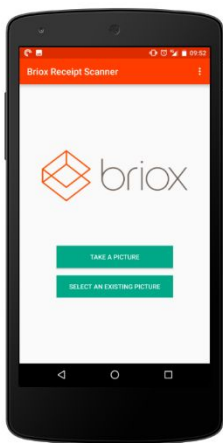


Product Updates: R16.4, October 2016

Here is what is new in Briox

Mobile



New Android and iOS Receipt Scanning App

Android and iOS Apps that scan receipts directly to the archive have been developed and will be available for download as soon as we get App store approval.

The scanned receipts will be immediately available in the Linked Documents Inbox of your archive and can be linked to journals or supplier invoices.

If you have several Briox accounts, you will be asked to select which one is to receive your scanned images when you login to the app. Enjoy!

Where: [Briox Scanning App](#)

Accounting

Tool tip for long descriptions in the chart of accounts

The purpose of the tooltip is to enable you to see the full account name and VAT code when hovering over them.

Where: [Registry – Chart of Account](#)

Copy accounts in the chart of accounts

You can now copy an account in your COA. Choose the account you want to copy from the list of accounts by clicking on it. Click on Copy to create an account with identical features: account classes, cost centres, projects, etc.

The following will remain empty for you to complete: the name of the account, the account number as well as the opening balance.

The copied account will automatically be active.

Where: [Registry – Chart of Account](#)

Product Updates: R16.4, October 2016


Copy supplier Invoices

Upon popular request we have added a copy button in the footer of your supplier invoices. Go to the Supplier Invoice list and select the invoice you want to copy by clicking on it. Click on Copy in the footer to create an identical invoice. Note that the date of the invoice will be today's date and the payment terms will take this into account when calculating the due date.

Where: [Purchases – Supplier Invoices](#)

Possibility to open linked documents in a new window

When supplier invoices and journals have a document linked to them, it is now possible to open the document in a new window and place it conveniently on your screens so that one can capture the invoice or journal from the information in the linked document itself.

Click on the arrow icon in the top right hand corner of the linked document section  to open it up in a new window.

Note that:

- When you post the journal the new window with the image remains open.
- If a new image is opened in the same way, it will open in the same window.
- When you are done registering images the extra window needs to be closed down manually.

A new filter in the linked documents section enables you to open documents that belong to other folders than the view you are in. This enables you to link documents that have been uploaded or mailed to the wrong section.

See below. Whether you are in a supplier invoice or Journal, you will be able to link documents from the Inbox, the Journal inbox and the Supplier Invoice inbox.



Where:

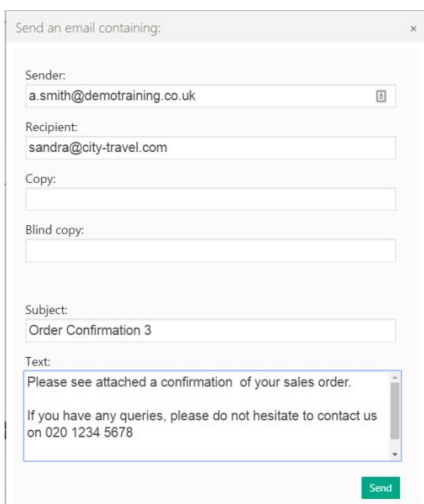
[Accounting - Journals – List](#)

[Purchases - Supplier Invoices - List](#)

