Phoenix Version 5 Feature Summary

Automatically Generate a Payments List from the Current Supplier Balance: For those running supplier accounts you are now able to print a List of Outstanding Suppliers. From this report you can automatically generate the payment file to pay all or selected suppliers.

When Entering a Customer or Supplier Payment the Link to the Correct Subaccount is Automatically Selected: If you use a category that has an automatic link to a Customer or Supplier account the link to Subaccount field is automatically populated based on the entry you nominate in the From/Pay To field Phoenix.

When Entering Transactions List the Last Few Entries for that Particular Payee/Payor: You now have the ability of displaying in the List area the last few entries of the person who you are recording the payment to or from. A handy feature to reduce double entry.

Enhanced Backup Utility: The new backup utility offers greater compression to minimise the size of your backup files especially when including image files.

Increased Backup Functionality: Now backup directly to CD or DVD without the need for specialist burning software.

Easier to Email Large Backups: Phoenix now provides the option to split your backups into a number of smaller files. This will make emailing large datasets easier.

Increased Number of Enterprises Available: Previously Phoenix only had 9 ranges of Enterprises available. Phoenix V5 now allows you expand this to a maximum of 99 Enterprise ranges.

Increased Number of Groups: Previously in Phoenix you only had 15 groups that you could use. This proved too limiting for some users, so this has been expanded out to 26 available groups.

Auto Assign an Enterprise to Sub-Categories: You are now able to automatically assign an Enterprise to a subcategory. This will reduce the time spent entering a transaction e.g. If you assign your Cattle Sales Subcategory to your Cattle Enterprise, when you are entering a cattle sales entry you allocate the subcategory and the Enterprise field is automatically completed.

Search on Transaction Type: You now have the ability to search on the type of the transaction entered e.g. Search on all transactions where the type was Cheque or Deposit etc.

Transaction List & Account Statement Reports are now able to be Ordered by Date: Under the Options Tab of the Transaction List & Account Statement there is a tick box to allow you to have your report shown in date order.

Nominate the GST Status of your Budget in Power Budgets: Set your Budget to have the data entered Inclusive or Exclusive and then switch GST on or off as required.

Easily Allocate Enterprises in Power Budgets: Allocate a budget sheet to a particular Enterprise. This negates the need to enter a worktable to allocate a value to a particular Enterprise.

Combine Sheets in Power Budgets: You can now merge multiple sheets within a budget into a single editable sheet.

Group your Spreadsheet Report in PB by Enterprise: You now have the ability to print your spreadsheet report on an Enterprise basis. This report allows you to separate one Enterprise per page.

Emailing Using Windows Mail in Vista: With the release of Microsoft Windows Vista Microsoft replaced Outlook Express with Windows Mail. Phoenix has not been able to backup to Email when Windows Mail is the default mail program. Phoenix V5 can now backup and restore directly to and from Windows Mail.

Choose not to Print Statements for Customers in Credit: When printing Statements you now have the ability to omit negative values: This allows you to not print statements for those that are in credit.

Edit a Card File Entry from the Enter Window: Previously if you were unable to edit the details of the Payee/Payor while entering a transaction. You were forced to cancel the transaction and then open Card File. Now there is a simple Edit button to open & alter the details of that person 'on the fly'.

Linked Account Summary: When linking a dissection to another account you will now be shown the balance of the destination account as well as the last entry to the account.

Dissection Notes: In previous versions of the program you have been limited to 40 characters in the comments field when entering a transaction. This posed a problem if you needed to enter more detail. We have now introduced a Dissection Note where you can type in an unlimited amount of text in order to record the detail that you need. When you print out reports such as the Transaction List or Category Review, or even when printing an Invoice you have the option to include this information on the printout.

Edit Scheduled Transactions: Now if you have a Scheduled Transaction you can edit the details of the transaction prior to posting.

Select All On Schedule Transactions: In the schedule transaction window you can now right click and *Select All*.

Automatically Exclude accounts with a balance of $0 from the Net Worth Report: When running the Net Worth report you can select to exclude accounts which have an opening & closing balance of $0.

The Term None has been changed to Unallocated in the Analysis area: The term None in the Enterprise and Group dropdown lists in the Analysis area has caused some confusion previously. The term has now been changed to *Unallocated*.

Larger Reference Field in Enter Screen: The reference field has been expanded to allow 13 characters.

Quantity Required for Subcategories Setup for Fuel Tax Credit: When using a subcategory that is setup for Fuel Tax Credit then you will be required to enter a quantity before being able to save the transaction. This means no more missed Fuel Tax Credit Claims.

More Detail when Printing a Transaction: Previously when you printed a transaction from the Enter screen there were details of the transaction missing from the report. Now the printout more closely reflects what you see on screen.

GST Report Preview Remembers the Last Used Size: Previously when you previewed the GST Return it would open in a Window that was too small. Phoenix now remembers how you last viewed this and next time you open it displays the same way

Increased Tracking Options on Quick Account History Graph: You now have the ability set the Quick Account History Graph to automatically track the current period. So as you reconcile your books forward the graph moves forward with you. Additional tracking options are also available such as tracking for a selected number of months, a set period, and from a specified period to the current period.

Fresh Look & Feel: New look to icons as well as a more contemporary look without changing the functionality you are used to.