

PlanMill 12.7

Release Notes

25.08.2010

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PlanMill 12.7 Summary (Released August 25, 2010)

PlanMill Release 12.7 offers new add-ons and several key features and enhancements, as well as addressing known and fixed issues.

1. PlanMill add-on

- **PlanMill Sales Order (new)** - Provide a streamlined way to manage quote-to order-to-bill process.

PlanMill Sales Order is completely integrated to PlanMill Business Application Suite (BAS) related modules such as Accounts, Contacts, Contracts, Requests, Projects and Products.

Key highlights

- Maximize invoicing accuracy by integrating all business processes, from quote to order to bill.
- Eliminate the risk of error with centralized customer records that are shared across the business.
- Bill customers on a one-time or recurring basis.
- Manage and automate different payments, whether monthly, quarterly or annually.
- Manage different customer, billing and shipping related information.

PlanMill Sales Order add-on is available to PlanMill PSA and ERP.

[Interested to test drive PlanMill Sales Order?](#)

- **PlanMill Finance Connector for Netvisor (new)** – A new real-time connector integrated with [Netvisor's](#) Cloud (SaaS) based financial system. This scalable and affordable total business management solution is uniquely designed for service business and related small and medium enterprises (SMEs).

Using the financial connector for Netvisor, all customer information, account account sales and sales ledger and bookkeeping related information are automatically available at Netvisor.*

PlanMill Finance Connector for Netvisor add-on is available to PlanMill PSA and ERP.

2. New features

- **My page**
 - User can manage its key personal information including bank account via My page.
 - **My competence assessment** – Enable self-assessment for employee.*
 - **Terminology update (UI)** - My page previously known as My settings.
- **Competences**
 - **Parent structure** - Support for parent structure for competences.
 - **Competence assessment** – Support for employee related self-assessment.*
- **Accounts**
 - **Settings** – Combined invoices field added.



- **Contacts**
 - **Communication** - Support for new social media related URL's such as Blog, Facebook & Twitter added.
 - **Terminology update (UI)** - Communication previously known as Other information.
- **Contracts** – Multiple contract item rows can be added in the contract form.
- **Products**
 - **Contract period** – Support for default contract period by product.
 - **Automatic invoice generation** – Support for automation generation of revenue items or draft invoices.
 - **Volume pricing** – Support for hourly based volume pricing scenarios.
- **Finances**
 - **List view** - Support for sales order.
- **Automated invoicing**
 - **Recurring transactions** - PlanMill automatically creates itemized invoices for your customers on a scheduled, recurring basis.*
- **Advanced pricing**
 - Support for more complex sales and pricing processes, with volume pricing, recurring invoicing and product, project, task, competence or person based prices.*

***Note:** A separate [activation request](#) by the customer is required.

3. Enhancements

- **Billing rule (new)** – Support for category based, volume priced – cumulative and expenses & purchases only.

4. Misc

- **New icons (UI)**
 - Automatic invoice generation 
 - Combined invoice 

5. General availability

- PlanMill Cloud customers: **25.8.2010**
- PlanMill On-Premise customers: **1.9.2010**

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