Product Updates: R16.4, October 2016

SALES

Write free text in your customer emails



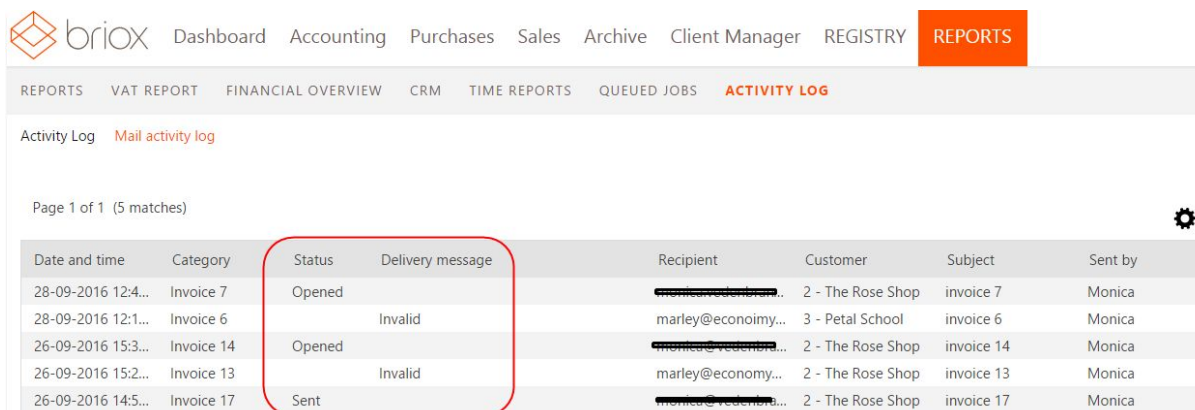
When sending quotes, orders or invoices to your customers you have, until now, had the possibility to send a standard text with pre-set mail addresses (set under **Settings – Sales – Email documents**).

As from now-on when you choose email as a delivery option on an **individual** quote order or invoice, a modal opens up where you can edit all the information contained in the mail. You now have the possibility to edit the message you are sending as well as recipient and sender addresses. Enjoy!

Where: [Sales – Quote/Order/ Invoice – List](#)

A log for sent emails

Under the activity log, a new **Mail activity log** for sent emails has been implemented. This log will look as below.



Date and time	Category	Status	Delivery message	Recipient	Customer	Subject	Sent by
28-09-2016 12:4...	Invoice 7	Opened		████████████████████	2 - The Rose Shop	invoice 7	Monica
28-09-2016 12:1...	Invoice 6		Invalid	marley@economy...	3 - Petal School	invoice 6	Monica
26-09-2016 15:3...	Invoice 14	Opened		monica@redenib...	2 - The Rose Shop	invoice 14	Monica
26-09-2016 15:2...	Invoice 13		Invalid	marley@economy...	2 - The Rose Shop	invoice 13	Monica
26-09-2016 14:5...	Invoice 17	Sent		monica@redenib...	2 - The Rose Shop	invoice 17	Monica

Product Updates: R16.4, October 2016

Each header is clickable so that you can sort on the various columns. Statuses are updated as mails are received and then opened for example.

Invoices that have not been delivered successfully will be **flagged** in your invoice list so that you can check the log and take appropriate action.

Where:

Reports - Activity log - Email Documents

Sales - Invoice/Quote/Order list

Send invoices to your customers with the Print Service (FI)

You can now choose Print Service as a default delivery option on your customers for their invoices and Reminders.

Where:

Registry - Customers – Document Delivery

Sales - Invoice List

Set how customers want to receive invoices

In the customer registry you now have the possibility to set how your customers want to receive their quotes, orders, invoices and reminders from you. The field E-documents has been renamed to **Document Delivery Option** and a drop down with delivery options (print, email) have been added. Set here the default delivery method you wish to use per document type and customer.

When it is time to dispatch your invoices for example the delivery method will now be pre-set for each customer so if you choose to mass dispatch, you can now choose **Default** as action in the customer invoice list and all the invoices will be dispatched as pre-set.

When you open an invoice you will see in the footer of the invoice what the default delivery option for the invoice is, as well as the default print template and language.

***Please note:** If you for example have **email** set as default delivery method on a customer, but then go in and Print a specific invoice, the delivery method for that specific invoice will be changed to **print**.*

Where:

Registry - Customers – Document Delivery

Sales - Invoice List

Product Updates: R16.4, October 2016

Improved Reminder Templates

You can now send reminders which display previously paid amounts as well as what is left to pay of your invoice.

If a partial payment has been made on an invoice:

- This will be displayed in the field for: **Previously paid amount**.
- **Amount due** will replace **Invoice Total** and display what is left for the customer to pay after the partial payment.
- **Invoice Total** will, as from now on, always display the invoice total (before any part-payments) and not the **amount due** as it has done until now.

