



Product Outline Document



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1. Overview

AURIA Gold Standard Business Software provides Customer Relationship Management, Financial Management and Supply Chain Management all in a cost-effective, easy-to-use package. Its wide range of features and stability more than rival higher cost systems; bringing you enterprise level software at SME prices.

Customers using AURIA Gold Standard Business Software include Mail Order Businesses, Service Organisations, Manufacturers and E-commerce portal companies. The software is robust, easy to use, flexible and scalable allowing it to grow with your business.

The Auria software supports the following key business functions. This document provides more detail on each area.



2. Sales

In any organisation, sales processing must be handled quickly, efficiently and with care. AURIA Gold Standard Business Software addresses this need, providing a wide range of facilities that allow you to take care of one of the most important aspects of your business - the customer sales process.

2.1. Capturing Orders

Auria's sales functionality is suitable for interactive or off-line sales contact between your staff and customers. The complete order capturing process can be efficiently managed by your operators via an easy to navigate sales order form. There is also a CTI based sales management form available, providing operators with prompts to assist with customer communication. CTI functionality can be provided via Oak Software or any other CTI application that supports a 'command line interface'.

New client account information can be quickly entered whilst keying a sales order. If a customer has called regarding a previous quote, individual or multiple quotes can be used to generate sales orders rapidly and efficiently. For repeat orders, previous sales orders can be duplicated to save operator time.

Auria gives your operators the ability to simultaneously process multiple orders which is useful in environments where customers call to place orders and mailed orders are keyed by call centre operatives. Auria sales order processing has been carefully designed so that it can be used whilst conversing with customers.

Your operators have the choice of processing orders in their entirety interactively (quite common in smaller mail order firms) or they can handle any number of orders as a batch. To ensure that operatives can provide customers with accurate credit information, it is easily to hand whilst keying orders. A sales order cannot be picked, released and invoiced if the customer is on a credit stop, unless an authorised user takes steps to release it.

Each customer account can be set to trade in any currency. Once this has been set, Auria automatically converts between the trading currency and that which is in use by your organisation. Auria supports triangulation between non-euro EC currencies so that conversions are consistent with currency conversion standards. Multiple tax rates are also supported, together with taxable and non-taxable price splits for products that combine taxable and non-taxable items, such as books with CDs.

Auria will also allow your operators to view the status of all outstanding orders so that they can be tracked through the entire fulfilment process. Rules are in place to control editing of sales orders once they have been picked to ensure that, once shipped, orders cannot be inconsistently modified.

Orders can be invoiced to one customer and shipped to another, or alternatively sent to different delivery addresses that are lodged against each customer record. It is a simple matter to add extra address information on the sales order form, reducing the need to switch from one form to another.

Each item sold on a sales order can have the catalogue that originated the item logged against it so that marketing information can be gathered for later review.

2.2. Product Information

During the sale process, Auria shows your operators essential, real-time product details, enabling them to give your customers up-to-date and accurate information in less time. Your operators have access to stock levels, linked products (which could be up-sales or cross-sales), customised pricing, promotions, long sales orientated descriptions (which provide operatives with the tools to ensure customers make more informed decisions) and product images.

Auria enables you to define product relationships. If, for example, there is insufficient stock, your operators can find out when an item is due and offer suitable alternatives. This avoids the usual frustrations customers may experience when a product is unavailable and no schedules or



alternatives are proffered. Associated products and accessories can be linked to each other which streamlines the process of cross-selling. Your customers will therefore have greater choice and you will be assured that they will receive the correct combinations of associated products and accessories.

Providing your operators with integrated access to your stock levels and product details allows them to inform your customers of estimated delivery dates, new product release dates or currently available alternatives. This, in turn, allows customers to make better informed buying choices, perhaps improving the prospect of profit-generating opportunities with little additional effort.

For customer loyalty schemes, promotions and offers, Auria is able to provide you with extensive price banding and discounting functionality. This ensures that the correct prices and special offers will always be linked to the appropriate customer marketing campaign.

Operators also have the ability to enter and view detailed product descriptions. Short product descriptions can be entered as well as free text product descriptions to allow unique information to be recorded against each item line (usually used on service orders and invoices). With this ability, you and your team will all have a clearer knowledge of products and their selling strengths. Auria will also generate keywords based on any part of the description, giving your operators the ability to retrieve product information more efficiently when customers want to know more about a product before they make the purchase.

Auria is able to show a product's cost price, the standard selling price and the price including the customer's discount, allowing your sales operators flexibility (where appropriate) to sell the product more effectively. It is also possible to see the total order weight for consignments subject to weight based delivery charges. This information can be used to configure delivery charge calculations, where necessary.

2.3. Back Orders

It is possible to allow or disallow back orders on an individual item basis or on entire orders. Equally, it is possible to ensure that complimentary product that may be part of a special offer is not sent out until chargeable items are ready to ship. This reduces the chance of customers receiving free product and employing additional operator time by cancelling the paid part of the order before it ships.

Using Auria will improve your stock management processes so that out of stock situations occur less frequently. However, if they do occur your operatives will be able to offer appropriate alternatives, reducing the chances of a lost sale. You can track stock shortages and stock allocations using a straightforward interface. Stock can be allocated to orders based on individual stock codes, goods that have been received within a date range, a sales order reference or simply based on all stock that is currently available. Whichever way you choose, you are provided with a means of improving your view of order completion opportunities, ensuring that your operators will have a clearer appreciation of order content together with stock movement and availability.

When assigning stock, your sales operators can view the entire order so that, where possible, complete back-orders can be fulfilled. For every product item on an order, a rapid appraisal of stock status can be made by viewing colour coded, 'at a glance' information. Auria also allows operators the flexibility to reallocate stock between orders in order to optimise order completion and to manage changing priorities in your sales orders. Any reallocations will be dynamically posted in real time across all of the relevant areas, with no interaction required from the operative. Any resulting shortages will also be reported on, to ensure that customers that may be affected by a change can be kept informed.

Further flexibility is provided by Auria by placing hold dates against items (or holding an entire order completely), should a customer wish for delivery to be deferred until a specific date. To minimise delivery charges, orders can be held back until all stock is available if either you, or your customer, require this. Where part-shipping is allowed, the back order status is clearly shown on customer documentation so that they remain fully apprised of the progress of their order.

2.4. Advance Orders

Auria provides your sales team with the ability to establish and confirm delivery dates ahead of time. Your operators can make a sale on a product before it is even released by specifying a product launch date against the stock item. Once the date is reached, stock is allocated to orders and they can be despatched. This additional service can increase customer loyalty and provide a more personal shopping experience and is useful for items such as gifts that need to be received by a particular date.

Your sales operators can assign a series of shipment dates to items on an order; a feature ideal for mail-order clubs, catalogue periodicals and customer loyalty schemes, where regular and punctual deliveries are essential. Auria has a complete club management module, for situations where more automated behaviours are required.

2.5. Batch/Interactive Document Productions

Where there are fewer operatives available, Auria provides your operators the adaptability to handle the sales order and fulfilment process from start to finish; ideal for market areas where providing excellence in personalised customer service is expected as standard from a small number of available staff. For a larger sales processing environment where there are more defined areas of responsibility, order processing and information capture, the sales order process can be segmented and elements processed in a batch environment, allowing focus on individual areas and improving throughput of orders.

Document layouts can also be customised in accordance with customer categories, product or sales channel. This allows a different 'branding' to be presented to customers depending on the way that you choose to segment your database. Once customised layouts have been created, Auria can be given rules that ensure that all document selection is completely automatic, reducing staff time whilst ensuring that customers receive appropriate and understandable documentation.



2.6. Delivery Features

Auria allows your operators to consolidate multiple orders into a single delivery note. It also handles the creation of multiple despatch notes and invoices where back orders are taken and fulfilled. All of this is controlled according to a set of rules, ensuring that orders are not updated inappropriately. All customer facing documentation can be printed individually or in batches, depending on your choice of operation method.

Delivery charges can be applied according to pre-set rules or, alternatively, charges can be manually entered onto an individual sales order so that the automatic calculation is overridden. This allows for the majority of your delivery charge calculations to be handled automatically, but provides the flexibility to override this behaviour where the pre-defined rules are not appropriate.

