# Upgrade to *Pro version*

# INTRODUCTION

Ezy Systems commenced in 1993 using the programming language Microsoft FoxPro to develop *EzyAccounts*, *EzyCellar* and *EzyWine*.

Ezy Systems has spent more than 25 years focusing on data capture and reporting requirements of users by addressing their needs in vineyard management, vintage planning, weighbridge operations, winemaking, plant servicing, bottling, contract winemaking & bottling, general accounting, payroll, human resources, marketing, CRM, wine club, asset register and POS (including cellar door sales, cafe and restaurant) and website interface.

**The company's objective has always been to streamline operations and remove the *costs, time, stress and errors* associated with double-entry when utilising multiple software packages.**

Late 2010 the Directors, Nick Cugura and Peter Ellis, decided it was time to upgrade the appearance and general navigation, which would require developing a new version. Microsoft Visual Basic (*VB.NET*) and SQL Server were chosen to develop the new version.

Senior Programmer, Donna Dimaano, was appointed Project Leader mid 2011.

The new version **is** packaged with **SQL Server *Express*** which is *free* and provides many of the features of the paid, full versions of Microsoft SQL Server database management system.

*The new version is not just an investment in a new interface. It's also about establishing a new platform that will allow Ezy Systems software to more easily add those functionalities required as your business evolves. The GUI interface makes it quicker and easier to process transactions.*

*EzyAccounts* **Pro**, which encompasses 85% of *EzyWine*, has been available since 2016 and is utilised by smaller wineries and wine distributors.

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### *EzyAccounts* **Pro**

It has been available since 2016

It can be loaded on your **local server** *or* **hosted** in cloud.

### *EzyCellar* **Pro**
### *EzyWine* **Pro**
### *EzySpirit* **Pro**

The Bottling module was completed mid 2017

The winemaking and vineyard modules are being beta tested by Casella Wines and will be generally available September 2019

### Upgrade Cost

The cost of migrating your existing data to the new version is AUD$500 per user plus onsite training costs as required

The support fee will remain the same.

# OVERVIEW

## Creditors - *EzyWine*

When maintaining creditor details, in the ***EzyWine*** version, you can only specify **one** creditor. The information is on 2 screens and there are other menu options that also relate to creditor details.

Whereas the ***EzyWine*** **Pro** version provides a selection screen which allows you to specify a range of creditors that you may want to modify. There is only one screen and tabs are utilised to provide access to all the creditor details.

# OVERVIEW (Cont'd)

## Creditors - *EzyWine* Pro



*Specify selection of creditors to be reported or modified.*



*Random selection is available.*

# OVERVIEW (Cont'd)

## Cellar Work Sheet Entry

Winemakers will find the new version much easier to navigate.
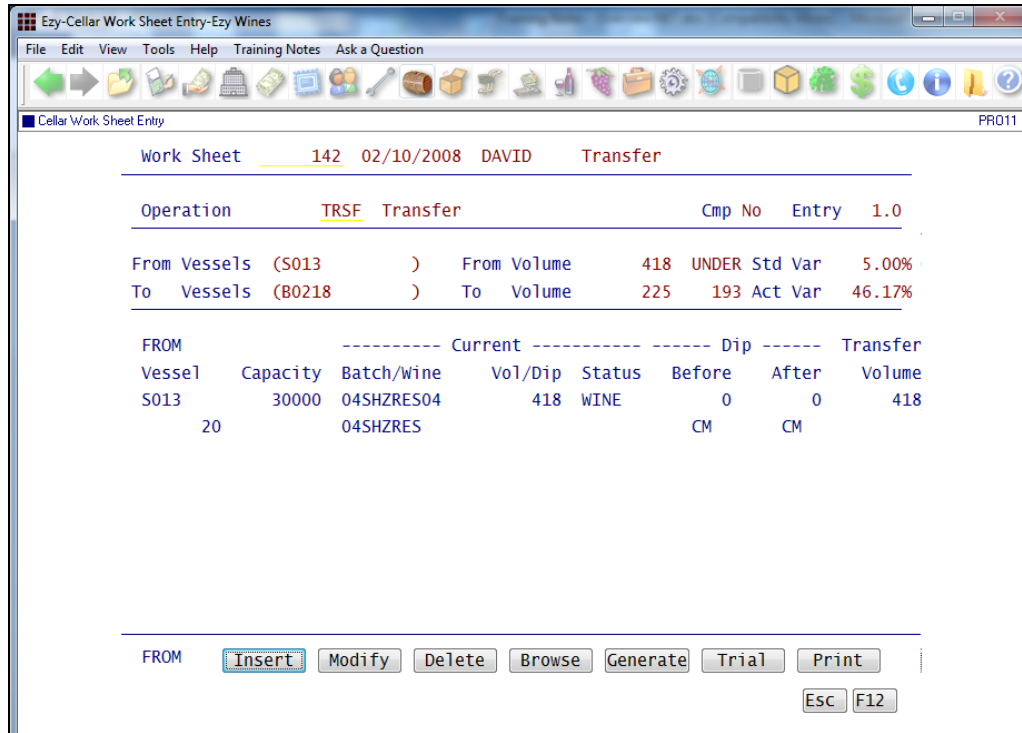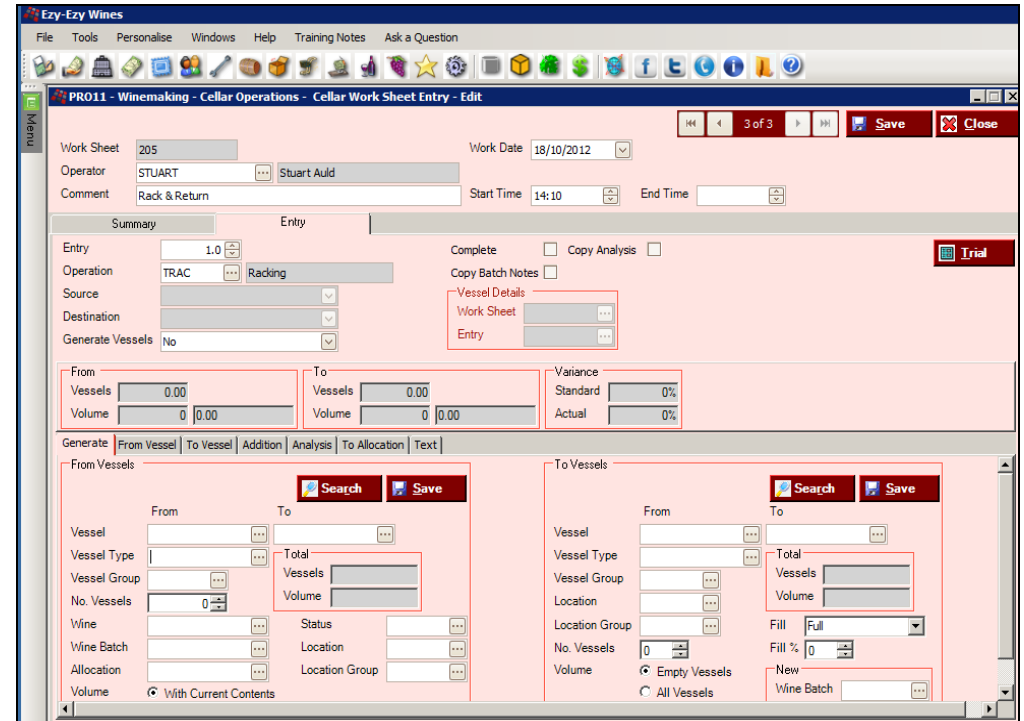


*EzyWine*



*EzyWine **Pro***

Tabs are used to navigate the different screens.

# OVERVIEW (Cont'd)

## Cellar Work Sheet Entry (Cont'd)



*From Vessel tab*



*Addition tab*

# OVERVIEW (Cont'd)

**Cellar Work Sheet Entry (Cont'd)**

# OVERVIEW (Cont'd)

**Sales Invoice Entry**

**Search Dialogue**

The Debtor search feature is available across all modules in both entry & report options and provides several ways of finding a specific Debtor or range of Debtors.



Debtor Search dialogue box showing search fields:

| Field | Value |
|---|---|
| Debtor | |
| Name | liq |
| Group | |
| Alias | |
| Address | |
| Postcode | |
| Phone | |
| Email | |

