



**New Pro version**

**Migration Journey**



**August 2023**

**Australia & New Zealand**

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## Introduction

Software is developed with an expected service life just like any other asset, and the old Fox version has well and truly run its course for 30 years!

We have ceased development of the old version as we cannot sustain the cost of developing both versions.

We will continue to support but not enhance the old version.

We will provide a migration schedule.

This document will assist you with the migration process.

Other sources of information include the following.

- **Pro Migration Overview** PowerPoint on the Ezy Systems website [News] tab.
- **Presentations** on the Ezy Systems website [Products] tab.

## Our Story

Peter Ellis and Nick Cugura commenced Ezy Systems May 1993 to develop software for the winery industry.

Programming language MS FoxPro was used to develop *EzyWine* on a computer running MS Windows 3.11 with 20 MB RAM and 2 GB hard disk.

We launched the software in the Griffith region in NSW in 1994 where we now have 15 clients.

Ezy Systems adopted a software free change policy and commenced annual courtesy visits which continues to strengthen the relationship with the users and ensure the development of the software.

By 2008 the software had grown to an astonishing 3,000 menu options, eight report writers and seven hundred databases and more than one million tonnes of grapes processed that vintage using the software by three hundred commercial wineries across Australia, New Zealand and South Africa.

Senior Programmer, Donna Dimaano, was appointed Project Leader and we decided to use MS Visual Basic and MS SQL Server database to develop the new version.

*EzyWine Pro* was released in May 2020 and we are still in the process of migrating hundreds of clients.

We are still the only company proving a **one stop solution!**

Clients that had dropped the outdated version of our software over the years have started to return due to the new interface, new features and time savings that remove the huge subscription costs, stress, time and errors of trying to use multiple packages that aren't really integrated.

In May 2023 Ezy Systems celebrated 30 years of servicing the winery industry.

**We are now looking at BI (business intelligence) and providing more integration and automation to further streamline your entire business.**

**We appreciate your loyalty and support.**

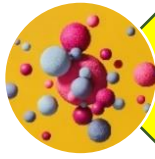
## Benefits

- **User friendly interface**
  - **Tabs make it quicker and easier to process transactions**
  - **Every menu option can be exported directly to MS Excel**
  - **Rebuild index no longer required**
  - **No record locking – the following menu options can be used anytime**
    - End of Month Updates
    - Transaction Updates
    - Change Codes
    - Cellar Reversal
    - Global Maintenance
  - **Interfacing with devices and other applications is easier**
- 
- Scroll Lists replaced with radio buttons so that all options are always visible
  - **Pick Lists replaced with powerful search tools making it quicker and easier to select required data to be edited or reported**
  - Dashboard with options for all users including Cashflow and Sales Summary
  - **Customised sales reports can be auto emailed to management and owners**
  - Latest changes will be automatically loaded every day
  - **Mobile apps for winemakers and sales staff**
  - Easier to grow and manage your wine club including website ecommerce interface
  - **Provides everyone with more time to work on the business rather than just in it.**

## Data Structure Changes

- **Debtor, Creditor, Employee, Prospect and Grower address**
  - suburb, state and country added
  - street name now has 2 lines of 40 characters
  - postcode increased from 4 to 8 characters
- Unlimited text can now be recorded against [F5] notes
- **Reference recorded against transactions has been increased from 8 to 16 characters**
- [Attachment] tab added for most transactions to meet *paperless* requirements.

## Migration Flow



Where is **Pro** to be installed?  
on your local server **or** with your cloud provider  
**or** Ezy Systems to provide cloud hosting?



Contact Ezy Systems  
Notify Ezy Systems of installation option,  
number of users and number of companies



If Ezy Systems is to provide cloud hosting  
request a quote and approve ASAP



Ezy Systems will copy live Fox data  
onto Ezy Systems server and transactions  
older than 7 years can be purged



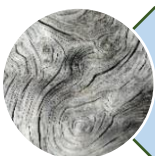
Ezy Systems to migrate your Fox data to **Pro**  
and provide users with access to **test** copy



Ezy Systems to provide users  
with remote overview training



Users to familiarise themselves with  
the new version using the **test** copy



Ezy Systems to migrate Fox data  
again and users to **go live**



Ezy Systems to provide users with remote  
overview training again, if required.