Auria currently integrates with despatch systems provided by companies such as Lynx, Business Post and Citylink. To integrate with any other carrier would be covered as part of the implementation cost and is relatively straightforward.

2.7. Telephone System Integration

Auria has a rapid, prompt-based, order processing screen that is linked to your telephone system via Oak Software (or any other CTI application that supports a command line interface). This allows your operators to see who the caller is and prepare themselves before the phone is picked up. There is flexibility to link the system into your call handling systems so that multi-channel sales are transparently supported.

2.8. Postcode Software Integration

Auria improves the accuracy of your address capture by linking with postcode software, providing your operators with a faster more accurate way to correctly identify addresses and post codes.

2.9. Credit Card and Payment Processing

Auria provides you with the ability to process multiple payment types against a sales order, giving your sales operators the flexibility to accept a diverse selection of payment methods. Credit cards, cheques, postal orders, vouchers, account terms and credit notes are all fully supported by Auria and any number can be entered against and assigned to an order whilst it is keyed.

Auria has a credit card authorisation and clearance module that integrates with Commidea, SecureTrading, CommsXL and other service providers, allowing you to choose the most appropriate and cost-effective method of authorising and collecting card payments. Using the integrated authorisation module, transactions can be processed automatically; reducing duplication of effort and entry errors thus saving staff time. Auria also enables operators to quickly process card or cheque refunds (directly from the returns note form, if required) and to record charge-backs that have been applied by your provider.

Customer account terms are accommodated. Deposits can be taken on account and then posted into your ledgers as over or under payments. Credit notes can be issued and assigned to sales orders as part or full payment all whilst processing orders; which streamlines account management. Whilst sales orders and payments are being processed, Auria accurately maintains full accounting information in the ledgers in real-time. You also have the ability to configure multiple merchants and to collect payments in any number of currencies.

2.10. Offers and Promotions

Auria allows you to develop a comprehensive range of offers and promotional prices. You can specify free or chargeable items for automatic shipping; useful for sending out seasonal catalogues or complimentary offerings. Marketing codes are recorded against sales orders to ensure that the source of orders is accurately tracked.



In addition to this, it is possible to track which catalogue the customer used to purchase individual items on an order.

Complete customisation of pricing is available, by customer, customer group, inventory type or stock item. It is also possible to define specialised catalogues or marketing codes to create product offerings. This enables you to fully utilise any marketing drives and also allows you to fully optimise the pricing of your product throughout its lifecycle.

2.11. Discounts

Auria supports multi level price lists and discount structures. Discounts can be linked to total order values or product quantities. Discounts can apply to a customer, irrespective of order value or products purchased. It is also possible to define discounts as a percentage based on order value. Further control is provided by allowing price lists to be created that are dependent on the quantity of an individual stock item, or groups of stock items based on their type. Each price can be defined as a percentage off list, or as a specific value, irrespective of the list price.

With Auria's true multi-currency facilities, it is possible to create specific price bands in any known currency. Equally, if you only sell in foreign currency infrequently, Auria will dynamically convert prices without any user intervention being required, save the accountant specifying the current conversion rates at a frequency that they feel appropriate.

Whilst price banding is extensive, Auria also allows any automatic discount to be overridden by authorised operators where required.

2.12. Customisable Documentation and Formats

Auria allows you extensive flexibility in document design and report formats. You can tailor your invoices, sales order confirmations, despatch notes and other documents to your requirements so that they adhere to your corporate standards. This flexibility allows definitions to be created for each individual customer classification or route to market. Thus, mail order customers, who typically have less interest in VAT can receive one document formatted to their expectation, whilst trade customers can receive another, with full VAT breakdown and a short-hand statement on view so they can see their current account status.

Documentation can be faxed, printed and emailed as an attachment (using a MAPI compliant mail client) or

exported. Exported reports can be in HTML, PDF or a number of additional formats such as Excel, Rich Text Format or Plain Text, enabling you to communicate with your customers quickly and efficiently.

Pro-forma invoicing is supported for situations where you are trading with a new customer with no history and the format of these documents is also under your control.

Printing of customer facing documentation is handled in a single central location. The entire fulfilment process is then handled from one point, with each of the fulfilment stages being tracked in an easily read format. The despatch manager allows individual orders, or batches of orders to be processed. It is possible to apply a number of processing filters to the view of items to be handled so the despatch department has flexibility in processing orders in sets.

2.13. Input and Output of CSV Files

Auria has an open database, that is to say we do not restrict access to any of the data stored in your system. The in-built report writer allows flexible export of your data in formats such as CSV, PDF, HTML and XLS.

Auria also provides you with a list of import facilities that accept CSV or fixed width format text files, so it is possible to import customer information and merge this with your existing database. There are also facilities for interacting with third party software using a procedural interface that exists in the Oracle database. This is useful for integrating with web sites or other external data gathering systems.

2.14. Complete Ledger Integration

Auria allows you to define a set of rules that determine precisely how sales and returns are recorded in your sales ledger. Stock costs, tax and banking information are all updated according to those pre-defined rules in real time.

Auria provides your operators with the ability to drill down from source documents into the sales ledger for greater clarity of account movements.

Operators have the ability to flag an invoice if it is in dispute and flexible credit control rules can be created to ensure non-payment is maintained at a minimum.

2.15. Sales Order Auto Products

At certain points in time, you may wish to offer concessionary product to customers to further promote your product offering. Also, you may wish to ensure that a new catalogue is shipped with every order. Using sales order auto products you can achieve this with a reduction in keying effort on behalf of your staff.

2.16. Sales Order Notes

Each sales order can have special instructions recorded against it which are either visible to the customer or private to your organisation. This allows the operator to personalise the service provided to your customers and to ensure that everyone in the organisation clearly understands customer requirements.



3. Purchasing

Running an efficient purchase ledger is vital to any organisation. Auria makes tracking orders, receiving goods, checking condition of goods received and management of supplier invoices a straightforward task. Each purchase processing stage is carefully managed to ensure minimum re-keying of information whilst providing maximum control over your purchases.

3.1. Supplier Details

Your operators have access to all essential supplier information from one easy to use purchasing screen. It is possible to record an unlimited number of suppliers against one product item, so if an item can be sourced from more than one location, it is possible to specify prices and supplier references unique to each source.

Supplier lead times from date of order or delivery date histories can be used for reports, enabling you to analyse supplier delivery efficiency with ease.

Your operators will have the ability to manage supplier payment terms either by implementing default periods for payment or by manual input. They can also flag suppliers 'inactive', even if there is an existing balance, if you are no longer purchasing product from a particular company.

3.2. Reorder Lists

Re-order lists can be quickly and easily created by operators; purchase orders can be completed in a matter of seconds from these lists using a straightforward order form.

Your operators can view all relevant product and supplier information during the purchase process. They can check sales figures, stock requirements and the progress of sale orders. Stock quantity, location and allocation status is also on view.

Operators have the ability to create recommended purchase lists based on criteria such as known repeat orders, seasonal variance, minimum stock levels and allocated stock items, ensuring your overall inventory is kept at an optimal level.

3.3. Purchase Orders

The purchase order processing is fully integrated into the purchase ledger as a standard feature. Operators have full drill-down ability from the purchase screen to the purchase ledger. All purchasing functionalities are also integrated with the Goods Received functionalities for total purchase order management.

Your operators can manage the whole purchase process from one purchase order form. From this easy to use form, orders can be created using previous order forms, or basing them on minimum stock and re-order levels. New product codes and details can also be generated and entered.

Operators can edit multiple purchase orders simultaneously, allowing one order to be referenced whilst another is created.

Purchase orders, as is standard with Auria, fully support multi-currency entries. The cost price is recorded in the currency of the supplier and appropriate conversions take place automatically.

Your operators have the flexibility to set due dates per item or for the entire order. These can then be displayed on the purchase notes or published on the web (if you have the integrated e-commerce module). Free text descriptions and 'special notes' can also be attached to the order form to provide suppliers with precise and accurate information regarding your requirements.

You can also enable your operators to have authority to delete purchase orders or delete outstanding items prior to despatch from the suppliers.