☐ Select All

| Debtor | Name | Postcode | Address | Alias | Group |
|---|---|---|---|---|---|
| ☐ NICKSL01 | Nick's Liquor Store MELBOURNE | 3000 | 12 Collins Street | LIQU | LIQU |
| ☐ NICKSL02 | Nick's Liquor Store BENDIGO | 3550 | 23 High St | LIQU | LIQU |
| ☐ NICKSLHO | Nick's Liquor HO SYDNEY | 1001 | 22 Chapel Street | LIQU | LIQU |
| ☐ PHILLI02 | Phillips Liquor Store | 7330 | 456 Railway St | LIQU | LIQU |
| ☐ VINTNE01 | Vintners Liquor Distributor | 3000 | 198 St Kilda Rd | DIST | DIST |
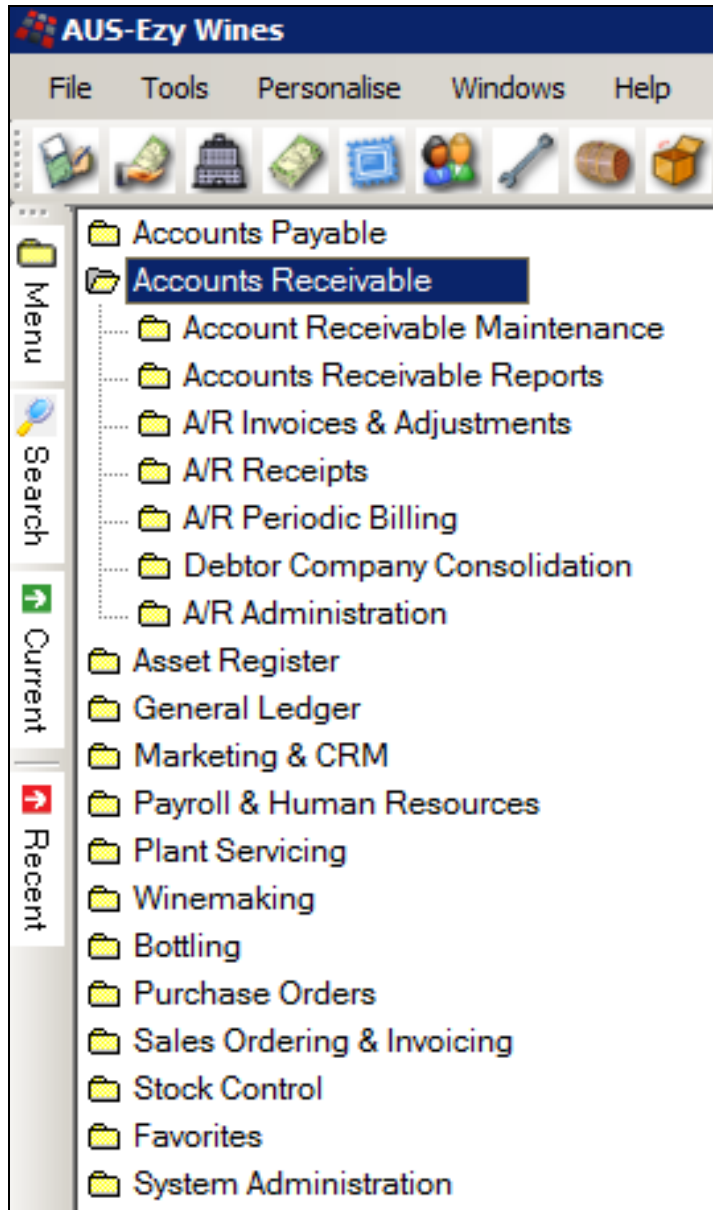
# NAVIGATION



## Menu Navigation

The mouse can be utilised to navigate the menus & select the required option.

The [Tab] and arrow keys can also be used to navigate the options.

Left click on a menu option name or press the [Enter] key to select the highlighted option.

The menu buttons can be customised for each user.
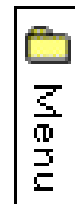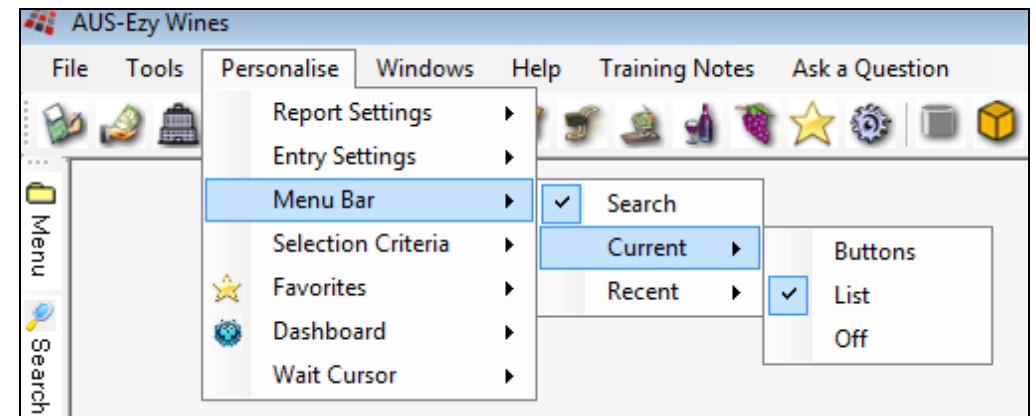




The menu can be displayed or hidden at any time.

# NAVIGATION (Cont'd)
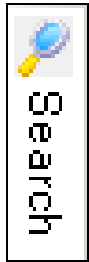


If you have access to the menu option, it can be opened here.
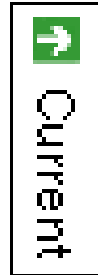


Debtor Drill Down Enquiry
Debtor YTD Sales Summary
Stock Item Prices
Promotions
Sales Invoice Entry

*List version*

## Ezy Menu Option Search

Option Code
Option Name    debtor    [Search]

| Menu | Option Name | Option Code | Access | Open |
|------|-------------|-------------|--------|------|
| A/R Administration | Import Debtor Details | ADM41 | ☑ | ... |
| A/R Administration | Export Debtor Details | ADM53 | ☑ | ... |
| A/R Administration | Debtor End of Month | ARA01 | ☑ | ... |
| A/R Administration | Debtor Ageing Maintenance | ARA03 | ☑ | ... |
| A/R Administration | Debtor Due Date Maintenance | ARA04 | ☑ | ... |
| A/R Administration | Debtor Credit Voucher Report | ARA05 | ☑ | ... |
| A/R Administration | Debtor Credit Voucher Print | ARA06 | ☑ | ... |
| A/R Administration | Archive Debtor Ledger | ARA07 | ☑ | ... |
| A/R Administration | Import Debtor Transactions | ARA10 | ☑ | ... |
| A/R Administration | Debtor Interest Update | ARA11 | ☑ | ... |
| A/R Administration | Global Debtor Maintenance | ARA12 | ☑ | ... |
| A/R Administration | Change Debtor Code | ARA13 | ☑ | ... |
| Accounts Receivable Reports | Debtor Add. Groups Exception | ARA14 | ☑ | ... |
| A/R Administration | Export Debtor Ledger | ARA16 | ☑ | ... |
| A/R Administration | Export Debtor Trial Balance | ARA18 | ☑ | ... |
| A/R Administration | Export Debtor TB By Due Date | ARA19 | ☑ | ... |
| Accounts Receivable Reports | Debtor Group Default Exception | ARA21 | ☑ | ... |
| A/R Administration | Zero Debtor Reward Points | ARA22 | ☑ | ... |
| A/R Administration | Import Debtor Messages | ARA23 | ☑ | ... |
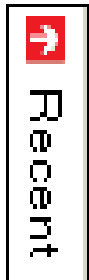


Menu options that have been recently accessed and closed.



*Buttons version*

# NAVIGATION (Cont'd)



### Action Buttons
To edit the selected entries either select the [Edit] button or on highlighting one of the entries, double left click on the mouse.
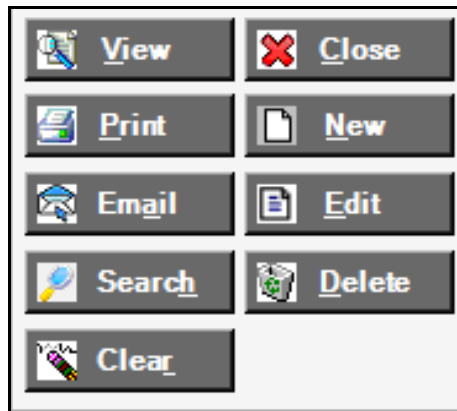




### Mouse Double Left Click
It will behave the same as selecting the [Edit] button.

### Mouse Right Click
A popup is displayed allowing you to *Edit* or *Delete* the highlighted entry. The *New* will allow you to insert a new entry and the *Select* option will load the value in the first column of the highlighted entry in the From/To selection.

# NAVIGATION (Cont'd)

The menus and options selected can be displayed at the same time.

# NAVIGATION (Cont'd)



**Data Sequence**

Click on the column heading to change the order in which the entries are displayed.

Double click on a column heading to toggle between ascending and descending sequence.



*Ascending Group*



*Descending Group*

## PERSONALISE

Each user can personalise various general features.

### Report Settings



### Entry Settings
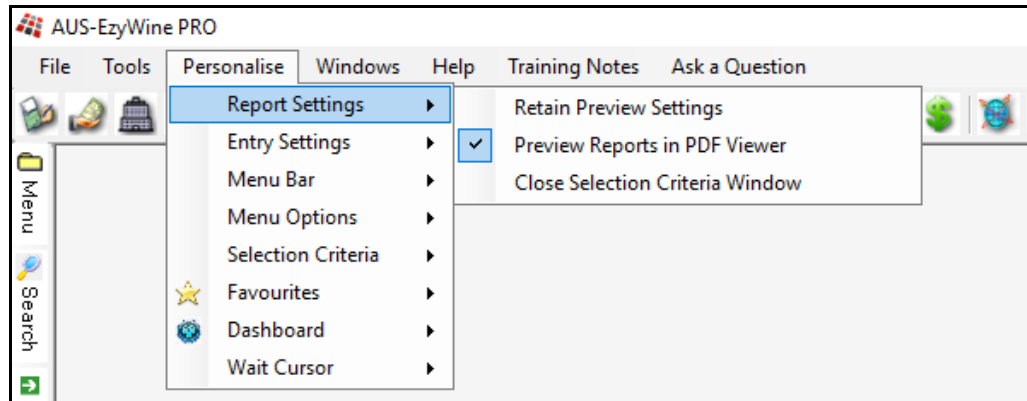


*Retain Preview Settings*
Specify whether the setting specified when previewing a report (such as page width) are to be retained.

*Preview Report in PDF Viewer*
When previewing reports, specify whether acrobat reader is to be used. Otherwise, the report will be displayed to the screen using Report Viewer.

