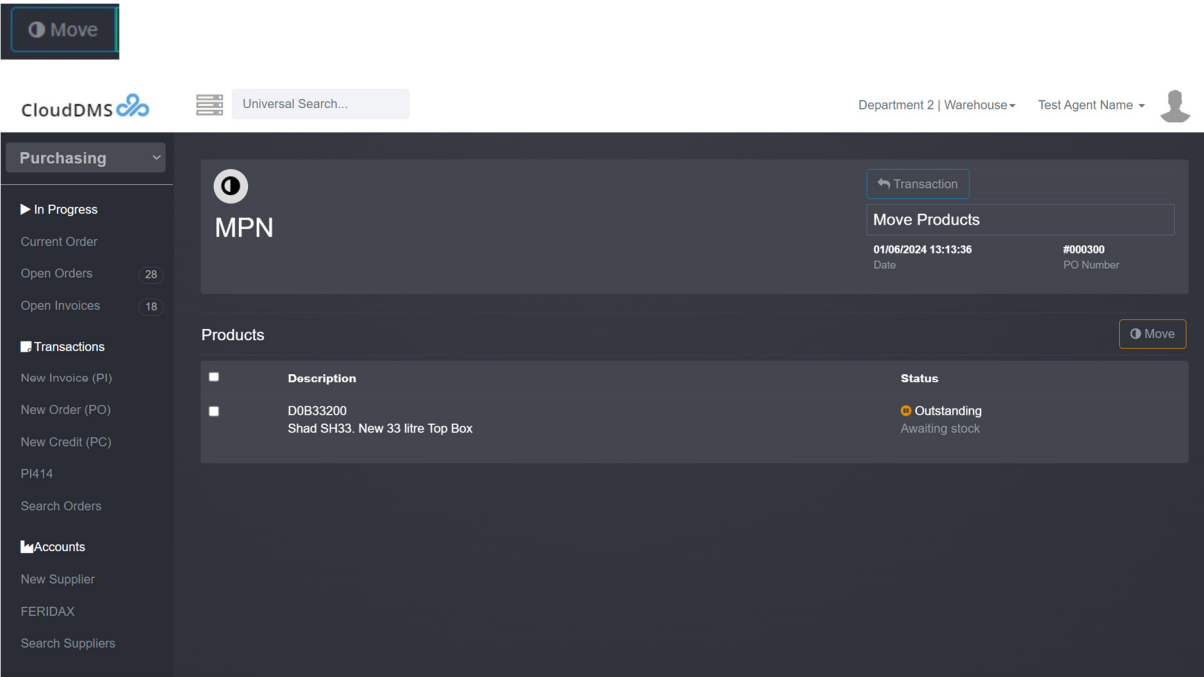
Cancel

and press '+add' to add it to the purchase order.

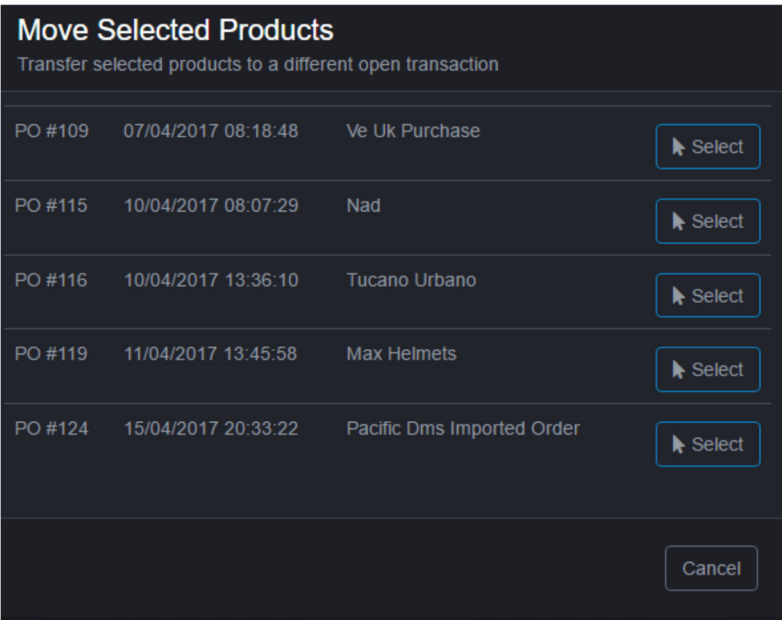
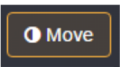
You can also add product by tagging them on the 'current order' screen.

Moving products to a different Purchase Order

If you don't want to order some of the products on the purchase order you can move them to another open order. Press 'move' on the purchase order screen.



Tag the required part and press 'move'



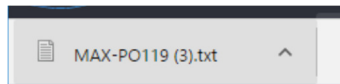
Press 'Select' to select the purchase order to move the product to.

Exporting a Purchase Order to CSV

Display the relevant purchase order then press 'CSV' on the toolbar



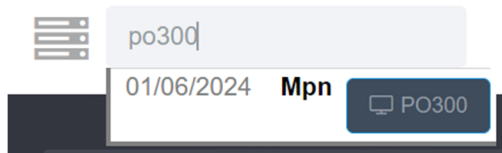
The CSV file will then be downloaded to your computer.



Press the down arrow beside the file to save or open the CSV file.


Finding a purchase order

Enter the transactions reference into the universal search box i.e. PI451



Then click on the purchase order reference to display the order.

Alternatively press 'search orders' on the 'purchase' screen menu bar.





 **Purchase Transaction Search**
Enter a search keyword and press enter.

Search...

Show 10 entries


Copy CSV PDF

Search:

Reference	Date	Account	Status	
PI414	06/06/2024 11:11:36 test agent name Department 2	Steve Sutton 278a Northfields Ave Ealing London W5 4ub	£ 1000.00 1 products	 View
PI415	06/06/2024 00:00:00 test agent name Department 2	Mpn	£ 1.00 1 products	 View
PO300	01/06/2024 13:13:36 test agent name Department 2	Mpn	£ 38.88 1 products	 View
PI410	25/05/2024 00:00:00 test agent name Department 2	Steve Sutton 278a Northfields Ave Ealing London W5 4ub	£ 1002.20 2 products	 View

Creating a new supplier account

Press 'new supplier' on the 'purchase' screen.

 **New Account**
Enter the new account details and press 'Save'

Account Code
Account Code

Account Status
Open

Account Group
supplier

Default Tax Code
none

Credit Limit
0

Account Name
ACCOUNT NAME

Address
Address

Post Code
POST CODE

Web Site
WEB SITE

Cancel

Add New Account

Enter the supplier's details and press 'save'. If the supplier is not UK based you may need to change the default tax code.

Finding a suppliers account

Type the suppliers account code, postcode, or company name into the universal search box.

Alternatively press ‘search suppliers’ on the ‘purchase’ screen menu bar.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Purchasing

In Progress

Current Order

Open Orders28

Open Invoices18

Transactions

New Invoice (PI)

New Order (PO)

New Credit (PC)

PI414

Search Orders

Accounts

New Supplier

FERIDAX

Search Suppliers

Reports

Back Orders

Creditors

Outstanding Products

Purchases (Invoice)

Purchases (boat)

Purchases (outboard)

Purchases (trailer)

Purchases (vehicle)

Stock Purchased

Outstanding

Price Trend (Vehicle)

Under Stock

Supplier Account Search

Enter a search keyword and press enter.

Search...

Show 10 entries

Copy CSV PDF

Search:

Account	Company	
MPN Open Supplier	Mpn	View
YAMAHA Open Supplier	Yamaha	View
CBS Open Supplier	Cbs Tw2 7dx	View
FOWLERS Open Supplier	Fowlers 2-12 Bath Road Pytle Hill Bristol Avon BS4 3dr	View
12345 Open Supplier	Heal Test Supplier Hp199ra	View
Open Supplier	131 Racing	View
KAWASAKI Open Supplier	Kawasaki Uk 274 Northfield Ave Ealing London W5 5Ub	View
Open Supplier		View
TEST Open Supplier	Test	View
GB50BF Open Supplier	Piaggio Bristol	View

Previous1234Next

Enter the transactions reference of the suppliers account code to find a purchase order.

Click on ‘view’ to display the purchase order.

Back Orders Report

Clock on ‘Back Orders’ to display the supply back-order report.

This report lists all products on back order with your suppliers over a specified period.

Supplier Back Orders

Products on back order with suppliers

07/05/2024

To

06/06/2024

Warehouse

All

Go

Show 10 entries

Copy CSV PDF

Search:

SKU	Description	Supplier	Order Date	Order Ref	Sale Ref	Status	Lead Time	Due
D0B23100	SIDE CASE SH23	STEVE SUTTON	01/06/2024	SC278		On Order, Stock		
D0B3211B	test prduct	MPN	06/06/2024	PO265 PI415	WO927	On Order, Customer Back Order		
D0B33200	Shad SH33. New 33 litre Top Box	MPN	01/06/2024	PO300		On Order, Stock		

Creditors

The creditor report lists all accounts which are in credit.

Creditors Report

Accounts who you owe to

06/06/2024

Customer

Go

Show 10 entries

Copy CSV PDF

Search:

Account Code	Customer	Balance	<30	30-60	60-90	Older	
	Mireia Sanchez Labernia	-1.00	0.00	0.00	0.00	-1.00	View
		-6,000.00	0.00	0.00	0.00	-6,000.00	View
	CHRIS TAPLINS	-99.05	0.00	0.00	0.00	-99.05	View
	SAM PRESTON	-300.00	0.00	0.00	0.00	-300.00	View
	LUCAS MASSONE	-9,000.00	0.00	0.00	0.00	-9,000.00	View
	PETE HARPER-BROWN	-90.01	0.00	0.00	0.00	-90.01	View
	Radek Losos	-10.01	0.00	0.00	0.00	-10.01	View
	Craig Fry	-7,786.50	0.00	0.00	0.00	-7,786.50	View
	SALES ORDER	-10.00	0.00	0.00	0.00	-10.00	View
	CHRIS STACEY	-11,499.00	0.00	0.00	0.00	-11,499.00	View
Total		-396,504.48	-11,768.33	-8,000.00	1.00	-134,422.16	

Previous

12345...8Next

Outstanding Products

The outstanding products report lists all purchase invoices with outstanding products. You can display the purchase invoice by clicking on the transaction reference.

Purchase Invoices with Outstanding Products					
Purchase invoices with products outstanding					
All All Go					
Show 10 entries Copy CSV PDF Search:					
Date	Ref	Status	Supplier	Outstanding	Total
15/01/2019	PI185	Closed	link test customer	1	1,000.00
17/09/2019	PI230	Closed	JIM HEAL	1	1,000.00
27/01/2020	PI247	Closed	JOHN SMITH	1	2,000.00
28/05/2020	PI257	Closed	tris mooney	1	5,000.00
19/08/2020	PI255	Closed	andy boldison	1	5,000.00
10/09/2020	PI269	Closed	JOHN SMITH	1	1,000.00
06/10/2020	PI265	Closed	JIM HEAL	1	20,000.00
12/06/2021	PI234	Closed	MPN	1	151.49
16/07/2021	PI303	Closed	new px cust	1	1,000.00
16/07/2021	PI304	Closed	customer px test	1	1,000.00
Previous 1 2 3 4 5 ... 11 Next					

Price List

The price list report shows all product lines with the supplier account name, supplier SKU and buy price. The report can be filtered for specific suppliers.

Purchasing Price List				
Product List with supplier SKU and price. First 50,000 'Normal' records only.				
mpn Go				
Show 10 entries Copy CSV PDF Search:				
SKU	Description	Supplier	Supplier SKU	Supplier Price
1007017PIRAIN	100/70r17 Pi Rain Scr1 *Front*	MPN		114.89
1008010BSTL	100/80j10 Bs Hoop U TI	MPN		15.74
1008010DUSTL	100/80i10 Du Scootsmart U TI	MPN		17.03
1008010ME7TL	100/80i10 Me Me7 Teen U TI	MPN		15.93
1008010MICTL	100/80i10 Mi City Grip TI	MPN		17.26
1008010MIS1TL	100/80i10 Mi S1 U TI	MPN		16.36
1008010MT22TL	100/80i10 Mt Mc22 TI	MPN		14.74
1008010MT22WWTL	100/80i10 Mt Mc22 -Whitewall- TI	MPN		23.18
1008010MT6TL	100/80j10 Mt Mc6 TI	MPN		12.37
1008010PI26TL	100/80j10 Pi SI26 U TI	MPN		18.26
Previous 1 2 3 4 5 ... 1850 Next				

Purchases (Invoice)

This report shows all closed purchase invoices during a specific date period.

Purchase Report

Closed Purchase invoice report

06/06/2024

To

06/06/2024

All

Supplier

All

Go

Show 10 entries

Copy CSV PDF

Search:

Date	Department	Agent	Ref	Account	Debit	Credit	Outstanding
06/06/2024	Department 2	test agent name	PI415	Mpn (MPN)	0.00	1.00	1.00
				Total	0.00	1.00	

Previous

1

Next

Purchases (Vehicle)

This report shows vehicle purchase invoices over a specified period.

vehicle Purchases Report

Closed vehicle purchase invoice report

06/06/2024

To

06/06/2024

All

Department 2

All

All

Go

Show 10 entries

Copy CSV PDF

Search:

Date	Department	Agent	Ref	Type	Category	Account	Serial	Reg	Make	Model	Total	Exempt Net
06/06/2024 11:11:36	Department 2	Test Agent Name	PI414	Purchase	USED-VEHICLE	Steve Sutton		EO61DMZ	KAWASAKI	ZX1000HBF ABS	1,000.00	1000.00
											1,000.00	1,000.00

Previous

1

Next

Stock Purchased

This report summarises stock purchases by purchase nominal over a specified period.

Stock Purchased

Stock purchase value by purchase nominal

07/05/2024

To

07/06/2024

Go

Show 10 entries

Copy CSV PDF

Search:

Purchase Nominal	Count	Ave Age	Value Now
5055: Purchase Used Vehicle	4	18	£ 16,300
5000: Purchases	30	7	£ 3,416
Total	34	8	£ 19,716

Previous

1

Next

Outstanding

This report lists all purchases invoices with an outstanding balance over a specified period.

Outstanding Purchase Invoice Report

Closed sales invoices which have not been paid in full.

06/06/2024

To

06/06/2024

Purchase Invoice

Department 2

Customer

All

Go

Copy Invoice

Show 10 entries

Copy CSV PDF

Search:

<input checked="" type="checkbox"/> Date	Department	Agent	Ref	Invoice Type	Account	Debit	Credit	Outstanding
<input checked="" type="checkbox"/> 06/06/2024	Department 2	test agent name	PI414	Vehicle	Steve Sutton	0.00	1000.00	-1000.00
Total						0.00	0.00	-1,000.00

Previous

1

Next

Price Trend (Vehicle)

Entering a registration number on this report will display anonymised sales information for that vehicle model/make over the last 3 years. This report helps when valuing part exchange and is based on actual transaction values not asking prices.

Vehicle Price Trend

Average invoice selling price over the last 3 years, based on anonymised data from all CloudDMS users

Reg

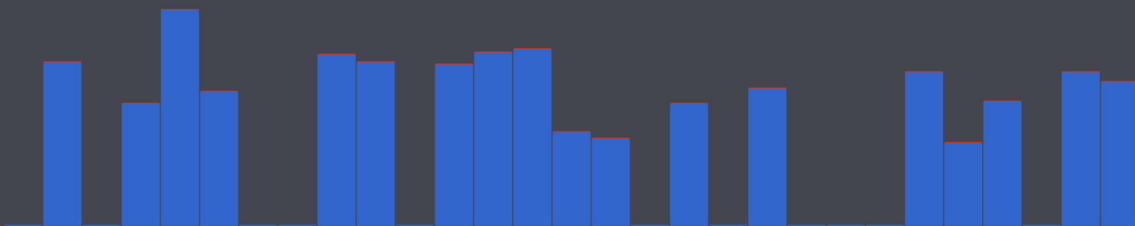
LJ09SEO

Used

All Dealers

Go

PIAGGIO GTS300 (ZAPM452000)



Date	No Sales	Mileage	Age (Years)	Selling Price
Jun-2024	0			
May-2024	1	12,400	10.5	£ 3,000
Apr-2024	0			
Mar-2024	1	23,400	12.8	£ 2,200
Feb-2024	1	10,300	8.3	£ 4,000
Jan-2024	2	8,800	12.9	£ 2,400
Dec-2023	0			
Nov-2023	0			
Oct-2023	3	16,400	9.3	£ 3,100
Sep-2023	1	20,200	9.8	£ 3,000
Aug-2023	0			

Under Stock

This report checks your re-order levels and lists any products which should be ordered.

Under Stock

Products which are below there max level.

