

Accounts Receivable

Accounts Receivable - Auto Receipt Option

You can now specify in your settings that an invoice always be automatically generated for any sales charged to account. This is very handy for stores who want a copy of all charged sales. Stores that do not have such a policy can continue using FloristWare as they have in the past - printing or not printing invoices at their discretion.

Accounts Receivable - Account Application Form

From the Accounts Receivable section you can now print out an "Account Application" form to give to anyone who is interested in opening an account. This is a practice we strongly encourage as it assures that you get all of the information you need before you extend credit.

Accounts Receivable - Last Statement Date

When printing statements for individual accounts you can now see the date the last statement was generated for each. This helps you avoid barraging an accounts payable contact with duplicate statements.

Accounts Receivable - Error Corrections

FloristWare version 2.5 makes it much easier to correct errors made when recording payments on account. In previous versions applying a payment to the wrong account was a difficult mistake to fix - it can now be done in seconds. Please note that we have also modified the payment recording process so that it is much harder to make errors in the first place.

Accounts Receivable - Recording Payments

FloristWare now makes it much harder to accidentally apply payments to the wrong account. By adding a quick step that requires you to confirm the account details before applying payment we have made it much easier to get it right the first time every time.

Accounts Receivable - Tax Exemption - By Account

FloristWare version 2.5 allows you to designate certain accounts as being sales tax exempt. By default any sales charged to an exempt account will have the sales tax stripped but you can - of course - override this. Please note that FloristWare supports two separate sales taxes (City & State for U.S. florists and Provincial and National for florists in Canada) and this feature tracks the exemption status for each tax separately.

Accounts Receivable - Create Account & Customer at the Same Time

One of the advantages of FloristWare is that - unlike most other systems - a customer record is not the same as an account record. This allows multiple customers to charge to the same account and allows each customer to charge to multiple accounts. It is a very powerful feature.

Earlier versions of FloristWare required that you create the charge account record and the customer record separately. Version 2.5 allows you to automatically create a customer record each time you create a new charge account.

Accounts Receivable - Payment Chaser

This new feature makes it easier than ever to chase down payment from delinquent accounts. With just a few clicks you can see a list of your accounts, the balances owing, date of last payment, A/P contact and phone number, etc. and sort the list by most any of these criteria. This makes it very easy to sit at the phone and call up any accounts that are running

behind.

Credit Card Processing

Credit Card Processing - Greater Merchant Service Flexibility

As you know FloristWare has always allowed you to work with the merchant service provider of your choice. With version 2.5 it now allows you to use two different merchant services accounts - one for "card present" transactions and one for everything else.

While this may not mean anything to most users it may - depending on the deal you have with your merchant service provider - allow you to save on transaction fees.

Customer

Customer Notes - Enhanced Profiles

FloristWare v2.5 makes it even easier to collect/maintain valuable marketing information. In particular a new check-box field allows you to indicate whether a customer is interested primarily in personal or corporate gift giving. This allows you to tailor your marketing efforts accordingly and enjoy a much better response as a result.

Customer Notes - Marketing Preferences

You can now store marketing preferences for each customer. This allows you to flag certain customers who do not want to receive marketing phone calls or e-mail. Any such customers will automatically be excluded from phone/e-mail campaigns as dictated by their settings.

Customer Notes - Sales Tax Settings

FloristWare version 2.5 allows you to designate certain accounts as being sales tax exempt. By default any sales charged to an exempt account will have the sales tax stripped. You can - of course - add it back in with a single click. Please note that FloristWare supports two separate sales taxes (City & State for U.S. florists and Provincial and National for florists in Canada) and this feature tracks the exemption status for each tax separately.

Customers/Administration - Find & Merge Duplicates

It is now easier than ever to find and merge customers that have been entered into the system more than once. Duplicate customer records can become a problem in certain situations - these improvements make it much easier to handle. Even the customers points are merged!