*Close Selection Criteria Window*
On running report specify whether you want to close the selection criteria.
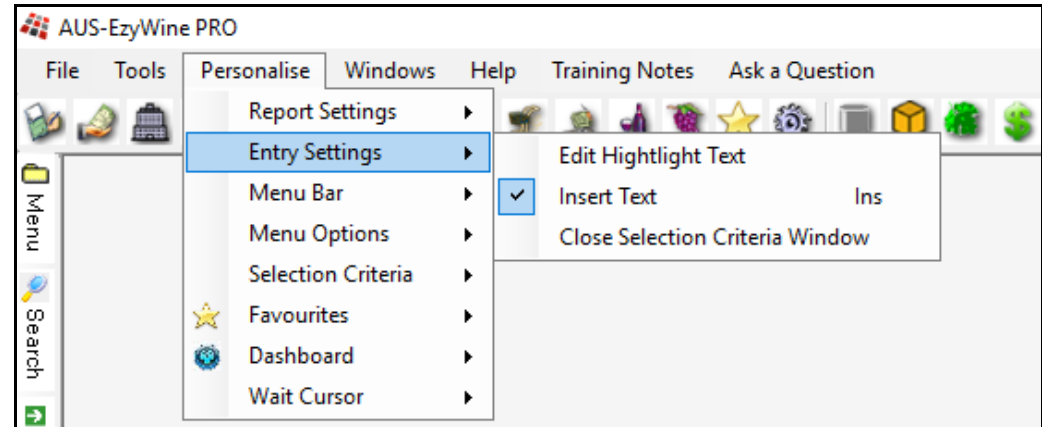
*Edit Highlight Text*
When modifying data, specify whether the text is to be highlighted. Otherwsie, the cursor will be positioned at the first letter.

*Insert Text*
When entering text, specify whether the keyboard is in insert mode (ie. as text is being entered, existng text will be moved to the right).

*Close Selection Criteria Window*
On completing insert or edit specify whether to close the selection criteria.

**PERSONALISE (Cont'd)**

**Menu Bar**
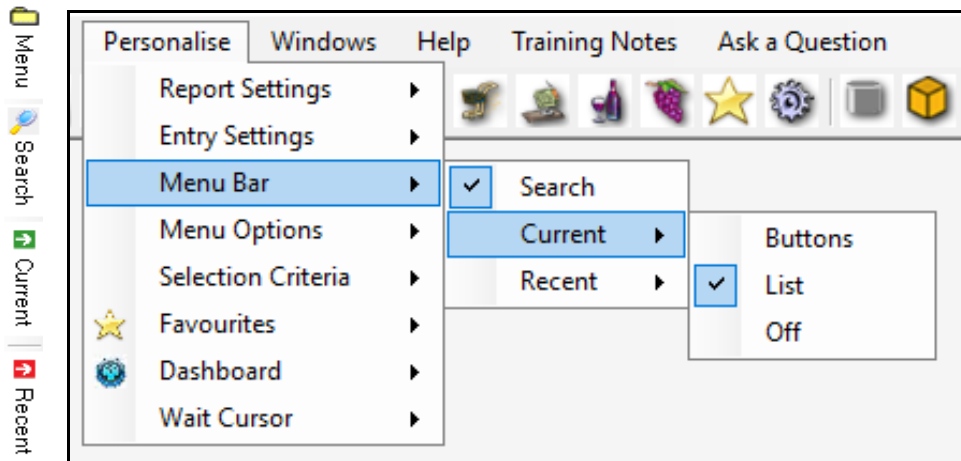


Spciedy whether the current and/or recent menu tabs are to appear vertically on the left side of the screen and whether the menu options are to appear as a list or a buttons.
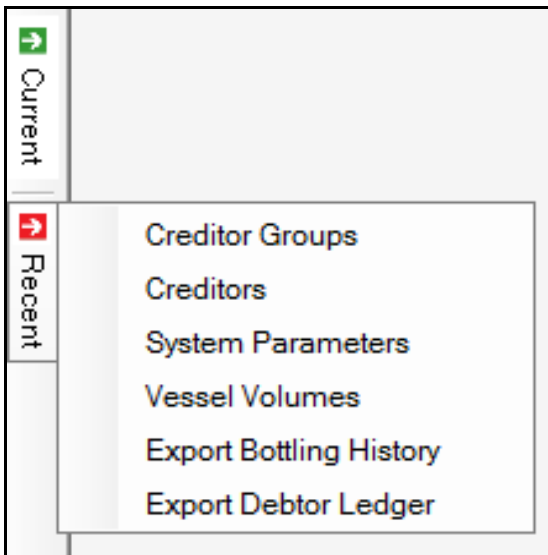
# PERSONALISE (Cont'd)

## Menu Options
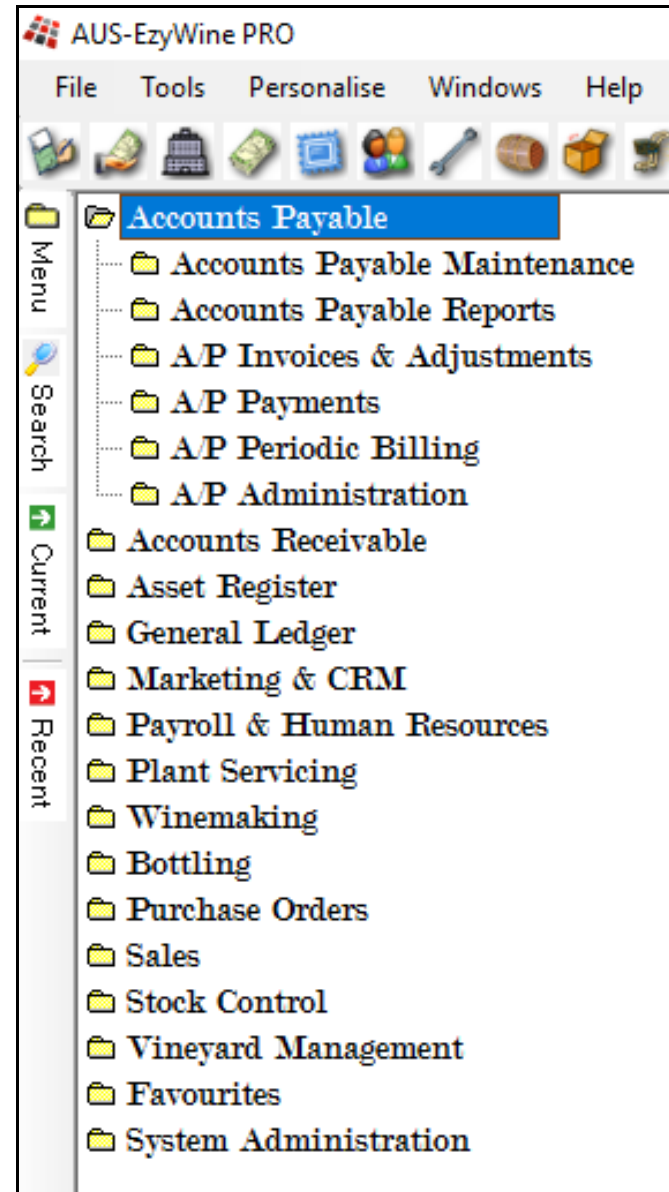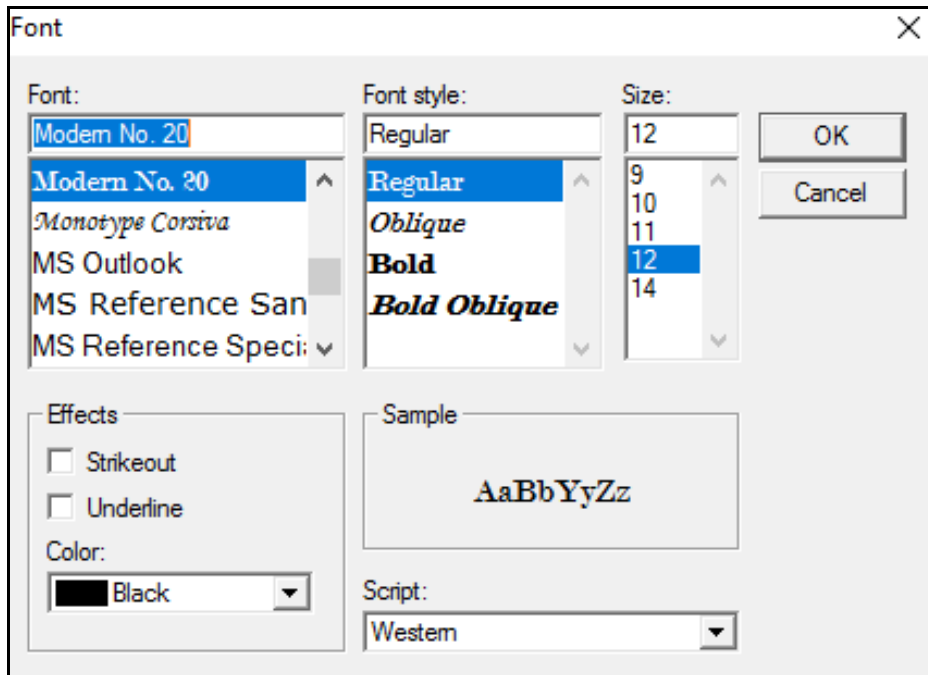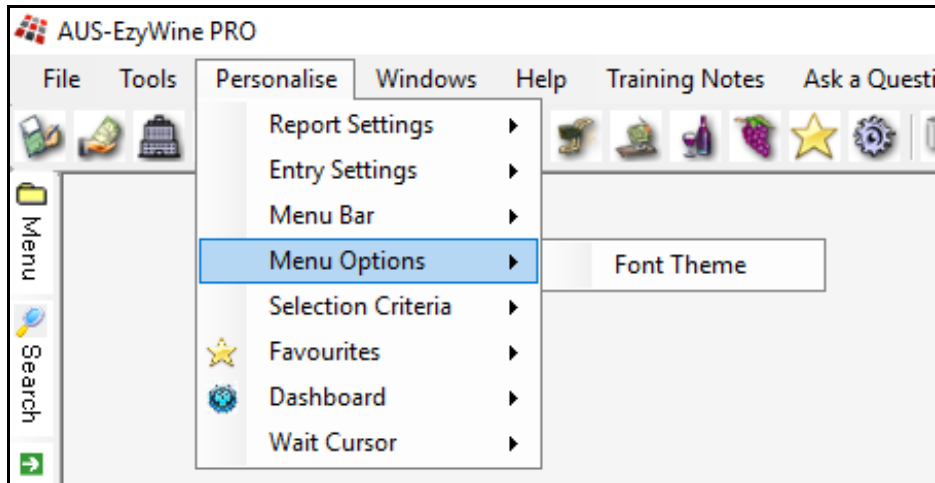
## PERSONALISE (Cont'd)

### Selection Criteria
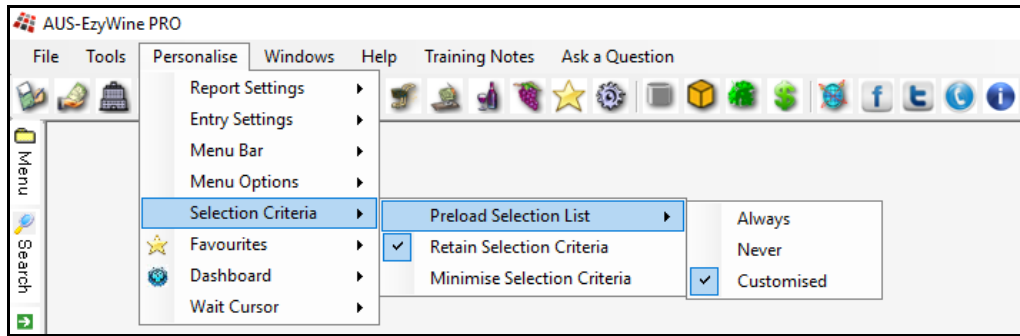


*Retain Selection Criteria*
Specify whether your selection criteria is retained.