# Dashboard

### Debtor Balances

Awaiting Payment **228,649**  
Overdue **191,534**

Ageing Date: 07/02/2023  
By Month / By Week  
Show Labels

### Creditor Balances

Awaiting Payment **9,591**  
Overdue **6,208**

Ageing Date: 07/04/2023  
By Month / By Week  
Show Labels

### Outstanding Transactions

GL General Journals	1
GL Cash Receipts	2
GL Reversals	5
Payslips	4
Stock Take	15
Purchase Order Receipts	33
Service Invoices	2
Cellar Door Sales	5
Mail Order Sales	2
Sales Credit Notes	12

### Stock Cost

Area Of Use: All  
Total **\$1,173,052**

### Enquiry

[Stock Item](#) [Stock Movement](#)  
[GL Batch](#) [Grower Delivery](#)

### Drill Down Enquiry

[Debtor](#) [Creditor](#)  
[GL Account](#) [Vessel](#)

### GL Ledger

Creditors	April	2021
Debtors	April	2021
Assets	April	2021
Stock	April	2021
Payroll	April	2021

### Cellar Operations

7 Operations

Date	Worksheet	Operator	Entry	Operation	Status
11/08/2022	304	DAVID	1.0	TBTT	Finished
11/08/2022	304	DAVID	3.0	ADD	Started
11/08/2022	304	DAVID	4.0	MULT	Issues
30/09/2022	306	DAVID	1.0	TRSF	Finished

### Bottling Schedule

3 Runs

Run	Line	Date	Start	Stock Item	Status
77	FLP	01/10/2022	0:00	22SHZRES7	Complete
78	FLP	29/03/2023	0:00	04SHZRES7	Pending
79	FLP	29/03/2023	0:00	04SHZRES7	Pending

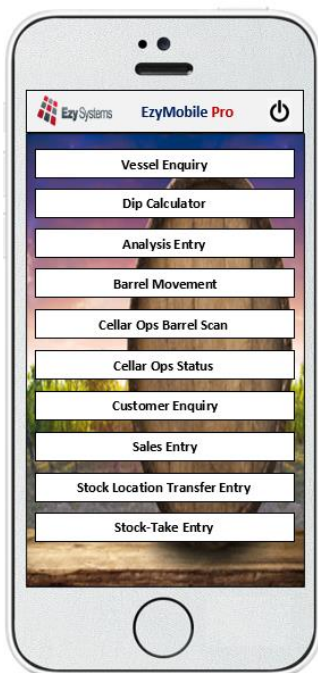
### Vineyard Operations

5 Operations

Date	Batch	Grower	Block	Section	Operation
17/05/2020	105	BIGHILL 1	HIGHWAY	SHZ-01	INCOME
12/06/2020	105	BELVOIR 1	GOLF	MER-01	GP-SLASH
16/09/2022	105	BIGHILL 1	DAM		SFUNGICI
30/03/2023	105	KYNETON 1	KYNETON	BARN-1	IRRIG01