Order forms can be faxed or e-mailed directly to your suppliers from within the application. Your operators can also request the suppliers to deliver directly to your customers. Should the delivered quantities not match the original purchase order values, your operators also have the ability to mark the order as 'complete' if over or under deliveries occur.

By using the in-built report writer, your operators also have the ability to generate price comparisons and therefore provide you with information to source suppliers for more cost effective products.

3.4. Goods Received Notes

Upon receipt of goods, your operators can quickly book the items in using a GRN (Goods Received Note) by retrieving the purchase order using the supplier code, product code or purchase order code. Purchases can be booked in with an 'accept all' for the entire order or on an item-by-item basis.

When goods are received, there is the option of updating the ledgers with an uninvoiced stock value to ensure that your balance sheet remains up-to-date and therefore good accounting practice is followed. This figure will be automatically updated as your suppliers raise invoices for the goods they have supplied.

If your supplier ships your order using more than one delivery, multiple receipts can be recorded against a single purchase order. Goods received are able to be tracked against purchase orders. Over and under deliveries can then be recorded and operators able to authorise order completion. Your purchase operators also have the ability to determine approval levels for acceptable tolerance limits when receiving under or over deliveries.

3.5. Quality Check/Goods Inwards Checks

Your operators have the ability to check and log the quality of goods as they are received; thereby ensuring the quality standards of your organisation is maintained to a consistently high level. The damaged purchases can be rejected and subsequently returned to the supplier. The ability to record and view who accepted and received goods is also a standard feature.

Quality of goods can be tracked against your suppliers, enabling you to make informed decisions on supplier sourcing.

Stock that fails a QC will not be booked in and a Supplier Action Request (SAR) can be completed to notify the supplier of you reason for failing the goods. The SAR does not affect stock.

3.6. Purchase Invoices

Your purchase operators can create a purchase invoice directly from a GRN (Goods Received Note), whereupon a purchase invoice is automatically generated.

As is standard across the application, multiple tax rates are fully supported as are multi-currency transactions and all invoices are posted directly into the purchase ledgers in real time.

Operators can check deliveries against invoices and flag and display supplier invoices in dispute. Purchase invoice layout can be customised and specified according to supplier categories.

3.7. Supplier Returns

If stock has been QC'd and subsequently needs to be returned to the supplier, there is a Supplier Return (SR) facility to achieve this. Using the SR facility, stock levels are updated appropriately and a report produced to send to the supplier. Equally, if stock is returned from customers, it is possible to track its return to suppliers. To maintain clear communication throughout your departments, the source purchase order is automatically updated to include the details of any returned goods.

Your operators are also able to track non-conforming stock returns, enabling you to gain a clearer picture of the supply chain.

3.8. Supplier Payments

There is a remittance advice facility built into Auria that allows operators to decide which supplier invoices are to be paid and to print the associated documentation. Payments entered are automatically assigned to the relevant invoices once posted. The design of the remittance advice can be modified by your operators, if required.



4. Stock Control

Managing your inventory is inevitably a balancing act between capital employed and response to product demand. Get it wrong and you risk letting customers down or tying up hard earned cash in redundant stock. It is therefore vital to control your stock accurately. Using the right system simplifies the process, improves cash flow and ensures that customers receive product they require in a timely fashion. Put simply, everyone wins.

4.1. Single 'Simple' Stock Items

For every single 'simple' stock item a unique product code is recorded and a product type is assigned. Against every stock item, Auria automatically maintains a complete purchase and usage history, enabling you to easily track stock movement through out your organisation. Each item can be classified and further sub-divided in numerous ways according to your company requirements.

Your operators will be able to quickly retrieve stock item information by product code, manufacturer, purchase order number, sales order number, manufacturer's product number, stock location, sell by date and fast or slow movers. The ability to view essential stock data such as quantities, allocation levels and on order figures comes as standard.



Items can be associated with up-sells, down-sells, cross-sells and promotional offers. Stocking units and purchase units are logged and displayed against the product. Auria automatically converts between purchase units and stocking (selling) units. Product weight can also be recorded on screen so that delivery charges can be calculated automatically.

Auria also allows you to create uncontrolled stock items to manage sales of services or items that you do not physically stock (or require the maintenance of stock levels). In association with this, items can be marked as allowing free text descriptions, so that sales operatives can record unique product descriptions when selling specific product.

4.2. Dynamically Assembled Stock Items

It is possible to create dynamically assembled stock items. This provides you with the ability to create sales kits or special combination offers. The levels reported to operators for selling purposes are based on the composite items. Picking lists can be generated to show the kit itself, or the composite items, depending on your requirements.

You can also use this adaptability, to assemble items 'just-in-time' while still retaining the ability to track stock based on component levels and therefore maintaining your stock at an optimal level to respond to rapid changes in market demand.

4.3. Build Items

Similar to dynamically assembled items, Auria gives you the facility to fully control the build process. Items can be placed in a structure and assembled within Auria to follow a manufacturing process that occurs within your business. The in-system assembly can also be reversed if the constituent parts are required at a later stage.

Auria provides an optional parts list and build module that tracks product composition through hierarchical parts lists and allows batches to be built and tracked accurately.

4.4. Long Description 'Free text' Items

The opportunity to attach complete 'free text' descriptions to products is available throughout Auria. With this ability to include short and long descriptions, customers are able to receive more detailed product information and special order instructions can be issued for the purchasing manager.

4.5. Multiple Locations

Auria lets you maintain efficiency in creating picking lists over multiple locations. Picking locations can be set as primary, secondary and tertiary. Picking lists can be created in location order to increase despatch efficiency and stock can be transferred between both on-site and off-site locations.

4.6. Multiple Suppliers

Auria can link several suppliers, each with their own unique reference and price associated with each item, enabling you to track prices in order to find the best value for money.

4.7. Full Transaction Histories with Drill-Down Capability

Every stock item within the Auria database is linked to a comprehensive transaction history. In this history every source document that created each transaction can be quickly located.

The history includes sale, return, purchase, disposal or any other form of transaction, all of which are located in Auria's centralised database. Transactions can be viewed with ease, either by type, (i.e. sale, return, adjustment etc) or by date range, providing you with a transparency essential for future reference and auditing.

4.8. Quick Stock Adjustments

Auria fully supports making quick changes to your stock figures. Adjustments can be made via a stock adjustment and the financial effect of the quantity change is dynamically posted into the ledgers. Adjustment reasons are entered either as free text or as a pre-configured field list. Stock items can also be rapidly relocated, or transfers between sites effected from the same form.

4.9. Full Stock Take Facilities

Auria has the facility to perform complete and rolling stock takes with speed and efficiency. Stock takes can be limited to warehouse, rack and bin and any adjustments can be posted directly into the ledgers.

Reports can be created to reflect a specified number of top moving items. Your operators can also have the ability to match the on screen data entry forms to the stock take reports in order to minimise stock take durations. Stock credit notes can also be automatically generated from returns notes.

4.10. Stock Image Association

Auria has the facility to store and display a variety of image formats. Your staff will have an accurate visual record of stock items that ensures clearer communication between departments, other staff and with the customer.

Images can be loaded from files or any TWAIN compatible device and stored in a variety of formats and sizes within a single repository. From this location, the product images can be attached to product codes, various on screen locations for staff and linked to website catalogues (when using Auria e-commerce).

4.11. Stock Keyword Association

Auria will automatically generate search keywords based on descriptions, stock codes and stock types. These same keywords are available for product searches within the Auria system as well as on the web site (if you have the e-commerce option).

You also have the freedom to create your own keywords that are more meaningful to yourself and your customers and therefore improving both staff and customer search capabilities.

4.12. Stock Assignment

With Auria you can quickly assign stock that has just been delivered and reassign stock from one order to another. Whilst assigning stock to an order, back ordered items and pending purchase orders can be checked at a glance.

To optimise your expenditure, reorder levels can be automatic, manually updated or linked to sales variables within specified time periods and seasons.

4.13. Returns

Returned stock is rapidly processed via the Returned Stock Processing form. The reason of return is entered from a pre-configured list and further explanation entered in the Returns Note, where required. Depending on the reason and condition of the returned item, the product can be posted back into stock, returned to the original supplier or disposed of.