*Minimise Selection Criteria*
Specify whether menu options with more than 7 selection criteria are to display all the options.
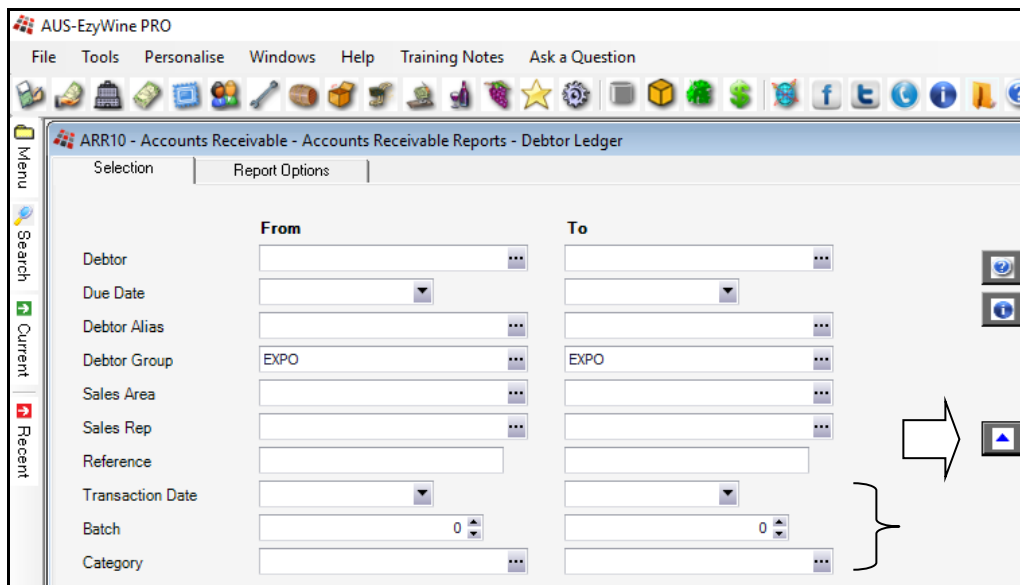


*Preload Selection List*
Specify whether entries below the selection criteria are to be preloaded.

If Customised is selected, the **Preload** button shown below will appear on each menu option and you will be able to specify which options preload the entries.
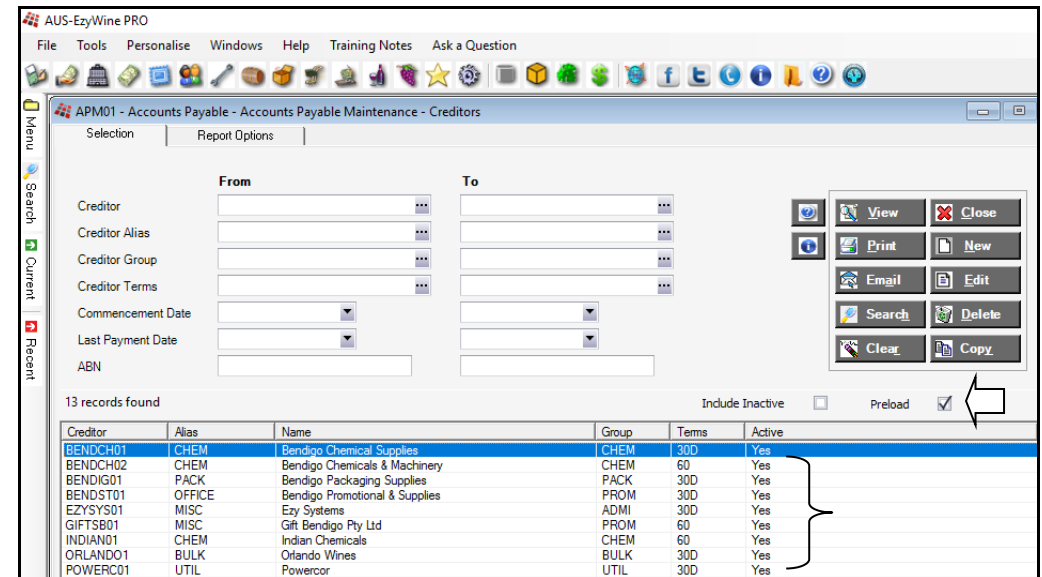


### General: Search Dialogue, Preload Limit
If the number of records exceed the limit recorded against this system paramteter, which defaults to 10,000, no entries will be preloaded.

This will ensure that there aren't long delays in waiting for data to be retrieved or reports generated.

The selection criteria will need to be utilised to reduce the number of records retrieved.

# PERSONALISE (Cont'd)

## Favourites
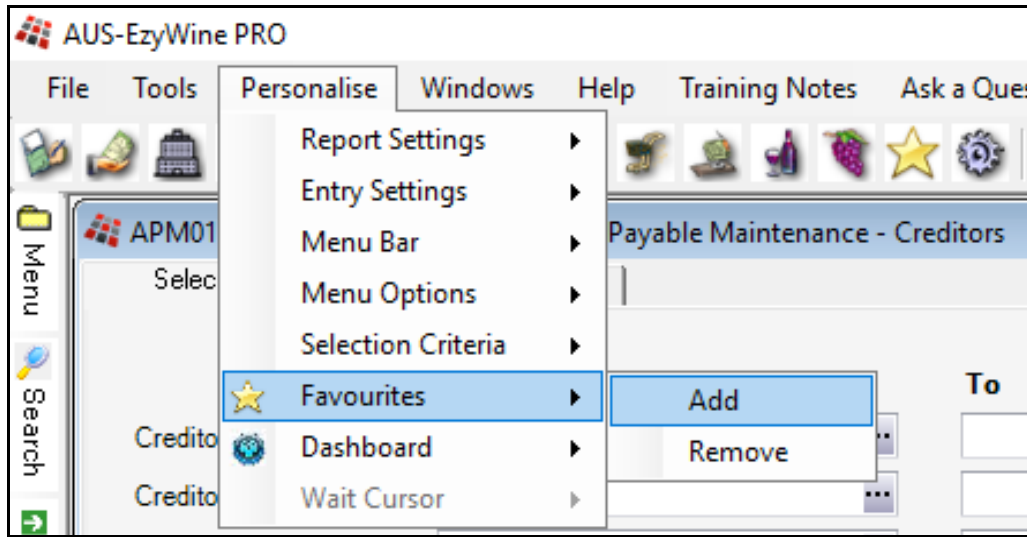


On selecting a menu option, you can specify whether to add to or remove from your Favourites menu.
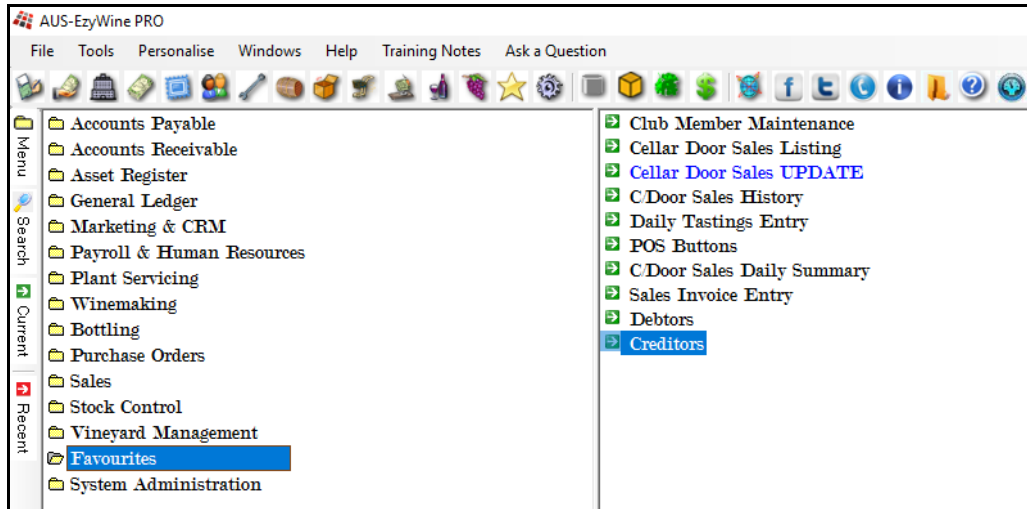


## Dashboard
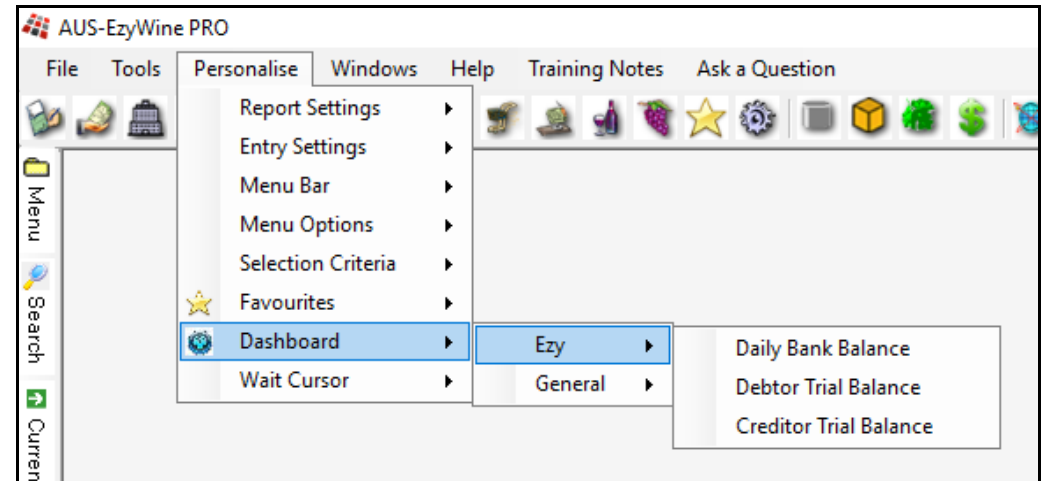


Specify which options are to appear on the dashboard.