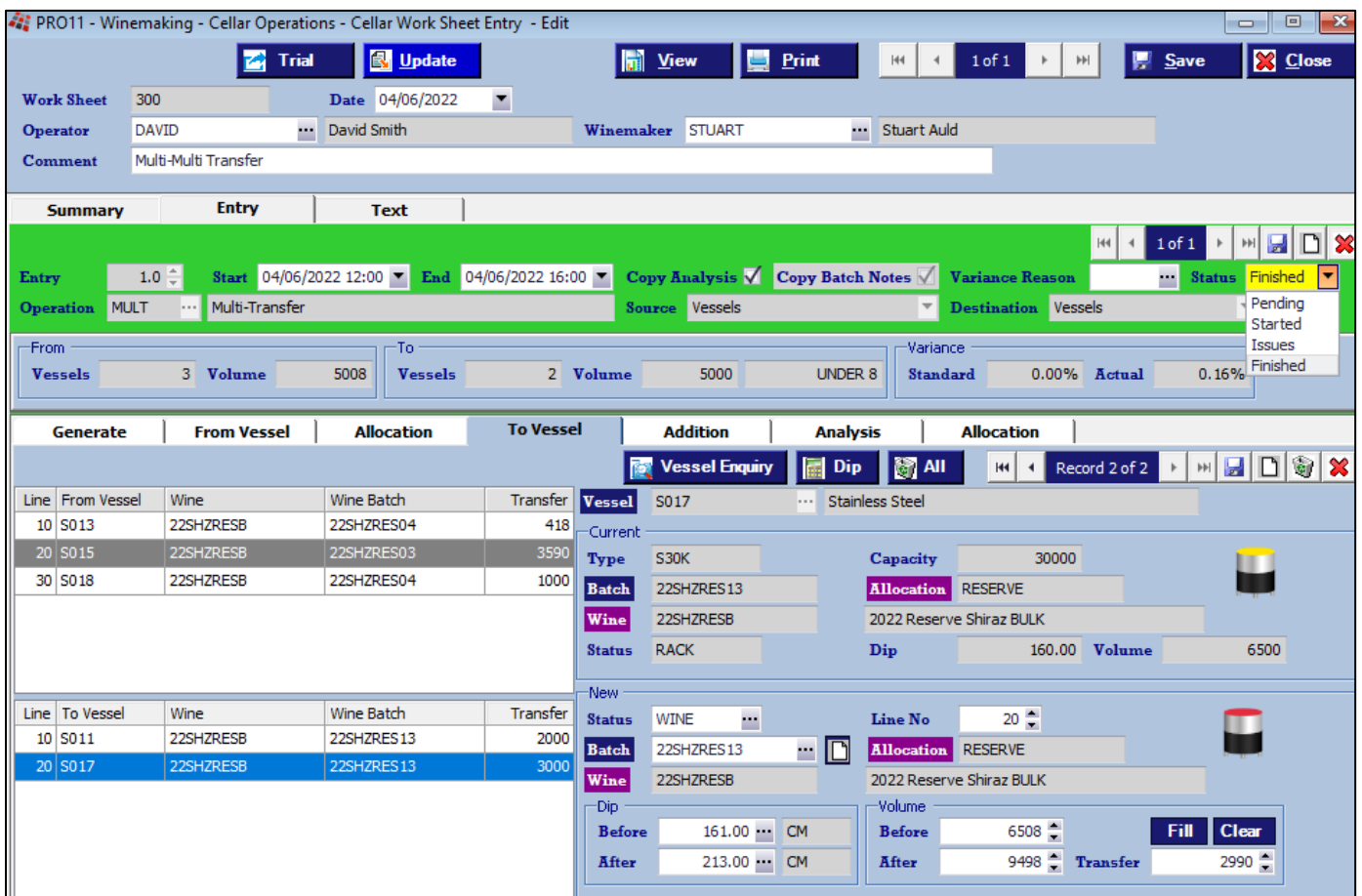
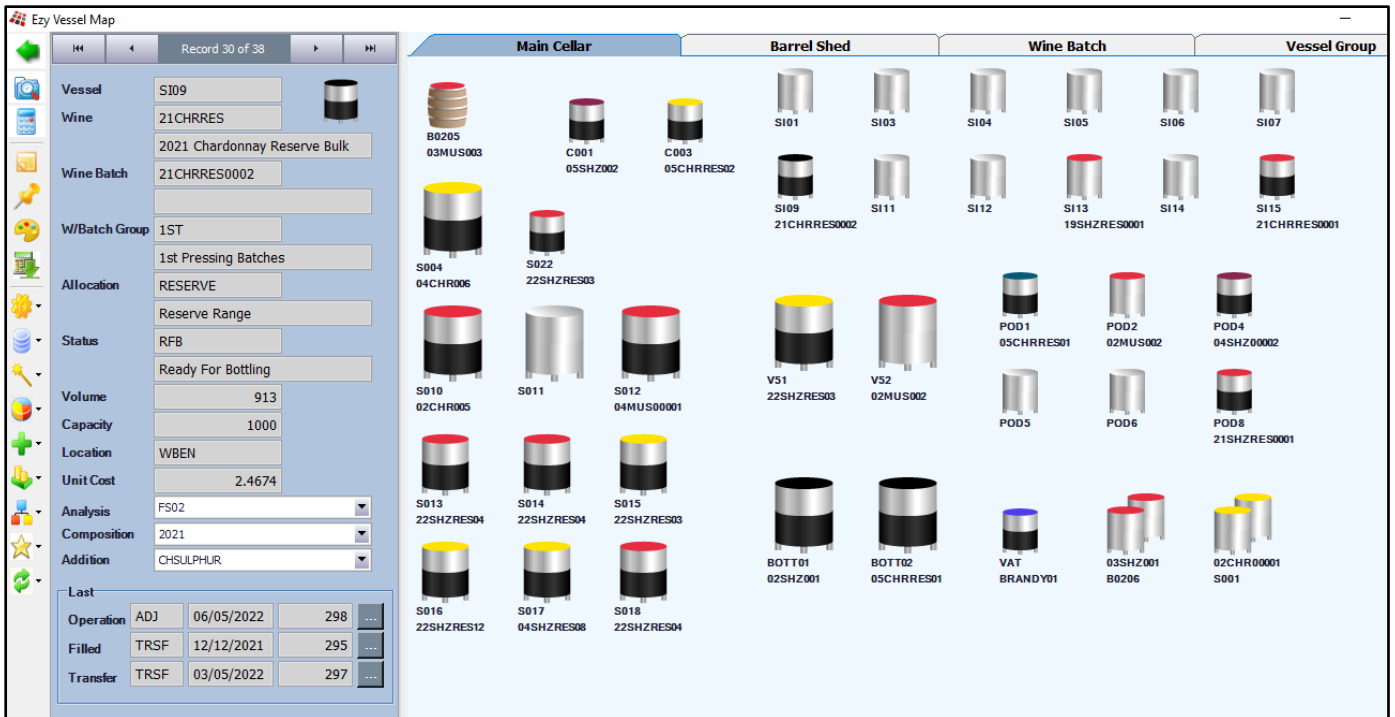
Cashflow and Sales options are being developed