Using the in-built report writer, your operators can produce reports based on Returns Notes for product and customer analysis.

4.14. Stock Selling Prices

Each stock item can have a list price specified in any currency. Alternatively, you can allow Auria to convert selling prices dynamically based on fluctuating currency conversion rates.

From the base list price, it is then possible to define additional pricing structures, linked to individual catalogues, customer classifications or the overall stock type by which you have categorised the item.

4.15. Catalogues

It is possible to view which catalogues a specific stock item appears on and where it is located. It is also possible to create a stock item that links to your catalogues so that they can be stock controlled, ensuring that you are never short of a particular catalogue that a customer may require.

4.16. Bar code support

Auria provides support for entering bar code information against stock items and keyboard wedge based scanners can be used. The report writer has built-in support for a range of standard bar codes, so all documentation can have printed barcodes present.

4.17. Stock Matrices

Sometimes you will find that certain stock items are almost identical except for certain attributes. For example, in the clothing industry you will find that a particular design of t-shirt is stocked in various colours and sizes but they are all essentially the same class of item. It is important to maintain individual stock levels and benefit from all the other fields that the Auria stock form provides without the management issues of maintaining a potentially high number of stock item records. Auria stock matrices handle all this for you allowing you to define the different attributes of the basic stock item whilst basic changes can be copied through to all the individual stock items seamlessly.

It is also possible for sales operatives to access products via the matrix, simplifying the addition of items to the sales orders where they do not know the exact stock code.





5. Accounts

Auria Gold Standard Business Software comes with a complete and fully integrated accounts package. Sales and purchases, payments and stock movements are all posted into the Auria ledgers in real-time, according to rules that you specify.

Your accounts staff will experience invaluable flexibility with accounts functions featured in Auria. It supports a 'word processor' like model, whereby transactions can be edited and updated (providing updates are within open accounting periods and will not invalidate other source documents).

Staff are able to create repeating journals so as to fully automate the entry of regular items. 'Auto-reversing journals' will allow any journals created by your accounts team to be posted into one accounting period and reversed out in another.

Using flexible accounting period support, operators have the ability to enter transactions for one month whilst the previous period is still open (if desired). Each ledger has its own closure control, so the sales ledger can have a period closed whilst the cash book or purchase ledger has the same period open, for example.

Put simply, your accounts team will have the standard financial control options essential to efficient management.

5.1. Nominal Ledger

Within the Auria nominal ledgers, you have the full range of standard accounts features such as ad-hoc journal entry, cost centre support, journal and item line descriptions, multi-currency journals and more; ultimately to the point of producing your Profit and Loss and Balance Sheet reports. The format of the two key reports is definable based on nominal types and categories as opposed to nominal codes, offering a greater degree of flexibility in your nominal coding schemes.

To support multi-currency transactions, your accountant can set conversion rates, at whatever frequency deemed appropriate, which are then automatically applied to transactions posted throughout the system. Your nominal ledger is set to operate in a single currency, but all transactions that pass through it can be in any known currency and will be converted from source values into the ledger currency automatically.

Fully automated VAT return and VAT transaction history reporting is also supported as standard, with support for unreturned transactions from previous periods being carried into the current period.

Auria can be given rules that determine what postings take place when goods are returned from customers or to suppliers. It is also possible to post stock takes and stock adjustments directly to the stock control accounts to ensure that your balance sheet is maintained as accurately as possible.

There is a period transaction summary form that allows you to view totals against a nominal account for the current year and previous past years for comparison purposes. From here, it is also possible to drill down into the detail so that postings can be viewed in source form.

5.2. Sales Ledger

The Auria sales ledger is fully integrated with the sales processing functions; supporting dynamic posting of data in real time. Within the sales ledgers, you have access to all standard accounts features including manual journal entry, accounts adjustments and write-offs together with the standard reports, such as customer lists, customer statements, aged balance reports and sales daybooks.

Your accounts staff will experience invaluable flexibility with the accounts functions featured in Auria. Any manual journal entries made against customer accounts are visible on the central customer record, which is available to all users with the correct permissions.

Repeating journals can be created, so as to fully automate the entry of regular items. 'Auto-reversing journals' will allow any journals created by your accounts team to be posted into one accounting period and reversed out in another. Auria can be configured to age balances in 30-60-90 day periods (or a different set of three intervals) or to show monthly balances (current, previous and prior.) Payment terms can be defined and printed on any appropriate documents.

Multi-currency transactions can be entered into the sales ledger. Each customer account is assigned a trading currency and Auria will automatically convert into the ledger currency based on conversion rates specified by your accountant. Integration with the VAT ledger is also provided so that all sales, credits etc are tracked for VAT reporting purposes. It is possible to utilise standard VAT rates or create journal specific rates for situations that require it, with provision of a VAT detail form that allows multiple values to be entered.



Your accounts team have the standard financial tools essential to efficient management. Drill down capability from source documents on the customer record is provided. Orders recorded against any customer account can be held by your accounts staff, if required. Operators can make client accounts 'dormant' or inactive, whilst retaining any outstanding accounts information. Accounts cannot be deleted until all legal requirements have been met.

5.3. Purchase Ledger

The Auria purchase ledger is fully integrated with the purchase processing functions, supporting all dynamic posting of data in real time. Within the purchase ledgers, you will have access to all standard accounts features, aged balance reports, transaction histories and purchase daybooks.

Your accounts staff will experience invaluable flexibility with the accounts functions featured in Auria. They will be able to create repeating journals so as to fully automate the entry of regular items. 'Auto-reversing journals' will allow any journals created by your accounts team to be posted into one accounting period and reversed out in another.

With flexible accounting period support, operators have the ability to enter transactions in one accounting period whilst the previous period is still open.

Full integration with the VAT ledger is provided for VAT reporting purposes. It is possible to utilise standard VAT rates or create journal specific rates for situations that require it, with provision of a VAT detail form that allows multiple values to be entered.

Your accounts team will have the standard financial control options essential to efficient management. Operators have drill down facilities from source documents to the corresponding ledger journal.

Payments can be made via individual payments to suppliers or through the remittance advice facility to make payments to more than one supplier in one payment run.

Documents produced can be e-mailed or faxed directly to suppliers on an individual basis. Your operators also have the ability to make supplier accounts dormant or inactive whilst retaining all accounts information. Suppliers cannot be deleted if relevant history exists in Auria.

5.4. Cash Book

Auria supports standard cash book functionality such as bank reconciliation, batch processing of cash transactions, ad-hoc receipts and payments together with standard cash book reporting, such as a cash daybook and transaction history. Your staff are also able to create regular repeating journals so as to fully automate the entry of regular cash transactions.

As payments are entered on the sales order and purchase processing forms, they are automatically entered into the bank account at the appropriate time. Credit card payments are initially created as 'deferred' so that they do not actually affect the cash book or nominal accounts until they have been authorised.

6. End User (Ad-hoc) Reporting

Many systems rely upon external reporting engines to provide end-user reporting. Auria has an inbuilt report writer that competes very favourably with mainstream commercial systems. It is straightforward to use, has access to the entire Auria database and allows you to create reports that can be fully integrated into the menu system. Reports can be exported into a variety of formats and we now have a data analysis engine built in that provides dynamic hierarchical views of your data which can be viewed and rearranged in a matter of seconds.

6.1. Fully user customisable end user reports

Your operators can create their own reports using the in-built report designer. With this flexibility they can isolate, expand upon and refine reports to enable a rapid and concise view of your business data.

Auria has a range of built-in reports supplied as standard. In addition to this, report formats particular to your business can be defined and created at time of Auria implementation. These are produced using the end-user report writer and provide a valuable reference for creating derivatives.

6.2. Link Reports to Menu Systems

Any reports created can be linked to the Auria menu system to enable easy access. Each group of users can be assigned a series of reports that they will utilise and access can be maintained in a consistent fashion.

6.3. Easy to use Query Designer

The built in query designer is intuitive and straightforward to use, with the ability to specify additional calculations, sort orders and data filters. Your more advanced operators have the ability to bypass the query designer and create SQL queries quickly and easily. Any queries stored in the Auria database interrogator can be used as the basis of reports, so more advanced users can develop and refine queries that can be re-used by less technical users.