Dashboard can be accessed by clicking on the top right button.

## PERSONALISE (Cont'd)

**Wait Cursor**
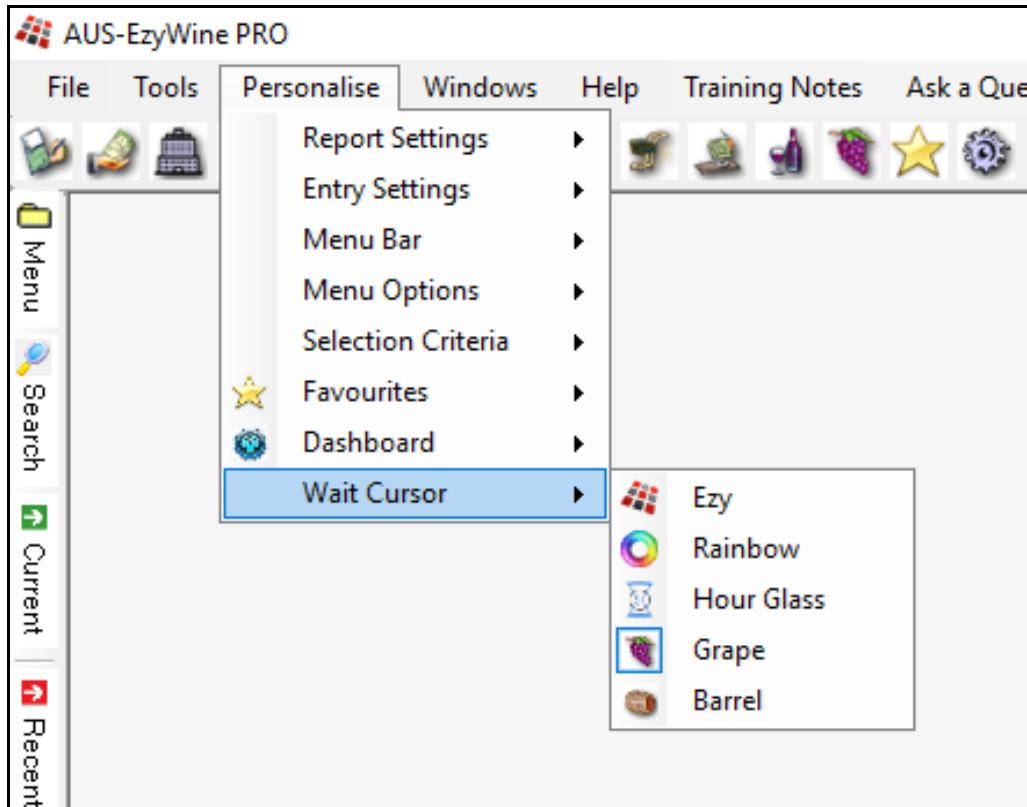


Select your prefered animated cursor which will be displayed when your request is being processed.

## WINDOWS

The [Windows] tab allows you to specify whether the open options are to be displayed cascaded or on top of each other.

This tab also lists the menu options that are currently open and allows you to move between them.

# [F5] NOTES



[F5] Notes – If notes can be recorded against a prompt, it will appear as a button. **Allocation\*** The **\*** indicates that notes exist.

# REPORTING
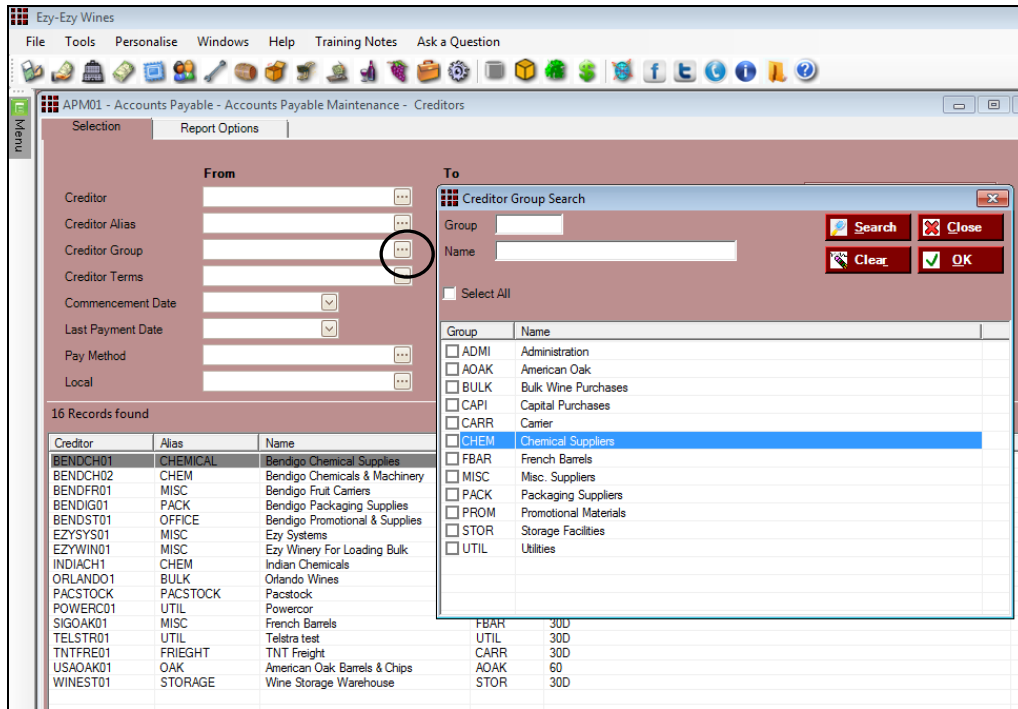


On specifying a selection criteria and selecting the [Search] button, a summary of the entries to be reported are listed below the selection criteria.

## From
If you only want to select one entry, simply double left click on the entry. Otherwise, tick the entries required and then click the [OK] button.

## To
Double click on the entry required - only one entry can be selected.

## Wildcards
? can also be utilised to select multiple entries. For example, to select all Shiraz stock items, you could specify ??SHZ?.

The From and To specified do not have to be valid unless the pick list is used.
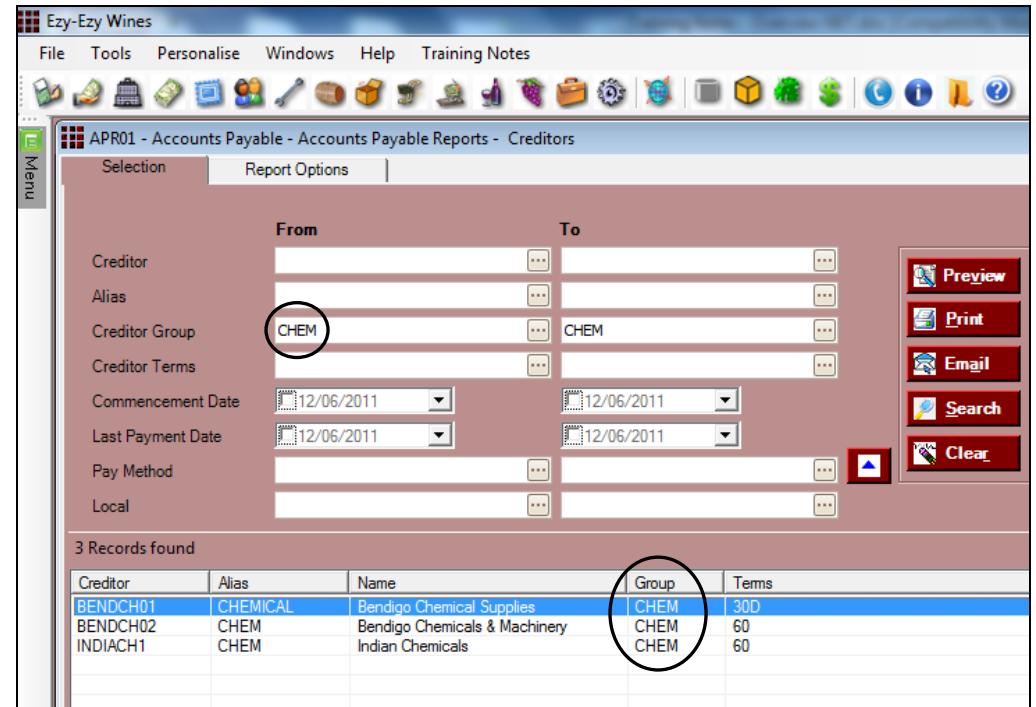
*[Print]*
This button allows you to specify a printer.

*[Email]*
This button allows you to email the report as an attachment.