Below Re-Order Level

All

All

Go

Show 10 entries

Copy CSV PDF

Search:

SKU	Description	Brand	Free In-Stock	Free On-Order	Reorder	Max	Shortfall	Last Invoice	
D1B29BA	Base Baul Sh 29 Negre :Recambios Top Case Shad	Mpn	0	0	7	11	11	31/01/2024 12:49:20	+ Order
D0B3300	Shad Sh33 Top Box. Red Refector	Mpn	0	0	5	10	10	04/03/2024 15:51:35	+ Order
160970008	Oil Filter For Kawasaki Hf204	Kawasaki	0	0	1	2	2	01/12/2023 15:00:39	+ Order
HELMET	Helmet	Piaggio	0	0	1	2	2	26/07/2021 15:42:35	+ Order
012789	Split Pins	-	0	0	10	20	20	31/01/2024 12:49:20	+ Order
575331	Fuel Tap	P	0	0	2	5	5	31/01/2024 12:49:20	+ Order
4712511833577	Topeak Pressure Rite	Topeak	0	0	2	5	5	31/01/2024 12:49:20	+ Order
BL460DB800	Blackburn Dayblazer 800 Front:	Blackburn	0	0	1	10	10	31/01/2024 12:49:20	+ Order
12345LHF	Cb500f Lhf Fairing	Honda	0	0	2	5	5	31/01/2024 12:49:20	+ Order
OIL2	Oily	Oil	0	0	2	10	10	31/01/2024 12:49:20	+ Order

Previous

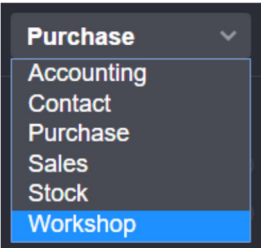
1

Next

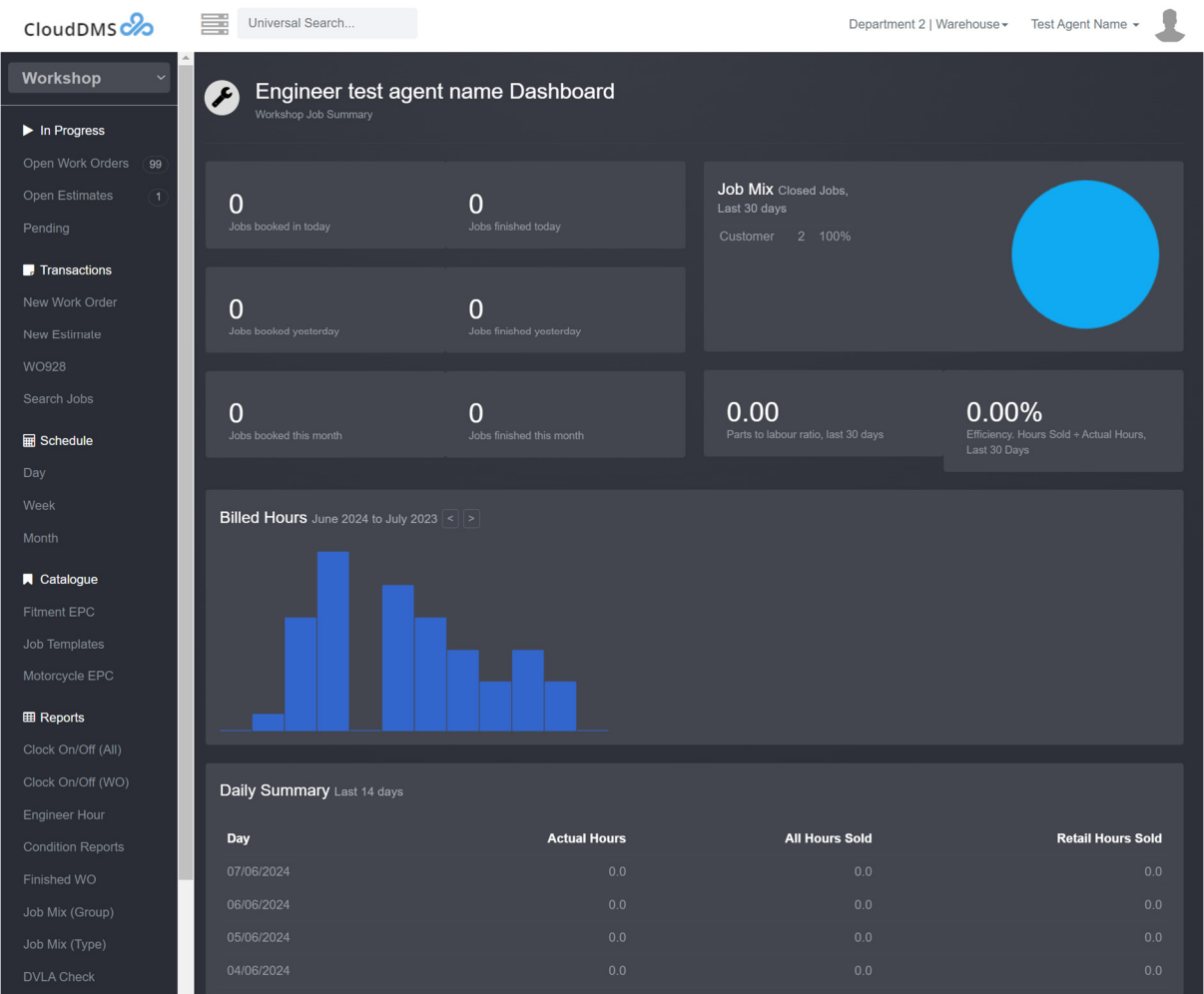
Workshop

The workshop section controls the scheduling of work orders.

Select 'workshop' from the main module selection drop-down.



The workshop dashboard will then be displayed, unless you have specified a different default page.



The dashboard shows a summary of work in progress and hours worked.

Open work orders

The ‘open work orders’ menu lists all in progress work orders.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Workshop

In Progress

Open Work Orders 98

Open Estimates 1

Pending

Transactions

New Work Order

New Estimate

WO926

Search Jobs

Schedule

Day

Week

Month

Catalogue

Fitment EPC

Job Templates

Motorcycle EPC

Reports

Clock On/Off (All)

Clock On/Off (WO)

Engineer Hour

Condition Reports

Finished WO

Job Mix (Group)

Job Mix (Type)

DVLA Check

DVSA Check (MOT)

Loan Vehicles

Open Work Orders

£ 14,581.62 open Work Orders.

Department 1Alltest agent nameStart DateAll

Show 10 entriesCopy CSV PDFSearch:

	Start Date	Sub	Ref	Agent	Department	Group	Customer	Serial	U1	U2	U3	U5	Note	Engi
	10/05/2024 10:50:12	PDI	WO921	test agent name	Department 1	Internal	DEPARTMENT 1	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-
	10/05/2024 10:49:00	Service	WO920	test agent name	Department 1	Internal	DEPARTMENT 3	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-
	09/05/2024 13:41:56		WO919	test agent name	Department 1	Internal	DEPARTMENT 3	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-
	09/05/2024 13:40:59		WO918	test agent name	Department 1	Internal	WORKSHOP	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-
	09/05/2024 13:39:15		WO917	test agent name	Department 1	Internal	WORKSHOP	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-
	09/05/2024 13:38:15		WO916	test agent name	Department 1	Internal	WORKSHOP	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-
	09/05/2024 13:35:43		WO915	test agent name	Department 1	Internal	WORKSHOP	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-
	09/05/2024 13:33:21		WO914	test agent name	Department 1	Internal	WORKSHOP	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-
	09/05/2024 13:16:00	Service	WO913	test agent name	Department 1	Internal	DEPARTMENT 2	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-
	09/05/2024 13:11:17		WO912	test agent name	Department 1	Internal	DEPARTMENT 3	N5652		KAWASAKI	ZR1000GGF	JKAZRT00FGA020750		-

Previous12345...10Next

You can filter the list by user agent and department.

Press ‘view’ beside the relevant job or click on the transaction reference to display the work order.

Open estimates

Lists all open estimates in a similar manor to open work orders.

Pending work orders

List all work orders scheduled for a future date.

Creating a new work order

You can either create a new work order by pressing ‘+’ on day/week/month schedule view or by pressing ‘new work order’ on the workshop menu bar.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Workshop

In Progress

Open Work Orders 98

Open Estimates 1

Pending

Transactions

New Work Order

New Estimate

WO926

Search Jobs

Schedule

Day

Week

Month

Catalogue

Filment EPC

Job Templates

Motorcycle EPC

Reports

Clock On/Off (All)

Clock On/Off (WO)

Engineer Hour

New Job

Select Account

Work Order

01/06/2024 13:16:52
Booked

WO*

test agent name
Agent

Department 1
Department

WO
Type

Open
Status

Job details

Associated

Products

Import

Description	Qty	Unit	%	Net	Tax	Vat	Line
Products		0		Net			£
Backorder				Vat			£
Stock				Total			£

Notes

Terms and Conditions

Selecting the customer

The first step is to select the customer, press ‘+Select Account’

Select Account

Transaction

Account Name

Account Name

Address

Address 1

Address 2

Address 3

Address 4

Post Code

Post Code

Phone

Phone

Email

Email

Account Code

Account Code

Transaction

Enter the customer's name, postcode or vehicles registration number into the account name box, as you type the nearest matches will be displayed.

Transaction

Account Name
steve

167624325	Steven Dume	Select
Open	Togo Rd, Greenham, AB27 8LJ	
	William Young	Select
Open	William Young, 20112 180	
1150758867553	30056359 Gw Steven Robinson	Select
Open	7 William Road, N25 2SA	
338622643	A Collins	Select
Open	94 North Colton Road, North Col	
51315001	Adam Stevens	Select
Open	3 Rosewood Close, LU20 8LJ	
2342325245	Adam Stevens	Select
Open	2 Edgewood, B12 3PQ	
959119756	Adam Stevenson	Select
Open	4 Galloway College, Glasgow	
59473544	Adam Stevenson	Select
Open	181, Galloway Street, G20 8JF	
	Adam Stevenson	Select
Open	4 Galloway College, Glasgow	
71702955	Adam Stevens	Select
Open	10 Galloway Street, G20 8JF	

Account Code

Transaction

Cancel Save

Press 'Select' beside the required customer, or press 'new account' to enter a create a new customer.

If the customer is already in the database, you can also select the vehicle from the associated drop down.

Associated

Vehicle: EO61LRE, KAWASAKI, ZX1000HBF ABS

Press 'save' to set the customer on the job.

The work order details dialogue will now be displayed.

Scheduling the date and setting up the work order

Work Order

Department 1 job.

Department

department 1

Engineer

unallocated No Engineer Set

Main Job Type

service

Start Date, Time

8 9 10 Noon

01/06/2024 13:16

Due Date, Time

1 2 3 Noon PM

Next AM Next Noon Next PM

01/06/2024 13:16

Job Details

Service Repair Tyres MOT PDI Warranty

Dyno Retification Collection Delivery

Service and MOT

Estimated Time

1.0

Actual Time

0.0

Mileage

On Site

No

Loan

No

Customer Waiting

No

Email booking to: steve@deepbluesystems.com, calendar attachment

Email booking to: steve@deepbluesystems.com, no calendar attachment

Select template...

Select template...

SMS booking reminder one day before

(U1) scheduled (DATE) (TIME) at Test Dealer. Default for all

(U1) scheduled (DATE) (TIME) at Test Dealer. Default for all

Close

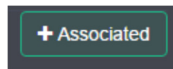
Save

- Select the engineer who will be performing the work. User agents must be tagged as 'engineers' in the user management screen to be listed.
- Set the job type from the list. You can add new job types in the company settings screen.
- Enter the start and end date.
- Enter the job details.
- Enter the estimated time.

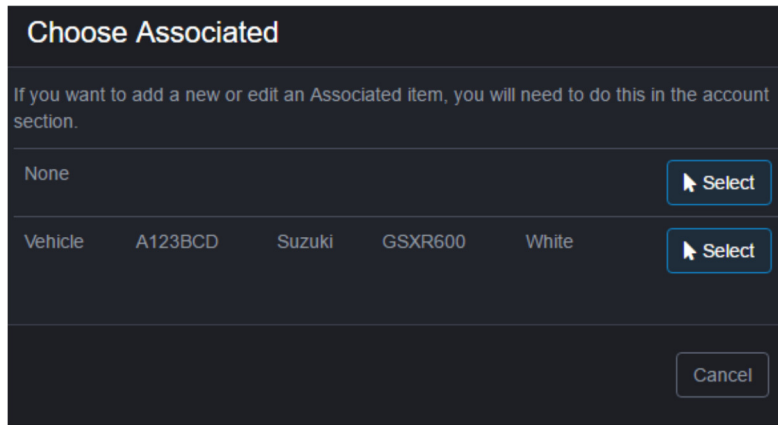
Press 'save' to update the job details.

Adding a vehicle to the work order

Press '+associated'



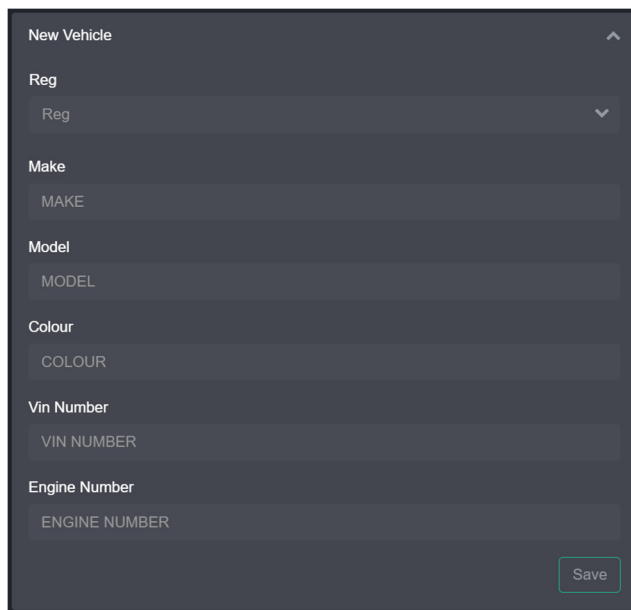
A list of the customer's existing vehicles will be displayed as well as a new section.



Choose Associated					
If you want to add a new or edit an Associated item, you will need to do this in the account section.					
None					Select
Vehicle	A123BCD	Suzuki	GSXR600	White	Select
					Cancel

Press 'select' beside the vehicle you want to add.

If the vehicle is not present, enter the vehicles details in the new vehicle section.



New Vehicle
Reg
Make
Model
Colour
Vin Number
Engine Number
Save

If your account has VRM lookup enabled, you can enter the registration number and then press the down chevron.

Reg

YG10AFX

YG10AFX

BMW

S 1000 RR

WB105070XAZV33071

Select

Private plate, wrong vehicle?

Refresh

The vehicle will then be looked up and you can add all the details by pressing 'Select'.

Press 'Save' at the bottom of the dialogue to confirm the vehicle.

DVLA automatic lookup

When a vehicle is allocated to a work order it will automatically be checked with DVLA records and highlight of the tax or mot are expired.

YG10AFX

Tax Expired: 01/06/2024

Make	BMW
Model	S 1000 RR
Colour	MULTI-COLOURED
Vin Number	WB105070XAZV33071
Engine Number	05108263

You can check the DVLA's records by pressing the DVLA check button.



The current DVLA information will then be displayed.

DVLA Check

Live DVLA record check. Enter the reg and press 'Go'

Reg

Show 10 entries

Copy CSV PDF

Search:

Item	Value
monthOfFirstRegistration	2010-03
wheelplan	2 WHEEL
motExpiryDate	2025-06-05
dateOfLastV5CIssued	2023-06-05
colour	MULTI-COLOUR
markedForExport	false
fuelType	PETROL
co2Emissions	0
engineCapacity	999
yearOfManufacture	2010

Previous

1

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Next

Service history check

Press the scales button to the right of the vehicles registration number to check the vehicle history.



The history returned runs across all users of CloudDMS as well as DVSA Mot records.

Service History

Service history across all customers with MOT data from DVSA. Enter the reg and press 'Go'

Reg / Unique ID

Show 10 entries

Copy CSV PDF

Search:

Date	Mileage	Dealer	Ref	Details	Group	Account	Total
07/06/2024		Test Account	WO929		Customer	Steve Sutton	0.00
05/09/2023	2040	MOT PASSED	No: 680863205776		DVSA		
26/08/2022	2025	MOT PASSED	No: 584783519602		DVSA		
31/08/2021	1931	MOT PASSED	No: 457669673779		DVSA		
02/07/2020	1916	MOT PASSED	No: 649570312397		DVSA		
13/12/2018	1900	MOT PASSED	No: 858739288776		DVSA		
03/10/2017	1886	MOT PASSED	No: 946878791706	free play in front wheel bearing	DVSA		
05/07/2016	1863	MOT PASSED	No: 133030318949		DVSA		
14/07/2015	1807	MOT PASSED	No: 648505695174		DVSA		
20/06/2014	1612	MOT PASSED	No: 988801274140		DVSA		

Previous


1

2

Next

MOT Check

Press the MOT button to retrieve current MOT history from the DVSA for the vehicle.

 **DVSA Check**
Vehicle MOT data from DVSA. Enter the reg and press 'Go'

Reg / Unique ID

Show 10 entries

Issued	Expires	Mileage	Result	Certificate	Note
05/09/2023	04/09/2024	2040	PASSED	680863205776	
26/08/2022	30/08/2023	2025 km	PASSED	584783519602	
31/08/2021	30/08/2022	1931 km	PASSED	457669673779	
02/07/2020	01/07/2021	1916 km	PASSED	649570312397	
13/12/2018	12/12/2019	1900 km	PASSED	858739288776	
03/10/2017	02/10/2018	1886 km	PASSED	946878791706	free play in front wheel bearing (ADVISORY)
05/07/2016	13/07/2017	1863 km	PASSED	133030318949	
14/07/2015	13/07/2016	1807	PASSED	648505695174	
20/06/2014	26/06/2015	1612	PASSED	988801274140	
27/06/2013	26/06/2014	1568	PASSED	986908773104	freeplay in front wheel bearing (USER ENTERED)

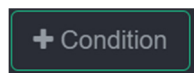
Previous Next

Recall Check

Press the recall button to check the central government recall database. Please note you should supplement this information with details from your manufacturer portal.

Add a condition report

Click '+Condition'

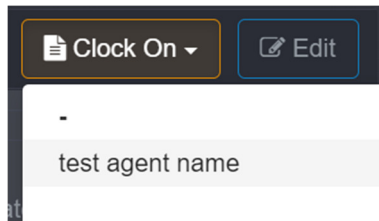


Then select the required condition report.

Clocking On/Off the Job.

Clocking on/off jobs allows you to accurately track the actual time spent on a work order.

You clock on the job by pressing the 'clock on' button



The button then changes to 'Clock Off'. Clicking this will clock off the job.