Customers/Administration - Find By Customer Number

In addition to searching for customers by name and phone number you can now search for them by their customer number. While this feature will not appeal to every shop it can be beneficial for very large shops with huge customers databases - often 20,000 or more.

Production & Delivery

Production/Delivery - Enhanced Progress Tracker Feature

The Progress Tracker feature has been greatly enhanced for version 2.5. You can now track each order through the "Production", "Ready To Ship", "Out For Delivery" and "Waiting For Pick-Up" areas. It has never been easier to keep production and delivery/pick-up so

efficient. The newly enhanced Progress Tracker tool also makes it easier than ever to provide your customers with delivery confirmations.

Production/Delivery - Enhanced Routes Feature

Previous versions of FloristWare supported just 3 individual routes. Version 2.5 now supports an unlimited number of routes. In addition it automatically assigns each delivery to the correct route (although you can override this if you wish) and can print out a separate trip sheet for each one.

Production/Delivery - Mapping

FloristWare users with high-speed internet access can now see any delivery on a map with a single mouse click. This option is found when using the "Progress Tracker" feature and allows your driver(s) to quickly and easily check where they are going prior to leaving your shop.

Production/Delivery - Turn-By-Turn Directions

FloristWare users with high-speed internet access can now get turn-by-turn directions from their shop to any delivery with a single mouse click.

Punch Clock

Punch Clock - Now Easier To Use

The process of "punching-in" and "punching-out" has been enhanced so that it is now easier and more intuitive for your employees. Employees also have the ability to adjust their hours for breaks, lunches, time away, etc. These changes make the punchclock feature even more powerful and a greater benefit to your business.

Punch Clock - Improved Report

The Punchclock Report - used to see the hours worked and wages earned by your employees - is now more powerful than ever. You can quickly and easily isolate the report to a single employee or remove employees from the report - allowing you to constrain the report to the employees/information you are interested in.

Reporting

Reports - Enhanced Daily Sales Report

One of the most important and powerful reports in FloristWare - the Daily Sales Report - is now more powerful and includes more information than ever. These changes were made at the request of our users.

Reports - Enhanced Sales By Product Report

The Sales By Product Report now allows you to "hide" or remove individual products or products that have no sales. This makes it very easy to constrain the report to the most useful information.

You also get more detail in the sales figures for each product. In the past you only saw the performance figures for each product (total sales that did not reflect refunds) as most florists used this report to gauge the "salability" of each product. You now see the adjusted amount after refunds as well - something that is very useful for florists who use it to track COGS (Cost of Goods Sold).

You can also export the data in the Sales by Product report to an Excel spreadsheet with a single click.

Reports - Enhanced Sales By Category Report

The Sales By Category Report now allows you to "hide" or remove individual categories or categories that have no sales. This makes it very easy to constrain the report to the most useful information.

You also get more detail in the sales figures for each category. In the past you only saw the performance figures for each category (total sales that did not reflect refunds) as most florists used this report to gauge the "salability" of each category. You now see the adjusted amount after refunds as well - something that is very useful for florists who use it to track COGS (Cost of Goods Sold).

Reports - New Franchise Report

The new Franchise Report is very useful to some of the franchisors and franchisees that are using FloristWare. It allows the franchisee to generate a report that contains all of the information most important to the franchisor in just a few clicks. This means that reporting is easy for the franchisee while also ensuring that the franchisor gets all of the information that they need.

Reports - Components Report

This new report allows you to keep track of the components that you will need to fill upcoming orders. For example, it could be used to tell you how many 50cm red roses you will need to fill your Valentines orders. This is a very powerful tool - far more powerful than many florists need but some of you will find it very, very valuable.

Reports - Realized Sales Report

The Realized Sales Report was introduced in response to requests from users.

As current users are aware, FloristWare uses the standard (and recommended) *accrual* method of recording sales. Please see the definition of the accrual method (as it relates to recording sales) below:

Under the accrual method, you record business income when a sale occurs, whether it be the delivery of a product or the rendering of a service on your part, regardless of when you get paid.

