# McGrane online ordering system integrates with Passfield

Bedding plant nursery McGrane's online ordering system is now fully integrated with Passfield. Clients benefit from regular updated stock lists, while McGrane's can choose what gets updated and how often.

#### How it works

An outgoing stock update file is regularly sent to an FTP folder on the online ordering system dedicated Cloud Hosting Environment. The McGrane's online ordering system picks this file up and updates the stock offering on the website. An incoming sales order file effectively does the same in reverse, updating Passfield with any new orders made online. This system works with the Passfield Scheduler, so McGrane's can set how often data updates take place.

### Inside:

**NEW** online ordering solution

Meet our new Directors

Look who's now using Passfield

Use QuickBooks? Take a look at this...

**New Forest Plants goes handheld** 

The new tool your sales team will love

**NEW:** client-specific availability lists

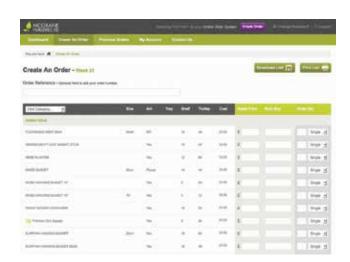
... and much more!

#### Client-specific stock offerings

McGrane has several different client groups and each require their own stock offerings. This new feature takes this into account – so when a client logs in online, they only see the stock availability specific to their client group.

#### **Full flexibility**

Tailored queries can be quickly written using SQL in this feature; it's possible to set up multiple outgoing files to update difference features. So as well as updating stock data for example, McGrane can choose to update customer records too.



#### What McGrane have said

"In the height of the season we need to get orders on fast so that we can provide the service our customers require. Our Webshop has significantly helped in this area with up to 40 orders a day being placed. Our customers also love it as they can view stock and order from McGrane's 24/7. The other added bonus is any member of the sales team can enter orders when they are out of the office."

Johnny Mackinnon, McGrane Nurseries Manager.

# Passfield live and kicking at Colourpacks

Colourpacks wholesales bedding plants in various formats to garden centres in the South East from a 19 acre site in Kent – and went live with Passfield in January. "We chose Passfield because it gives us the functionality we were looking for, with plenty of flexibility and scope for expansion," explains Colourpacks Director Nigel Fox. "The system is very powerful and easy to use."

Going live with such a business-critical system requires plenty of support – as Nigel explains:

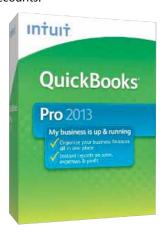
"an important factor when choosing any software is the customer support. Passfield's support is first class and probably the best I have come across."



## Passfield now links to QuickBooks

Great news for QuickBooks users: Passfield now links with the QuickBooks accounting package. So, no more duplicate entries of invoices or time-consuming import/ exports – sales and purchase invoices will now post seamlessly to QuickBooks. This link will also synchronise client details including credit limit, credit balance and On-stop status.

Passfield already provides 'off the shelf links' to Sage 50, 200 and Access Accounts.



## Passfield joins forces with Creative Online Media to offer 'one stop shop' web solution

Following the successful implementation of McGrane's webshop, Passfield Data Systems and Creative Online Media are delighted to announce their agreement to jointly offer a complete web commerce solution to existing and new clients.

Creative Online Media has vast experience in web commerce solutions and can cover all of your online needs, from design, to web development to SEO. Alan Brown, Creative Online Media MD said "This is an exciting new development. The new online ordering system is fully integrated with Passfield, so orders placed on it by your customers are automatically imported into your Passfield system. This will save valuable time adding orders and makes it easier and faster for customers to place orders with you. As the system is web-based clients can place orders from anywhere, 24/7/365, as long as they have a connection to the Internet. "

#### Key features:

#### Your customers

- can place orders and these orders are automatically imported into your Passfield system. The frequency of imports is configurable to suit your needs
- will view up-to-date stock information. The frequency of updates is configurable to suit your needs
- have the ability to input retail price, multi-buy option, order quantity, add notes / special requirements and specify preferred delivery date
- can view their previous web orders going back over a period of two years
- can submit general queries via their account on the online ordering system.

#### You and your team

- will have your own dedicated administration area which gives you
  control over customer access and what products they see. You can
  add customers, create their logins and password and also manage
  these details going forward e.g. change passwords etc
- will be able to determine the products each customer is able to order depending on the Group list they are assigned to. Alternatively automated stock update files will do this for you
- can add images for each product which your clients can see when ordering products
- can view orders as they are placed on the online system and see when they are imported into Passfield
- can place orders on behalf of customers in the event of a telephone or fax order being taken.

#### Further upgrade features will also be available, which include:

- View/download invoices. Invoices are automatically pulled from Passfield and displayed on your customer's online account, removing the need for you to email or post invoices, saving time and money
- Account locking/credit limit. Show/set credit limits for your customers and also lock access if they breach set limits
- Email key lines to clients via an integrated, industry-leading email
  marketing system. The stats from the email marketing system are
  pulled into your online account area so you can see who saw the
  email and what links they clicked in it.