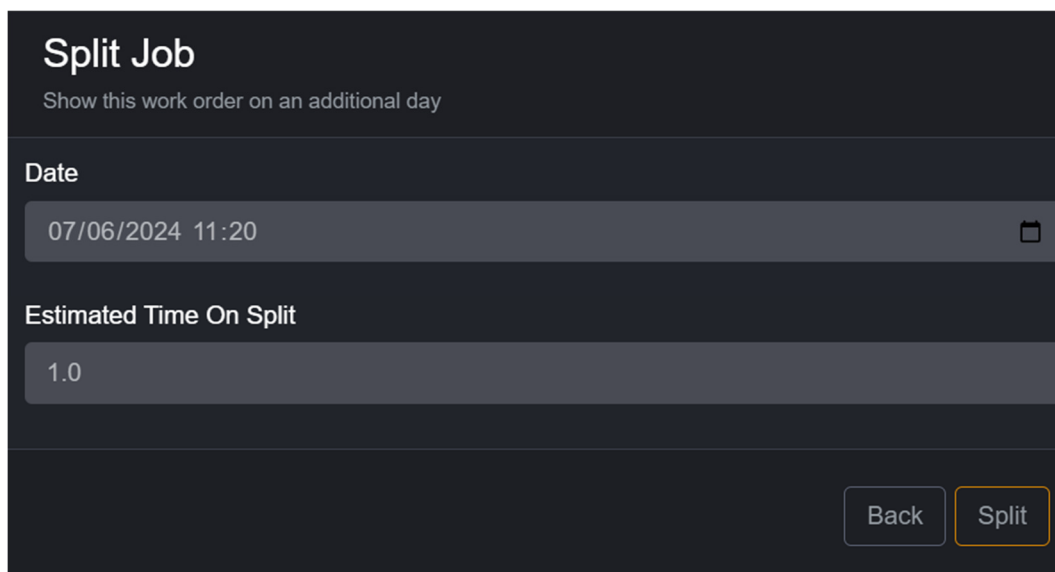
Splitting a Job over multiple days

Work orders can be split so they show over multiple days, or if you want to allocate multiple engineers to a single job.

Press the split button at the top of the screen.



The split dialogue will then be displayed.

A screenshot of a 'Split Job' dialog box. The title 'Split Job' is at the top in white. Below it, a subtitle reads 'Show this work order on an additional day'. The dialog has two main input sections. The first is labeled 'Date' and contains a text field with '07/06/2024 11:20' and a calendar icon on the right. The second is labeled 'Estimated Time On Split' and contains a text field with '1.0'. At the bottom right, there are two buttons: 'Back' and 'Split'.

Enter the date for the split and estimate the time then press 'Split'

Splitting a Job to a different account

If a warranty qualifying fault is found whilst the work is underway you can split the work order to a different account. This allows you bill two people. To do this press the split button at the top of the screen.



The split customer dialogue will then be displayed.

Split Customer

Move some products to a new job on another account

Account Name

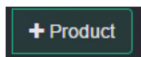
ACCOUNT NAME

BackSplit

Select the relevant account and press 'split'

Adding a product to job

Display the open work order and press '+product' to display the dialogue box.



Enter the products SKU and press '+add' beside the require product.

Sell Warehouse Product

Enter the SKU then select the part from the list

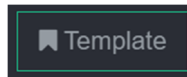
Qtyd0b3211

D0B3211	TOP CASE SH32 LEATHER :TOP CASES mpn	£ 87.31 Ex. 72.76	✔ Nonstockable	→ Supersession
D0B3211B	test prdouct	£ 121.20 Ex. 101.00	🚚 Back Order Warehouse ▼	+ Add

Adding a template to a work order

You can setup workshop templates which contains products and instructions from the 'Job templates' menu in the workshop section.

When displaying a work order you can apply a template by pressing the 'Template' button.



Your templates will then be listed.

Apply Template

Apply a job template to this transaction

KAWASAKI

All Types

Year

Size

Search templates..

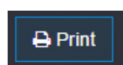
#	Name	Model	Year	Size	D	W	Price Inc	
1	ZX1000WK-FS	KAWASAKI ZX1000WK			5	Y	120.98	
	Service (1 hour)							

Use the filter options or DVLA lookup to find the relevant template.

To apply the template press 'Apply' beside the relevant one.

Printing a job card

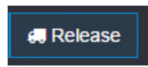
Display the work order and press 'print' to create a pdf job card



Releasing the parts to the job card

When a part is physically give to the workshop for fitting the stock needs to released from stock.

Press 'release'



The Dispatch/release screen will now be displayed.

Check any products which have been released and press 'dispatch'

You can also dispatch all in stock products automatically when you 'finish' the work order

Finishing the work order

When you have finished the work you can close the work order and create a sales invoice. Start by display the work order and then press 'finish WO'



The finish dialogue id now displayed.

Invoice this Work Order

Are you sure you want to close this Work Order and create an Invoice?

Job Type

service

Engineer

test user

Actual Hours Worked

Mileage

Set in-stock products status

instock reserved

☐ SMS notification to: 07973116378

Select template...

Service A654TRY is now complete and ready for collection

Next Service due

31/05/2025

Close

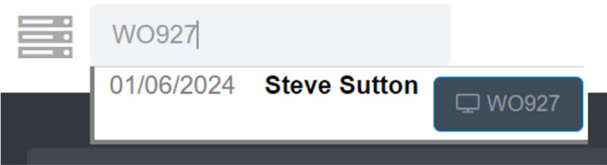
Finish WO & Invoice

The dialogue will default to setting all in stock products as fitted, if this is not the case change the option on the drop-down box.

Press 'Finish WO & INvoice' to close the work order and creates a sales invoice.

Finding a workshop job

You can find a work order on the day/week/month schedule view or by entering the transactions reference in the universal search box i.e. WO665.



Alternatively press ‘search jobs’ in the workshop screens main toolbar.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Workshop

In Progress

Open Work Orders 99

Open Estimates 1

Pending

Transactions

New Work Order

New Estimate

WO926

Search Jobs

Schedule

Day

Week

Month

Catalogue

Filment EPC

Job Templates

Motorcycle EPC

Reports

Clock On/Off (All)

Clock On/Off (WO)

Engineer Hour

Condition Reports

Finished WO

Job Mix (Group)

Job Mix (Type)

DVLA Check

DVSA Check (MOT)

Loan Vehicles

Recall Check

V History (Detail)

V History (Summary)

Workshop Transaction Search

Transaction Ref

Starting

Keyword

Go

-

Starting

Keyword

-

Starting

Keyword

Copy Invoice

Show 10 entries

Copy CSV PDF

Search:

Reference	Date	Account	Status	
SI2008	01/06/2024 12:54:04 test agent name Department 2	Steve Sutton 4 Barnfield Avenue W7 1BN	£ 600.0000 2 items	<div>View</div>
SI2009	01/06/2024 12:30:56 test agent name Department 2	Workshop	£ 0.0000 0 items	<div>View</div>
SC278	01/06/2024 00:00:00 test agent name Department 2	Steve Sutton 4 Barnfield Avenue W7 1BN	£ 360.0000 1 items	<div>View</div>
SI2007	31/05/2024 17:05:08 test agent name Department 2	Ian Smith Altered 3 CM14WH	£ 2000.0000 1 items	<div>View</div>
SI2006	23/05/2024 00:00:00 test agent name Department 2	Mark Sadler Derbyshire Motorbike School Unit 8 Block 13 DE55 4BR	£ 0.0000 0 items	<div>View</div>
SI2005	21/05/2024 10:11:58 Test User Department 2	Tricia King 63 Heol Fawr CF46 6NP	£ 331.6166 5 items	<div>View</div>
SI2004	21/05/2024 10:04:30 Test User Department 2	Tricia King 63 Heol Fawr CF46 6NP	£ 11990.0000 1 items	<div>View</div>
SI2003	21/05/2024 09:52:30 Test User Department 2	Workshop	£ 60.0000 1 items	<div>View</div>
SI2002	18/05/2024 10:41:37 test agent name Department 2	Dave Smith1234 120 Macfarlane Road W12 7LA	£ 121.2000 1 items	<div>View</div>
SI1987	18/05/2024 10:14:35 Test User Department 2	Hire Fleet 2	£ 211.6200 4 items	<div>View</div>

Previous

1

2

3

4

5

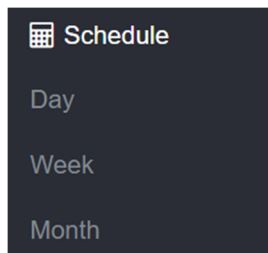
...

10

Next

Viewing the workshop schedule

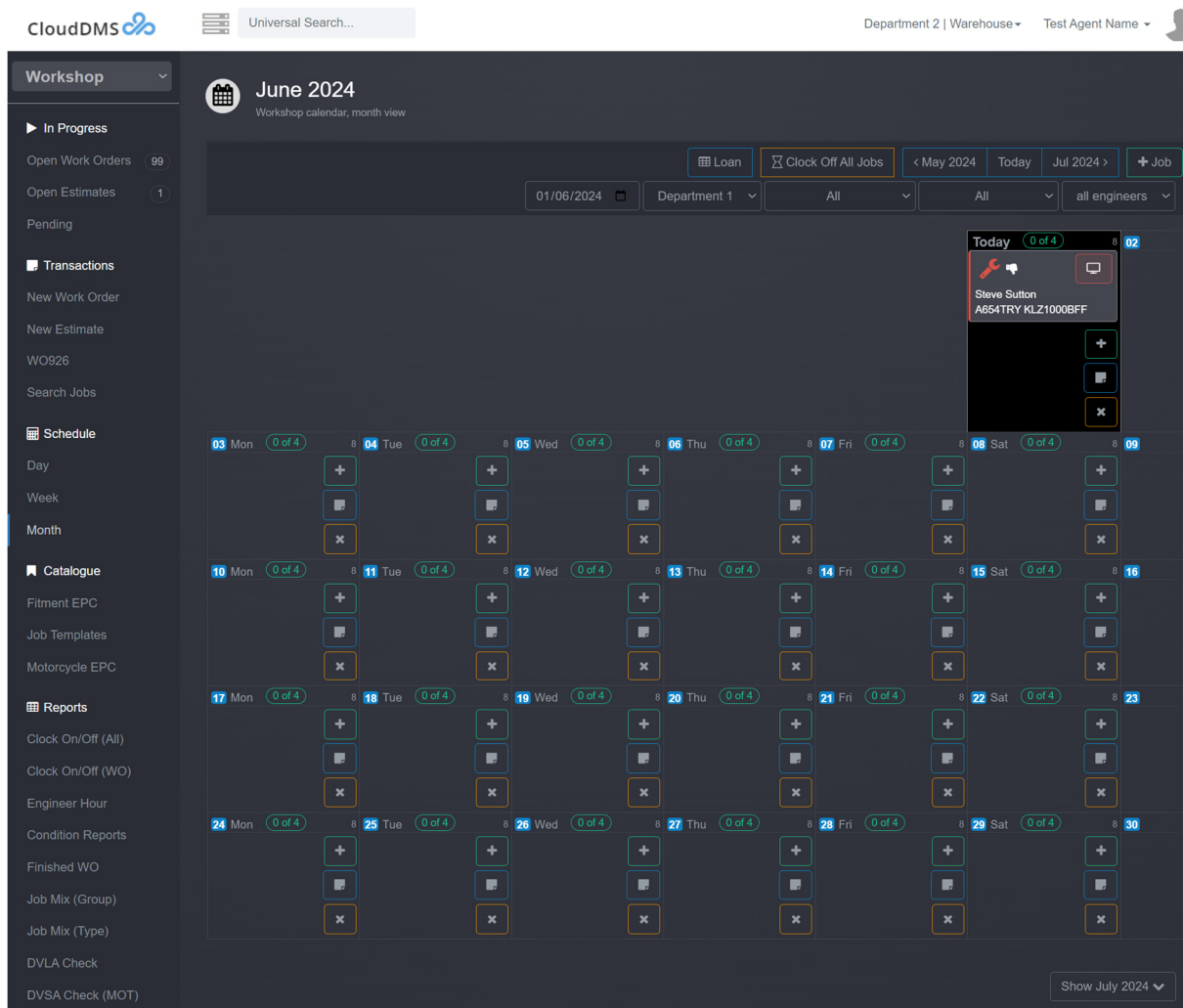
The workshop schedule has 3 views day, week and month, all accessible from the main workshop menu bar.



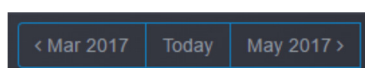
Month View

The month view displays the schedule for the current month.

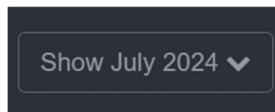
Press month' on the main workshop screen menu bar.



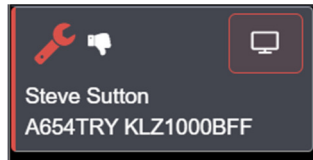
A calendar of the month is displayed. You can move backwards and forwards through the months by using the blue navigation buttons.



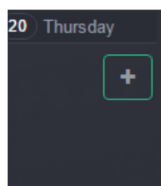
Order you can display the next month in place by pressing the show button at the bottom of the schedule.



Pressing the display button on a job will show you the Work orders details.



Press '+' on the schedule will start booking a new job at the relevant day/time



Clicking on a day will zoom in to the day view.



CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Workshop

Saturday 01 June 2024

Workshop calendar, day view

In Progress

Open Work Orders99

Open Estimates1

Pending

Transactions

New Work Order

New Estimate

WO926

Search Jobs

Schedule

Day

Week

Month

Catalogue

Fitment EPC

Job Templates

Motorcycle EPC

Reports

Clock On/Off (All)

Clock On/Off (WO)

Engineer Hour

Condition Reports

Finished WO

Job Mix (Group)

Job Mix (Type)

DVLA Check

DVSA Check (MOT)

Loan Vehicles

Recall Check

V History (Detail)

V History (Summary)

0 of 4

test agent name

8.00 hrs free

08:00

08:15

08:30

08:45

09:00

09:15

09:30

09:45

10:00

10:15

10:30

10:45

11:00

11:15

11:30

11:45

12:00

12:15

12:30

12:45

13:00

13:15

927

Steve Sutton , A654TRY KLZ1000BFF

Open Department 1

WO927

Service

Customer

01/06/2024 13:16:00

Start Date

1.00 hours

Estimated

test agent name

Booking Agent

01/06/2024 13:16:00

Due Date

0.00 hours

Actual

-

Engineer

Reserved WO927

Reserved WO927

Reserved WO927

13:30

13:45

14:00

14:15

14:30

Week View

The week view displays the schedule for the current week.

Press 'week' on the main workshop screen menu bar.

326

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Workshop

27 May - 02 June 2024

Workshop calendar, week view

In Progress

Open Work Orders 99

Open Estimates 1

Pending

Transactions

New Work Order

New Estimate

WO926

Search Jobs

Schedule

Day

Week

Month

Catalogue

Filment EPC

Job Templates

Motorcycle EPC

Reports

Clock On/Off (All)

Clock On/Off (WO)

Engineer Hour

Condition Reports

Finished WO

Job Mix (Group)

Job Mix (Type)

DVLA Check

DVSA Check (MOT)

Loan Vehicles

Recall Check

V History (Detail)

V History (Summary)

Uninvoiced (Summary)

Loan

Clock Off All Jobs

< 20 May

Today

03 June >

+ Job

01/06/2024

Department 1

All

All

all engineers

27 Monday May 2024

Total: 0.00 test agent name:8.00

28 Tuesday May 2024

Total: 0.00 test agent name:8.00

29 Wednesday May 2024

Total: 0.00 test agent name:8.00

30 Thursday May 2024

Total: 0.00 test agent name:8.00

31 Friday May 2024

Total: 1.00 test agent name:8.00

926 Service

Ted U 10:11 (1.00)

Steve Sutton

A654TRY KLZ1000BFF

Today, Saturday 01 June 2024 0 of 4

Total: 1.00 test agent name:8.00

927 Service

13:16 (1.00)

Steve Sutton

A654TRY KLZ1000BFF

02 Sunday June 2024 0 of 4

Total: 0.00 test agent name:8.00

Show Week 03 June - 09 June 2024

Day View

The day view displays the schedule for today.

Press 'day' on the main workshop screen menu bar.

327



Workshop

In Progress

Open Work Orders 99

Open Estimates 1

Pending

Transactions

New Work Order

New Estimate

WO926

Search Jobs

Schedule

Day

Week

Month

Catalogue

Fitment EPC

Job Templates

Motorcycle EPC

Reports

Clock On/Off (All)

Clock On/Off (WO)

Engineer Hour

Condition Reports

Finished WO

Job Mix (Group)

Job Mix (Type)

DVLA Check

DVSA Check (MOT)

Loan Vehicles

Recall Check

V History (Detail)

V History (Summary)

Uninvoiced (Summary)



Saturday 01 June 2024

Workshop calendar, day view

Loan

Jobs

Calendar

Clock Off All Jobs

< 31 May

Today

02 Jun >

+ Job

01/06/2024

Department 1

All

0 of 4

test agent name

8.00 hrs free

08:00

08:15

08:30

08:45

09:00

09:15

09:30

09:45

10:00

10:15

10:30

10:45

11:00

11:15

11:30

11:45

12:00

12:15

12:30

12:45

13:00

13:15



Steve Sutton , A654TRY KLZ1000BFF

Open Department 1

WO927

Service

Customer

01/06/2024 13:16:00

Start Date

1.00 hours

Estimated

test agent name

Booking Agent

01/06/2024 13:16:00

Due Date

0.00 hours

Actual

-

Engineer

13:30

Reserved WO927

13:45

Reserved WO927

14:00

Reserved WO927

14:15

14:30

14:45

15:00

15:15

15:30

15:45

16:00

Closing of Days in the Schedule

You can close a day for all or just a specific engineer, this will stop work being booked for this period.