To be more precise, under the accrual method you recognize an item of income when all the events that establish your right to receive the income have happened, and when the amount of income you are to receive is known with reasonable accuracy. If you estimate an amount due to you with reasonable accuracy and record it as income, and the amount you eventually receive differs from your estimate, you should make an adjustment to your income in the year you actually receive the payment.

As you can see a question arises if payment is not made at the time of the sale - if for example the sale is charged to an account or payment is deferred. The sale is still recorded

on the day that it was made and all of your figures reflect that - sales taxes are due, the sale appears in your income figure, etc.

The people who are interested in your records don't really care when you get paid. If you did have to write off a bad debt you would make an adjustment in the form of a bad debt expense down the road as discussed at the end of the second paragraph of the definition shown above.

This is the way that municipal/state/provincial/federal governments want you to do it. And, to be safe, this is the way you should do it.

However, some stores are absolutely adamant that they do not pay sales taxes or consider a sale as being made until such time as they receive payment in full. If they make a sale today and charge it to an account they don't want to record it as income or be eligible to pay sales tax on it until they themselves get paid. This is known as the "Cash" method.

In the eyes of the government this is almost always seen as wrong. However, we also respect the position of our users and their right to run their businesses as they see fit. And, since some of them had been working this way for years, we chose to give them the option of continuing to record sales in this fashion. The new Realized Sales report shows sales and sales tax figures according to the date the sales were paid - not the date the sales were made.

We are happy to support the practices of our users but please understand that this one concerns us greatly. Many stores that have been recording sales using the cash method are doing so because they do not know it is (generally) technically incorrect. It is a completely reasonable and understandable explanation, but that doesn't necessarily get you out of the woods with the government. Another problem is that many florists who use the cash method for recording sales use the accrual method for recording expenses - picking and choosing the method that works to their advantages according to the situation. This is much harder to defend.

If you are currently using the accrual method you should stick with it and disregard this new report entirely. If you are currently using the Cash method because you did not realize doing so was technically incorrect we urge you to consult your bookkeeper/accountant and consider switching to the accrual method as soon as possible. If you are committed to the cash method then you have the new Realized Sales report to help you.

Sale/Order Process

Sale/Order Process - Floral Strategies Method

Tim Huckabee, AISFE is a very respected industry sales trainer and founder of FloralStrategies.com. Over the past ten years he has proven time and time again that a shop that uses his unique order-taking process will increase the value of their average sale substantially - often by ten dollars and frequently more than that.

Adherents of the FloralStrategies.com method can now adjust their settings so that FloristWare will take them through the order process in the exact order that Tim suggests - increasing sale value and improving customer service.

Please note that this setting is not magical - to get the full benefit you will need training from Tim (as a FloristWare user you are entitled to special rates). However, anyone that

believes in the FloralStrategies.com approach will find this new option makes it easier than ever to stay true to a proven formula.

Sale/Order Process - New "Power User" Start Screen

Experienced users can now adjust their personal settings to reflect their skill level and, in doing so, shave several steps from the beginning of each order.

As FloristWare users know it is very easy to use - basically each screen asks a single question and the user just has to answer it. While this makes things very, very simple it can sometimes frustrate more experienced users who would like to be able to get through an order faster.

This new "Start Screen" is the first step in an ongoing process that will allow each user to customize key processes to their skill level. In this case, we are replacing several very simple questions (and screens) with a single more complex question. While this might intimidate a complete novice it is very easy for an even somewhat experienced user to understand, and doing so allows them to skip several screens at the start of each order.

This is a feature that experienced users are sure to love. And, as we mentioned, it is just the first step - we'll be adding more and more shortcuts and user-defined options in the months ahead.

Sale/Order Process - New "Hold" Order Feature

FloristWare now allows you to "Hold" an order indefinitely. While an order is being held you can make unlimited changes to it.

