

**What's been happening at EasyBooks?**

The last nine months have seen the product support and distribution successfully transferred back into the hands of the owners. We have been overwhelmed by the favourable response to this move and have expanded our resource base to accommodate the resulting increase in business.

The focus has been on customer service and turning around support calls in a timely manner. For users who require support from time to time, be aware of the critical peak times such as "GST Returns" and "end of year rollovers". These periods tend to generate a higher than usual support demand. If you are unable to phone through to support staff due to busy lines, please leave a telephone message and our staff will respond as soon as practicable. Alternatively, you may email [support@easybooks.co.nz](mailto:support@easybooks.co.nz). Helpdesk hours are 8:30am – 4:30pm Auckland business days. (Note the office is closed between Christmas and New Year.)

**EasyBooks New Release Announced**

The EasyBooks stable continues to undergo functionality improvements in line with users' demands. Based on user feedback, EasyBooks has provided a mix of both productivity improvements and "birds eye views". Users subscribing to updates will gain the benefit of these added value features:

**1) Graphs – Get the bigger picture at a glance and focus on key hot spots**

Graphing now available for:

- Receipts, Payments and Cashflow
- Actual versus Forecast
- Variances

**2) Speed up printing and posting of customer invoices**

This is a big time saver for those users who typically wish to schedule printing bulk invoices in one hit. Invoices that have been saved and posted can be selected individually or in bulk for automated print file creation.

**3) Cash Flow Summary Report**

This new report provides a summary of the monthly cash flow heading totals. This is useful in identifying seasonal variations or trends within the current financial year.

**4) Monthly Balances Report now available to Professional Version Users**

This report shows a summary of monthly balances to bank account level for each company name.

**5) New Credit Notes Template added**

Microsoft Word templates are currently available for customer invoices, job cards, quotes, and statements. EasyBooks adds a new template for credit notes.

**6) Kiwi Bank Internet formats amended for cheque and credit card**

EasyBooks now handles the latest Internet format amendments from Kiwi Bank

**EasyBooks Tip List:**

- Payee code memorization and subsequent recognition is done by matching on the other party name or particulars from the bank statement. This feature significantly reduces data entry time.
- Wild cards improve transaction recognition by allowing matching on slightly different names. A good example of this is a suburbanite setup of petrol stations and the resulting text that appears in bank statements and other party records. E.g. "Shell Albany" and "Shell Constellation drive" can both be memorized using a payee name "Shell?" (the question mark "?" being the wild card).
- When setting up the automatic payments make sure that they are pre-coded with the codes being used in the EasyBooks cashbook. This ensures the automated recognition during the coding and importing process.
- Major trading banks in New Zealand implement a transaction type number in their electronic statements. These numbers can be memorized and linked to a specific ledger code within the system. This feature is useful when dealing with bank charges and transaction fees. These can be linked and automatically coded to the appropriate payee / ledger code. . Go to **Cashbook- >Transactions- >Transaction import- >Map Bank Codes**

**EasyBooks Referral Program**

Satisfied users are our best reference. Refer a new user and get a double deal. You will get six months' free support worth \$74.50 and the referee will get a 25% discount off the retail price. (Offer valid on payment of referee's invoice and proof of serial number. Offer not available in conjunction with other promotions. Promotion ends 31<sup>st</sup> March 2010.)

**From the Team at EasyBooks****EASYBOOKS LIMITED**

P.O. Box 28684  
Remuera, Auckland  
New Zealand

[www.easybooks.co.nz](http://www.easybooks.co.nz)

Tel: (09) 985 8046

Fax: (09) 985 8050

Email: [info@easybooks.co.nz](mailto:info@easybooks.co.nz)