Press the close button on the relevant day.



The close day dialogue will then be displayed.

Close Day

Close schedule to stop jobs being booked.

Note

Start Date

25/06/2024

End Date

25/06/2024

Engineer

all engineers

Department

department 1

Cancel

Save

Setup the closure and press 'save'.

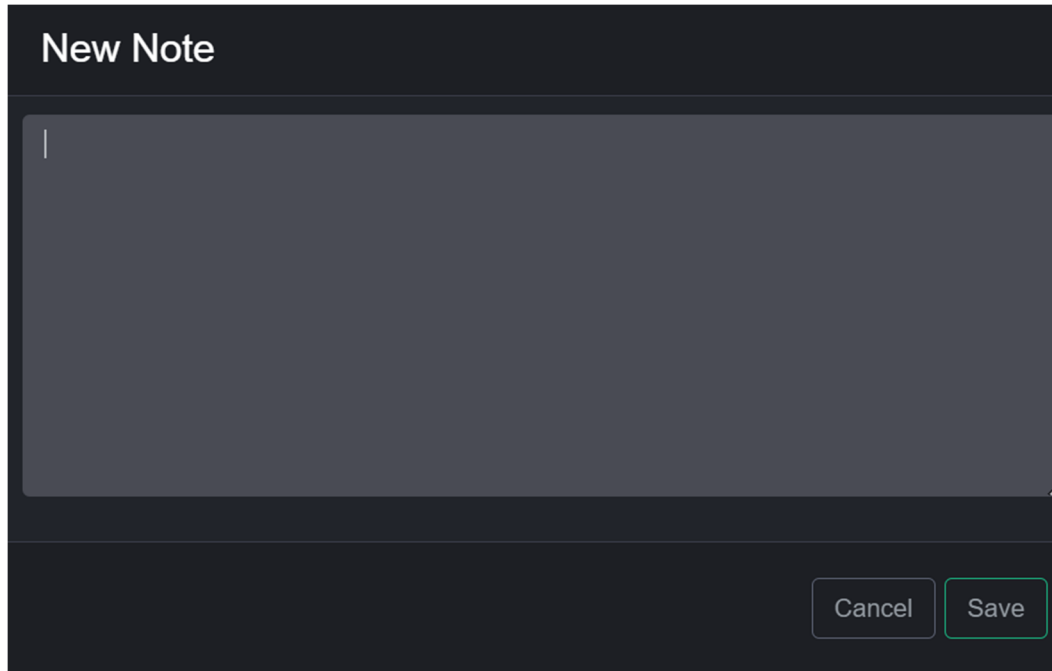
You can also close off days on-mass from 'company settings' i.e. close every Sunday.

Adding day notes

You can add a note on a day by pressing the note button.

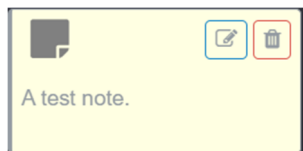


The note dialogue will be displayed.

A dark-themed dialog box titled 'New Note'. It features a large, empty text input area for writing the note. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a green border.

Enter the note and press 'Save'

The note will then be displayed in the schedule.




Job Templates

You can configure job types by clicking on 'Job Templates'

Job Templates

The template screen will then be displayed.



Workshop Templates

Configure Job Templates. Templates can be applied on a work order.

- All Makes -

All

Year

Year

Size

Size































Go

+ Template

Show 10 entries

Copy CSV PDF

Search:

#	Name	Model	Type	Year	Size	D	W	Product Kit	Price	Price Inc	
	Test Template	Model Name	Service	-	-		N	TEST-KIT	215.00	258.00	  
	!St SERVICE	Royal Enfield Himalyan	Service	-	-		N	OILSERV	176.35	211.62	  
	Test Template	Suzuki ALL	Service	-	-		N	TEST-KIT	215.00	258.00	  
	Test Template	Suzuki Gsx	Service	-	-		N	D0B36100			  
	Suzuki Service	Suzuki Rf600	Service	1993-1996	599-600		N	TEST-KIT	215.00	258.00	  
1	Oil Service	Any Any	Service			1	Y	OILSERV	176.35	211.62	  
1	Honda General	Honda Honda All	MOT	1990-1995	100-150	2	Y	OILSERV	176.35	211.62	  
1	Head Race Bearings	Honda SH125	Service	2000-2010	124-125	2	N	OILSERV	176.35	211.62	  
1	SH125 Later	Honda SH125	Service	2011-2020	124-125	0	Y	OILSERV	176.35	211.62	  
1	ZX1000WK-FS	KAWASAKI ZX1000WK	Service			5	Y	ZX1000WK-FS	100.82	120.98	  

To add a new template press '+Template'

+ Template


The dialogue will then be displayed, setup the fields as required.

Products to add to the work order with the template must be contained in a product kit.

Fitment EPC

On each product record (in the stock section) you can define model fitment information.

This fitment database can then be browsed from the 'Fitment EPC'.



Fitment EPC

Fitments can be setup from the 'Fitment' button on each product record.

Filter


AUTOMATIC SCOOTER STANDARD PARTS & ACCESSORIES

Choose List...

Choose List...


Choose List...

Go

SKU	Description	Bin	Stock	Price	+ Sell
 D0B3300	SHAD SH33 TOP BOX, RED REFECTOR		2	8.3300	

Clock On/Off (All) report

The clock on/off report allows you to see a log of work booked against work orders.



Engineer Clock On/Off

Workshop clock on/off job report

01/06/2023

To

08/06/2024

All








All

Go

Show 10 entries

Copy CSV PDF

Search:

Engineer	Department	Transaction	Account	Clock On	Clock Off	Hours	
Mark White	Department 1	WO843	FIG	26/07/2023 13:34:47	26/07/2023 16:21:43	2.8	
Mark White	Department 1	WO843	FIG	27/07/2023 09:38:50	27/07/2023 10:02:27	0.4	
test agent name	Department 1	WO846	FELIX DE JESUS CARDOSO	28/07/2023 10:48:04	28/07/2023 10:48:33	0.0	
test agent name	Department 1	WO842	CLAIRE SUTCLIFFE	22/09/2023 12:11:32	22/09/2023 12:13:51	0.0	
test agent name	Department 1	WO715	PETER HASLER	28/09/2023 14:17:46	28/09/2023 14:23:02	0.1	
Test User	Department 2	WO904	HIRE FLEET 2	28/03/2024 11:44:45	28/03/2024 12:24:35	0.7	
test agent name	Department 1	WO929	STEVE SUTTON	07/06/2024 11:20:25		0.4	
						4.4	

Previous

1

Next

Clock On/Off (WO) report

This report shows all clocking on/off for a specific work order.

Clock On/Off

Workshop clock on/off job report for a specific work order

WO904

Go

Show 10 entries

Copy CSV PDF

Search:

Engineer	Department	Transaction	Account	Clock On	Clock Off	Hours
Test User	Department 2	WO904	HIRE FLEET 2	28/03/2024 11:44:45	28/03/2024 12:24:35	0.7
						0.7

Previous1Next

Engineer Hours

The engineer hour report allows you to see estimated hours, actual hours and billed hours for a specific period.

Engineer Hours

Make sure you select the labour nominal from the drop down, then press 'Go'

If a job has been split, then the billed hours are divided by the number of splits.

Closed Date07/06/2023To07/06/2024AllAllLabourCustomerGo

Show 10 entries

Copy CSV PDF

Search:

Engineer	Department	Account Group	Sub Type	Start	Due	Finished	Transaction	Estimated	Actual	Invoiced	Value	Cus
Test User	Department 1	Customer	Service	21/06/2023 09:15:16	20/06/2023 13:17:05	21/06/2023 10:15:15	WO839	1.0	3.0	1.0	60.00	DAV
Test User	Department 1	Customer	Service	22/06/2023 12:27:19	22/06/2023 13:05:00	22/06/2023 13:28:59	WO840	1.0	10.0	0.0	0.00	14164654654 yamaha r6 STE MAI
test agent name	Department 1	Customer	Service	22/06/2023 12:42:11	04/03/2022 15:10:00	22/06/2023 13:42:11	WO792	1.0	3.0	0.0	0.00	KAWASAKI ZX1000SHFA JIM
Test User	Department 1	Customer	Service	22/06/2023 12:42:40	22/09/2022 08:00:00	22/06/2023 13:42:40	WO813	1.0	6.0	0.0	0.00	FUT
test agent name	Department 1	Customer	Service	22/07/2023 15:40:48	03/08/2022 08:48:00	22/07/2023 16:40:48	WO808	1.0	10.0	3.0	180.00	KT17HKH STE SUT
test agent name	Department 1	Customer	Service	28/07/2023 09:48:52	28/07/2023 17:00:00	28/07/2023 10:48:52	WO846	3.0	4.0	1.0	60.00	FEL JES CAF
test agent name	Department 1	Customer	PDI	28/07/2023 13:33:01	28/07/2023 12:50:00	28/07/2023 14:33:01	WO847	1.0	1.0	0.0	0.00	GY70DFV HONDA WW 125-A CLA F RO
Test User	Department 1	Customer	Service	28/08/2023 09:22:57	03/08/2023 11:06:00	28/08/2023 10:22:56	WO849	1.0	5.0	2.5	150.00	KAWASAKI ZR800BGF JOH
Test User	Department 1	Customer	Service	05/09/2023 10:44:13	29/04/2017 09:37:32	05/09/2023 11:44:13	WO3	1.0	1.0	0.5	45.00	stev
Test User	Department 1	Customer	Service	18/09/2023 12:25:39	27/07/2023 08:52:00	18/09/2023 13:25:39	WO844	1.0	1.0	1.0	60.00	ADAM LUKER 4 Chester Crescent AD
								48.5	195.4	57.3	3,331.00	

Previous12345Next

Condition reports

Displays a list of work orders which have condition reports for a specific period.

Condition Reports

List of condition reports for a period

07/06/2024

To

07/06/2024

Go

Show 10 entries

Copy CSV PDF

Search:

Date	Reg	Make	Model	VIN	Work Order
07/06/2024 10:56:00	EO61LRE	KAWASAKI	ZX1000HBF ABS	JKAZXT00GHA004716	WO929

Total: 1

Previous

1

Next

Finished WO

Displays a list of finish work orders for a specific period.

Work Order Report

Closed work orders report

07/04/2024

To

07/06/2024

All

Customer

All

Go

Show 10 entries

Copy CSV PDF

Search:

Booked	Finished	Department	Ref	Engineer					Job Type	Mileage	Account	
28/03/2024	09/04/2024	Department 2	WO905	Test User	KAWASAKI	ZR800BGF	JKBZR800ABDA20748		Service	0	John Smith	
04/04/2024	24/04/2024	Department 1	WO910	Test User	RV08MVM	HONDA	SH125	ZDCJF14A06F062997	Service	0	Dave Smith	
21/05/2024	21/05/2024	Department 2	WO925	Test User	MT69NVP	SKODA	FABIA MONTE CARLO TSI	TMBFR6NJ8KZ094924	Service	28000	Tricia King	
31/05/2024	31/05/2024	Department 1	WO926	Test User	A654TRY	KAWASAKI	KLZ1000BFF	JKALZT00BBA004768	Service	666	Steve Sutton	
03/06/2024	03/06/2024	Department 1	WO928	Test User					Service	1	Steve Spears	

Previous

1

Next

Job Mix (Group)

Displays a summary of the percentage of work orders by account group. Useful for see how much internal work, warranty work vs paying customers.

<div> <div></div> <div>Work Order Job Mix</div> <div>Number of jobs per account type for a period</div> </div>		
<div> <div>07/06/2024</div> <div>To</div> <div>07/06/2024</div> <div>Go</div> </div>		
<div> <div>Show 10 entries</div> <div>Copy CSV PDF</div> <div>Search:</div> </div>		
Account Group	Count	Percentage
Club	0	0.0%
Customer	1	100.0%
Internal	0	0.0%
Price D	0	0.0%
Supplier	0	0.0%
Trade	0	0.0%
Warranty	0	0.0%
	1	
<div> <div>Previous</div> <div>1</div> <div>Next</div> </div>		

Job Mix (Type)

Displays a summary of work order for a specific period by work order sub type. This allows you to see service work vs PDI's etc.

<div> <div></div> <div>Work Order Job Mix by Type</div> <div>Number of jobs per job type for a period. Based on Work order start date and job type.</div> </div>		
<div> <div>07/05/2024</div> <div>To</div> <div>07/06/2024</div> <div>Go</div> </div>		
<div> <div>Show 10 entries</div> <div>Copy CSV PDF</div> <div>Search:</div> </div>		
Job Sub Type	Count	Percentage
	8	44.4%
PDI	2	11.1%
Service	8	44.4%
	18	
<div> <div>Previous</div> <div>1</div> <div>Next</div> </div>		

DVLA Check

This report allows you to enter a registration number and check DVLA vehicle records.

DVSA Check

This report allows you to enter a registration number and check DVSA MOT records.

Loan Vehicles

This report shows you which loan vehicle have been allocated to which jobs for a period of time.

Recall Check.

This report will check government recall databases.

Vehicle history (detailed)

This report will display all products fitted to a vehicle in a specific time period at your dealership.

Vehicle history (summary)

This report displays a summary of work carried out on a vehicle across all users of CloudDMS and includes DVSA Mot records.

Un-invoiced (summary)

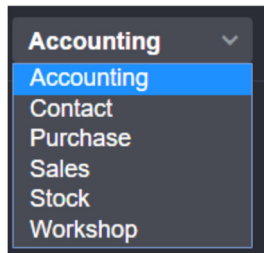
This report shows the value of un-invoiced product on work orders.

Uninvoiced							
Value of uninvoiced transactions, including all product types							
Work Order ▾ All ▾ All ▾ Go							
Show 10 ▾ entries Copy CSV PDF Search:							
Date	Reference	Agent	Account	Net	Vat	Total	
27/12/2020 12:26:32	WO697	test agent name	HIRE WORKSHOP	0.00	0.00	0.00	
24/09/2018 17:32:48	WO278	Test User	ANDREW WEBSTER	0.00	0.00	0.00	
27/09/2018 11:35:28	WO286	Test User	ANDREW WEBSTER	0.00	0.00	0.00	
27/09/2018 11:36:59	WO287	Test User	ANDREW WEBSTER	0.00	0.00	0.00	
16/11/2018 15:37:13	WO297	tim	TIM SUNDERLAND	571.26	114.25	685.51	
10/01/2019 11:58:01	WO317	Test User	JOHN SMITH	0.00	0.00	0.00	
10/01/2019 11:58:01	WO318	John Poulsen	JOHN SMITH	0.00	0.00	0.00	
10/01/2019 11:58:01	WO319	Test User	JOHN SMITH	0.00	0.00	0.00	
10/01/2019 17:55:50	WO320	tim	MRS.	502.00	100.40	602.40	
09/05/2019 11:05:47	WO540	Gavin Glover	4TH D	4.00	0.80	4.80	
				25,023.11	3,981.99	29,005.10	

Accounting

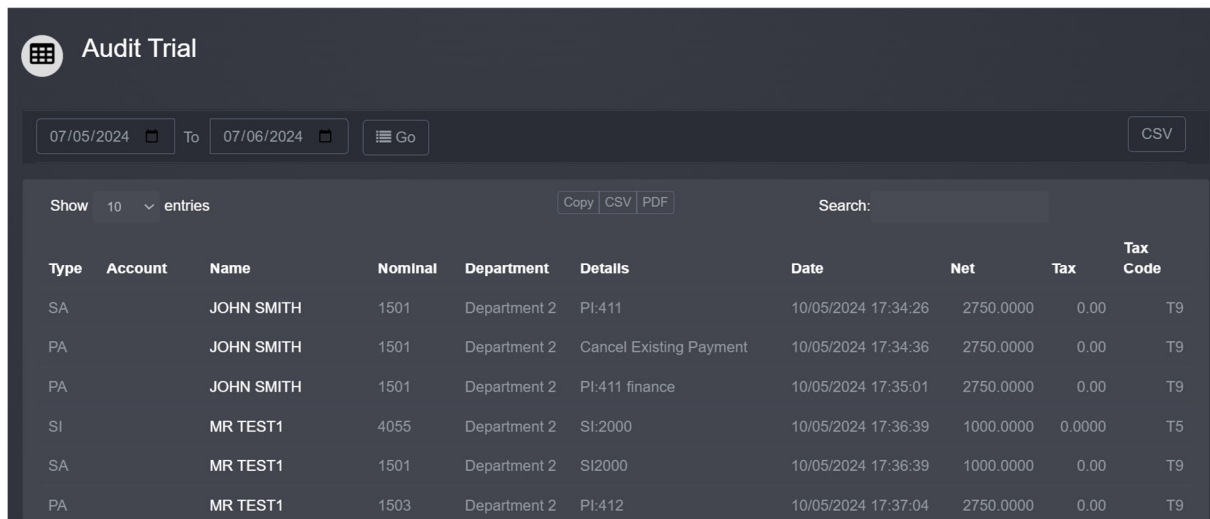
The accounting section contains the nominal ledger and allows you to post transactions directly to it.

Selecting 'Accounting' from the main module selection drop down.



Audit Trail

Press 'Audit Trail' to display the audit trail. This screen lists all ledger transactions for a specified period of time.



The screenshot shows the 'Audit Trail' interface. At the top, there is a header with a calendar icon and the title 'Audit Trail'. Below the header, there is a date range selector showing '07/05/2024' to '07/06/2024' with a 'Go' button. To the right of the date range is a 'CSV' button. Below the date range, there is a 'Show' dropdown set to '10' and 'entries', followed by 'Copy', 'CSV', and 'PDF' buttons. A search bar is also present. The main area contains a table with the following columns: Type, Account, Name, Nominal, Department, Details, Date, Net, Tax, and Tax Code. The table lists several transactions, including payments and sales, with details like 'JOHN SMITH' and 'MR TEST1'.