# Mobile Apps



# Cellar Operations

All operations and reporting can be performed from within the interactive vessel map. Quicker and easier to process cellar ops with all information available at your fingertips.





# Paperless

Attachments can be recorded against all reference data and transactions.

SAO01 - Sales - Sales Orders - Sales Order Entry - Edit

Order No: 132.00 On Hold:  Address: Smith Wine Merchants USA

Debtor: SMITHWM1 Alias: EXPORT Sales Rep: EXPORT

Order Date: 12/08/2021 Reference: PO#100 Carrier Reference: USSHIP Carrier: BFS Despatch Date: 12/08/2021 Discount Class: D0 Terms: 120D Sales Area: USA Promotion: [ ]

Address: 10 Kentucky Street, New York City, UNITED STATES OF AMERICA

Order Type: PHONE Credit Rating: GOOD Credit Limit: 0

Price Type: Export Cartons: 640 Required: 12/08/2021 Rate: 0.7500 [USD]

Total: Sub-Total \$ 51,680.00, WET \$ 0.00, GST \$ 0.00, Total \$ 51,680.00

Balance: Total \$ 44,135.48, Current \$ 521.88, 30 Days \$ 0.00, 60 Days \$ 13,978.12, 90 Days \$ -279.00, 120 Days \$ 29,914.48, 150 Days \$ 0.00

Attachments: 04\_merlot.jpg

# Debtor Receipt Auto Allocation

Payment can be automatically recorded against multiple invoices and then modified as required.