6.4. Advanced Reports

Most reports that you require will either be defined and stored at the time of Auria's implementation or can be easily created using the Report Designer.

However, your more technically advanced users with knowledge of languages like BASIC or Pascal will be very familiar with the report language used in the Designer. With this fully event-driven system, they will be able to create advanced reports with a high degree of control over calculations and positioning of fields. You therefore have the ultimate power to customise your reports so that they completely meet your corporate requirements.

6.5. Report Explorer

Your administrators have full management capabilities over report availability as all reports are stored and managed in a hierarchical tree structure. Their positions in the management structure can be independent from where they appear on the on-screen menu.

6.6. Linked to Database Query Tool

By using the in-built database interrogator (which is perfect for those with an understanding of SQL), your more technical users can generate data sets to be used by the rest of your staff. These can then be used in the query tool to generate data that is processed using the Report Writer. Note that once the data set has been specified, it is dynamically updated as your system processes information.

6.7. Export in Different Formats

Your administrators have the ability to save reports in an encoded format for storage and subsequent retrieval. Reports can also be shared using alternative formats that include HTML, PDF, Excel and other common file formats. The report writer integrates with your e-mail and fax client to enable direct reporting to customers, suppliers or other third parties.

6.8. Open Database

A significant benefit of choosing Auria is that its database is open to you without payment of additional licenses for reporting tools or database link utilities. The entire database is available to you to with no restrictions for read access.

6.9. Web reporting

It is possible to create reports for publishing on your website. Sometimes it is important to provide third parties with straightforward access to some of your reports. To achieve this, you can specify intervals that specific reports should be produced at and these will automatically become available to authorised site visitors.



7. Product Builds

Auria Manufacturing provides hierarchical parts lists allowing multi-level component creation. Each parts list is version controlled and merging of revisions between parts lists and active builds is possible as updates take place. It is possible to create standard product parts lists and custom parts lists so that as orders are taken for standard or custom product, the system can create the necessary elements to automate production.

7.1. Parts Lists

You have a versatile control over the management of your parts lists. Product builds can be created in multiple nested levels using flexible component groupings. Component groups can be exploded into the parts list view so that the complete list of required items is clearly visible.

7.2. Complete Revision Control

A complete revision history of changes made to parts lists is recorded allowing operators to see what changes were made and when. Options allow reverting to older revisions and deleting of revisions no longer required. When coupled with the build management process, it is possible to view differences between a build version of a parts list and the latest version listing all additions, modifications and deletions.

7.3. Stock Build Management

Your operators can easily manage stock builds with speed and efficiency. Any component allocations are updated in real time with the fully integrated functions within Stock Control and the Purchase Ledgers.

Stock items can be built from parts lists and the process can be managed completely within Auria. If updates to a parts list occur when a build is in progress, the build can be reconciled with the new revision of the parts list. Operators can create reports showing differences between builds and current versions of parts list, providing you with a clearer picture of the implications of the alterations.

7.4. Time Sheets

Auria helps you oversee the labour costs of your manufacturing process. Operators can record labour against custom build projects so that it is possible to calculate the labour costs more precisely.

8. EPOS Integration

If you run retail outlets, Auria Retail will suit your business. You benefit from all of the functions provided by the standard product with additional facilities tailored to the requirements of a retail business. Primarily, we provide Electronic Point of Sale facilities, including control of EPOS hardware, a complete till module with optional real-time credit card processing and all the standard reports that a retailer requires.

8.1. Electronic Till System

With Auria, your sales floor will have access to essential product and stock information and have a greater flexibility in sales capture and stock management. Point of Sales is fully integrated with all the relevant Auria functions including, Account Ledgers, Sales, Purchasing and Stock Control. Auria will run on standard PC hardware, or EPOS hardware such as IBM SurePoS. Connections between different retail outlets can be handled in a variety of ways, and your Auria reseller will suggest an appropriate solution.

Auria's total integration enables Point of Sales users at remote sites to access and update product information and to track stock across the entire network of sites. Any orders taken by your sales team will be posted in real time into the Sales Ledgers.

The Auria Till Module can be interfaced with standard cash drawers and other EPOS hardware. Full barcode reading support is available via specialised keyboards or keyboard wedges. Full PoS printer capabilities are supported, including cheque printing facilities.

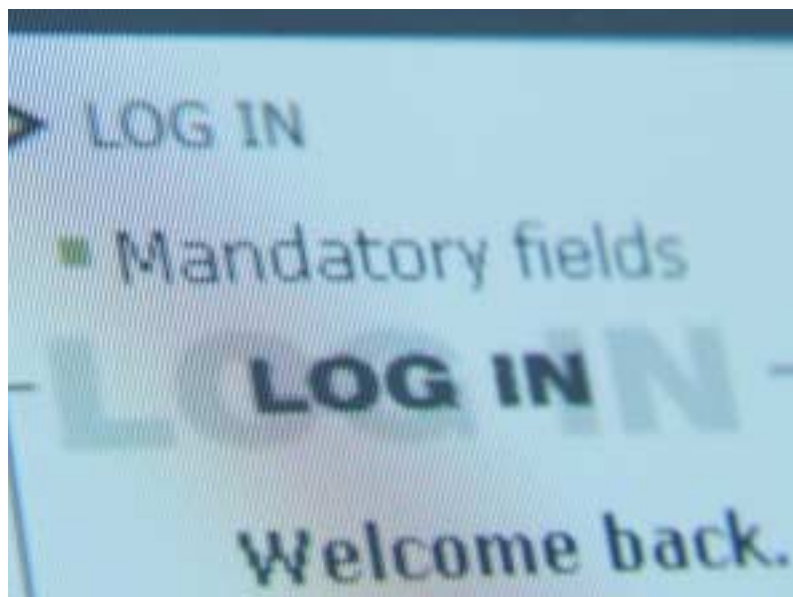
8.2. Standard Retail Reports

Operators will be able to create reports essential to PoS management. X-Total and Z-Total reports can be created at the click of a mouse. For more precise reporting, sales can be sub-divided by site, department even sales representative. All standard Retail Reports are integrated with the Auria ledgers for real-time retail sales information.



8.3. Integrated with Auria Sales, Stock Control and Accounts

With the EPOS functions being linked into the central stock database, stock levels, product descriptions, availability and requirements are all easily to hand. All sales from POS terminals are automatically processed through the sales processing system, ensuring that your accounts are always an accurate reflection of the day's trading.



9. Catalogue Sales

Auria allows you to define multiple catalogues which either refer to printed catalogues or are published directly to the web (if you are using the e-commerce module).

Catalogue pricing can be based on your central price lists (higher or lower in percentage terms) or can be specific values that are maintained independently from your central price list. Catalogues can be maintained in multiple currencies and attached to one or more company classifications or countries, so that sales can be limited to one or more groups of customer.

9.1. Create Printed Catalogue Definitions

By using the centralised database within Auria, you can achieve greater consistency in catalogue creation. You use your central stock list, codes, descriptions and other details for catalogue creation with only one reference point being required. Multiple catalogues can be generated to supply differing market and product requirements. It is then possible to export the catalogue definition for processing by a third party.

Auria also provides you with the facility to create specific pricing on a catalogue by catalogue basis. With the ability to attach marketing codes to catalogues created in Auria, tracking product sales by individual catalogues is made more efficient.

9.2. Web-based Catalogue Creation

Because all details are maintained within Auria's database, catalogues can be seamlessly published on to your website. Catalogues containing special offers can also be created specifically for your web site.

Like your printed catalogues, web sales can be tracked and analysed in the same way. Pricing can also be specific to your web based customers.

With Auria you can create multi-currency web catalogues, making them available to one or more countries therefore expanding your offering to a wider customer base.

It is possible to gather marketing information from the website as customers place orders (using the e-commerce module) so that marketing efficiency can be measured from your web-based sales channels.

9.3. Custom Pricing

Auria facilitates great flexibility in pricing. Not only can you use your standard product prices, but fixed and discounted prices can be easily created for your web and mail order customer base via catalogues.

Maintaining different catalogues in a multitude of currencies is straightforward, ensuring that it is less of a chore when providing your products or services to a number of different countries.