Type	Account	Name	Nominal	Department	Details	Date	Net	Tax	Tax Code
SA		JOHN SMITH	1501	Department 2	Pl:411	10/05/2024 17:34:26	2750.0000	0.00	T9
PA		JOHN SMITH	1501	Department 2	Cancel Existing Payment	10/05/2024 17:34:36	2750.0000	0.00	T9
PA		JOHN SMITH	1501	Department 2	Pl:411 finance	10/05/2024 17:35:01	2750.0000	0.00	T9
SI		MR TEST1	4055	Department 2	SI:2000	10/05/2024 17:36:39	1000.0000	0.0000	T5
SA		MR TEST1	1501	Department 2	SI:2000	10/05/2024 17:36:39	1000.0000	0.00	T9
PA		MR TEST1	1503	Department 2	Pl:412	10/05/2024 17:37:04	2750.0000	0.00	T9

Nominal Ledger

Press 'ledger' in the 'accounting' screen to display the ledger.

CloudDMS

Universal Search...

Department 2 | Warehouse

Test Agent Name

Accounting

Financials

Audit Trail

Nominal Ledger

Batch

Journal

Payment

Transaction

Export

QuickBooks Export

Sage Export

Xero Export

Reports

Zero Unallocated

Utilities

Merge Nominals

Nominal Ledger

Nominal Accounts

Nominal Balances

01/06/2024

Go

+ Nominal

Assets	Debit	Credit	
1100 - Debtors Control Account	3648939.82		<div>View</div>
1200 - Bank Account		17000.00	<div>View</div>
1500 - Cash	52799.76		<div>View</div>
1501 - Card		1384826.67	<div>View</div>
1502 - Customer Transfer		981404.93	<div>View</div>
1503 - Black Horse Finance	64106.45		<div>View</div>
1504 - MotoNovo Finance	20200.00		<div>View</div>
1506 - PayPal	379.85		<div>View</div>
1506 - Cheque	800.00		<div>View</div>
1507 - Warranty			<div>View</div>
1508 - Supplier Return credit	18998.00		<div>View</div>
1509 - Finance Settlement		9378.80	<div>View</div>
1510 - Windcave	1180.90		<div>View</div>
1515 - Part Exchange	1908.00		<div>View</div>
1600 - Loyalty Points	7.20		<div>View</div>
Liabilities	Debit	Credit	
2100 - Creditors Control Account		541906.35	<div>View</div>
2200 - Sales Tax Control Account		550010.84	<div>View</div>
2201 - Purchase Tax Control Account	41113.11		<div>View</div>
2202 - Vat Liability Account			<div>View</div>
Product Sales	Debit	Credit	

Clicking on 'view' beside a nominal will show you the nominals activity

Accounting

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Utilities

Merge Nominals

1500

Cash

Assets

£ 52799.7600

Nominal Group

20/10/2023 15:18:19

Last Transaction

01/06/2024

Go

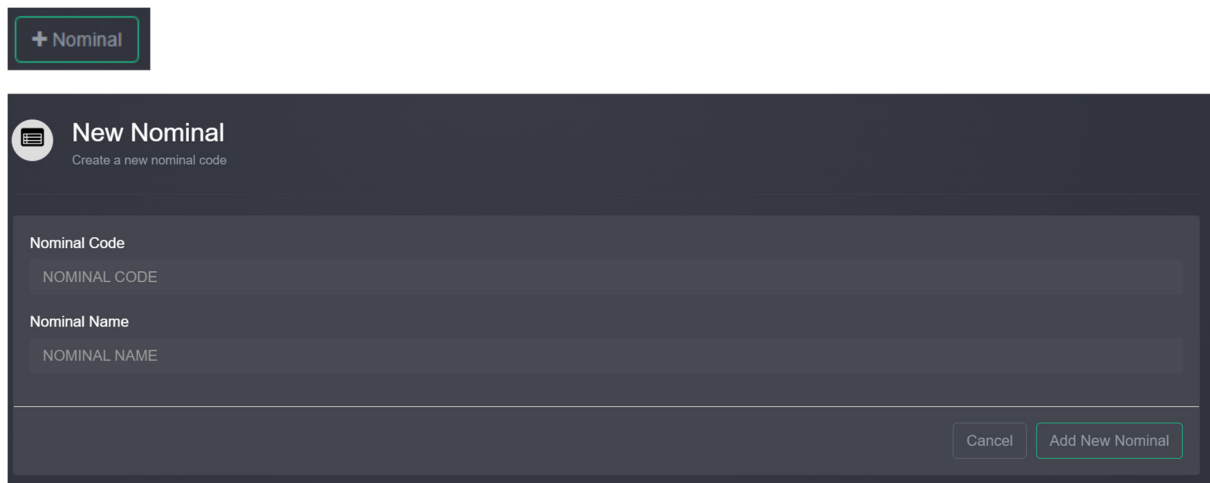
Actuals

Month	Actuals
June 2024	0.0000
May 2024	0.0000
April 2024	0.0000
March 2024	0.0000
February 2024	0.0000
January 2024	0.0000

Month	Actuals
December 2023	0.0000
November 2023	0.0000
October 2023	-551.0000
September 2023	-10519.1800
August 2023	-850.0000
July 2023	-44730.0000

Creating a new nominal

Press '+nominal' on the nominal ledger screen.




The screenshot shows a mobile application interface for creating a new nominal. At the top, there is a dark header bar with a menu icon on the left and the text 'New Nominal' followed by 'Create a new nominal code'. Below the header, there are two input fields: 'Nominal Code' with a placeholder 'NOMINAL CODE' and 'Nominal Name' with a placeholder 'NOMINAL NAME'. At the bottom right, there are two buttons: 'Cancel' and 'Add New Nominal'.

Codes should follow this scheme

- 1100 Debtors control account
- 1200 Primary bank account
- 1500-1599 payment types. i.e. cash, card. cheques
- 2100 Creditors control account
- 2200 sales tax
- 2201 purchase tax
- 2202 vat
- 4000-4999 sales nominals
- 5000-5999 purchase nominals
- 6000-9999 overheads

Journaling entries

Press 'journal' on the account screen.

 **Journal Entry**
Journal entries must balance before they can be posted, i.e. credits - debits must equal zero.

+ Entry

Balance0.0000

Nominal	Department	Details	Tax Code	Debit	Credit
			0.0000	0.0000	

Press '+entry'

+ Entry

New Pending Journal Entry

Date

16/04/2017 10:50:36

Nominal Code

1100 - Debtors Control Account

Department

Software Support

Details

Tax Code

9 - Vat

☒ Debit ☐ Credit

0.00

Cancel


Save

Enter the details and press save.

Entries posted must balance. When you have listed the balancing entries the 'post' option will be displayed.

Payments

Press 'payment' on the account screen

 **Payment Entry**
Batch receipt and payment entry.

+ Entry

Post

Account	Date	Type	Nominal	Department	Details	Net	Tax Code	Vat
						0.0000		0.0000

Press '+entry'

+ Entry

New Payment Transaction

Bank Account

Bank Account

Date

16/04/2017 10:51:51

Type

Batch Receipt

Nominal Code

4000 - Sales Other

Department

Software Support

Details

Net

0.00

Tax Code

1 - Standard Rated

Vat

0.00


Cancel

Save

Enter the payment details and press 'save'

Transactions

Press 'transaction' on the 'accounting' screen

 **Transaction Entry**
Batch invoice and credit entry.

+ Entry

Post

Account	Date	Type	Nominal	Department	Details	Net	Tax Code	Vat
						0.0000		0.0000

Press '+entry'

+ Entry

New Transaction

Account

Date

16/04/2017 10:52:45

Type

Sales Invoice

Nominal Code

4000 - Sales Other

Department

Software Support

Details

Net

0.00

Tax Code

1 - Standard Rated

Vat

0.00

Cancel Save


Entries to nominal ledger must balance before they can be posted.

Quick Books Export

The quick books export allows you to export various CSV files for import into quick books.

Sage Export

The sage export allows you to export various CSV files for import into sage. Account nominals can also be re-mapped as required.



Sage Export

Export CSV files for import into Sage accounting

Account CSV

Export a CSV file of customers who have a transaction in the period

07/06/2024

To

07/06/2024

Export All Accounts

Export Customer Accounts

Export Supplier Accounts

Audit Trial CSV

Export a CSV file of the Audit Trial the period. This can include sales invoices, sales credits, purchase invoices, payments and receipts.

07/06/2024

To

07/06/2024

☒ SI. Sales Invoice

☒ SC. Sales Credit

☐ PI. Purchase Invoice

☐ SA. Receipt

☐ PA. Payment

☐ Include Internal

Show

10

entries

Copy

CSV

PDF

Search:

Name	CloudDMS Nominal	CSV Export Nominal	
Cash	1500		<div>Edit</div>
Card	1501		<div>Edit</div>
Customer Transfer	1502		<div>Edit</div>
Black Horse Finance	1503		<div>Edit</div>
MotoNovo Finance	1504		<div>Edit</div>
PayPal	1505		<div>Edit</div>
Cheque	1506		<div>Edit</div>
Warranty	1507		<div>Edit</div>
Supplier Return credit	1508		<div>Edit</div>
Finance Settlement	1509		<div>Edit</div>

Previous

1

2

Next

Export Audit Trial

Xero Export

The Xero export allows you to export various CSV files for import into Xero. Account nominals can also be re-mapped as required.

Zero Unallocated.

This report shows accounts with a zero balance that have un-allocated amounts.

Zero Balance Un-Allocated		
Accounts with a zero balance that have un-allocated transactions		
Show 10 entries Copy CSV PDF Search:		
Account Code	Customer	Balance
	Jak Beal	0.00 View
	CMS MOTORCYCLES	0.00 View
	CUSTOMER TRANSFER A	0.00 View
	David Fleming	0.00 View
	dep2	0.00 View
	DES GREGORY 5	0.00 View
	FELIX DE JESUS CARDOSO	0.00 View
	JIO	0.00 View
	JOHN SM	0.00 View
	JOHN SMITH	0.00 View
Previous 1 2 Next		

Merge Nominals

This screen allows you to combine nominals if you need to tidy up the ledger.

<div><div></div><div>Merge/Change Nominals</div><div>Combine or change nominal codes</div></div> <div><div>Nominals will be adjusted across the entire DMS, for all matching product SKU's, including vehicles.</div><div>The nominal ledgers will be combined and the merge nominal deleted.</div><div>It may take some time to process the changes. If the alteration times-out email support with change you want made.</div></div> <div><div>Find Nominal (Merge)</div><div></div></div> <div><div>Change Nominal to (Keep)</div><div></div></div> <div><div>Close</div><div>Update</div></div>

Marketing

The marketing section allows you to manage notifications to your customers via email or SMS. This section is only recommended for notifications regarding servicing and MOTs etc.

Promotional email campaigns should be carried out using Mailchimp.

Campaigns

Campaigns are mass email/SMS communications which you have configured to contact your customers.

Queued

Queued campaigns lists all campaigns which are set-up and in the queue to run.

Paused

Lists all campaigns which are set-up and paused.

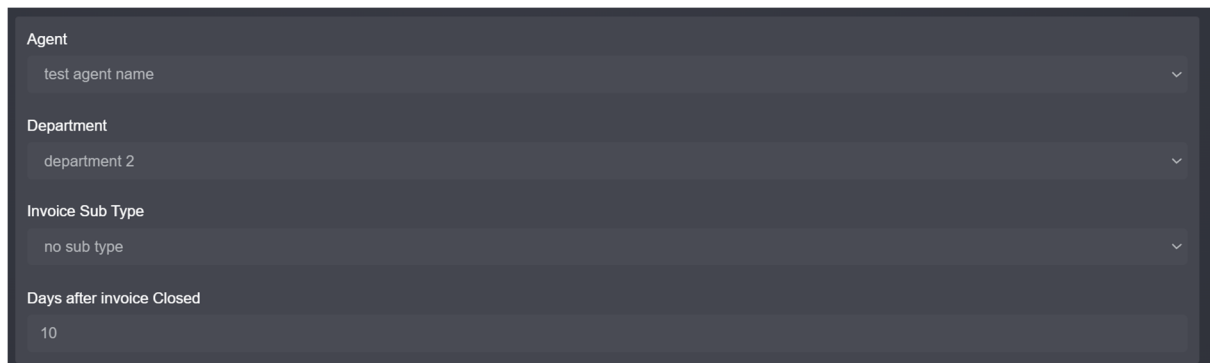
Sent One Off

Displays completed campaigns.

New Follow Up

This section allows you to set-up an automatic follow-up communication to your customers. Typical uses would be to send an email 5 days after a customer collects a new vehicle to make sure they are happy or send a service reminder one year after their last service.

You can configure the selection criteria based on transaction sub type and the number of days since the trigger transaction.



The screenshot shows a dark-themed configuration form with four sections, each with a label and a dropdown menu:

- Agent**: dropdown menu showing "test agent name" with a downward arrow.
- Department**: dropdown menu showing "department 2" with a downward arrow.
- Invoice Sub Type**: dropdown menu showing "no sub type" with a downward arrow.
- Days after invoice Closed**: text input field containing the number "10".

You then specify the SMS message you want sent. It's critical that you change 'send SMS' to 'Yes'.

Send SMS

No

SMS From ID

SMS FROM ID

SMS Template

Select template...

SMS Message

Or the email you want sent. Change 'Send Email' to 'Yes'.

Send Email

No

From

TEST2@DEEPBLUESYSTEMS.COM

Email Header

department 2

Email Subject

email subject

Email Message

Create open thread

No

Agent

test agent name

Message

When everything is setup press 'save'.

Messages matching you trigger criteria will automatically be sent.

New One Off

This screen lets you send out a one-off batch of messages based on certain criteria. The most common use is for MOT reminders.

Selection criteria is based on customer, vehicle or transactions. Set the criteria as required.

Customer Selection

- Starting Keyword

- Starting Keyword

Vehicle Selection

- Starting Keyword

- Starting Keyword

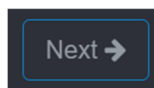
Transaction Selection

- Starting Keyword

- Starting Keyword

- Starting Keyword

Press 'next' at the bottom of the screen to preview the results.



Matching customers will then be previewed on the screen.

Name	Address1	Address2	Address3	Address4	Address5	Email	Mobile	Reg	Make	Model	V
IAN SMITH	altered 3		CHELMSFORD	ESSEX	CM14WH	JOHN@ABC.COM	07712345678	EK60VJE	KAWASAKI	ZZR1400	J
TEST CUSTOMER	280A NORTHFIELD AVENUE		LONDON		W5 4UB	no marketing					
CHICKEN SOUP	284A NORTHFIELD AVENUE		LONDON		W5 4UB		07973116379	AA123BCD	KAWASAKI	EX650EFF	J
JAMES FISHER	234 HAPPY LANE			VERWOOD	BH31 6TY						
JOHN SMITH	80 CUCKOO AVENUE		LONDON		W7 1BN	no marketing	no marketing				
LUCIAN STAN	3 Wimborne Grove	Watford		Hertfordshire	WD174JF	no marketing	no marketing	It68vyw	HONDA	NSS 300 A-K	2

6 Records

4 Email Addresses

4 Mobile Numbers

Previous 1 Next

If you are happy with the results press 'next' to move to the message section.

Send SMS

No

SMS From ID

SMS FROM ID

SMS Template

Select template...

SMS Message

Send Email

No

From

TEST2@DEEPBLUESYSTEMS.COM

Email Header

department 2

Email Template

Select template...

Email Subject

email subject

Email Message

Enter the message you want to send and press 'next'.

The 'One Off 07/06/2024 12:11:34' campaign is ready to send.
Please select the campaign status and press 'save'

☐ Queue to Send

☒ Pause to Send later


← Back

Save

If you want to send the messages right away select 'queue to send' and press 'save'.

Email Attachments

This section allows you to setup an extra attachment which will be sent with all emails. Useful if you want to include your terms of business with every email sent from the system.

 **Email Attachments**
Configure attachments to be added to outgoing emails, typically terms and conditions.

[+ Attachment](#)

Show 10 entries

Copy CSV PDF

Search:

Name	Department
Terms	All


Previous

1

Next

Email Templates

This section allows you to configure email templates which can quickly be selected when emailing your customers. This save time and ensures communications are consistent.

 **Email Templates**
Configure Email Templates. Templates can be selected when sending Email/Email messages.

[+ Template](#)

Show 10 entries


Copy CSV PDF

Search:

Message	Work Order Default	Department
Dep 1 Message		Department 1
MOT Due Department 2		Department 2
OVERDUE ACCOUNT The Following Transaction Attached Are Still Outstanding Despite Continuous Statements Being Sent. This Invoice Is Extremely Overdue And Requires Payment By Return Please. If You Have Any Queries On The Outstanding Invoice(S) Please Contact Us Without Delay. If You Would Like To Pay By BACS Our Bank Details Are Lloyds Bank 30-80-89 42812268, Or You Can Phone Us On 01202 612610 To Pay By Debit Or Credit Card. If You Have Made Payment Since Receiving This Letter Please Accept Our Apologizes. Yours Sincerely For AVON MARINA LLP L Baker LIANE BAKER (MRS) ACCOUNTS DEPT		All

SMS Templates

This section allows you to configure SMS templates which can quickly be selected when texting your customers. This save time and ensures communications are consistent.

 **SMS Templates**
Configure SMS Templates. Templates can be selected when sending SMS messages.

+ Template

Show 10 entries


Copy CSV PDF

Search:

Message	Work Order Default	Department	
(U1) Scheduled (DATE) (TIME) At Test Dealer.		Department 1	<div><div></div><div>Edit</div></div>
(U1) Scheduled (DATE) (TIME) At Test Dealer. Default For All	Default	All	<div><div></div><div>Edit</div></div>
Department 1 Only Sms Message		Department 1	<div><div></div><div>Edit</div></div>
Hello From Crescent. The Parts You've Ordered Are Now Ready For Collection. Regards, Parts Department		Department 1	<div><div></div><div>Edit</div></div>
Service Reminder. Please Drop Off 08.30 Tomorrow (02/09/17). Do Not Reply To This Message		All	<div><div></div><div>Edit</div></div>
Test Template, Department 2 Only		Department 2	<div><div></div><div>Edit</div></div>

Account List.

