



August 2011

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Less than a month of winter is left, and I for one am looking forward to spring with longer daylight hours and no frosts. So far this year the team at Rees has focused on our new module (Rocam) together with enhancements to security within your Rees2000 system. Background work has also been undertaken to ensure data integrity and functionality. We hope you enjoy reading about our latest changes, please share this newsletter amongst your personnel.

Web based access for your customers

ROCAM (Rees Online Customer Access Module) provides the ability for your customers to view their own financial information with your business. It gives them web access to view and print current statements, invoices, and current quotes at any time of the day or night.

Benefits include:

- Eliminate all the telephone calls requesting copies of invoices or account balances.
- Enable your clients to access their current quotes when they want.
- Provide the customer service that will allow them to update their business administration outside of your office hours.
- Enable your customers to have their invoices as they are produced.

EG Building Supplies Customer Access
0800 EG BUILD
hello@egbuild.test
demo@rocam.co.nz Settings Logout

Bob Builders Ltd
345 Wood Avenue, Sunflower Valley, Southland 9245

Invoices [See All Invoices](#)
Last updated: 08-08-2011 at 08:29:53

Invoice #	Date	Order #	Amount
60854	08-08-2011	546YT	\$613.02
60812	28-07-2011	DF23	\$347.91
60788	25-07-2011	WQ345	\$-57.11
60753	21-07-2011	ERW	\$487.17
60723	09-07-2011	2457	\$24.67

Latest Statement
Last updated: 08-08-2011 at 08:29:53

Date	Curr Bal	1 Mth	2 Mths	3 Mths	Close Bal
08-08-2011	\$613.02	\$1507.75	\$0.00	\$488.17	\$2608.94

Monthly Statement History [See All Statements](#)
Last updated: 03-08-2011 at 09:26:40

Date	Curr Bal	1 Mth	2 Mths	3 Mths	Close Bal
31-07-2011	\$1507.75	\$0.00	\$0.00	\$488.17	\$1995.92
30-06-2011	\$33181.56	\$20409.74	\$488.17	\$0.00	\$54079.47
31-05-2011	\$20409.74	\$67545.34	\$0.00	\$0.00	\$87955.08
30-04-2011	\$82178.25	\$5489.54	\$0.00	\$0.00	\$87667.79
01-04-2011	\$82178.25	\$5489.54	\$0.00	\$0.00	\$87667.79

Quotes [See All Quotes](#)
Last updated: 08-08-2011 at 08:29:53

Quote #	Date	Amount	Description
16020	28-07-2011	\$33.53	50 x 50 mm Radiata TL...
16001	01-06-2011	\$2810.68	S/S WIRE CAT LEFT HAN...
14945	01-05-2011	\$9831.48	BOLT & NUT STAINLESS ...
14634	01-04-2011	\$619025.68	Stage 1

This module is simple to use from both your administration purposes AND your customers access to their information.

Check it out at www.rocam.co.nz. Sign in with username **demo@rocam.co.nz** and password **rocamedemo** for a sneak peak.

Please contact us for pricing details. 0800 733 739 or sales@rees.co.nz

Quote import to Special Client pricing

You can now convert a quotation from (4.4) Enter Quotes into a Client special price using the new menu option (1.12.9) Add/Update Prices from a Quote. This option will read in the quote to any client you wish to copy to regardless of the date but will warn if outside of valid to date ranges.

```
Notes: Client special Prices will be added/updated from the quoted values.
       If there are more than one item lines for the same stock item, then the price of
       the last one will be used for the client special price.

Quote number to use for Prices 24616      Shift-F5 for Quote List

Date 09/08/2011 Accepted 15/08/2011 Valid To 09/09/2011
Descriptions of the first items:
6.0 x 300-324 sed H6 poles

Invoice Net      $11400.00   GST   $1710.00   Gross   $13110.00

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Set Special Prices for client TEST      Mr Test Client

Price Effective Date From 09/08/11
Price Effective Date To   30/09/11
```

Event Log Recording

Did you know you can set up to record all outgoing emails (email log) and also all changes to Stock prices, cost prices and stock groups from menus (2.1) Set up Stock and also record stocktake entries/adjustments, (2.2.3)/(2.2.16).

To set up to record this information go to Rees2000 menu option (14.14) password = SETUP, page 3 for the stock log and page 5 for the email log.

Stock is recorded in the event log as a type T and the email as a type E. The event log can be found in Rees2000 menu option (14.5).

Exclude users from change client buy price, credit limits or stop credit options

If you have the security module you can prevent each user from accessing client buy price (this includes their discount group field and discount allowed field. You can also stop them changing a client's credit limit AND removing them from 'Stop Credit'.

The security module can also prevent certain users altering existing invoices and seeing cost prices in the (2.1) set up stock screen.

```
User can alter invoices? Y/N (Default=Yes) 
Exclude Display of cost prices on set up stock screen (Option 2:1)  N
Exclude editing of stock 'Average Cost' field  N

Exclude User (Option 1.1) altering client; "Stop Credit"? Y/N  N
"Credit Limit"? Y/N  N
All Pricing Fields? Y/N  N
```

The security module is often overlooked by companies yet it helps provide you with data security. You wouldn't leave your premises unlocked, so why allow anyone access to your financial data?

The security module means you have a user name and password to access Rees2000 then every menu option within Rees can be set to either Read only rights, Read/Write, Full rights or No rights (so they don't even see the menu number). The security limits the function key lookups and, if you have direct e-mail, customises the email sender's address on outgoing emails.

Call us today to discuss your Rees2000 security needs.