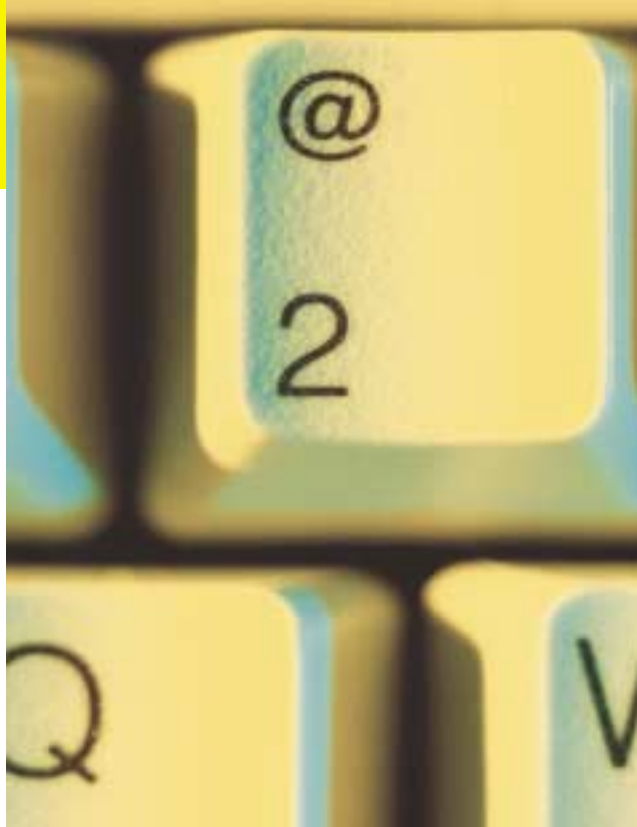
9.4. Country Specific Catalogues

Auria allows you the versatility to run several catalogues for one or more countries. Each catalogue can be operated in more than one currency and customers can only see catalogues that pertain to their own country when this feature is enabled.

Prices can be based on a variable or fixed currency conversion and discounts can be applied before conversion to allow for varying price expectations within that country.

9.5. Attach Catalogues to Marketing Codes

Auria gives you the facility to attach marketing codes to each of your catalogues, which lets you efficiently track your catalogue marketing and sales development. Sales orders can gather marketing code and catalogue information so that you can monitor the sales generated by individual catalogues or marketing campaigns.



10. Web Integration

The appearance and facilities that you provide on your web site will have a direct effect on your e-commerce success. Maintaining an accurate and up-to-date web site can be a chore and a significant drain on your budget. Either you spend a significant sum on contractors, or your staff interrupt their regular duties to undertake web site maintenance. Auria e-commerce changes this. Auria offers a complete solution that minimises workload and provides a high degree of control over what is available to your customers - all at a price that competes very favourably with standard web design companies' non-database driven solutions.

10.1. Web Account Facilities

Auria e-commerce provides you with a full ordering and customer account management system that is directly integrated into the centralised database. Several websites can be managed from a single Auria database, perhaps one site for each sales channel that you sell to. All sales orders, client information capture and payments can be made by the customer on the web-site and all the transaction information is posted directly into Auria without the need for complex and troublesome interfaces. Alternatively, if you have an existing site that you do not wish to change, e-commerce integration can be achieved using the in-built import and export facilities that are available in Auria as standard.

You can allow or disallow any amount of customer account control. Customers can manage their account on-line and independently from you, maintaining their own account record; therefore reducing direct queries and saving your staff valuable time. If you allow credit sales on the web site, all credit control facilities offered under Auria also apply to on-line accounts.

10.2. Specific Web Catalogues

All catalogues can be created and managed in Auria using product information present in the Auria database. You can create multiple catalogues specifically for your web customers. Catalogues can be defined on a country by country basis and can appear in one or more currencies. Special offers can be created that are available only to on-line customers, should you wish to develop further sales via this medium.

Stock information is directly linked to the Auria database and accurately displayed on your website. This ensures that the web site is always up to date and reflects the current state of your product list - all with no additional effort on your behalf.

Due to Auria's adaptability you have an enhanced ability to maintain your entire e-commerce site without the need for out-of-house expertise, reducing costs and allowing you greater control.

10.3. Order Status Information

For on-line customers Auria provides order acceptance e-mails and order progress bulletins on the website. Customers can also be allowed to view the status of back orders with the option to amend or cancel. It is possible for customers to view orders they have placed by any means, in addition to their web orders. It is also possible to provide your customers with courier tracking links so that they can directly visit the courier website to check on the delivery progress of their order.

10.4. Stock Status Information

Up to date stock information can be published on-line with availability and estimated delivery schedules on display. As orders are completed on the web, stock is assigned immediately (when using live links, or where a specific site for holding web stock has been created) within the Auria database and directly on the website, providing your customers with consistently accurate stock availability information.

10.5. Search Facilities (via Keywords)

Auria automatically generates keywords based on product descriptions and product codes which can be used to search for stock information on-line. You can also create your own search keywords that you feel are more appropriate for your customers and your own use.

Information retrieved via keywords can automatically link to pages where the product and any other associated products are displayed, increasing the chances of selling related items to what the web visitor searched for. It is also possible for your sales operatives to search for products using exactly the same keywords as are available on the web, allowing them to retrieve stock items in a similar fashion to customers.

10.6. Special Pricing and Promotions

To encourage and further develop on-line custom, unique web prices can be defined in Auria catalogues and if required, applied across multiple currencies. These prices can be discounted off the main list price, if desired, or can be fixed values.

Special offers can be provided on the e-commerce site by creating marketing definitions that are uniquely available on the web. This way, you can provide further encouragement for customers to shop on-line, reducing direct staff involvement in the selling process.

10.7. Live or Deferred Auria Links

If your budget allows, you can make use of live links between Auria and the website. This provides the website with direct access to the Auria database and everything that occurs on the web is reflected immediately in Auria. Deferred links allow you to support an almost real-time link at less expense, using ISDN or broadband links and a special database that attracts no additional licensing costs.



10.8. Complete Creative Web Design Service

Auria's robust, centralised database and inherent versatility lets you seamlessly integrate your current web site with our e-commerce solution. Your Auria reseller can generate customised display templates for your web catalogues to ensure positive customer and user experience and to maintain your preferred corporate image.

Your Auria reseller can also provide advice on optimising your website to improve search engine hits and, if it suits your requirements, they can take on complete web site management on your behalf.



11. Marketing

Given that a significant amount of time and staff resource can be dedicated to marketing, it makes sense that your chosen system allows you to monitor responses to your marketing efforts. Auria allows you to create mailshot codes and track these against sales and purchases for the purpose of analysing this important area of your business. Once the marketing campaigns have been created, much of the tracking is carried out transparently to the end-user.

11.1. Analysis Codes

Auria provides you with numerous methods of segmenting your customer database, giving you the ability to target marketing activity more specifically to different customer groups. Customers can be segmented into classes, types, sales channels, purchase preferences, purchase frequency, marketing codes, order sources and profile codes. All of these can be used to dynamically analyse the effectiveness of marketing campaigns and whether you are meeting the needs of your target customers.

11.2. Mailing List Selection

Mailing lists in Auria can be generated dynamically based on the constantly changing information present in the Auria database. Alternatively, customer groups can be created that remain static for the duration of their existence. It is important to recognise that there is almost unlimited power to analyse your database in any number of ways and that this information can form the source of a marketing campaign.

The Auria database is totally open so the built-in tools, or any third party tool, can be used to query the database. Auria's in-built report writer allows you to produce letters, mailings, labels or any conceivable printed material based on data that is maintained within the database.

11.3. Marketing Programme Definition

Marketing codes can be created to uniquely identify individual marketing programmes as well as a means of controlling the whole sales order process.

Against a marketing code, sales and purchases can be logged so that expenditure and revenue can be analysed. Price banding and special offers can be created and linked to marketing codes to optimise marketing campaigns and encourage customer loyalty. Options can be set against the marketing code within Auria provide a wide range of automatic behaviours based on the selection of a suitable marketing code by the operator (or the customer, when ordering on the e-commerce enabled website.)