Allows you to specify criteria to list all matching accounts.

 **Account List**
Email & phones numbers will be removed if the customer has 'no marketing' preference set

Account Code Starting Keyword Go

- Starting Keyword

- Starting Keyword

Show 10 entries

Copy CSV PDF

Search:


Code	Group	Name	Address1	Address2	Address3	Address4	Address5	Phone	Mobile	Email
No data available in table										

Previous

Next

Tasks

The task section is essentially a to-do list, allowing you to record tasks and mark them as completed.

 **Open Tasks**
Open task list

All ▾

All ▾

Go

Show 10 ▾ entries

Copy | CSV | PDF

Search:

Priority	Group	Subject	Start	Due	
High	Product	John Ridout Shock Bolt	23/10/2018	23/12/2018	View
Normal	To Do	Vehicle Stock Summary Report. Depots Across The Top Make Down The Side	26/02/2019	28/03/2019	View

Previous

1

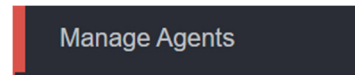
Next

Trade Customer Portal

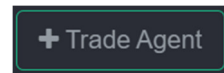
CloudDMS includes a full trade portal allowing your customers to login into a limited version the system and check stock levels, back orders, account balance as well as raise sales orders.

Adding a Trade Agent User

Navigate to 'Manage Agents' in the Admin section.



Press '+Trade Agent'



The new trade agent dialogue will then be displayed.

A dark-themed dialog box titled "Add New Trade Agent". It contains several input fields: "Name" (placeholder: Name), "Department" (dropdown: department 1), "Stock Depot" (dropdown: shop), "Mobile" (placeholder: mobile), "Login Email" (placeholder: test2@deepbluesystems.com), "New Password" (masked with dots), "Confirm Password" (empty), and "Linked Account Name" (placeholder: Search by Name or Postcode). At the bottom, there is a light blue box with the heading "Pricing Schedule" and a bullet point: "• 'Trade' agents cost £3.00 per month". At the very bottom are "Close" and "Save" buttons.

Enter the agents name, email and a password as well as settings the department and stock depot.

You need to link the trade agent to their company's account. Click in the 'Linked Account Name' box and start typing their company name.

Linked Account Name

As you type the nearest match is displayed, when you see the right account press 'select'

Linked Account Name

CBS
Open Supplier


Cbs
, TW2 7DX

Select

Press 'Save' to create the agent login. The agent will automatically be emailed login details.

Trade Agent Login

You trade customer should log into the system from <https://deepbluesystems.com> you their credentials.



Username

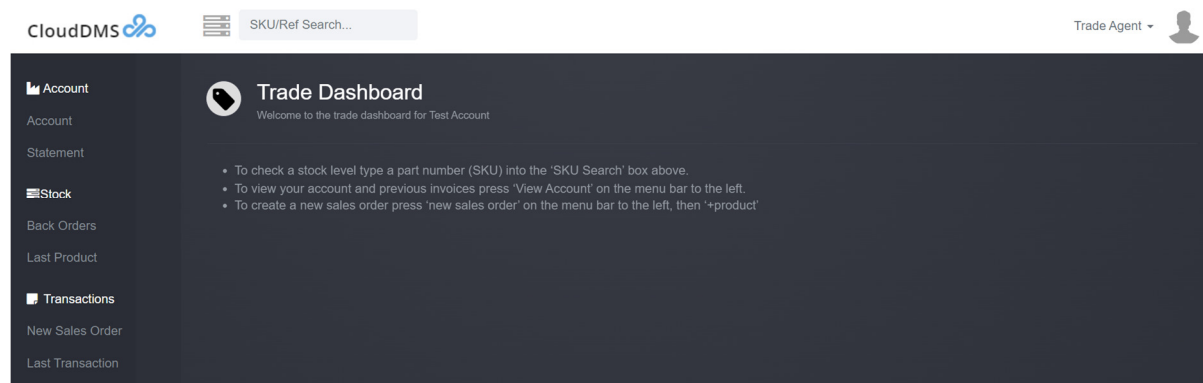
Password

Sign In

Terms & Conditions
Deep Blue Systems Cloud DMS

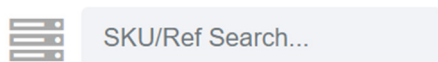
Portal Landing Page

Once a trade agent logs into the system, they will see a customised menu bar which provides access to their available functions.

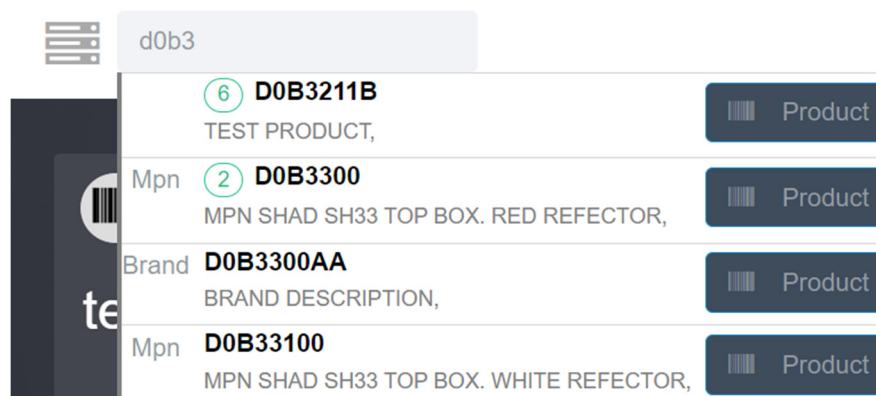


Checking Stock Levels

Click in the universal search box and enter the SKU



As you type the nearest match will be displayed. Press 'Product' beside the relevant SKU to display the stock record.



The stock record allows your customer to see the current stock level as well as pricing information.

D0B3211B

6

In Stock

Normal

Type

Standard Rated

Tax Code

Available

Status

Selling

+ Sell

Group	Price	Inc.
Club	117.00	140.40
Customer	101.00	121.20

If your customer wants to order the part, they can press '+Sell' and raise a sales order.

Account

The account option displays the customers account, including pervious transactions and current account balance.

CloudDMS

SKU/Ref Search...

Trade Agent

Account

Account

Statement

Stock

Back Orders

Last Product

Transactions

New Sales Order

Last Transaction

JOHN SMITH

22 Barnfield Avenue
Kingston Upon Thames
Surrey
KT2 5RE

Open

Status

23 hours ago

Last Transaction

Customer

Group

None

Tax Code

Transactions

All

All

Account

Service Sales Invoice SI1380

Closed Department 2

11/11/2024 11:11:42

Date

Test User

Agent

£ 208.34

£ 200.00 Outstanding

View

Sales Order SO108

Pending Department 1

20 hours ago

Date

Trade Agent

Agent

£ 471.20

3 Products

View

Credit Limit The account is over its credit limit

£ 161,014.54

Balance in debt

£ 2000.00

Credit Limit

£ 65,745.97

Open Balance

Associated

Previous transactions can be displayed and printed by pressing 'view' beside the relevant transaction.

356

Account Statement

Press statement on the menu bar will display a current statement for the account which can be printed.

Test Company

address 1, address 2, address 3 address 4
email@hotmail.com

Account Statement

JOHN SMITH
22 Barnfield Avenue

Date : 13 June 2024
Agent : -

Kingston Upon Thames
Surrey
KT2 5RE

Date	Order No	Reference	Outstanding	Debit	Credit	Balance
13/11/2017		PI:68	500.00	0.00	500.00	-500.00
21/11/2017		SI:340	0.00	10.00	0.00	-490.00
21/11/2017		SI340	0.00	0.00	10.00	-500.00
21/11/2017	PJ10KXN	SI:341	0.00	83.99	0.00	-416.01
21/11/2017		SI341	0.00	0.00	83.99	-500.00
26/11/2017		SI:277	4.78	2054.78	0.00	1554.78
26/11/2017		SI277	0.00	0.00	50.00	1504.78
26/11/2017		SI320	0.00	0.00	500.00	1004.78
26/11/2017		SI:320	0.00	2400.00	0.00	3404.78
26/11/2017		SI320	1000.00	0.00	1000.00	2404.78
29/12/2017		SI320	0.00	0.00	1.00	2403.78
10/01/2018		SI392	0.00	0.00	3995.00	-1591.22
10/01/2018		SI:392	0.00	3995.00	0.00	2403.78
10/01/2018		SC:54	0.00	0.00	59.00	2344.78
14/01/2018		PI:81	0.00	0.00	2000.00	344.78
14/01/2018		PI:81	0.00	2000.00	0.00	2344.78
14/01/2018	Dg56cnf	SI:405	78.64	78.64	0.00	2423.42
14/01/2018		finance	0.00	0.00	2000.00	423.42

Sales Orders

A new sales order can be raised by pressing 'New Sales Order'

New Sales Order

JOHN SMITH

22 Barnfield Avenue
Kingston Upon Thames
Surrey
KT2 5RE

(07973) 116 378

No Marketing

jeff@deepbluesystems.com

No Marketing

Sales Order

13/06/2024 11:23:48

Date

SO*

Reference

Trade Agent

Agent

Department 1

Department

Customer

Account Group

Open

Status

Products

PrintProduct

Description	Qty	Unit	%	Net	Tax	Vat	Line
-------------	-----	------	---	-----	-----	-----	------

Payment Log

Date	Agent	Detail	Amount
------	-------	--------	--------

NotesEdit

Total

Terms and Conditions

Adding products

Pressing '+Product' will display the part picker

+ Product

Add Product to Sales Order

Enter the SKU then select the part from the list

Cancel

Click in the SKU box and enter the part number. As you type the nearest match will be displayed.

Add Product to Sales Order

Enter the SKU then select the part from the list

Qty

D0B3211B	test product	£ 121.20	+ Add
	Ex. 101.00		
D0B3300	SHAD SH33 TOP BOX. RED REFECTOR mpn	£ 10.00	+ Add
	Ex. 8.33		
D0B3300AA	DESCRIPTION brand	£ ?	Back Order
	No Customer	Shop	
	Price		
D0B33100	Shad Sh33 Top Box. White	£ 86.99	Supersession
	Ex. 72.49		

Cancel

Press '+Add' beside the relevant product to add it to the sales order.

Description	Qty	Unit	%	Net	Tax	Vat	Line
D0B3211B	1.00	101.00	0.00	101.00	T1	20.20	121.20
test product							
Status			Qty	Unit	Discount	Net	
In Stock, Reserved. Ab Shop		1.00	101.00	0.00	101.00		

Repeat unit all products required have been added.

Finishing the Sales Order

When the sales order is complete press 'Finish SO'

Finish SO

This will display the finish dialogue

Finish this Sales Order

Are you sure you want to close this Sales Order?

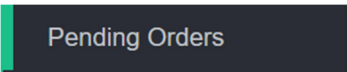
Close Finish SO

Pressing 'Finish SO' again will mark the sales order as 'Pending' which will stop further products being added to it.

Managing trade agent orders

Log into the DMS using your normal login.

In the 'sales' section click on 'Pending Orders'



Any pending orders will then be displayed.

Open Pending Sales Orders

Pending sales orders are created by trade agents via a trade login.

All ▾

Show 10 ▾ entries

Copy CSV PDF

Search:

	Date	Ref	Agent	Department	Customer	Note	Total
	13/06/2024	SO109	Trade Agent	Department 1	JOHN SMITH		121.20
	12/06/2024	SO108	Trade Agent	Department 1	JOHN SMITH		471.20
							592.40

To display the order click on the view button or the transactions reference.

You can then modify the sales order and press 'Finish SO' to change the transaction to a sales invoice.

Common Questions and Answers

Please refer to the 'knowledge base' which can be found on the user menu in the top right corner of the screen.

What's the difference between, Sales Invoice, Sales Order, and Proforma?

Proforma's show what something would cost, it does not reduce stock levels and does not incur a debt for the customer.

Sales orders allows you to book products out of stock without raising an invoice. When you complete a sales-order it becomes a sales invoice.

Sales invoices is essentially a request for payment for products which have been supplied to the customer. The invoice details which products have been sold and at what price.

How can I delete a deposit?

You can't delete a deposit, but you can cancel it out.

- Display the customer's account
- Press '+Payment'
- Change the Payment type from 'receipt' to 'payment'
- Enter the amount and press 'save'
- Press 'Allocate' and pro-rata the payment
- Press 'Allocate' on the dialogue

Change the DMS colour scheme

The DMS supports 2 main colour schemes. Dark and Light. To change scheme go to the 'Admin' section then click on Agent Profile. Press Edit, select the required scheme under 'colour scheme' and press Save.

Changing/renaming a department

If you want to change a departments name the best option is to add a new department with the new name, then delete the old department. This way old invoices will still be able to find the departments settings and print with headers. If you just rename the department invoices created with the old department name may print without your header.

Contact Support

Please search the knowledge base and consult the user guide before contacting support. Please include your company details when emailing support.

- Questions & Problems Email support@deepbluesystems.com
- Bugs & Feature Requests Email steve@deepbluesystems.com

We aim to respond to emails within 1 business day.

How do I change my password?

Go to 'admin' -> 'Agent profile' and click 'change password'. Or, login as another user (administrator level) and go to 'admin'-'manage agents' and press 'reset password;' beside the relevant account.

How do I change the next sales invoice number?

You can set the invoice number from 'admin' -> 'company settings' -> 'script values'. Press 'edit' on the sales invoice line and set the number as required, then press 'save'

Choose Opening Screen

You can select which screen is displayed after you sign in from the agent profile screen in 'Admin'. Press Edit, select the screen from the list and press Save

How can I send a SMS message to all customers?

- Go to 'Marketing'
- Click on 'new one off'
- Choose any filters required, or leave blank for all.
- Press 'next'
- Press 'next' again
- Set 'send SMS' to 'Yes' and enter the 'SMS Message'
- Press 'Next'
- Change it to 'Queue to Send' and press 'save'

How do I link my system to Contact Online?

- Log into CloudDMS as an administrator
- Go to the 'admin' section
- Click on 'Data Feeds'
- Press '+Feed'
- Expand 'Contact Online'
- Select the required department and agent from the drop downs, then press 'add feed'
- Email the company ID and Database Node to contact online.

Contact online will then be able to push sales leads into the DMS.

How do I send mot reminders?

- You can send mot and service reminders on a batch basis using a vehicles mot and service due fields.
- Go to the 'Marketing' section
- Click on 'New One Off'
- In 'Vehicle Selection' select 'Mot Due'
- To the right change the march type to 'Greater'
- Enter the start date
- On the next line select 'Mot Due' again
- To the right select 'Less'
- Enter the end date
- Press 'next' to preview the matching customers
- Press 'Next' again to move onto the message
- Change 'Send SMS' to 'Yes'

- Enter the SMS Message and press 'next again'
- Click on 'Queue to send' and press 'Save'

The messages will be sent in the next 5 to 20 minutes.

Thread categories and sales lead processing

Threads can have category, make, and model tags set. This allows you to allocate a new thread as 'NEW MOTORCYCLES' 'SUZUKI' 'GSX750' or whatever the customer is interested in. These extra fields can be used in the 'open thread' list to filter the threads. So you could see all 'clothing' enquires. Etc. Before you can tag the threads, you have setup the fields. You do this from 'admin' -> 'company settings' -> 'issue categories' You can define any categories you require, inside each category you can add makes, inside each make you can add models. Once these fields are setup you can then tag and filter threads on them. This feature will be useful for managing sales leads as well as reporting on sale conversions etc.

Thread Overview

Each customer has a 'contact' and an 'account' screen. On the contact screen you can create a new 'thread'. The title of the thread should be something short and to the point. i.e. looking to buy a GTS. Once the thread is created you can then record contacts within the thread by pressing '+activity'. Essentially each contact should be recorded separately inside the thread. Threads stay open till you close them. You can see a list of open thread at any time by clicking on the 'open threads' option on the menu bar. When you close a thread you can choose an existing resolution or specify a new one. Resolutions are the outcome of the thread so, 'Sold Bike', 'No Sale', etc. You can schedule a closed thread to reopen on a specified date. You can also specify a date for a thread to show as open on your list.

Why cant I send emails through the DMS from my own email account?

The email function in the DMS is one way like the SMS. Essentially the from address can't be altered, the emails are sent from a special bulk email account (we pay for every email sent) which has all the validations and authentications to give them the best chance of getting through ISP and email client filters.

In your agent profile you can set the 'from email' field which will allow customers to reply to you pressing 'reply' in their mail client.

Text SMS Message Templates

You can save common SMS messages as a template to save re-typing common customer notifications. Common SMS templates would be 'Your bike is ready for collection', 'Your parts have arrived' When the DMS prompts for an SMS message there will always be a drop down box above the message listing saved SMS templates. To Add/Edit/Delete a SMS template go to 'Marketing' -> 'SMS Templates'

Booking in 'on-order' products and back-order allocation.

Different sections of the DMS apply slightly different rules in selecting which product is booked in. Each product on a purchase invoice has a specific destination, which could be stock or for a customer. When you book in from a purchase invoice you are booking in those specific items on the purchase invoice. If you go to 'stock' -> 'book in' it looks at all on-order products. Typing in a part

number to tag products will tag the oldest customer one first. You can also display a products page then press 'back order' just below the stock level. This shows you the back orders for the product. Pressing the little up arrow beside each line will book in that specific part.