How does this help you? Imagine a customer comes in with their own container and asks you to fill it and charge them whatever it costs with a limit of say \$150. You would take the order as you would normally - noting things like flower and color preference and noting their price considerations - and then click the "hold" button.

FloristWare will then print a special version of the worksheet that denotes the special "held" status of the order and requires the designer to enter the final price once they have completed the piece. The order can then be reopened in FloristWare, the price entered, any changes made and the order finished.

Here is another example. A customer is having a party and wants to order some flowers but is not sure of the final quantities. You can now hold the order and continue to reopen and adjust it until such time as the customer is ready to make a final decision.

Sale/Order Process - Product Description Short Forms

FloristWare lets you define up to twelve short forms that can be used to expand into longer enclosure product descriptions. For example, you can have "tdl" expand to "Traditional" or "sc" expand to "Seasonal Colors". This is a very powerful tool that helps save time.

Instead of entering the short form you can also just click on the phrase in the list. So, for example, clicking on "Seasonal Colors" in your list of favorite expressions would insert "Seasonal Colors" into the product description.

Sale/Order Process - Card Message Short Forms

FloristWare lets you define up to twelve short forms that can be used to expand into longer enclosure card messages. For example, you can have "wl" expand to "With love" or "ha" expand to "Happy Anniversary". This is a very powerful tool that helps save time and reduce mistakes.

In version 2.5 it becomes even easier to use. Instead of entering the short form (which confuses some people) you can just click on the phrase in the list. So, for example, clicking on "Happy Anniversary" in your list of favorite expressions would insert "Happy Anniversary" into the card message.

Sale/Order Process - New "Back" Button

Almost all processes now include a "Back" button that allows the user to work back through whatever they are doing and correct mistakes, make additions and review information as needed. This is a very valuable feature for people used to an internet browser type interface and makes FloristWare even easier to use.

Sale/Order Process - New "Upsell" Feature

This is a very powerful new feature that increases your average sale value by automating the process of upselling the customer various add-on items like cards, balloons, chocolates, etc.

Here is how it works. You specify that certain categories contain "Upsell" items - typically smaller, high margin products that are added on to the "core" item (usually flowers).

Then - each time your employees take an order and have selected the "core" item - FloristWare will take them to a list of Upsell products. This basically forces the employee to go through an upsell process which - when left to their own devices - they typically ignore.

Sale/Order Process - Default Delivery Area

FloristWare now allows you to select a default delivery area. Instead of having to enter the destination city for every single delivery order FloristWare will assume the default area until you specify another. This is a tremendous timesaver for stores that send a lot of orders to just one area.

Sales Taxes

Sales Tax Exemption - By Account

You can now designate certain accounts as being sales tax exempt. By default any sales charged to an exempt account will have the sales tax stripped but you can - of course - override this. Please note that FloristWare supports two separate sales taxes (City & State for U.S. florists and Provincial and National for florists in Canada) and this feature tracks the exemption status for each tax separately.

Sales Tax Exemption - By Customer

You can now designate certain customers as being sales tax exempt. By default any sales charged to a tax exempt customer will have the sales tax stripped but you can - of course - override this. Please note that FloristWare supports two separate sales taxes (City & State for U.S. florists and Provincial and National for florists in Canada) and this feature tracks the exemption status for each tax separately.

Sales Tax Exemption - By Product

You can now designate certain products as being sales tax exempt. This is very useful for stores that carry tax exempt products (certain types of food for example). You can - of course - override this. Please note that FloristWare supports two separate sales taxes (City & State for U.S. florists and Provincial and National for florists in Canada) and this feature tracks the exemption status for each tax separately.

Other...

Improved Organization Through Related Order/Sale Numbers

Sale and order numbers are now more intuitive and easy to understand. Since each sale can contain multiple orders the order numbers now make it very clear to which sale each order belongs. This makes it much easier to keep track of sales and orders.

