Bromcom Finance User Interface Changes January 2024

Welcome to the session. We will begin shortly.

Please ensure that you also have an audio connection either through a headset and microphone attached to your computer or by telephone to the published number. You will join the session muted but there is a chat facility available where you can type questions.

This session will be recorded and shared with colleagues after the session. By attending you agree and accept you may be captured in the recording.





Introductions & & Welcome

Alison York ICT & Digital



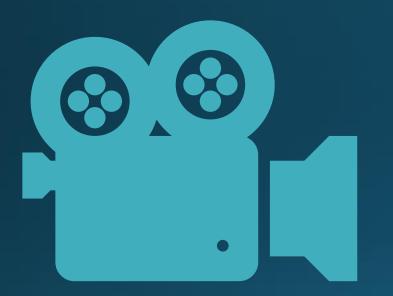


Welcome

Feel free to ask questions throughout either in the chat or put your hand up.

There will be time to ask questions at the end of the session.





Session is being recorded and will be shared on https://www.schoolsict.digital/bromcom/

Aim of the session



Go through the changes that have been done



See what it looks like

Prepare you ready to use the new look system



Allay any fears

The pages have a new and improved look and feel. The most notable changes are:

The **side menu** in these pages will remain in view to make it easier to move from one page to another, but it can be minimised if required. **Note**: Only pages converted to the new UI will appear in the side menu.

Action buttons at the top of the page will be disabled if they cannot be used at that stage. E.g., Authorise button will be disabled if a Purchase Order is selected that has no rows.

Where Select All rows was possible - rows will now be selected using the individual **tick boxes** or the tick box in the header row to **select all**.

Grid actions will include Excel as an option.

| - | Finance | New Standard | • New Free Text | () Clone | e 🖉 View | /Edit 📘 📋 Cancel | Authorise | 🖶 Print/Dispatch | 🚚 Add Delivery | £ Add Invoice | K Close | | | |
|----------|-------------------------|---|-----------------|----------|------------|------------------|---------------|------------------|----------------|-----------------------|--------------------|---------------|-----------------|------------------|
| | ACCOUNTS PAYABLE | | | | | | | | | | | | | |
| wites | CE Suppliers | Filters | 0 | Purc | hase Order | List | | | | | | | | |
| b | Purchase Orders | | | | | | | | | | | | | |
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| nta | E Payment Processing | Supplier | | | Date 11 | Order Number | Supplier Code | Supplier | | 11 Order Status | 11 Order Method 11 | Ord Value (£) | Outstanding (E) | Originator |
| 1 | ACCOUNTS RECEIVABLE | Select a Supplier. Order Status | . • | | 11/10/2023 | 230055 | SC000026 | A Paiva | | Printed | PRINT PO | 6,000.00 | 6,000.00 | B BromcomUser |
| | Customers | Outstanding Gro | | 0 | 11/10/2023 | 230059 | SC000026 | A Paiva | | Printed | PRINT PO | 0.00 | 0.00 | в |
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| • | BUDGETING | Fully Invoiced On Hold | | | 20/10/2023 | 230077 | SC000339 | LGÍL | | Printed | EMAIL PO | 1,250.00 | 1,250.00 | B BromcomUse |
| | 🗠 Budget Forecasts | Cancelled | | | | | | | | | | | | 8 |
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| | Salary Projections | | | | 01/11/2023 | #00001 (45) | SC000320 | 3D FilaPrint Ltd | | Not Yet Authorised | PRINT PO | 0.00 | 0.00 | B BromcomUse |

Side tabs show as **panels** located in the main area of the page. This applies to the **Purchase Order Details**, **Supplier Details**, and **Customer Details** pages.

Supplier grid updated with new and improved features, and an **Actions** dropdown which will house the existing options: Send Email, New Order, Export, Import, and Delete.

Three **new columns** added to the **Customer List** page - **Last Statement**, **Statement Number**. and **Related Parties**, and a new **Actions** dropdown will house the existing option to **Delete**.