It is possible to specify products that will automatically be added to a sales order when a specific marketing code is entered. This can be for delivery charges, items covered in the marketing campaign or complimentary product. This ensures that accurate details are recorded on associated sales orders and that keying effort is minimised.

11.4. Specially Priced Products

In order to match customer demand and market shifts, Auria gives you the flexibility to override system defined price bands with special prices against the marketing code. Prices can therefore be reduced or free offers made according to your own criteria.

Multi-currency price definitions can also be set against each marketing code, enabling internationally focussed marketing campaigns to be created.

11.5. Marketing Codes are E-commerce Enabled

Marketing codes that have specific behaviours in Auria will have the same behaviours on the website, ensuring that customers' experience is consistent whatever way they choose to make contact with you. Although web based orders are clearly identifiable in Auria, the analysis tools that you use treat it as another sales channel (route to market) and so your view of customers is also consistent within Auria.





12. Contact Management

CRM is a buzzword that means many things to different people. Auria CRM allows you to view interactions with your customers in a single location and enables you to track, monitor and react efficiently. Remember, it is use of knowledge that gives true power, and Auria allows you to make use of your pool of knowledge in ways that traditionally disparate systems simply cannot manage. Many CRM systems concentrate only on sales and marketing. The completeness of Auria extends this much further, to include any customer management activities, complaint handling and resolution, product returns and more.

12.1. Client Information

Auria enables your operators to efficiently manage essential client information centrally in a single location. This central store is used by your entire organisation, significantly reducing data duplication and redundancy. Viewable information as standard includes contact name, job title, direct telephone, direct fax, mobile numbers, direct email address, contact specific notes, bank account details and alternative delivery address. Also, the company name, primary and secondary contact, address, telephone, fax, email details, web site address, company specific notes, credit information and histories, profiling and related activities are all viewable in the same location.

There is a simple word processor available allowing documents generated in relation to the client to be automatically saved against their record for future retrieval by any staff member with the appropriate privileges. Currently in development, there is an email and workflow client (available in beta test form for clients that are interested) that integrates with the Auria database, allowing email communications to be centrally tracked alongside all other client contact histories.

You can configure and apply your own customer classifications that are more appropriate to your company requirements. Discount structures can be attached to individual customers to enable you to provide service on a more personal level. Your operators can flag customer preferences to not receive your company's marketing communications, avoiding any degradation in client relations (or costly mistakes involved in mailing customers who have expressly requested not to receive marketing communications).

Client information can be searched using a unique code, contact surname, postcode, town, or on the order screen using a sales order reference. Auria automatically checks client details for duplicates based on a standard set of rules, enabling you to manage your list more effectively. If duplicates do occur, you are able to merge records to combine details that have been gathered against the duplicate accounts.

Your users can flag a customer account as 'inactive' even if there is an existing balance. They can also flag accounts as 'deleted' whilst retaining the full client record until the database is cleaned at a later date.

12.2. Full Trading Histories

Your operators will be able to view every order, invoice, return, credit, refund, write-off, bounced cheque, charged back credit card transaction or any other type of account activity in an historical journal. With the multi-form nature of Auria, it is possible to easily refer to and view this information whilst sales orders are being simultaneously processed.

Each history element has full drill down availability to the source document. The histories are not limited to a specific period of time or a particular set of accounting periods. Only available storage places a maximum limit on what can be stored. Storing eight to ten years' worth of history is not unknown, and performance does not degrade measurably over time in general system use.

12.3. Accounts and Credit Histories

Your operators will be able to create new customer accounts via one screen, either during the sales order process or while working on the customer definition form. They will be able to create and manage an unlimited number of accounts (subject to available storage).

With Auria's full integration between ledgers and all customer accounts, information such as credit histories, transaction histories, activity logs and summaries are all made in real time and operators have full drill-down ability to all source documents.

12.4. Free-Form Notes

You can enter any amount of free-text note information against the customer and supplier accounts. This allows the operators freedom to record additional useful information that cannot easily be categorised but is none-the-less very important to effectively manage your trading relationships.

12.5. Activity Management

With Auria, you will be able to generate call lists from either existing customers or newly imported/keyed customers. Tasks can then be assigned to operators against customers or contacts in the customer organisation. These can be delegated, re-assigned, escalated and tracked to ensure that they are carried out in a timely fashion. Multiple tasks can be assigned and tracked over any period of time.

12.6. Multiple Address and Contacts

Your operators will be able to create and manage multiple addresses and contacts that are attached to one organisation (customers and suppliers).

Addresses can be categorised using 'address-types', such as main, primary delivery or alternative delivery, invoice, statement etc. They can also be flagged as non-mailing so that mailings can be blocked for a specific address (it is also possible to flag a customer account as being non-rentable if you rent your lists).

Multiple contacts can be managed to include various types of contact within an organisation, nature of activity within an organisation, or simply to record information about additional family members if the customer is an individual.

12.7. Quotes and Quote Histories

Your operators will have instant access to quotes and quote histories. Quote histories include quotes that have been won, lost or that are pending. Operators can also log activities against the quote and the customer, including general enquiries, phone calls (both made and received), personal visits, meetings, postal correspondence, e-mails and faxes. With such detail, you and your operators will have a clearer record of all activities involved in interacting with your customers.

All quotes have the ability to be 'cloned' to create new quotes. With each generated quote, a unique quote reference is created, enabling them to be efficiently retrieved and tracked. Auria enables you to send quotes directly by e-mail or fax from within the application. Your operators will also find it easy to convert quotes into sales orders, reducing the need for information re-entry.

From quote histories that are recorded in Auria's central database, operators can generate various reports using Auria's in-built report writer detailing (but not limited to) quotes taken, quotes converted, quotes lost and quotes pending.

12.8. Correspondence (Letters and E-mails)

Using Auria, your operators can generate correspondence templates. Every letter generated using the internal word processor will be automatically recorded against the customer record, enabling them to easily track communications against all customers.

There is a label manager available in Auria, allowing contact details to be lodged in a stored list that can be used to create label runs (perhaps for mailing out product information or welcome packs). The list is maintained centrally, but can be restricted to access by individual users.

There is an optional workflow client available (Auria Workplace) that allows operators to create their own personalised contact lists, schedules and planners that are based on activities that are stored on the central Auria database. It also allows emails to be tracked within the main Auria application so that all authorised staff members can view email histories.

Any documents that are created within Auria can be sent by e-mail or fax from within the application directly to your customers, assuring you of immediate and efficient communication with less staff time employed.

13. Activity Management

The ability to manage and streamline activities in your organisation is vital to ensure that you are providing your customers with the best possible service. Co-ordinating activities and tracking what each individual's responsibilities are can be a complex task. Auria's activity management provides you with a central resource for tracking activities that are either internal to your organisation or related to customer service. These facilities are an integral part of the system and provide all of the features required to quickly and efficiently organise and plan your time.

13.1. Action Management

Auria enables your operators to create actions and associate them with customer or supplier records and, optionally, to specific contacts in the organisation. Actions can be created by one individual and then delegated to your operators (providing they have the necessary permissions to do this). Rules can be specified to control the delegation of actions, thus providing controls over whose actions are automatically accepted by delegates and whose must be explicitly accepted before becoming the delegate's responsibility.

The ability to import customer details from external sources and to use these to create new call lists is provided for your operators. Call lists create actions that can be easily tracked through different phases of completion. Management of enquiries and quotes can be recorded as actions for easy progress tracking.



13.2. Action Administration

Actions must be completed by the delegate providing strict controls on the completion of actions. However, some users (such as on the road sales people) do not have access to update their actions directly in a timely fashion. Action administration allows a user to manage actions on behalf of other users; giving them the ability to complete their actions.

13.3. Client Management

Auria provides your operators the tools to efficiently manage client contact and associated information. Reminders to carry out specific tasks can be created and monitored. As part of the configuration of Auria, it is possible to ensure that activities are linked to the sales process so that your operators are prompted to address sales relevant activities such as quotes and follow-ups.

Customer complaints can be managed via a range of defined activity types and objectives. These can be actioned, tracked and escalated to priority levels to ensure that a resolution is forthcoming in an acceptable timeframe.

13.4. Task Management

General tasks can be created as actions so that they can be tracked centrally. If you use the optional Auria Workplace application, it is possible to generate task lists and each operator can manage their own task list such that progress is recorded and tracked centrally.