Enhanced Sales Search

FloristWare version 2.5 makes searching for sales easier than ever. You can now search by all of the existing criteria and we have added some new search options like date ranges, order number, customer phone number, etc.

New Order Search

In previous version of FloristWare you could not search for an order directly - you had to search for the sale that the order belonged to.

While this worked very well there were some situations in which it would have been easier to search for the order itself - which is why we added this powerful new feature. It allows you to search orders by sale or delivery date or date range, sale or order number, customer or recipient name or phone number. It makes it very easy to find any order with even very little to go on.

Improved Faxing

FloristWare 2.5 offers a new way to send faxes (usually receipts, invoices, statements, worksheets, etc.). In the past we connected to the WinFax application but there were drawbacks to this approach. First, you needed the WinFax software. Secondly you needed a phone line - which also often meant long distance charges.

In version 2.5 we are switching to eFax. This allows you to instantly send e-mails without any additional software or a phone line using the eFax e-mail to fax service. It's a great improvement and one that makes faxing from FloristWare easier and cheaper than ever before.

Hot Spots Reference List

You can now print a nicely formatted chart of your local HotSpots (the places you deliver to most frequently) with just a single click. This is very handy for florists that like to keep a reference copy on paper near the phone. Others like to make sure every driver has a list.

Local Areas Reference List

You can print a nicely formatted list of all your local delivery areas along with the delivery

charge, order minimum and cutoff time. Many florists like to keep a list like this by the phone.

Local Areas Export

You can now export all of your local delivery areas and related delivery charges, order minimums and cutoff times to an Excel spreadsheet. This is something that users asked for and we were happy to supply it - even though we don't quite understand what it's for!

Staff Messaging System

The staff messaging system has been greatly improved. It is essentially an e-mail system that focuses solely on communicating with your staff as efficiently as possible. It's better than e-mail because it only allows the employees to talk to each other - this means that they aren't wasting time e-mailing friends. Also - managers and owners have complete access to all messages so they can monitor how the system is being used.

Weighscale

This is a very powerful feature for any shop that does direct shipping. You can enter a default weight for each product and FloristWare will automatically calculate the total weight of the order and associated shipping charges and add it to the order. While this may not benefit many traditional florists it has proven very popular with those of you that are shipping things like gift baskets through carriers such as UPS and Fedex.

Enclosure Cards For Pick-Up Orders

Earlier version of FloristWare only supported the automated printing of Enclosure Cards for delivery orders - the system could not print a card for a pick-up. This was done because our early experience showed us that most customers who were picking their orders up would rather hand-write a card when doing so.

However - several users have since told us that there are situations in which they would like to be able to print an enclosure card for pick-up orders. FloristWare now gives you this option.

Receipt/Invoice Format Options

FloristWare now lets you choose between two different receipt/invoice formats. One is the format our users are already accustomed to. The new optional version contains even more detail.

Why did we add more detail to an already very detailed format? It was another excellent suggestion from Tim Huckabee of Floral Strategies. He believes very strongly that anyone who places a phone order should in turn receive a highly detailed receipt by e-mail, and be given instruction to review it carefully. Experience has shown him that this gives customers the chance to spot all kinds of mistakes - from wrong delivery dates and addresses, bad spellings in names and card messages and more. He is convinced that this level of service prevents the kind of mistakes that can cost you a customer.

We have great respect for Tim and his methods and are pleased to say the version 2.5 not only supports but completely automates this feature.

FloralSource Inc. (FSI) Sending

Version 2.5 makes sending outgoing wires through the FloralSource network easier than ever. It really is simply a matter of a couple of clicks and a few seconds to send your outgoing wires directly to FSI through FloristWare.