Two new variables have been added to the standard reminder template to achieve this:

- **Previously paid amount** {PREVIOUSLY_PAID_AMOUNT}: shows the sum of previous payments in the invoice currency.
- **Amount due** {AMOUNT_DUE}: shows the invoice total minus the previously paid amount.

NOTE: The behavior of the {TOTAL} variable has been changed so that it now always shows the invoice total.

*Please note the following if you have created your own reminder template:
The Invoice Total variable {TOTAL}, has been replaced by the Amount due variable {AMOUNT_DUE} in your custom templates.*

Where:

Sales – Reminders

Settings - Sales - General - Printout templates

Sales / Purchases

New Variables for your emails

The following **variables** are now available for you to use in your emails. The list will be available in the application under **Settings – Sales – Email Documents**.

Subject	Variable
Delivery Name (company name or contact name on the customer)	{DELIVERY_NAME}

Product Updates: R16.4, October 2016


Contact Name (Company Name) - New!	{CONTACT_NAME}
Invoice/Quote/Order/Purchase Order no	{INVOICE_NO} {ORDER_NO} {QUOTE_NO} {PURCHASE_NO}
Invoice date	{INVOICE_DATE}
Invoice due date	{DUE_DATE}
Invoice total	{TOTAL}
“Valid to date” on quotes	{EXPIRY_DATE}
Delivery date	{DELIVERY_DATE}
Total Ordered (Purchase Order)	{AMOUNT_ORDERED}
Total Delivered (Purchase Order)	{AMOUNT_DELIVERED}
Supplier Name (Purchase Order)	{SUPPLIER_NAME}

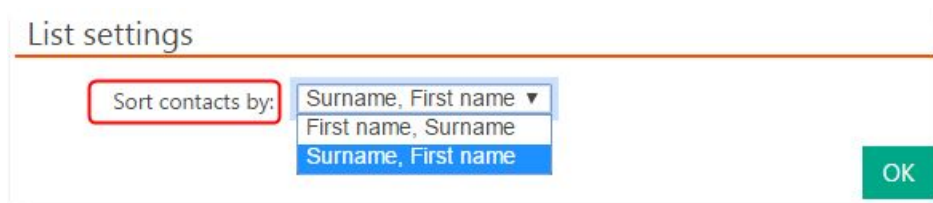
Where: Settings – Sales/Purchases - Email Documents

CRM

Alphabetic sorting of contacts in the CRM

In the contact list a new quick setting enables you to choose whether your contact list is to be sorted alphabetically using the contact name or surname.

The quick setting is user specific. Click on the gear icon  to open up the sorting option:



The sorting option is also available in the **Mobile app** under Settings.

Where: CRM – Contacts

Product Updates: R16.4, October 2016

User Access Rights

Budget has been moved to the Registry

In an effort to have more coherent user access rights, the budget has been moved from Settings to the Registry so that the user who is managing the budget does not need to be an administrator.

Where: [Registry – Chart of Accounts – Budget](#).

Amend Chart of Accounts

A new user right has been added to Accounting Access Rights: **Amend Chart of Accounts**. The user who has access to this will have access to everything in the COA.

Where: [Settings – Users – Edit users – Accounting Access Rights](#).

Framework

Additional security for your Briox Account

When working with financial information security is always a top priority. This is why using **two-step verification** when logging on is so important. Adding an additional layer of security ensures that even if someone were to find out your login credentials - username and password - they still would not be able to access your Briox Account.

For version 16.4, the two-step verification in Briox has been completely rewritten. Instead of using SMS for verification, we've moved to using an app to generate your one-time password.

Simply download and install the **Google Authenticator** app for you iPhone or Android device and head in to the **Your Account tab** in the sidebar. Click the button under Password and Authentication and follow the on screen instructions to activate two step verification.

If you were previously using the SMS based two-step verification, you will need to reactivate it using the Google Authenticator app instead.

Where: [Login](#)