Booking in Products which were ordered on a Purchase Order

When an order arrives from your supplier you need to book it into stock. There are 2 main methods of doing this. The first is to display the original purchase order. You can find the purchase order in the suppliers account or by typing its reference into the universal search window. i.e. PO4555 Once displayed press 'Book In'. This will display the 'on order' list. You should make sure the delivered products are checked then press 'Book In'. The screen will then display the status for the products which have just been booked in and give you the option to print a stock allocation list or product labels.

The second option is to go to 'stock' – 'Book In'. This displays a list of all product you have ordered, from all suppliers which have not yet arrived. The first step now is to check all the parts which have arrived in this delivery. You can do this by ticking the check box by each product or entering the SKU at the top of the screen and pressing enter. You can use a barcode scanner for doing this. Once all parts have been checked press 'Book In', where you can then print a stock allocation list or labels.

Exporting Kawasaki Purchase Orders in CSV

Purchase orders can be exported from the DMS in the correct format to import directly into Kawasaki's dealer system. The supplier account code must be 'KAWASAKI' in order for the DMS to apply the correct export format. To export an order.

- Display a Kawasaki Purchase Order
- Press the CSV button
- Select 'export all products' or 'export outstanding' from the dialogue box
- Press the Export button

The file will then be downloaded to your computer. A prompt will be displayed by your browser allowing you to save or open the file.

How do I change the terms on a vehicle sales invoice?

- Go to 'admin'->'Company settings'->'Terms'.
- Press '+Terms' and create some new terms for the purchase invoice.
- Go to 'admin'->'Company settings'->'Terms Allocation'.
- Press '+Allocation' and configure the terms override.

How do I get a list of vehicle purchases?

Go to 'purchasing'->'Purchases (vehicle)'.

- Set the date range
- Select the vehicle category i.e. 'new-vehicles'
- Select weather to include all vehicle purchases, outright purchases, or part exchanges.
- Press 'Go'

Vehicles will only be included in the report if they were purchased via a purchase invoice. Vehicles added directly into stock via the 'up-arrow' will not be included.

Is there a way to move all parts that are on an open order back to the current order?

If you delete/remove each part from an open purchase order it will go back onto the current order list.

Can I save customer credit card details?

There is no area or fields in the cloudDMS for credit card details as its not permitted under GDPR regulation. We do not recommend recording or writing down customer credit card details in any form.

How can automatically add notes to every single invoice as soon as it is raised?

- Go to 'admin' -> 'company settings'
- Click on 'Script'
- Press 'Edit' beside 'Sales Invoice'
- Enter the text you want added to every invoice in the 'Terms' section
- Press 'Save'

How can I re-open or edit a closed sales invoice?

Normally you can't cancel or re-open a closed sales invoice. The correct procedure is to display the sales invoice, then press 'credit'. This will credit the invoice, then you can re-invoice it again. The advantage of crediting is it shows a clear history of what has happened as well as conforming to established accounting best practice.

Recently however we have added the option to 're-open' a closed invoice. To enable you to do this you need to add a specific permission to your login.

- Go to 'admin' -> 'manage agents'.
- Press 'permissions' beside the relevant agent
- Press 'add permission'
- Under 'sales restrictions' select 'all invoice re-opening' and press 'apply'.
- The agent will have to log out and back in again for the permission to take effect.

Re-opening invoices is not recommended as it can cause inconsistencies with reporting for the date in question. Some invoices in certain circumstances cannot be re-opened, if this is the case you will need to credit and re-invoice.

How can I remove a payment method?

Go to 'admin' -> 'company settings' -> 'payment methods' Find the payment on the list and press 'delete' beside the required method to remove it.

How can I search for a vehicle by Registration number?

You can type the registration number into the universal search box to find customers (or stock). Alternatively, you can go to the 'Contact' section, then 'Search Accounts'. In this screen you can select Reg from the field list.

How can I sell/invoicing in another currency like euros?

CloudDMS only support one currency, GBP. There is however the option to print a euro total on invoices, although the invoice is still in GBP and all ledger amounts will be in GBP.

- First go to 'admin'-'>'company settings', then click on currency. If its not there already add in 'Euro', the symbol and exchange rate. If its already present press 'edit' and set the exchange rate.
- Next go to your suppliers account and press 'edit', set the 'Invoicing currency' to 'Euro', press 'Save'. The next time you create a sales invoice for that account the current exchange rate (from company settings) will be set for the invoice and a euro total will be printed. This will only be applied to invoice created after you set the accounts invoicing currency.

How can I upload a PDF to a work order for future reference.

Each work order has a linked 'thread' to record contact with the customer as well as notes and documents.

- Display the work order
- Click 'contact' on the 'job details' toolbar to display the associated thread.
- Press '+activity'.
- Add a note in the 'details' box if required.
- Press 'Choose File', then select the file.
- Press 'Save'

How do add an internal cost to a vehicle stock record?

- Display the vehicles stock record
- On the 'costs' toolbar press '+internal'.
- Press '+invoice' or '+job' beside the internal account you want to use, normally 'workshop'.
- This will start the invoice (or work order)
- Add parts, labour, etc. When you finish the invoice, it will show as an internal cost against the stock record.

How do I add a delivery address to an invoice?

- Start a new sales invoice, or display the existing sales invoice
- Press '+associated'
- If the customer has an existing delivery address you can pick it from the list, or you can enter the new delivery address in the section below.

Please note, you cannot have a delivery address and a vehicle specified on the same invoice, its one or the other.

How do I add common terms to all my invoices?

- Go to 'admin'-'>'company settings', then click on 'script values'.
- Beside 'sales invoice' press 'edit'
- Enter the terms and press 'save'

How do I allocate a sales credit to a new sales invoice?

If the invoice is open you can press the allocate button beside the payment button. This will allow you allocate any closed sales credit or account payment to the invoice. If the sales invoice is closed go to the customer's account and then press 'allocate'. You can then allocate the sales credit to the sales invoice.

How do I book out/sell a fraction/part of product, i.e. sell 0.5 of a product.

Products of type 'Normal' can only be booked out in whole numbers.

Products of type 'Non-stockable' can be booked out in fractions, but non-stockable do not have stock levels.

Products of type 'Fractional' can be booked out in fractions and a stock level maintained.

How do I change a payments date?

You have to be an administrator to change a payment date.

- Display the customer's account.
- Press the 'View' button on the account toolbar
- Find the relevant payment on the customer's account ledger
- Press the yellow edit button at the end of the line
- Alter the date and press 'Save'

How do I change an invoice date after it has been finished.

Changing invoice dates is not recommended as it can cause inconsistencies in some reports.

However you can change an invoice date if you are an administrator and you have the permission added to your user account.

To add the permission:

- Go to 'admin'->'manage agents'
- Press 'permissions' beside the relevant agent
- Press '+permission'
- Under 'sales restrictions' select 'allow invoice date editing' and press 'apply'
- You will need to log out and log back in again for the permission to be active.

To change the invoice date

- Display the customer's account
- Press 'activity' to see the accounts transactions
- Find the relevant sales invoice and press the yellow edit button at the end of the line.

How do I delete a payment?

Its not possible to delete a payment, you can however cancel it out by creating another opposite payment.

If the payment was originally made on the customer's account:

- Display the customer's account
- Press 'Payment' on the account toolbar
- Change the payment type to 'payment (money out)'

- Select the payment type and enter the amount
- Press 'Save'

This will create a payment on the customers account to cancel out the original payment. You can also clear down the account by press 'Allocate' on the account tab then allocate the payments to each other.

If the payment was made on an invoice:

- Display the invoice
- Press 'x' button beside the payment

This will create an opposite payment to cancel it out.

How do I dispatch/release some products from an invoice?

- Display the sales invoice.
- Press the 'release' button on the products toolbar. This button is only displayed if the invoice is closed.
- In-stock reserved products will now be displayed. Check the products you want to release/dispatch.
- Press 'release'
- Set or check the required options on the dialog and press 'release'.

How do I do a refund?

Display the original sales invoice the press the 'credit' button on the toolbar. This it will credit the whole invoice.

Alternatively press 'new credit' on the 'sales' section side bar.

- Select the customer
- Add the parts being returned.
- Finish the sales credit.
- If you are refunding the money record a payment on the sales credit.
- Press 'Book In' to book the parts back into stock

How do I edit the invoice header?

- Go to 'admin' -> 'company settings'
- click on 'headers'
- Press 'edit' beside 'header'
- Scroll down till you see the email address, then correct it.
- Press 'save' at the bottom of the dialogue box.

How do I extract customer dispatch details for the royal mail website?

Go to 'stock' -> 'book out', then from the stop down select 'dispatched today' or a specific batch. Press 'Export' and select 'Royal Mail' This file should be fine to upload to the royal mail, although you may have to make an adjustment in the royal mail portal to fit the format exactly.

How do I get the finance company's name on a sales invoice?

The sales invoice must open and not have any payments recorded. You should see a button marked '+ invoice to', press this and select the finance company. This will move the invoice to the finance company so its invoiced to them, but leave a short cut on the customers invoice history so you can see the vehicle sale. The vehicle will also remain on the customer. Alternatively you can press '+Associated' and enter another address. If you enter the first line as 'Finance Invoice To:' they should accept it. You could also sell the vehicle directly to the finance company then add the customer with '+Associated' as a delivery address. With this method you would have to manually added the vehicle to the customers account.

How do I handle returns and faulty products.

If a customer returns a product(s), you should raise a sales credit.

If the customer is returning all the products on an invoice.

- Display the original sales invoice.
- Press 'Credit' or the product tool bar. This will create a sales credit for all the products on the original sales invoice.
- Finish the sales credit.

If the customer is returning part or a previous invoice or products from multiple invoices.

- Display the customer's account.
- Press '+credit'. This will create a new sales credit for the customer
- Add the products which are being returned.
- Finish the sales credit.

If you are refunding the customer record a payment (money out) against the sales credit. If you want to leave credit on the account, then leave the sales un-paid. The sales credit can then be allocated to a future sales invoice.

If the products are being returned to stock and can be re-sold book in the sales credit. This will add the products to your stock. If the products were not returned or can not be re-sold expand each line on the sales credit and mark them as 'never received'.

How do I hide Bin Locations on invoice print outs?

- Go to 'admin'->'company settings' ->'Headers'
- Press 'edit' beside the header and change 'hide bin locations' to 'yes'
- Press 'Save'

How do I import a sale from eBay?

In your eBay account sign up for 'file exchange' if it is not already added to your selling account. In the file exchange section export the relevant sales to CSV and save the file to your desktop.

- In 'sales' press 'new invoice'
- Then press 'import'
- Select 'eBay File Exchange'
- Select the file and press 'import'
- If the file contains many sales it may take several minutes to process Its important to check and correct the sales invoice before closing it.

- The product SKU must be present in the 'custom label' field in eBay. If this is not present the product will not be booked out to the sale.
- The product tax code in the DMS must match the tax code in eBay.
- If there is more than one sale in the CSV file they will all be processed and can be found on the 'open invoice' list.
- The customer reference is set to 'eBay xxxx' where xxxx is the 'sales record number' field in the file exchange CSV. This reference is checked to ensure that sales are not imported more than once.
- The import attempts to match the customer to an existing record in your customer database by looking at the 'customer name' and 'post code'. If not match is found a new customer is created.
- Postage is added using non-stockable part number 'POSTAGE'. This SKU must exist in your parts database.
- Payment details are added to the invoice notes. You will have to manually enter the payment when you close the sale.
- If a product has been sold to a customer outside the EU you will have to manually adjust the tax code

How do I move a sales credit to a different account?

- Go to 'Admin'-'>'Company Settings'-'>'Payment Methods'
- Press '+Payment method'
- Add a new payment method of type 'TRANSFER' You can use a different payment type if required. Then display the sales credit on the first account.
- Record a payment of type 'TRANSFER' for the full amount. As it's a sales credit this would be recorded as a 'money out' payment. Display the invoice on the second account • Press '+Payment' • Change the payment to 'money in'
- Record a payment of type 'TRANSFER' for the same amount.

This will move the credit from the first account to the new account. The two payments will cancel each other out in the day totals.

How do I print a delivery Note?

- Display the sales invoice
- If the invoice is not 'finished' you will need to press 'Finish SI'
- If there are products in stock ready to be released, you will see a large green button marked 'release', otherwise a small blue button marked with a truck will be displayed. Press this button.
- From this screen you can tag and release products if required.
- On the 'Dispatch' select a dispatch batch. • Press 'delivery' to print the delivery note.

You can see a list of invoices which are ready to be dispatched from 'stock'-'>'Dispatch invoices'

How do I print a Statement for a single account?

- Display the customers account
- Press 'View' on the customer account toolbar
- Press 'Statement' (with the print icon)
- Press 'Print' on the dialogue screen.

How do I sell a new bike to an existing invoice

- display the vehicle stock record
- press 'sell'
- In the section below the area where you choose the customers you can expand a section marked 'open invoice'
- select the required option invoice

How do I turn a pro-forma into an invoice?

- Display the pro-forma
- Press 'Invoice' on the toolbar.

How do I turn off the ability to sell a product that doesn't have an active part number (Free text)?

- Go to 'admin' -> 'manage agents'.
- Then press 'permissions' beside the relevant user.
- Then press '+Add permission'
- Under 'sales restriction' select 'no free text on SKU picker'
- Press 'Apply'.

The restriction will be applied the next time the user logs in.

How is VAT calculated on an invoice?

Any rounding is done to 2 decimal places on unit net and vat. Using an example invoice which contains 13 parts which retails at £83.32 + VAT. For 1 of the product you would have: 83.32 + 16.66 = 99.98 The net total is then: 83.32 * 13 = 1083.16 The vat total is: 16.66 * 13 = 216.58 Making a line total of £1299.74.

How to a record a finance settlement on a vehicle part exchange sale?

Sell the new vehicle to the customer and purchase the part exchange (and link them) as normal.

- On the sales invoice press '+Payment'
- Change the payment type from receipt (money on) to payment (money out)
- Select the payment method. Normally you would setup a new payment method for settlements called 'FINANCE SETTLEMENT'
- Enter the amount and press 'Save'

I have a customer requiring his total spend with us itemised by invoice?

Press 'sales' on the customers account screen (product toolbar), which allows you to set a date range and see what's been sold to him. Or if you can press 'activity' on the customers account and set the date range to see all the ins/outs on the account. Both can be exported to CSV or PDF

I have sold a vehicle and the mileage at the date of sale is not changing when I edit it?

The vehicle record has a mileage field, which is current and changes over time. When you sell a vehicle to sales invoice the mileage at the time of sale is recorded separately for the sales invoice. If the invoice is open when you edit the mileage then the mileage at the time of sale is updated as

well as the mileage on vehicle record. If the invoice is closed then only the mileage on the vehicle record is updated not the mileage at the time of sale. Essentially editing the mileage after the invoice has been closed will not change the mileage on the invoice.

[I have two accounts for the same customer, how can I merge them?](#)

Go to 'Admin' then press 'Merge Accounts'. If the option is not visible you will need an administrator to login and merge the accounts.

Select the account you want to keep in the top box 'Account Name (1)' Enter the account you want to get rid of in 'Account name (2)' and press 'Merge Accounts'

[Is there a way to add a negative line to an invoice?](#)

You cant add a negative quantity to a sales invoice. There are two ways to do it. 1. Define a new payment type in admin->company settings->payments. Then record a 'payment' for the amount. 2. Create a sales credit for the amount, finish the sales credit then allocate it to the invoice as a payment.

[Is there a way you can search for a customer by chassis \(VIN\) number?](#)

Yes. Go to the 'Contact' section, then click 'Search Accounts' In the drop down field list select 'VIN', enter the VIN and press 'Go' You can also change the match type to 'Containing' if you just want to enter the last few numbers.

[Loyalty Points Overview](#)

The cloudDMS loyalty points system allows a customer to collect loyalty points when purchasing products. You can decide how many points are given for each product and how much each point is worth. These points can then be converted into a sales credit on the customer's account. The first step is to setup the value of each loyalty point. Go to 'admin' -> 'company settings', then press 'edit' in the top right. Set the 'loyalty point value' and press 'save'. The next step is specify how many loyalty points each product is worth. Display the relevant product and press 'edit' in the top right. In the 'loyalty points' field enter how many points this product is worth, then press 'save'. If you want to setup every product then email support@deepbluesystems.com with the points per pound you want allocated and we can set them on mass for you. When a customer purchases a product with a loyalty points value those points will be added to the customer's account. Points are added to the account when a sales invoice is completed. On the 'sales' screen there is a 'loyalty points' report which will display all customers loyalty points balance. Clicking the loyalty point total on a specific customer will display that customers loyalty points ledger. If they have some points you can press '+redeem' to turn the points into a sales credit on their account.

[Selling a vehicle \(on finance\) with a part exchange which has outstanding finance](#)

Please carefully follow the procedure listed below for sales which have a part exchange which itself has outstanding finance:

- Buy in the part exchange and set the buy price.
- Finish the purchase invoice on the part exchange. Do not add any payments.
- Sell the new the bike to the customer.
- Link the sales invoice to the purchase invoice

- If there was a finance settlement on the part exchange record the payment on the sales invoice as a payment (money out).
- If the customer in financing the new vehicle record a payment (money in) for the finance
- If the customer is leaving a deposit record the payment (money in)
- Leave the vehicle sales invoice open till the customer collects the vehicle.

Sometimes the associated vehicle is not set on sales invoices, why?

It depends on how you sell the vehicle to the customer. Here are the options and if the associated on the vehicle sales invoice will be set.

- Selling from vehicle stock record will set associated on the invoice.
- Ticking one vehicle from stock list and selling will set associated on the invoice.
- Ticking more than one vehicle from stock list and selling on-mass will not set associated on the invoice.
- Selling from the invoice on the part picker by searching for 'new-vehicle', expanding the list of stock and selecting a vehicle will not set associated on the invoice.

The print-out is to faint on my thermal receipt printer.