# REPORTING (Cont'd)
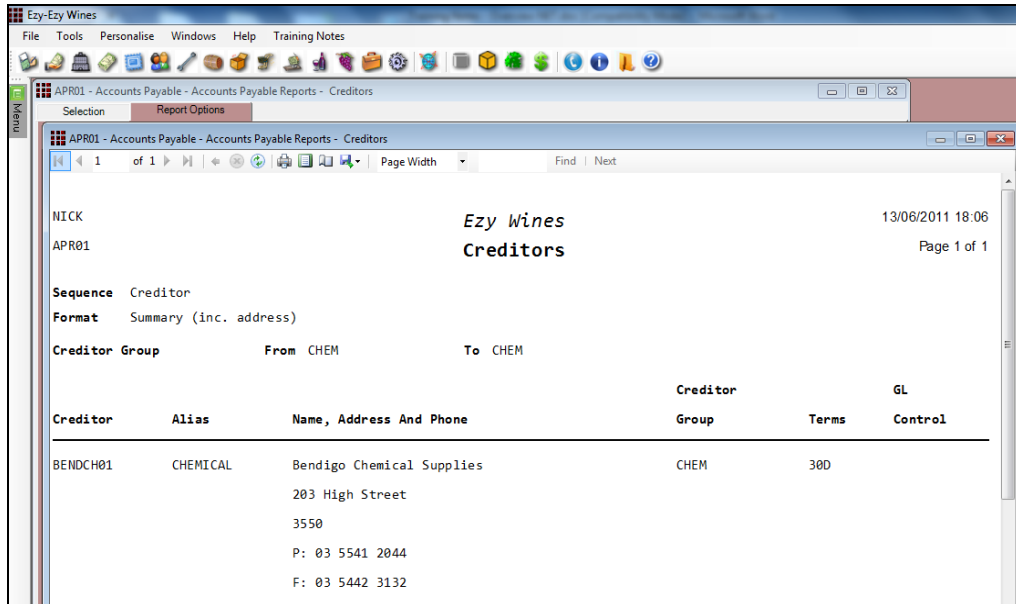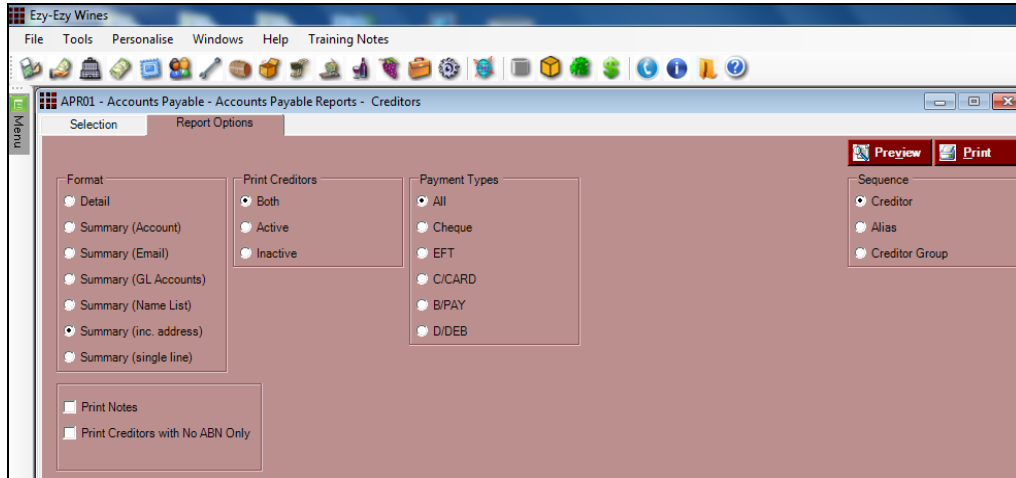


*[Preview]*
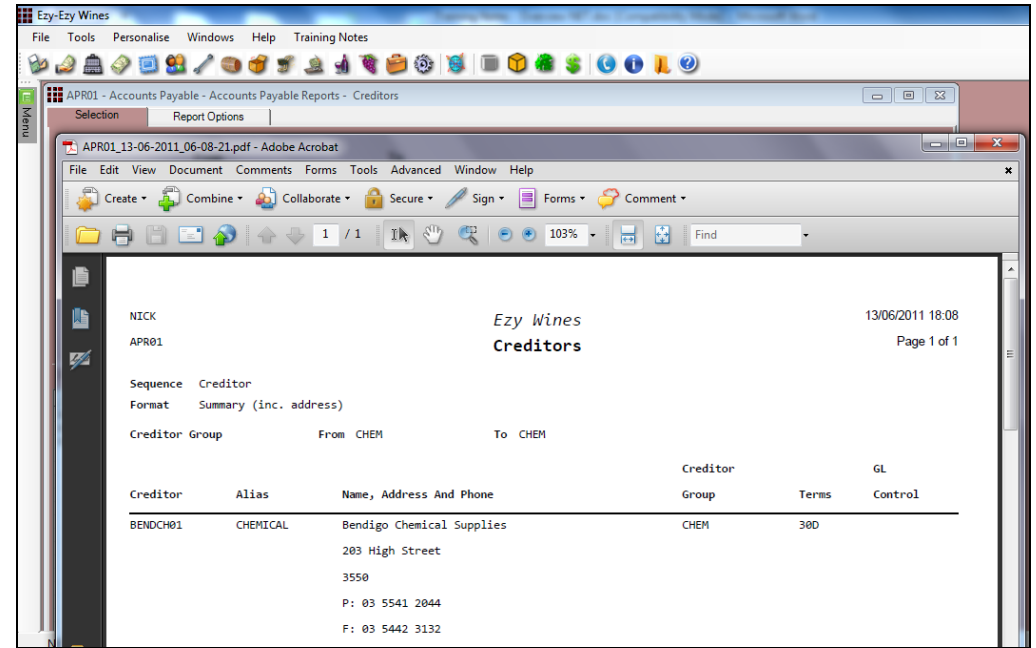


[Preview] version when Personalise, Report Settings, Preview Reports in PDF is selected.

# RESTRICTING USER ACCESS

*System Administration, User Access*

The *EzyWine* version had 24 menu options that could be utilised to restrict user access, whereas the *EzyWine* **Pro** version consolidates all these options into one and provides tabs.
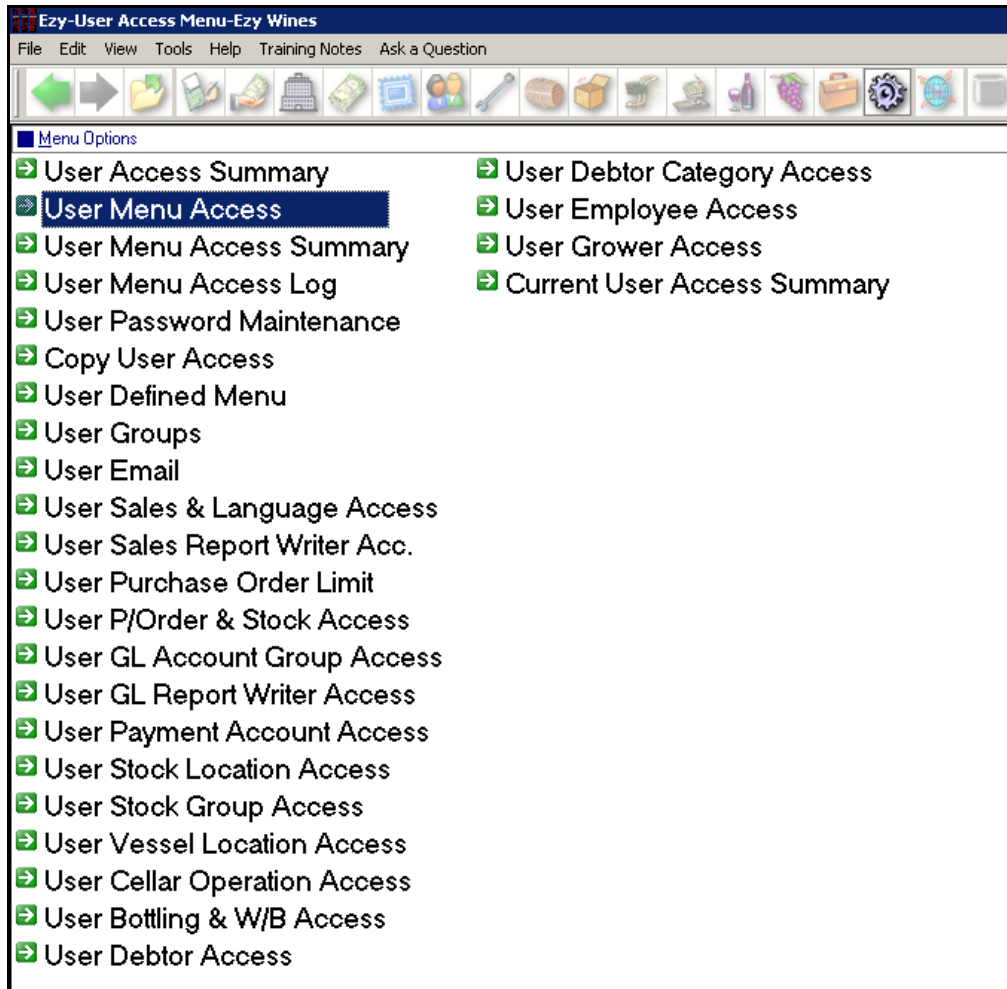