ARC01 - Accounts Receivable - A/R Receipts - Debtor Receipt Entry - Edit

Batch: 39 Actual Total: 1119.52 Actual Records: 1 Last Modified: NICK

Batch Total: 0.00 Batch Records: 0

Debtor: PHILL101 Phillips Cafe Entry: 1

Alias: REST Balance: 1,620.30

Date: 11/05/2021 Bank Deposit:  CR Rating: CLIM

Reference: APRIL STATEMENT Description: Phillips Cafe

Cash Amount: 1119.52 Discount: 0.00 Claims: 0.00

Cheque Amount: 0.00 Bank: [ ] Branch: [ ]

Card Amount: 0.00 Card Type: None Expiry: [ ]

GL Month: Apr Card No: [ ] Order Type: Mail

GL Claim A/C: 12-065 Trade Discounts - Export Unallocated: Payment 0.00, Disc/Claim 0.00

GL Bank A/C: 60-010 Cash At Bank

Allocation: Auto Allocation

Transaction	Type	Reference	Due	Amount	Payment	Discount
16/03/03	Inv	1	30/04/03	710.00	710.00	0.00
19/07/04	Inv	30	30/08/04	446.60	446.60	0.00
20/07/04	CRNot	13	30/08/04	-624.80	-624.80	0.00
15/08/04	Inv	31	30/09/04	537.72	537.72	0.00
17/02/05	Inv	39	02/03/05	191.18	50.00	0.00

Transaction Date: 17/02/2005 Type: Inv

Reference: 39

Description: Sales Invoice

Due Date: 02/03/2005

Amount: 191.18

Payment: 50.00



## User Training

We will provide remote training!

We recommend that each user familiarise themselves with the new version prior to going live.

The System Administration, User Access, User Menu Access Log option can be utilised to provide each user with a list of the menu options that they have accessed in the past 12 months.

The users should familiarise themselves with the 'High' priority menu options.

Priority	Menu Option	Name	12 Months Usage Prior Migration	Usage Since Migration	----- Last Access ----- User Id	Date
High	PRO11	Cellar Work Sheet Entry	204	281	NICK	21/06/2023
Low	SYS02	System Parameters	172	194	EZYSYS	28/06/2023
Low	ARR09	Debtor Detail Trial Balance	121	17	NICK	14/01/2023
High	STS03	Stock-Take Entry	113	3	NICK	21/09/2022
High	PRO04	Weighbridge Docket Entry	101	61	NICK	20/06/2023
Low	SYS24	Stationery Designer	87	114	EZYSYS	30/06/2023
High	PBO01	Bottling Run Schedule Entry	74	73	EZYSYS	11/05/2023
Low	SYS07	User Access Maintenance	73	99	NICK	21/06/2023
Low	STM01	Stock Items	70	45	EZYSYS	18/04/2023
High	SAI01	Sales Invoice Entry	61	71	NICK	30/06/2023
Low	ARM01	Debtors	60	48	EZYSYS	28/06/2023
Low	SYSDRY	Diary	55	88	NICK	26/06/2023
Low	APP02	Creditor Payment Maintenance	50	22	NICK	09/03/2023
Low	PBO06	Bottling Material Requirements	50	0	NICK	19/05/2021
Low	STA06	Copy Stock Items	49	6	NICK	10/02/2023

## Pro Migration Preparation & Cost

### There is no upfront cost to migrate to the new version!

The data for each live company will be copied onto our local secure server where we will check data integrity, critical menu options and stationery.

This will ensure a smooth transition to Pro.

Please contact Renee to commence your migration.

### Support Services

The support fee includes:

- 24/7 help desk
- Regular upgrades
- Annual courtesy visit.

Most software companies don't offer any of these services!

### Support Fee

- **A new support fee structure will apply on commencing the migration process.**

We will continue to support the Fox version and ensure that all industry and statutory requirements are met across all modules until August 2025.

- **The monthly support fees will be calculated as follows.**

- \$350 software licence
- \$50 per user
- \$75 per live company.

If you have 10 users and just one live company, the monthly support fee will be \$925.

- **You can specify the required number of users!**

The System Administration, User Access, User Menu Access Log option, 'Summary' format, sequenced by User Id, for the last month or so, will report the number of *actual active users*.

### Local server or cloud?

- We will evaluate your current environment and advise your IT accordingly.
- Pro can be installed on your local server or hosted with your cloud provider.
- We can provide cloud hosting if required for additional \$300 plus \$75 per user per month.
- **Most clients already have a local server that can be used!**

### Old Version Support

The Fox version will be supported until 31<sup>st</sup> August 2025.

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