The ability to **Create Statement** and **Reprint Statement** on the **Customer List** page.

| | | | | | | | | | | | | | | | Active Financia |
|----------------------------|--|---|---|-----------------------|---|--|--|---|---|--------------------|------------------|-------------------|---|---------------------|-----------------|
| PAYABLE | Purchase Order Detail | | | | | | | | | | | | | | |
| | New E Save | 9 History Q Preview ✓ Authorise | B Print/Dispatch | Ø Attachments 🛛 🛤 Add | Delivery É Add Invoice | × Close | | | | | | | | | |
| Orders | Order Number | 230055 | | On Hold | | | Supplier* | | A Palva, SC000 | 026 | | | | | ХY |
| Credit Notes Processing | Order Date* | 11/10/2023 | 8 | Status | Printed | | Contact Name | | ayten aa | | ×× | Contract | Select a Contr | | |
| | Book* | 23 - 1 - Purchase Order bo | oka X V | Requested By | | | Delivery Address | | Ifield Community | y College, Crawley | Avenue, Craw | fey, RH11 008, GI | 18 | | × |
| RECEIVABLE | Pay From | LLOYDS BANK ACCOUNT, | | Centrally Paid | | | Enal | | e000034@brom | | | | | | × |
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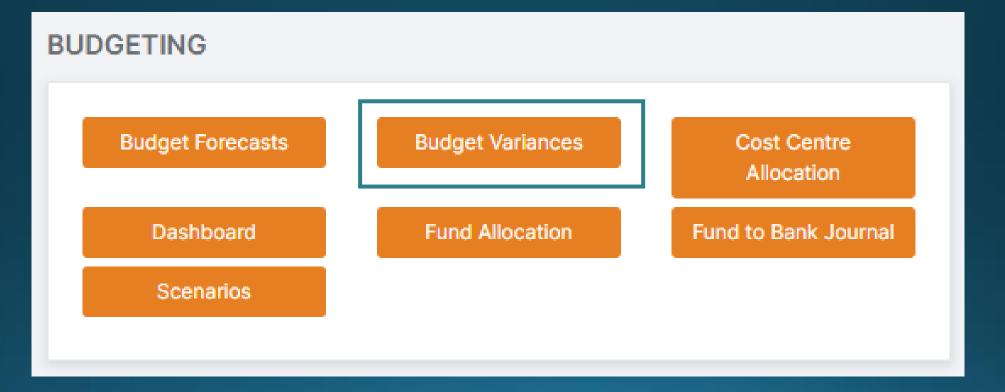
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|-----------------------|-------------------------|-------------|----------|--------------------------------------|------------------|--------------|--|------------------|------------|
| Suppliers | Send Email New Order | | | | | Show Sundry | Show On Hold Show Awaiting Approval | | |
| □ Name ↑ | 쇼 Export 소 Import | Balance (£) | Hold | Supplier Code Contact Name Telephone | Credit Limit (E) | Credit Terms | Address | BACS F | |
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| • New 10 Save | े Save as template 🗇 History 🖉 Attachments 🗸 Authorise 🔒 Print/Dispatch 🖾 Add Credit Note 🗙 Olose | | | | | | | | | | |
| Customer* | Select a Customer 👻 🗋 🖨 Hold | Invoice Number | | Transaction Number* | 000081 | | | | | | |
| Customer Address | | Status | New | Invoice Date* | 23/01/2024 | | | | | | |
| | | Paid by Date* | 23/01/2024 | Tax Point Date* | 23/01/2024 | | | | | | |
| Customer Notes | | Notes | | | | | | | | | |
| Book* | SIB - 1 - Sales Involce/Credit Note books X V | | | | | A | | | | | |
| Posting Period* | Apr.1 ~ | Invoice Total (£) | | | | 6.00 | | | | | |



Demo

Budget Variances



Questions





Thank you