*EzyWine*
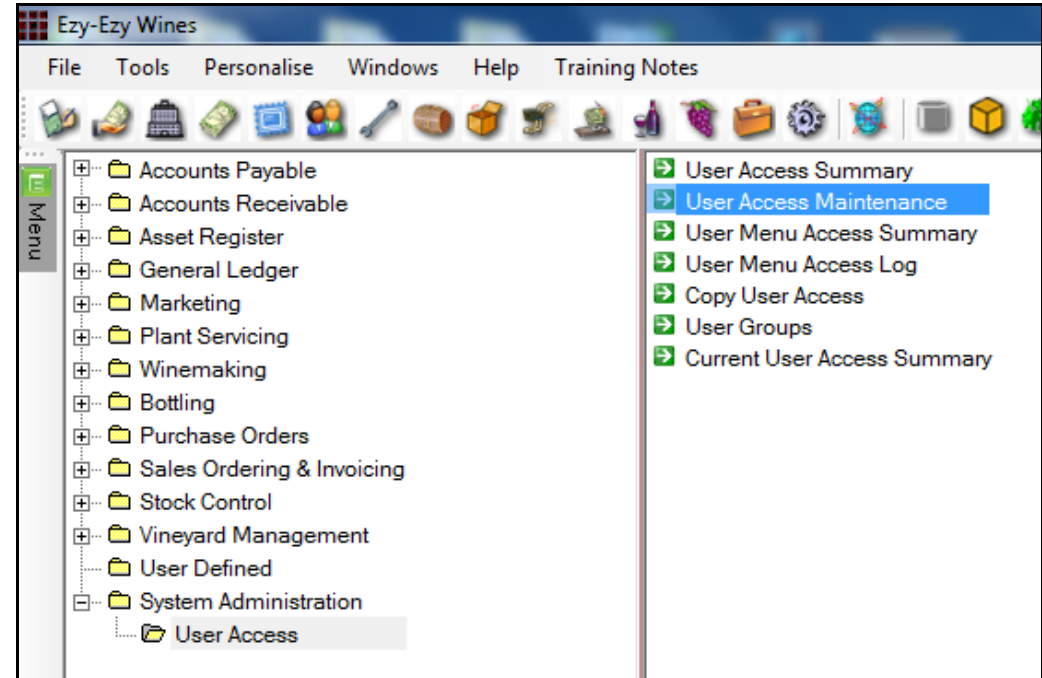


*EzyWine* **Pro**

# RESTRICTING USER ACCESS (Cont'd)
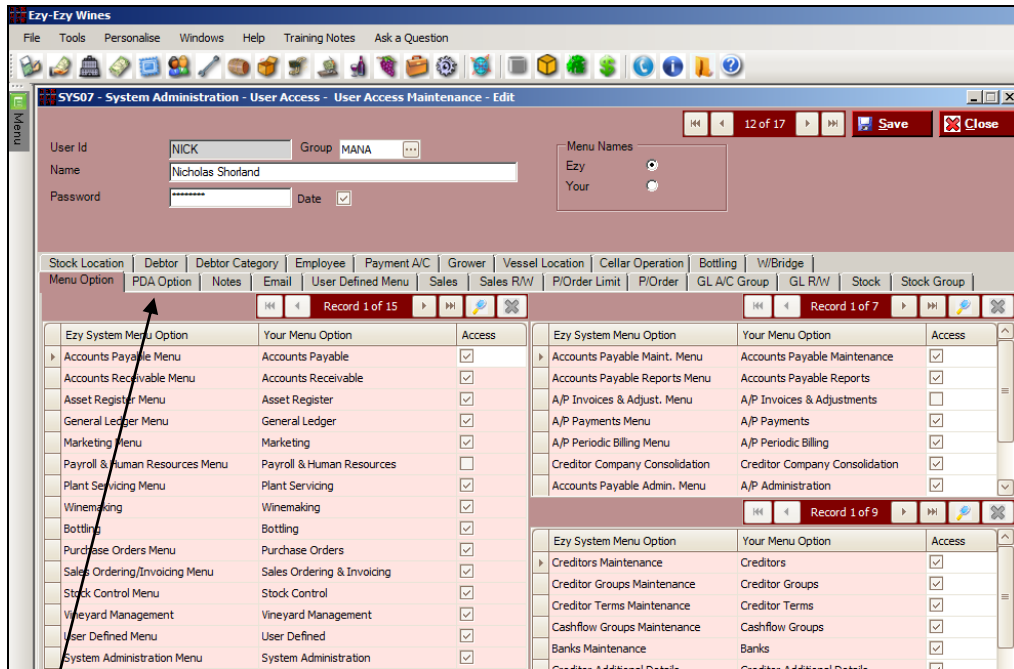


**Tabs**
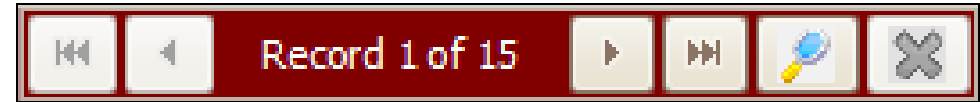


First

Previous

Next

Last

Search
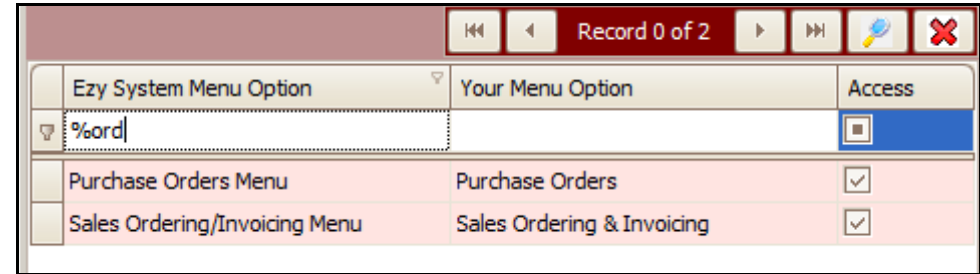


**Multi-Entry Filtration**

The [Search] button allows you to filter which entries are shown.

**%** can be utilised to filter information required.

# PREVIEW UPDATES

When using an Update option, the [View] button will run the listing, report any issues and show the GL interface.





1 Batches Updated Successfully
1 Batches Failed to Update

# POS



## Main Features

- *Buttons Customisable*
- *Barcode Scanning*
- *Mobile Waiters POS*
- *Rewards Program*
- *Bill Splitting*
- *Bar Docket*
- *Kitchen Docket*
- *Restrict User Access*
- *Regular Customers Buttons*
- *Mailing List Registration*
- *Display 2 Logos*
- *Reservations*
- *Meal Options*
- *Delete Password*
- *Sales Rep Performance*
- *Tasting Stock Tracking*
- *Table Map*
- *View Member Sales History*
- *Wine Club Interface*
- *Zones*
- *Vouchers*
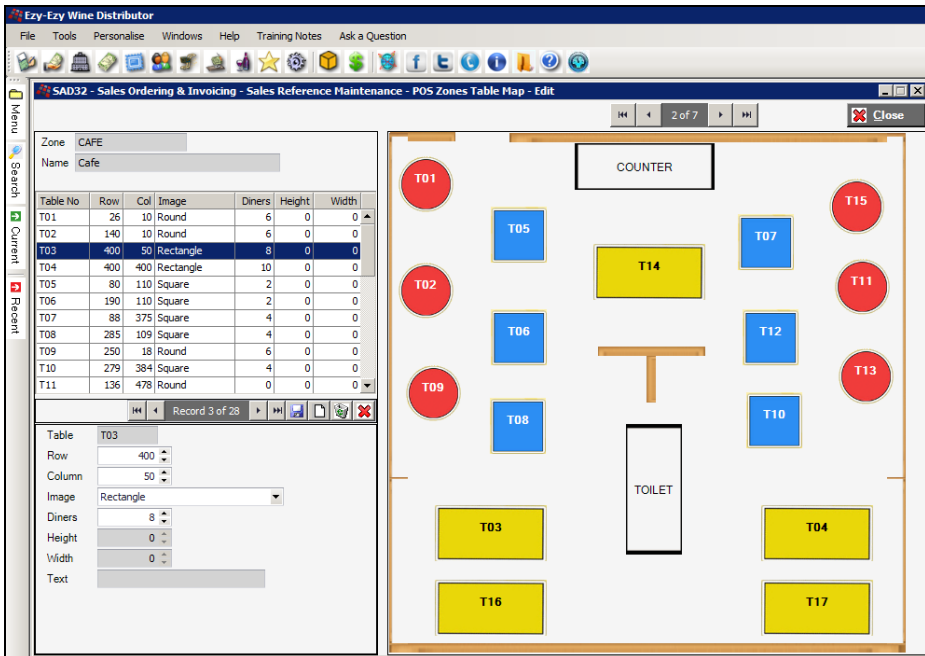
# *EzyWine* versus *EzyWine* Pro

| General Notes | | *EzyWine* | *EzyWine* Pro |
|---|---|---|---|
| Language | Language used to write the software | MS Visual FoxPro | MS Visual Basic**.NET** |
| Cloud | Run *EzyWine* on a remote server (Ezy Systems can provide Hosting) | Yes | Yes |
| Database | Database used to store the data | MS Visual FoxPro | MS SQL<br><br>Most clients can download the **Desktop Edition of MS SQL** for free. <u>SQL 2012 Express Edition</u><br>This free version of SQL allows up to 10GB of data per database.  There will be few clients that may exceed this limit and will need to purchase **MS SQL Server** |
| Rebuild Index | Rebuilding of database indexes | Needs to be done periodically | Not required |
| User Access Sessions | Accessing the same database (company) multiple times | Log in multiple times | Only need to log in once and can access multiple menu options |
| Reporting | Reporting language and tools | FoxPro and<br>Acrobat Reader | Visual Basic Report Viewer and<br>Acrobat Reader |
| Number of Records | Number of records selected | Not available | Count of records that can be modified or reported is available with *every* option |
| Name | Debtor, Creditor, Prospect, Employee, Grower, Associates, Vendors, Buyers and Purchase Order Departments | 30 characters | 40 characters |
| Address Details | | 3 lines of 30 characters | 2 lines of 40 characters + Suburb, State & Country fields |
| Postcode | | 4 characters | 8 characters |
| Stock Item Description | Many options impacted | 30 characters | 40 characters |
| Transaction Ref. | A/P Invoice, A/R Invoice & Stock Adjustments and GL Journals | 8 characters | 16 characters |
| Reference Data | Flag reference data such as Debtor, Groups, Stock Items as inactive | Some of the reference data | ALL reference data |