13.5. Reminders

Your staff can be prompted to complete outstanding tasks by means of automated prompts and reminders. Actions can be quickly viewed and carried out to completion from the reminder form. Your operators will also have the ability to acknowledge or re-schedule the reminders should they need to re-prioritise their work.

13.6. Call List Management

Multiple call lists can be created from existing and newly imported customer details and then assigned to call centre operatives. Equally, operators can manage their own sets of call lists, picking up lists that are available in a central pool as they make progress.

When an operator picks up a call list, it generates call actions that are assigned to that operator for each company on the call list. As calls are made, the actions are completed automatically, with optional follow-ups being generated according to action rules or at the request of the operator. If an incomplete call list is 'put down', the outstanding actions remain, ready to be assigned to the next operator that picks up the list. This way, call lists are managed effectively, ensuring completion at some point in its lifetime.

As part of the Auria configuration process, it is possible to define events that happen in the system that will generate a call list or place a customer or supplier record on a call list. It could be, for example, that you would like to follow up customers who have received a new type of product, or that if a customer does not purchase for a given period of time, contact should be prompted. Many of these behaviours can be maintained separately from the main Auria application and located in the central database, ensuring that business rules are consistently maintained without affecting day to day use of Auria.



14. Time Recording

Most organisations have a requirement to track the time that their staff spend working on a wide range of activities. This requirement is generally met using paper based systems, or time recording packages that stand alone from the central business systems. Auria offers the option of a tried and tested time recording module that accurately tracks staff time against customer projects. From the time logs, it is possible to automatically generate time-based invoices for review and subsequent presentation to your customers.

14.1. Record Time Spent In 'Real Time'

Auria provides you with 'real time' time logging to match a dynamic, multi-tasking business environment. Your operators can rapidly identify the customer associated with a particular activity and then start a time log entry.

It is inevitable that operators will suffer interruptions whilst working on a particular task. The time log system allows for this and it is very easy to interrupt a current activity, log a new entry, complete it and then continue with the original task with the minimum of keying effort.

Colour coding provides operators feedback as to whether their current activity directly results in billing time, or whether it is viewed as an overhead activity (something that some organisations may seek to control to remain effective).

Previous time logs can be cloned for quick generation of repeat activities. Full descriptions of jobs can be entered against each customer giving greater clarity of information.

14.2. Maintain Accurate Customer Records

Your operators have the ability to accurately manage labour costs logged against your customer records. Work projects particular to each customer and multiple work types (chargeable and non-chargeable) are set against each project. Each can have a customer reference lodged against it for reporting purposes so that it can be included in time log reports and invoices.

Project expenditure can also be efficiently monitored and controlled, allowing you to set time limits and budgets for operators' tasks.

Time log authenticity can be ensured as each time log entry is accurately time stamped and sequenced. Once a time log entry has been entered on a report to a customer using a project statement or an invoice, it cannot be changed. This way, your work flow history is accurately maintained in line with the documentation that customers receive.

14.3. Generate Invoices From Time Logs

Auria ensures maximum use of time log information by allowing you to instantly generate invoices from time log entries. The invoices can contain full time log descriptions as entered by your operatives, or simply a breakdown of task type and duration. It is possible to review all time log entries before generating invoices, to ensure that the invoices will always contain appropriate content.

Fixed price projects can be created which offers the flexibility of invoicing according to a predetermined schedule and time log entries do not directly affect the value of the invoices. This way, it is possible to ensure a guaranteed price offering to customers whilst maintaining the ability to track your own staff costs against the project.

14.4. Categorise Entries

Your operators can enter free text descriptions for every time log entry. Each entry has an associated work project and work type (which must be pre-authorised, with set durations). Work projects are specific to customers and work types are global to the system (based on the types of activity that you carry out internally and on your customers' behalf.)

14.5. Accounts and Customer Integration

With the time logging system being fully integrated with the Auria database, customer information is instantly available without any re-keying. It is also possible to view time logged against a customer's projects from the customer management forms in Auria.

It is possible to produce batches of invoices from time log entries up to a particular date, or to raise individual invoices on a customer by time log the work and calculate the total rates, each work project and type has an associated sales stock reference which ensures that the invoice is automatically posted into the ledger and no further re-keying of information is required. Once the time log entry has been invoiced, users are prevented from making retrospective changes to the information, ensuring auditability of the data.

Each work project and work type has an associated sales stock reference so that time log invoices can be automatically posted into the ledgers by specifying appropriate rules.

15. General System Features

15.1. Security

Auria is hosted on an Oracle® database. Inherently, this provides a very scalable, secure and reliable foundation on which to build any system. Rather than making grand claims of database independence, Auria works with a single database in the most efficient way possible.

The application integrates with windows client profiles, allowing each user to have a separate username and password to access the system. All updates that take place to the data are logged; user and time-stamps are applied consistently.

No data is ever physically deleted from the database until the administrator elects to do so. If a user accidentally removes a piece of information, the administrator stands a very good chance of identifying and recovering from the situation where re-keying is not a possibility. Deferred deletion of data also has the added benefit that the chances of suffering loss due to malicious use of the Auria application are reduced.



There are many ways that data can be protected and your Auria reseller is able to advise on the most appropriate solution that meets your exact requirements (and budget).

15.2. Menu And Form Access

An element of security is introduced by giving administrators the ability to customise the menu layouts. An easy-to-use menu bar designer is provided and it is possible to provide different groups of users with appropriate menu structures so that the number of options presented to them is minimised and targeted to their operational requirements.

More importantly, access permissions are in place that can control what forms people can read and modify. This way, it is possible to provide users with only the access that they require, ensuring that data is held as privately as possible and simplifying the user interface.

15.3. Reporting

There are a number of standard built-in reports, along with an OLAP data analysis tool that allows you to dynamically restructure different sets of data in a variety of ways. The end user report writer provides you with the flexibility to analyse any part of your database and produce printed documents or export the results to external applications for additional processing.

The OLAP analysis tool effectively provides you with a multi-dimensional view of your data. For example, if you wish to analyse sales over a quarterly basis, you can do this. Then, without referring back to the database, if you wish to break the sales down by sales representative, sales channel, month etc, it is a simple matter of dragging the relevant column into the analysis view. Everything is then rapidly re-calculated based on the new view that you require. Analysing around 1,000,000 rows takes less than a minute to gather the source information and 're-dimensioning' the information takes less than five seconds.

Given that the database is openly accessible in read-only mode to third party report writers (Microsoft® Access® can also be used), the ability to analyse your entire database is unrestricted.

15.4. Quick Form Access

In recognition that not all users prefer to use the mouse, each form allows keyboard driven access and access to each form can be made via a set of shortcuts that can easily be learned.

15.5. Design Aesthetics

Auria has been carefully designed to be feature-rich whilst remaining easy to use. Sales operatives are generally competent in using the system following one to three days' training and practice.



All of the forms have a consistent 'look and feel' and are laid out clearly in a standard fashion. It is possible to have more than one of the same form active at a time, so it is possible, for example, to view two sales orders, two customer records for comparison purposes. It is also possible to be entering one sales order and to start working on another, if necessary.

Given that Auria is a standard Windows® application, Auria does not try to re-invent the wheel with 'clever' interface designs that actually make the software harder to learn and use. If you are familiar with the methodology used to operate a standard Windows® application, Auria implements its functionality using the same standards.

15.6. Customisation Possibilities

Auria, as a standard application, is likely to meet the needs of any mail order organisation. There are situations where you may have specific requirements that are unique to your organisation. Rather than these remaining outside of Auria, it is possible for the software to be changed so that your exact requirements are fulfilled as part of adopting Auria as your single, integrated solution.

Your Auria reseller can advise you on customisation possibilities. The intelligent design of Auria allows for additional functionality to be developed at very cost-effective rates and the authors of the software have significant experience producing customisations for a wide variety of business types.

- Sales >
- Purchasing >
- Stock Control >
- Accounts >
- End User Reporting >
- Product Builds >
- EPOS Integration >
- Catalogue Sales >
- Web Integration >
- Marketing >
- Contact Management >
- Activity Management >
- Time Recording >

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