#### **Introducing our Directors**

Passfield Data Systems has always been a family business – and never more so than now. Joining Dorita Vellacott are her two children, Chris Vellacott and Caroline Wijetunge.

As a non-Executive Director, Chris is a prominent financial analyst at Reuters with a razor-sharp understanding of business and the financial sector. He lives in London with his wife and two boys, and like many of our customers, is up well before dawn to start his working day before the markets open.

Some of you may remember Caroline – she previously worked for Passfield about thirteen years ago, before going on to become a successful copywriter. She writes for charities, business and the financial sector, and

is now bringing her marketing and communications expertise back to work for Passfield.

Also working with us as Technical Consultant is Dr Roshan Wijetunge. Roshan's extensive software experience comes from his specialised work in the automotive industry. He works in an advisory role with our development team.



#### **New Forest Plants adopts handhelds**

New Forest Plants has been using Passfield for sales and stock control - and recently took their usage one step further, as Operations Manager Chris Dennis explains:

"We've started using handhelds for our availability lists and they're really good. Previously, we'd have to go out on the nursery with a huge paper stock list and write everything down. Then we'd have to bring it to the office and do loads of data entry – getting the information from paper into Passfield.

So it's working really well. It means we can do availability really quickly, and we're thinking of using Handhelds for recording wastage as well."

Chris also told us that they use the Master Order feature to manage reserves for customers: "that's been really useful as a sales tool this year."

## Why housekeep your data when Passfield can do it for you?

Here's a neat little bolt on feature we developed recently – and it is now available to all Passfield users...

You can now use the Passfield Scheduler to give your database an automatic tidy-up. You choose what tasks you want it to do and then how often you'd like it to run. So as well as running a back-up, you could also get it to delete old batches, for example.

Database housekeeping is just like ordinary housekeeping – it's necessary and important, but most people would rather spend their time on something else. This new feature is your very own automated housekeeper.

#### Composite substitution now standard

We created this feature for David Austin Roses but it comes as standard in the very latest version of Passfield. It allows you to substitute one stock line for another automatically. All you need to do is specify the substitute stock line within the composite stock line record. You also have an option to enable/ disable this setup. We included this so that you can remember the substitution relationship but not have it active.

If your nursery tends to work with stock substitutions it could be a real time-saver.

## Client stock availability lists

We've introduced a new feature that makes it very easy to send out clientspecific availability lists. It's a standard feature in the latest version of Passfield, and here's how it works:

Simply highlight the clients you want to send lists to from your client list, and go to Client Stock Availability.

All presented data is looked up specifically for each client. So lists are produced showing **their** retail prices, barcodes, pack types – and so on. So every availability list you create here is potentially customised for each client. And because they're documents, you can design them how you want and email them out directly.



#### Sales order notes small but powerful

Here's a useful Passfield feature we think deserves a shout-out: the sales order notes field lets you add those extra bits of client info that don't quite fit anywhere else. Things like "Don't deliver on a Friday after 3pm", "Don't substitute this stock line with another", or "Won't accept mixed trays".

Your sales team will see this info any time they raise a new order for that client – making it that much easier to deliver the best possible service.



# Would you like to know more about Passfield?

Passfield is the most comprehensive nursery management software available and it is being successfully used by many different sized horticultural businesses. With an established and growing worldwide client base you can be reassured by the success of this ever evolving system.

Passfield's clients range from small specialist nurseries that use Passfield to carry out basic sales processing and simple stock control, to large commercial nurseries that utilise Passfield's full production control. System flexibility lets you decide how Passfield is best used to match your business needs.

If you have any questions or would like a system demonstration contact-

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#### Create your own alerts

More good news – the latest version of Passfield comes with a custom alert feature – so you can set up your own specific alert. Perhaps you'd like an alert whenever a certain number of customer accounts are on stop, or when you reach a certain number of active orders? Or maybe you want to be alerted when you have too many old batches. You can also choose how often you'd like to get the alerts – from every minute to every few hours, for example.

It's an easy way to stay one step ahead of any emerging customer, sales or stock issues.

## New 52-week matrix report function

We've now expanded our existing matrix report function to deal with 52 week analysis.

So, for example you will have weeks 1 to 52 running along the top, your client list running down the left, and values for each with end totals. Analysis can occur on financial value or stock quantities. And queries can be written to look at other areas of data such as Purchasing.

The added bonus is we've set this one up to output seamlessly to Excel – so you can format it in Excel without having to tidy it up beforehand.



#### Come and see us at GroSouth

Following a successful show in 2012 Passfield will be once again exhibiting at GroSouth, held on 13th November 2013 at Roundstone Nurseries near Chichester, West Sussex.

Why not come along to stand 83 and have an informal chat about your management software requirements?

More information on the show can be found www.grosouth.co.uk