What's new with Clever Dynamics - brand new apps for Quality, Rebates & more

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Our aims

1
Demonstrate the 3 new and upcoming Clever Apps

2
Explain the core functionality for each

3
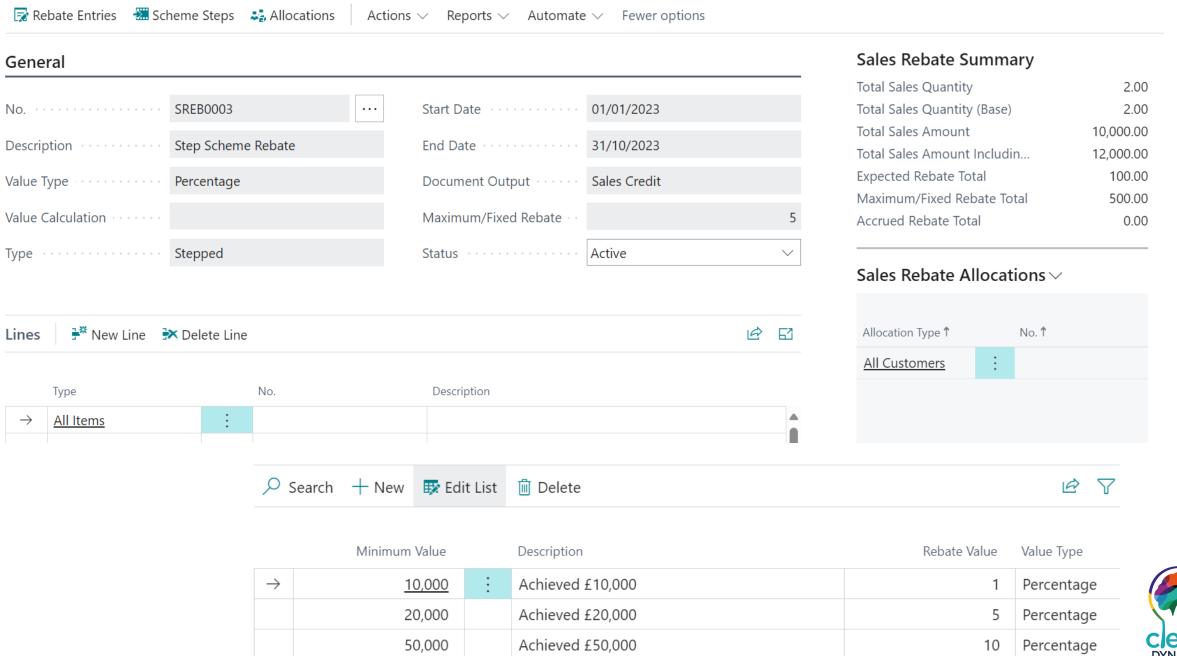**Discuss the benefits for each app**

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1. Clever Rebates – Sales and Purchase

- What are Rebates?

- What are the benefits?
  - ○ Automation
  - ○ Visibility
  - ○ Flexibility
  - ○ Accrual reversals

General

No.	SREB0003 ...	Start Date	01/01/2023
Description	Step Scheme Rebate	End Date	31/10/2023
Value Type	Percentage	Document Output	Sales Credit
Value Calculation		Maximum/Fixed Rebate	5
Type	Stepped	Status	Active ⌄

Sales Rebate Summary

Total Sales Quantity	2.00
Total Sales Quantity (Base)	2.00
Total Sales Amount	10,000.00
Total Sales Amount Includin...	12,000.00
Expected Rebate Total	100.00
Maximum/Fixed Rebate Total	500.00
Accrued Rebate Total	0.00

Sales Rebate Allocations ⌄

Allocation Type ↑		No. ↑
All Customers	⋮	

Lines

New Line   Delete Line

	Type	No.	Description
→	All Items	⋮	

Search   + New   Edit List   Delete

	Minimum Value	Description	Rebate Value	Value Type
→	10,000 ⋮	Achieved £10,000	1	Percentage
	20,000	Achieved £20,000	5	Percentage
	50,000	Achieved £50,000	10	Percentage

• What are the key features?