| Function | Options | *EzyWine* | *EzyWine* **Pro** |
|---|---|---|---|
| PICK LIST (Maintenance)<br><br>Entry must be valid prior to saving | Blank entry | Show all entries | Show all entries in a ***search dialogue*** with more selection options including multi-selection |
| | Entry finds no matches | Load all entries and position at nearest one | Show all entries |
| | Partial match: one or more found | Show all entries – positioned at nearest one | Show matching entries only |
| | Exact match | No pick list | Only when button is selected, only show the entry in the search screen |
| PICK LIST (Report Selection Criteria) | | Valid entry,? and *<br><br>Random selection (*) does not list what was selected | Valid entry, ? and multi-select - ***search dialog***<br><br>*Entry does not have to be valid – you can enter Debtor A to B to report on all Debtors >= A and <= B  (ie. only the A's will be listed)*<br><br>Random selection can be retained and list selection |
| SCROLL LIST (Maintenance) | | Not obvious as to which fields have a scroll list - press space bar to view the different options | Scroll bar button makes it obvious that there are multiple options - ***radio button*** |
| SCROLL LIST (Selection Criteria) | | Not obvious as to which fields have a scroll list - press space bar to view the different options | Each scroll list option appears as a separate button – surrounded by a border |
| Sequence entry records | Such as Creditor maintenance | Not possible | Click on column heading to change sequence of entries (ascending and descending) |
| Arrow keys | All entry options | Moves cursor  between field | Will not do anything |
| Auto-next field | All entry options | When field is filled, cursor moves to next field | User can specify whether to auto move to next field |
| Selection Criteria | All reports | Selection only available for reports | Selection can *also* be used to list entries to be modified (ie. available in maintenance options) |
| | | Banner always appears on 1st page | Banner can appear or 1st page, bottom of every page or not appear at all |
| | | Maximun12 From/To options | Maximum 20 From/To options |
| | | Dates – box to unclick date when not required | Dates – date must be removed if not required |

| Function | Options | *EzyWine* | *EzyWine* **Pro** |
|---|---|---|---|
| *Consolidate all information onto* **1 screen** | *Debtor Maintenance*<br><br>*Cellar Work Sheet Entry* | *3 x screens*<br><br>*8 x screens* | *Tabs appear on the one screen* |
| [F5] Notes & Comments | All modules | Text restricted to 320 characters | No text field size restrictions |
| Standard Reports | Such as Sales Analysis Reports, Sales By Debtor (SAX01) | | In many areas, the standard reports could be generated by calling the report writer<br><br>Support staff could create the reports in the R.W. |
| Modify multiple reference data | Such as Debtors | You have to manually find each Debtor | Utilise the selection criteria to specify a range of Debtors and then step through them – this feature will save a lot of time and ensure required Debtors are not missed |
| Email | All Reports | Setup as printers, which are not obvious | New action button |
| Save report | All Reports | Not available but there are a few export options | Every report can be saved as a file |
| Record locking | Whether the same record, such as a particular Creditor can be accessed at the same time | Not possible<br>'Record is locked by another user' message appears | The same record can be accessed and modified by multiple users all changes will be recorded |
| Global Maintenance options | Options such as A/R Administration, Global Debtor Maintenance | Can only be accessed when there are no other users in the related modules | No restrictions in regards to options accessed by other users |
| Customise options available on the user defined menu | | User Defined Menu<br>But user could not specify options available unless they had System Administration access | Renamed to Favorites<br>Every user can easily maintain the options available |
| Listings To Include GL Interface | All modules with UPDATE options | Only Sales Invoice, Credit Note, Service Invoice Listing & A/P Inv & Adjust & Payslip Summary | All modules with UPDATE options<br><br>Each Update option will allow you to view the GL interface prior to actually committing the Update |
| Edit Debtor details when entering sale | Every Sales Entry option | Not available | Edit email, phone and contact details |

# *EzyWine* versus *EzyWine* Pro (Cont'd)

| Function | Options | *EzyWine* | *EzyWine* Pro |
|---|---|---|---|
| Report Writers | Asset, Sales, Vintage, Cellar, GL, Stock and Vineyard | | Preview button<br>Private or public reports |
| POS Table Map | Drag and drop table image | No | Yes |
| Vessel Map | Drag and drop to simply change coordinates | Not available | Vessel, Wine Batch and Vessel Group image can be moved |
| | Change a vessel's wine status | Not available | Yes<br><br>An adjustment worksheet is processed |
| | Access [F5] note | No | Yes |
| Add options to user defined menu | User Defined Menu | Access is restricted to user that has access to System Administrations, User Access Menu, User Defined Menu option<br><br>*Generally not accessible to users!* | Renamed Favorites<br><br>On accessing the required menu option, user can easily add or remove option from favorites menu as required |
| Selection Criteria | All | Reports only | Maintenance and Reports options<br><br>On double clicking on one of the entries shown on the selection criteria, it is preloaded against the selection criteria |
| Transactions order | Transaction options | Generally only by transaction number | Several sequence options including transaction number, date, Debtor, Creditor, etc |
| Export Data | Export options on the Administration menu in every module | TXT, XLS, CSV and **DBF** | TXT, XLS, CSV and **XML** |
| | | File generated can only be saved | *File is opened immediately* |
| Stationery | Print options such as Sales Invoice Print and Purchase Order Print | a) Some only have hardcoded format<br>b) Some only created using Stationery Designer<br>c) Combinations of a) and b) | Hardcoded formats no longer available<br><br>Stationery Designer is to be utilised – sample format will be provided and can be changed as required.<br><br>Stationery Designer includes colour, fonts, images, etc |

# *EzyWine* versus *EzyWine* <span style="color:red">*Pro*</span> (Cont'd)

## Obsolete Menu Options

The following menu options are no longer required in the <span style="color:red">**Pro**</span> version with most being incorporated into other options as a tab.

**System Administration**
> Rebuild Indexes *removed*
> Suburb Maintenance *added*
> Copy Live Data To Test
> Custom Translation Maintenance
> System Change Request Form
> Convert XLS to DBF

**User Access Menu**
> User Password Maintenance
> User Sales & Language Access
> User Sales Report Writer Acc.
> User P/Order & Stock Access
> User GL Account Group Access
> User GL Report Writer Access
> User Payment Account Access
> User Stock Location Access
> User Stock Group Access
> User Vessel Location Access
> User Cellar Operation Access
> User Bottling & W/B Access
> User Vendor Access
> User Debtor Access
> User Debtor Category Access
> User Employee Access
> User Grower Access

**A/P Administration**
> Creditor Additional Details
> Creditor Mailmerge Interface
> Creditor Withholding Tax
> Creditor Enquiry
> EFT Purge

**A/R Administration**
> Debtor Contact Details
> Debtor Additional Details
> Debtor Additional Groups
> Debtor Delivery Addresses
> Debtor Sales Default Location
> Debtor Sales Messages
> Debtor Additional Details
> Debtor Stock Group & Rep
> Debtor Mailmerge Interface
> Debtor Enquiry

**Payroll Administration**
> EFT File Purge

**Stock Administration**
> Stock Items Barcodes
> Stock Items Additional Details
> Stock Items Additional Groups

# *EzyWine* versus *EzyWine* Pro (Cont'd)

## Obsolete Menu Options (cont'd)

**General Ledger**
- COA Additional GL A/C Groups

**Marketing & CRM**
- Prospect Rating
- Prospect Contacts
- Prospect Facts
- Marketing Mailmerge Interface

**Stock**
- Stock Item Barcodes
- Stock Item Additional Details
- Stock Item Additional Groups
- Stock Prices By Price Class
- Stock Item Dimensions
- Stock Items Additional Details
- Supplier Tender Response Entry
- Tender Requirements Print

**Sales**
- Debtor Sales Analysis Exempt.
- Debtor Sales Default Location
- M/Order Totals
- Sales Budgets
- Copy Sales Budgets
- Stock Item Budgets
- Stock Group Budgets
- Debtor/Stock Item Budgets
- Stock Item/Locn Group Budgets
- Sales Area Budgets
- Sales Area Group Budgets
- Sales Rep Budgets
- Sales Rep Group Budgets
- Sales Rep/Stock Item Budgets
- Sales Rep/Non-Stock Budgets
- Sales Area Budgets
- Sales Area Group Budgets
- Sales Area/Stock Item Budgets
- Cellar Door Sales Entry
- Allocation Group Plan Maint.
- Stock Allocation Plan Maint.
- Planned Allocation Listing
- Stock Item/Sales Area Summary
- Allocation Group Summary
- Allocation Group/Stock Summary
- Import Planned Allocation
- Export Planned Allocation
- Export Stock Item/Sales Area
- Export Alloc. Group/Stock Item
- Import Sales Budgets

## *EzyWine* versus *EzyWine Pro* (Cont'd)

### Obsolete System Parameters

The following obsolete system parameters have been removed from the **Pro** version.

Acc/Pay: Creditors Additional Details
Acc/Pay: Inv/Adj, Listing To Show GL
Acc/Rec: Debtor, Record Priority
Acc/Rec: Access Debtor Sales Tax GL A/C
Acc/Rec: Mandatory Debtor S/Tax GL A/C
Cellar: Entry, Enhanced Format
General: Sales Tax Certificate No
P/Orders: Entry, Record S/Tax Rates/Amt.
Purchase Order Receipt GL Extra Detail
Sales Analysis Export: Sales Tax Value
Sales C/Note: Listing To Show GL
Sales Invoices: Entry, Draft Print Only
Sales Invoices: Listing To Show GL
Sales Invoices: Entry, Released Can Mod.
Sales Invoices: Entry, By Location Group
Sales: "CARTONS" Stock Unit
Sales: "UNIT" Stock Unit
Sales: Entry, Post Print Batch Command
Sales: New Debtor, GL Sales Tax GL
Service Invoices: Listing To Show GL
Stock: Record GST GL A/C
Stock: Sales Tax Rate 1
Stock: Sales Tax Rate 2
Stock: Sales Tax Rate 3
Stock: Sales Tax Rate 4
Stock: Sales Tax Rate 5
Stock: Sales Tax Rate 6

Stock: Access Stock Sales Tax GL A/C
Stock: Next Alias Number
Stock: Mandatory Stock Sales Tax GL
Stock: Multiple Alias Codes
Stock: Wholesale S/Tax On Notional Price