

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

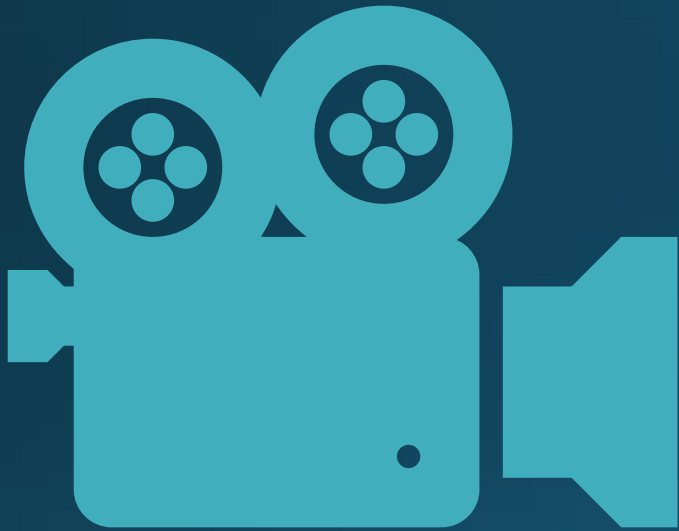
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Welcome

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.



Home

Finance



Favourites



Modules



Students



Staff



Groups



Others



Reports

ACCOUNTS PAYABLE

Suppliers

Purchase Orders

Deliveries

Invoices & Credit Notes

Payment Processing

ACCOUNTS RECEIVABLE

Customers

Invoices & Credit Notes

Receipts

Pay In Slips

Refunds

BUDGETING

Budget Forecasts

Budget Variances

Cost Centre Allocation

Dashboard

Scenarios

STAFFING

Salary Calculator

Salary Projections

New Standard

New Free Text

Clone

View/Edit

Cancel

Authorise

Print/Dispatch

Add Delivery

Add Invoice

Close

Filters

Reset

Supplier

Select a Supplier...

Order Status

 Outstanding Group Not Yet Authorised Authorised Printed Partly Delivered Fully Delivered Partly Invoiced Fully Invoiced On Hold Cancelled Rejected Write Off

Year(s)

 Active yr only Active yr & other outstanding All

Purchase Order List

Grid actions

Copy

Excel

CSV

PDF

Print

Search:

<input type="checkbox"/>	Date	Order Number	Supplier Code	Supplier	Order Status	Order Method	Ord Value (£)	Outstanding (£)	Originator
<input type="checkbox"/>	11/10/2023	230055	SC000026	A Paiva	Printed	PRINT PO	6,000.00	6,000.00	B BromcomUser
<input type="checkbox"/>	11/10/2023	230059	SC000026	A Paiva	Printed	PRINT PO	0.00	0.00	B BromcomUser
<input type="checkbox"/>	19/10/2023	230073	SC000026	A Paiva	Printed	PRINT PO	1,000.00	1,000.00	B BromcomUser
<input type="checkbox"/>	19/10/2023	230076	SC000244	A Emery	Printed	PRINT PO	800.00	800.00	B BromcomUser
<input type="checkbox"/>	20/10/2023	230077	SC000339	LGfL	Printed	EMAIL PO	1,250.00	1,250.00	B BromcomUser
<input type="checkbox"/>	20/10/2023	230078	SC000339	LGfL	Printed	EMAIL PO	1,250.00	1,250.00	B BromcomUser
<input type="checkbox"/>	31/10/2023	230087	00AA	00sundryAA	Printed	PRINT PO	2,000.00	2,000.00	B BromcomUser
<input type="checkbox"/>	01/11/2023	230088	002SUN	002Sunr+dry	Printed	PRINT PO	5,000.00	5,000.00	B BromcomUser
<input type="checkbox"/>	01/11/2023	45109	SC000320	3D FiloPrint Ltd	Authorised	PRINT PO	1,500.00	1,500.00	B BromcomUser
<input type="checkbox"/>	01/11/2023	#00001 (45)	SC000320	3D FiloPrint Ltd	Not Yet Authorised	PRINT PO	0.00	0.00	B BromcomUser

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.

ACCOUNTS PAYABLE

- Suppliers
- Purchase Orders**
- Deliveries
- Invoices & Credit Notes
- Payment Processing

ACCOUNTS RECEIVABLE

- Customers
- Invoices & Credit Notes
- Receipts
- Pay in Slip
- Refunds

BUDGETING

- Budget Forecasts
- Budget Variances
- Cost Centre Allocation
- Dashboard
- Scenarios

STAFFING

- Salary Calculator
- Salary Projections

Purchase Order Detail

View Save History Preview Authorise Print/Dispatch Attachments Add Delivery Add Invoice Close

Order Number: 230055 On Hold Supplier*: A Palva, SC000026
 Order Date*: 11/10/2023 Contact Name: ayten as Contract: Select a Contract...
 Book*: 23 - 1 - Purchase Order books Requested By: Select Staff Member... Delivery Address: ifield Community College, Crawley Avenue, Crawley, RH11 0DB, GBR
 Pay From: LLOYDS BANK ACCOUNT, BKL Centrally Paid Email: a000034@bramcomcloud.com
 Special Instructions: Delivery Instructions:
 Order Method: PRINT PURCHASE ORDER Total Net Order Value (£): 6,000.00

Order lines

Add View/Edit Remove Cancel Remainder Clone Find Invoices

Grid actions: Copy Excel CSV PDF Print Search:

Line No.	Description	Status	Unit Cost (£)	Disc. %	Line Net Total (£)	VAT Code	CC Code	Ledger Code	Fund Code
1	Ass	Ordered		900.00 0.00		3,600.00 W	00132	3998	01
2	444	Ordered		800.00 0.00		2,400.00 B	00132	998477	01

Invoices & Credit Notes

Add Invoice Add Credit Note Authorise Cancel/Credit View/Edit Card Payment

Grid actions: Copy Excel CSV PDF Print Search:

Pay From	Invoice Number	Invoice ID	Invoice Date	Paid by Date	Invoice Status	Invoice Value (£)	Narrative
333455	444	2480	17/10/2023	17/10/2023	Cancelled		6,720.00
626622	4443	2516	26/11/2023	26/11/2023	Unauthorised		444.00
626622	4466	2475	16/11/2023	16/11/2023	Unauthorised		6,666.00
BKL	www	2698	21/12/2023	21/12/2023	Unauthorised		333.00

Deliveries

Add Delivery View/Edit Delete

Grid actions: Copy Excel CSV PDF Print Search:

Del Note Number	Del Status	Del Note ID	Del Note Date	Del Date
1	Confirmed	0000057	08/01/2024	08/01/2024
454788	New	0000001	16/11/2023	16/11/2023
478544	New	0000004	16/11/2023	16/11/2023
test	New	0000005	04/01/2024	04/01/2024

New View/Edit Actions Close

Suppliers

Show Sundry Show On Hold Show Awaiting Approval

- Send Email
- New Order
- Export
- Import
- Delete

Name	Balance (£)	Hold	Supplier Code	Contact Name	Telephone	Credit Limit (£)	Credit Terms	Address	BACS
00 Long Text Sundry supplier n...	1,806.00	Yes	SUPPCODE WHL...			0.00	0	While the worst of the winds is said to have passed, ...	
002Sun=dry	-1,027.60	Yes	002SUN			0.00	0	TW10 6LS	
00Sundry	1,135.00	No	0011			333.00	30		
00_AytenSundry	0.00	No	00AASUN			0.00	30		

Columns Filters

Invoice

New Save Save as template History Attachments Authorise Print/Dispatch Add Credit Note Close

Customer* On Hold Invoice Number Transaction Number*

Customer Address Status Invoice Date*

Customer Notes Paid by Date* Tax Point Date*

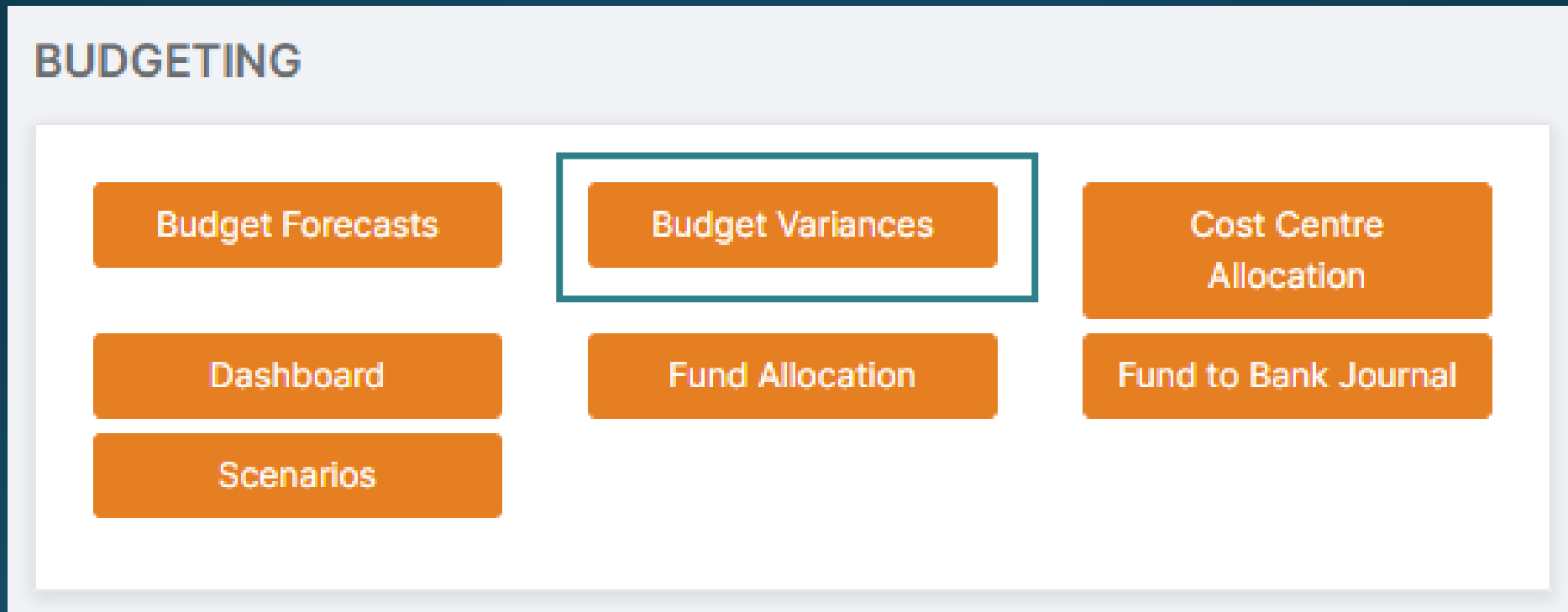
Book* Notes

Posting Period* Invoice Total (£)



Demo

Budget Variances



Questions



Thank you