If the print not dark enough in the printer driver in windows under printing preferences for the printer you can adjust the printer intensity up to 130% and slow the print speed that also helps
Example below from Star <https://www.starmicronics.com/help-center/knowledge-base/configure-tsp100-series-printers-esc-pos-mode/>

What ecommerce (online selling) platform works best with cloudDMS.

We recommend basing your eCommerce website on either Magento or Shopify. CloudDMS can import orders from a text (CSV) file in Magento or Shopify file format. This is a manual process whereby you download the orders then upload it into the DMS. Multiple order can be imported from a single file. The cloudDMS can ftp a CSV file to a given location on a schedule with part number and stock level information (as well as images and other information if required). Your website would then have to process the file to show stock levels. There are plugin available for Magento and Shopify to help with this. If you want a custom integration or fully automatic order importing, its completely possible. We would need details/specifications on exactly what you want to do and how you want it to operate, We can then give you an estimate for the number of hours/cost required to implement.

When I email an invoice to a customer is going into there junk folder.

There is a settings you can change which will help reduce the chance of the email being classified as junk.

Go to 'admin' -> 'agent profile', then press 'edit'. In the 'from email' box remove the email address. Then the system will stop trying to spoof the login email account and just use noreply@deepblue.systems. The email will then be much less likely to be categories as junk.

When I scan a barcode with a barcode scanner 'MISC001' is added to the invoice?

The problem is caused by the speed of the barcode scanner interacting with the free text option in the SQL picker.

To stop LINE001 being added to invoices when you scan a barcode:

- go to 'admin' -> 'manage agents'.
- Press 'permissions' beside the agent who uses the barcode scanner.
- Press '+permission'
- In 'Sales Restriction' select 'No Free text on SKU picker'
- Press 'Add' You will have to log out and back in for the setting to take effect.

You will need to add the permission for each user who may use a barcode scanner.

When I sell a product to an internal invoice its sold at cost price.

Each product can have a price specified for each account group. If you sell a product and there is no price specified for the current account group then a warning message is displayed and the product is sold at cost price.

So you will need to add an 'internal' price for any products you don't want them sold at cost price on internal transactions.

The best way to do this is to go to admin->price files and add in extra 'price file subs' for each supplier you need the prices for. Make sure you pick the 'internal' account group. You won't be charged for price files processed for the 'internal' account group. Any product like 'LABOUR' you will need to manually add an internal price against.

Backorder system overview

Products have stock levels and can also have min/max stock levels set. When you sell a part you have not got, or the stock level falls below the reorder level it will be added to the 'awaiting allocation to purchase order list'. You can see this at any time in 'purchasing' -> 'Current Order'

At this point the parts are not ordered, just waiting to be put on a purchase order. You can filter the list using the drop down selection boxes. The options are by supplier and also by stock/customer order. Before you can put a part on order you have to have an open purchase order to allocate it to. To create a new purchase order go to 'Purchasing' -> 'New Order'. Press '+Account' and select the supplier.

You can add products directly to this purchase order. To allocate the back orders to the purchase order, display the 'current order', select the supplier, make sure the required products are checked, then press '+Order'. Select the required purchase order from the list of open purchase orders. The products will then be allocated to that purchase order. If the products are not allocated it will be because the supplier has not been added to the specific product.

You can also press 'auto' which will put unallocated products on the relevant suppliers open purchase order or create a new purchase order if one is not present.

When you are ready to send an order to your supplier, display the relevant purchase order and press 'finish' to close it. You can then print, email, or export the order and send to your supplier. When the order is delivered you can display the relevant purchase order and press 'book in', or you can go to the 'stock' section and select 'book in'. You can then press 'allocation' to print the stock allocation list.

If the part was a customer it will now be in stock reserved. When the part is dispatched or fitted it needs to be released from stock. You can do this on the sales invoice by pressing 'dispatch' or in 'stock' -> 'dispatch invoices'

How can I hide/show fields on the on-screen vehicle stock list?

- Go to 'admin'->'company settings'
- click on 'Associated Types'.
- Press 'edit' beside vehicle
- Un-check the fields you don't want displayed.
- Press 'Save'

How do convert a stock vehicle to a demo vehicle

- Display the vehicles stock record
- Click 'Transfer' ** Select the demo vehicle category and press 'transfer'

Please note that this wont change the vehicles stock number. If you want the vehicle to be issued a 'D' stock number you will need to sell the vehicle to an internal account (at cost) then buy it back into stock as a demo.

How do I add a credit to a vehicle?

- Display the vehicle stock record
- On the costs toolbar press '+Internal'
- Press '+Invoice' beside the relevant internal account
- In the top right change the transaction from 'sales invoice' to 'sales credit'. You must do this before adding any part
- Add the products • Finish the sales credit.

The internal credit will now show against the vehicle on the 'sales (vehicle)' report and on the vehicle stock record.

How do I add a supplier to a product?

- Display the product record
- Press '+Supplier' on the 'Buying' toolbar
- Enter the suppliers name in the 'Supplier Account' box. If the supplier does not exist you may have to add them from 'purchasing'->'New Supplier'
- Enter the suppliers SKU (part number) if its different to the one you are selling it under
- Enter the purchase price. You have to enter something in this box, if you don't know the price enter '0'

How do I cancel/un-dispatch/release a product which has already been released?

To un-release a product.

- Display the sales invoice
- Expand the line in question
- Press the blue display button at the end of the line to display the stock record
- Press 'edit' beside dispatch date

- Remove/delete the date
- Press 'save'

How do I change bin/stock location for a product?

The bin location is stored per item of stock, **NOT** per part number.

- Display the product in question.
- Scroll down to the stock and press the edit button beside the stock line.

You can change an individual items location, or change the location for all products. The bin location displayed at the top of the screen is the one for the most recent item of stock, changing the bin location on stock items may not change the bin location at the top. But it will change the bin location on the specified item of stock.

How do I do a stock valuation for a certain(previous) date?

Go to 'stock'->'stock list (basic)'. Then select the date and press 'go'.

How do I move a vehicle to a different stock category?

- Display the vehicles stock record.
- Press 'transfer'
- Select the new vehicle category
- Press 'transfer'

You may also want to change the vehicles stock number.

How do I setup the AutoTrader/BikeTrader data feed.

- Go to 'Admin'->'Data Feeds'
- Press '+Feed'
- Expand 'AutoTrader Vehicle Stock Feed'
- Enter your dealer ID and ftp details, these will be provided by auto trader.
- Press 'Add Feed' Configure optional auto trader fields
- Go to 'admin'->'company settings'->'Associated Types'
- Press 'edit' beside vehicle

The following fields if present will be included in the feed: REG, MILEAGE, MAKE, MODEL, OPTIONS, TRIM, VARIANT, TRANSMISSION, ENGINE SIZE, COLOUR, GRABBER, DESCRIPTION, 1ST REG DATE, CC

How do I show the engine number on my vehicle stock list?

- Go to 'admin'->'company settings'.
- click on 'associated typed'.
- Press 'edit' beside vehicle
- Check 'show column on stock list' beside engine number

How do I stop a user creating/making new product lines/part numbers?

- Go to Admin-> manage agents.
- Press 'Permissions beside the relevant user'
- Press '+Add Permission'

- Under 'stock restrictions' select 'no new product records'
- Press 'Apply'

Restriction will come into effect the next time the user logs in.

Price file upload specification

Price files are loaded onto the system after 8pm. If you are including buy prices make sure you specify the supplier when you upload the file.

The file has to be a tab separated text file., with the header on the first line. The following column header are valid. PARTNO [Required.

This should match or be the main [SKU] DESC [Product description] PRICE [Selling price in GBP, make sure the field does not include a £ sign]

REFERNO [Super-session]

TRADE PRICE [Buy price].

Make sure you specify a supplier when uploading]

VAT [VAT Code. Should make you setup vat codes i.e. 1 for T1 standard rate]

2NDPARTNO [Normally used for barcodes]

BRAND

SUPPLIERSKU [Supplier part number if different from main part number]

EUROPRICE [Buy price in euros]

OBSOLETE [Set to 1 if obsolete, leave blank or set to 0 if not]

SALESNOMINAL [Sales nominal. If included this overrides the settings when uploading]

PURCHASENOMINAL [Purchase nominal. If included this overrides the settings when uploading]

What does 'sold (reserved)' mean on a vehicle or parts stock record?

When a vehicle or product has been sold on an invoice it is taken out of stock and marked as 'sold (reserved)'. When the customer collects the vehicle (or you post the product) you should release the stock, its status will then be 'sold' You can release a vehicle from the finish dialogue when you press 'finish SI', or you can click on the 'release' button on the sales invoices parts toolbar. Depending on your setup the 'release' button may not be available whilst the invoice is open.

What's the best way to do a stock take?

- Go to 'stock' -> 'stock list (basic)', export the report to CSV, then open in excel
- In excel sort, filter, or organise as required. You only need part number, stock level and optionally bin location.
- Correct the stock levels in excel, and add on any you find which were not in the file.
- Save the excel file as a CSV or tab delimited file on your desktop.
- Go to 'stock' -> 'stock take' and press 'CSV'. ** Set the file details on the dialogue and press 'import'.

If your CSV file contains more than 1000 lines you will need to upload it in sections.

'Error. No message to send' is displayed when I try to email a workshop booking confirmation.

If you tick the box and 'select template...' is showing it will display the message. You must select a template. Go to 'marketing'-'>'Email templates', here you can set a default, edit, or create a new template.

Can the DMS send automated MOT and service reminders?

Yes, the only condition is that the workshop job must be booked in with the job type set to 'MOT'

- Go to 'marketing'-'>'new follow up'.
- Set the invoice sub type to 'MOT'.
- Set the 'days after invoice closed' to 330 (11 months)
- Set 'Send SMS' and/or 'Send Email' to yes and enter the message details. • Press 'Save'

The customer will then be contacted the specified amount of time after the last mot. You could also set up another follow-up for job type 'service'

How can I delete a 'Close day' off the scheduler

Switch to the scheduler day view and you will then see a small delete button for the 'closed day' items.

How can I disable a mechanic due to holiday?

- Go to the 'Workshop' section
- Click on 'week' view ** Press the yellow 'x' button on the right hand side of the day
- Fill out the dialogue, make sure you select the relevant mechanic
- Press 'save'

How can I see how much labour we have sold?

There are a few options: 1. Display the labour product page, then click on 'sales'. This display the sales for each month, both unit and amount. 2. Go to 'Sales'-'>'Sales (Invoice)'. Change the report type from 'basic' to 'nominal' and set a date range.

This will give you the total sales for the labour nominal (4026). 3. Go to 'workshop'-'>'Engineer hour'. Select the labour nominal, set the date range and press 'Go'. This will display the number of labour hours sold.

How do I add a new job type (category) for workshop Work Orders?

First you must be logged in as an administer.

- Go to 'admin'-'>'Company Settings'-'>'Job Types'
- Press '+ Job Type'
- Enter the job type
- Press 'Save'

How do I add a new mechanic?

You have to be an administrator to add agents.

- Go to 'admin'
- click on 'manage agents'
- Press '+Agent'
- Enter the mechanics details. Make sure you set 'engineer' to 'yes'
- Press 'save'

How do I change the 'enabled engineers' for the online booking?

First the relevant department has to be enabled.

- Go to 'admin'->'company settings'->'department'.
- Press 'edit' beside the relevant department
- Enter a name in the 'department name for online booking' box. If this is blank, then the department is disabled.

Finally, you must enable the relevant mechanic/engineer.

- Go to 'admin'->'Manage agents'
- Press 'edit' beside the relevant agent.
- Set 'bookable online' to 'yes'

How do I create a workshop job template?

The first step is to create a new product kit to hold all the parts which will be added when the template is applied.

- Go to 'stock', then click 'new product'
- Enter an SKU, you will need this when you create the template.
- Change the type from 'normal' to 'kit'
- Press 'add new product' at the bottom of the screen.

The product kit part number will now be displayed. The next step is to add the products to it.

- Press '+Product'
- Quantity and Enter the SKU, then '+Add'
- Repeat this for each product.

The final step is to setup the workshop template.

- Go to 'workshop' and click on 'job templates'
- Press '+Template'
- Give the template a name
- Specify the model details that the template will apply to (optional)
- Select the template type and set the estimated time.
- Enter the product kit sku
- Enter the job details and press 'save'

When you are on a work order you can apply a template by pressing 'template'

How do I hide SKU's (part numbers) on Estimates

You can only hide part numbers on estimates when you print to a PDF.

- Display the estimate and press 'Print'.
- On the dialogue box change 'hide SKU' to 'Yes'
- Press 'Print ES'

The estimate will then be displayed in a new tab as a PDF. If you want to email the estimate save the estimate to your desktop then send using your normal email program.

How do we add text to the bottom of the job cards/work orders?

- Go to 'admin' -> 'company settings'
- Click on 'script'
- Press 'edit' beside 'work order'
- Enter the text in the 'terms' box • Press 'save'

How do we set our 'Workshop' hourly labour rate?

Create a new 'non-stockable' product called 'LABOUR', you can then add this to invoices/work orders.

To do this:

- Go to the 'Stock' section
- Press 'new product'
- In SKU enter 'LABOUR'
- In Description enter 'Per Hour'
- Set the Type to 'Non-Stockable'
- Press 'Save'
- On the selling toolbar press '+Price'
- Enter the price excluding vat and press 'save'

You can then add LABOUR to your transactions settings the quantity to the number of hours.

How I add an engineer to the workshop scheduler?

Go to 'admin'->'manage agents'. If the person already has an account press 'edit' beside the name then set 'Engineer' to 'yes'. If the person does have an account, you will need to create one. If they don't need to login set the account level to 'disabled'.

I've finished a work order but now I cant remove a product from the open sales invoice.

If a product has been released it wont allow you to remove it from the invoice. When you finish the work order there is the option ('set in-stock product status') to mark products as fitted or 'reserved in-stock'.

You can un-release the product (if you are logged in as an administrator) by:

- Expanding the line in question on the sales invoice
- Press the display button at the end of the line to display the products stock record
- Press 'edit' at the end of the 'dispatch' line.

- Delete the dispatch date (click on each section and press delete on the keyboard)
- Press 'save'

In the workshop how does charged labour get allocated to the engineer hours report.

When you book a job you are asked to enter the estimated hours. When you complete a work order the system asks you for the actual hours worked. The report shows these entered values along with the amount actually billed. You need to select the relevant nominal group from the drop down list in the report. The report will automatically try to select a nominal with the work LABOUR in it.

In the workshop what does 'release' mean?

Release is used to say the part(s) on the work order have left your stock and been fitted, it's similar to 'Dispatch' on a sales invoice. You can either release the parts as you go, or release them all with the 'Finnish' dialogue which is presented when finishing the work order.

Invoice an Estimate Repair to an Insurance Company

Make sure the insurance company has an account on the DMS, if they don't you will need to create one. Create the workshop job on the customer's account in the normal way. For clarity to may want to set the workshop job type to 'Repair' or 'Estimate Repair'. When the work is complete finish the work order which will create an open invoice.

Press 'Invoice to' at the top of the invoice. Enter the insurance company name and press Save.

The invoice will now show as a debt on the insurance company account. The invoice will also show on the customer's account (marked as payable by the insurance company).

The customer excess should be recorded as a payment on the invoice.

Is it possible to merge multiple work orders into one?

It's not possible to merge work orders, but you can complete multiple work orders to one invoice. On the work order finish dialogue if there is an open invoice on the customer's account a drop down will be shown on the 'Finish WO & Invoice' button.

PDI's

You can a vehicle you have just sold into the workshop for its PDI by following this procedure

- Display the vehicles sales invoice
- Expand the line on the invoice which contains the vehicle
- Press the 'display' button at the end of the line to show the vehicles stock record
- Press '+Internal' on the Costs toolbar
- Click on '+Job' beside the required internal account
- The work order will now be created and displayed.

Process the work order as normal and complete it to an internal invoice.

Turn an Estimate into a Workshop Job

Display the invoice in the customer's account. Press '+Job' on the estimate. A workshop job will now be created based on the estimate.

Warranty work.

First display the vehicles stock record. You can do this by expanding the bikes line on the vehicle sales invoice and pressing the small display button. Or you can type the vehicles stock number into the universal search.

- On the vehicle stock record press the '+warranty' button on the 'costs' toolbar. Press '+job' beside the relevant warranty account.
- You may need to add a new customer of type 'warranty' if the relevant one is not present.
- Pressing '+job' will start the job card.
- Book the parts as required and add the labour part number.
- Complete the job
- Complete the internal invoice

When viewing the 'Engineer hour' report in the workshop section make sure you have selected 'Internal' or 'all' from the drop down filter.

When booking a vehicle in the workshop for service can I use the registration number instead of the customers name?

Yes, providing the customer and vehicle are already in the database. * In 'workshop' press 'new work order', then '+ select account'. * In the account name box type the registration number, if it is already in the database it will let you select the customer. If its not in the database you have to start with customers name.

When customers make a workshop booking, is there a way we can send them an email with drop-off and collection instructions automatically?

The best way would be to make a PDF containing the instructions. You can then attach this PDF to emails sent from the workshop department.

- Make the PDF using word or something similar.
- Go to marketing->'email attachments'
- Press '+Attachment' and give it a name, choose a department and the PDF.
- Press 'save'

Then when you save the workshop booking check the 'email booking confirmation box'

When I edit the actual time on a work order the system changes it. (Clock on/off)

When the work order is open if the actual time is less than the clocked on/off time the system will increase it to match the clock on/off record. If the work order is closed and you are an administrator you can edit the actual time and it will not alter it based on the clock on/off records.

When I sell a part to an internal job it has no price.

Each account group needs to have its own price specified for each product. Make sure there is an 'Internal' price setup for the part you are selling.

Why is a work order job showing as blue on the schedule?

The 'customer waiting' field on the work order has been set to 'yes'