Rebate No. ▼		Document Type ↓	Docu... No.	Document Line No.	Invoice Paid	Type ↓	Item No.	Qua...	Bill-to Customer No.	Posting Date ↓	Sales Amount	Sales Amount Including VAT
SREB0003		Invoice	103265	10000	☐	All Items	1900-S	1	10000	05/10/2023	2,500	3,000
SREB0003	⋮	Invoice	103264	10000	☐	All Items	1896-S	1	10000	05/10/2023	7,500	9,000

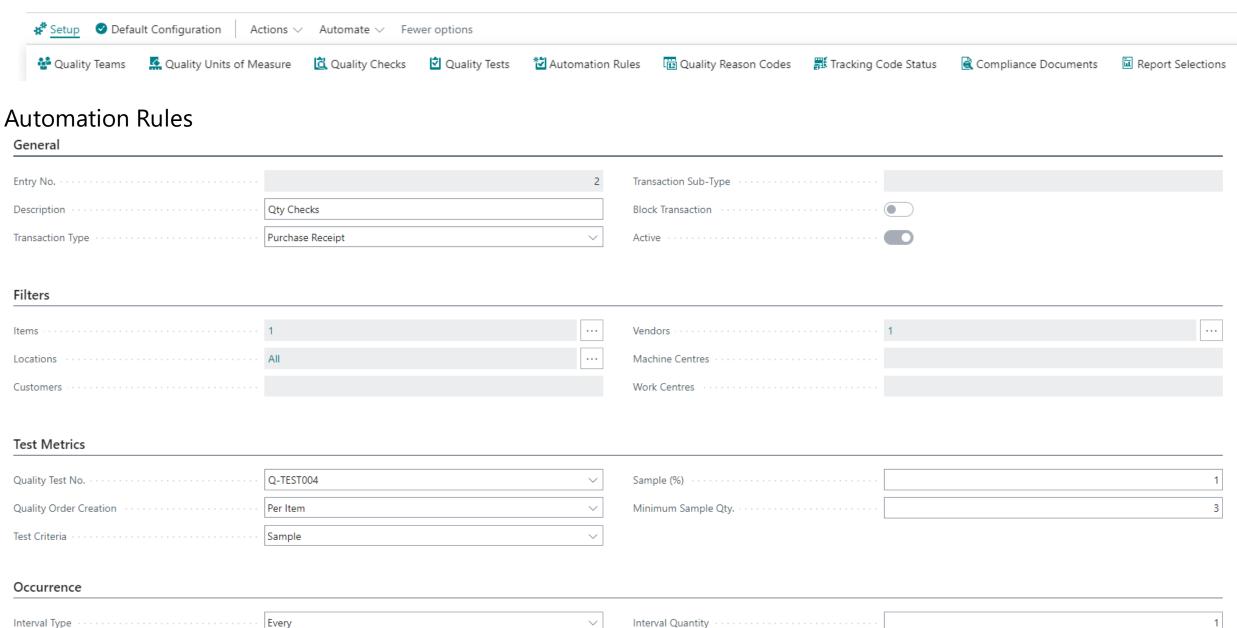| Accrual Calculated	Accrual Calculated Date	Accrual Amount	Issued	Issued Date	Issued Document Type	Issued Document No.	Revers...
☑	12/10/2023	125	☐				☐
☑	12/10/2023	375	☐				☐

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2. Clever Quality

- What is Clever Quality?

  o Improving efficiency

  o Reducing risk

  o Providing better service and goods

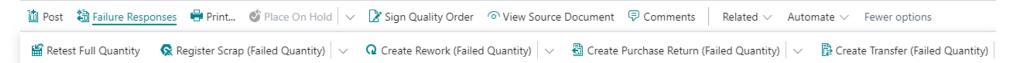 o Setting business standards

  o Visibility

Quality Setup

Automation Rules

General

Entry No.	2	Transaction Sub-Type	
Description	Qty Checks	Block Transaction	(off)
Transaction Type	Purchase Receipt	Active	(on)

Filters

Items	1	Vendors	1
Locations	All	Machine Centres	
Customers		Work Centres	

Test Metrics

Quality Test No.	Q-TEST004	Sample (%)	1
Quality Order Creation	Per Item	Minimum Sample Qty.	3
Test Criteria	Sample		

Occurrence

Interval Type	Every	Interval Quantity	1

Q-TEST005 · 2

❊ Create New Version   **▤ Versions**   **▤ Where Used** | Automate ⌄   Fewer options

No.	Q-TEST005	Status	Open
Description	Demo	Tracking Status Code	IN PROCESS
Version No.	2	Date Created	19/06/2023
Quality Team Responsible	⌄	Created By	ADMIN
Default Quality Team Member	⌄		
Blind Test	🔵		
Signature Required	⚫		

Lines | **Manage**   Sequence   Line

▤ Select Quality Checks…   **▦ New Line**   **▦ Delete Line**

	Quality Check Code		Description	Unit of Measure Code	Result Type	Test Iterations	No. of Results	Result Calculation	Target Result	Lower Limit	Upper Limit
	QUANTITY		Quantity Checks	UNITS	Numeric	Single Result		Value	5		
→	TEMP	⋮	Temperature Checks	.C	Numeric	Sample Size		Value	18	16.00	20.00