More Tabbed Layouts For Better Navigation

Based on the positive reaction to certain changes introduced in version 2.0 we have expanded the use of "Tabbed" layouts. These layouts (or screens) allow us to fit more information on a single screen by breaking it down into separate tabs. Florists like this because they have instant access to a lot of information on a single page, but are not overwhelmed by it all at once. This is a perfect example of how FloristWare is able to combine power with ease-of use.

E-Mail - Cover Messages For Invoices & Receipts

The ability to automatically and immediately send receipts and invoices by e-mail has always been one of the most popular features in FloristWare. As the result of suggestions from our users we have made this tool even more powerful by allowing you to specify a default cover message that appears in the body of each e-mail. The receipt/invoice itself is attached as a pdf.

Some florists plan to use this to deliver a nice note while others plan on using it as part of their implementation of the Floral Strategies system, which suggests that customers be encouraged to review their e-mailed receipt/invoice for any mistakes. This helps reduce errors and avoid embarrassing situations.

Pull Down Menus Enhanced

This is a relatively minor change but one that some users will really appreciate. Pull-down menus are now more clearly differentiated from standard text entry fields by a small gray arrow.

Help "Notepad" Feature

FloristWare is very easy to use but - from time to time - little questions still come up.

In the past we have encouraged florists to write these questions down and, when they had a nice little list and a few minutes to spare - to call Support for answers.

The only problem is that all too often the users lost their lists and forgot their questions before they had a chance to call. So, we've made it even easier - you can now type your questions right into a special list inside FloristWare, and they will all be waiting there for you the next time you call Support.

This is one more example of how we're trying to provide the best support possible while most of our competitors are doing everything they can to make support difficult (and often expensive) to maintain.

FloralStrategies.com Follow-Up

Another aspect of the FloralStrategies.com program involves following up with recipients. Version 2.5 automates this very powerful approach to building sales and relationships.

Here is how it works. If you choose to use this feature (it's simply a setting that you can

change at any time) you can - with just a few clicks - be presented with a list of all your recent deliveries that includes the names and phone numbers of recipients.

The idea is that you call them and make sure that they received their gift and to tell them how to care for their flowers or plants. From there you can jump off into their notes and make comments that will allow you to serve them better in the future. When talking to the recipient you are trying to win them over as a customer since they already received the best advertisement for your store, one of your designs!

Speedier Interface

Some florists felt that FloristWare had "too many screens". While there really was a good reason for each and every step in the process (and most of our users were quite happy with the process) we have always believed that the product should develop in accordance with the needs, comments and suggestions put forward by real-world florists. As a result we visited some of our busiest user shops and went through the most common sale and order-taking processes over and over again, looking for places where we could trim a screen or two.

We are please to say that we have been able to trim several screens from the most important processes. The good news is that most of the testers haven't really noticed the loss. They all comment that making a sale or taking an order is faster, but they don't notice anything missing or find the process more complicated. That is the best possible response.

New Navigation Options - Less Clicks or "Mouse Work"

We have added an exciting new navigation option for our users. In addition to using the mouse or a touch screen monitor FloristWare now allows you to navigate between buttons using the Tab key. Simply tab to the button you want with your left hand and then activate it by clicking the Enter or Return key with your right hand.

People who felt FloristWare required "too many clicks" or "too much mouse work" will love this feature because it is so much faster - you almost never need to take your hands away from the keyboard to reach for the mouse.

Testing has shown that even users who are perfectly happy with the mouse fall in love with the new system almost immediately - it really is that much faster.

Faster Speed Through Improved Architecture

Some users that were running FloristWare in very high volume shops (more than \$5 million in sales per year) noticed that over time the software was gradually - and very slightly - beginning to slow down.

By analyzing their systems - loaded with real-world data - we were able to spot not only existing but potential bottlenecks. As a result much of the back-end of the software has been rebuilt from the ground up and optimized to make it run faster than ever. Volume users are very pleased with this development and report that FloristWare is now running faster than ever before. Typical flower shops are even more lucky - they probably never got enough data into the system to notice a slowdown but they will still notice an immediate increase in speed.