Quality Order

Q-ORD149

Post | Failure Responses | Print... | Place On Hold ∨ | Sign Quality Order | View Source Document | Comments | Related ∨ | Automate ∨ | Fewer options

Retest Full Quantity | Register Scrap (Failed Quantity) ∨ | Create Rework (Failed Quantity) ∨ | Create Purchase Return (Failed Quantity) ∨ | Create Transfer (Failed Quantity)

Test Quantities

Sample Qty.	3.00	Qty. Scrapped	
Qty. Tested	3.00	Qty. Reworked	
Qty. Passed	**3.00**	Qty. Returned	
Qty. Failed		Qty. Transferred	
Qty. With Concessions			

Edit - Quality Result Entry

Sample Information

Lot No.	LOT0106	Warranty Date	
Serial No.	_	Qty. To Test	3.00
Expiration Date	05/05/2025		

Test Information

Quality Check Code	TEMP	Unit of Measure Code	.C
Description	Temperature Checks	Result Calculation	Value

Comments | Links | Upload | Take Picture

	Test Iteration ↑		Result	Result Recorded By	Result Recorded At
→	1	⋮	18	ADMIN	12/10/2023 21:54

Lines | Manage | Line

◀ Previous Column   ▶ Next Column

Description		No. of Results Required	Result Type	Opti...	Lot No.:LOT0106
→ Temperature Checks	⋮	1	Numeric	☐	**18**
Overall Result		0		☐	**Pass**

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3. Clever Trade Plus – Sales & Purchase

- What is the Trade Plus App?

- Deep dive into 2 core features..

Sales Re-ordering

Sales Type ↑		Sales Code ↑	Item No. ↑	Variant Code ↑	Starting Date ↑	Ending Date
Customer	⋮	10000	1005			
Customer		10000	1906-S	GREEN		
Customer		20000	1906-S	RED		
Customer Price ...		PG1	1006			
All Customers			1001		05/10/2023	09/10/2023
All Customers			1004		05/10/2023	

Exclude from Sales Reorder ········ ⬤

Substitute when Unavailable ········ ⬤

Demo

Sales Item Reorder

Location Code ·

Home   Reports

➕ Add to Exclusions

No.	Item Description	Substitute for No.	Substitute for Variant	Substitute Pre Price	Sales Unit of Measure	Quantity	Unit Price After Line Discount
1960-S	ROME Guest Chair, green			0.00	PCS		125.10
1004	ATHENS Desk	1896-S		649.40	PCS		649.40
1972-S	MUNICH Swivel Chair, yellow			0.00	PCS		123.30
1996-S	ATLANTA Whiteboard, base			0.00	PCS		906.70
1965-W	Conference Bundle 2-8			0.00	PCS		151.70
1953-W	Guest Section 1			0.00	PCS		81.60

Item Details

No.	1005
Description	Quality Lot Tracked Item

Availability

Variant Filter	''
Location Filter	''
Inventory	314
Qty. on Sales Order	0
Qty. on Service Order	0
Qty. on Asm. Component	0
Qty. on Component Lines	0
Qty. on Job Order	0
Qty. on Purch. Return	0
Available Inventory	314.00

Blanket Order Enhancements – Sales & Purchase

o Blanket Order From and To dates
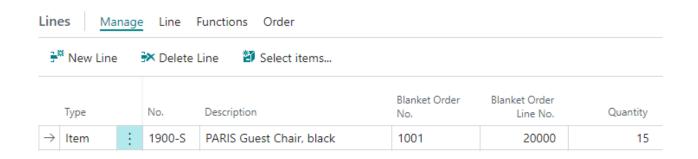
Blanket From Date	01/10/2023
Blanket To Date	31/10/2023

o Ability to limit items being used manually

Order Against Blanket Only

o Customer/Vendor level over-ride

Auto Consume Blanket Orders

Exclude Blanket Only Restriction

o Auto Consume Demo

Lines | Manage | Line | Functions | Order

New Line | Delete Line | Select items...

Type	No.	Description	Blanket Order No.	Blanket Order Line No.	Quantity
→ Item	1900-S	PARIS Guest Chair, black	1001	20000	15

Blanket Order

Blanket Order No.	1001
Blanket Order Line No.	20000
Item No.	1900-S
Available Qty. (Base)	3.00
Blanket From Date	01/10/2023
Blanket To Date	31/10/2023
No. of Blanket Ord...	5

But wait – there's more!

Mandatory Ship-To-Codes

Retain Posted documents

Control duplicates for Item references (Customer, Vendor and Barcodes)

Sales & Purchase Input Log

Item Status Approvals

Check External Doc Ref on "release" & show where used

Archive on Release

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Availability

Clever Rebates – Out now
Clever Quality – End Oct
Clever Trade Plus – Early Nov

Thank you!

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