

Entersoft Business Suite v5.0.10.0

Entersoft Business Suite®

New features and functionalities

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Brief description of contents

Commercial and Financial administration

- A number of new functionalities has been added to the [Mobile warehouse operations](#).
- A number of new functionalities has been added to the [ESRetail](#).

Horizontal functionality

- Environment | More comprehensive application window management
- Manage users | Log entry of add / remove user from user groups
- [Collaboration](#) > Chat | Progressive message loading
- [Collaboration](#) > Chat | Improvements to new message notifications
- ESPak Package | Easier sharing and other extensions
- Screen configuration | Default status configuration of context view and context OLAP parameter panels
- Additional properties | Extensions to support associated properties

Next up, the new functionalities & improvements catalog is broken down per category, along with use instructions & examples.

1. Commercial and Financial administration

1.1 Allocate stock counting differences to Consumptions

In the **Allocate stock counting differences to Consumptions** process (menu: *Production/ Productions and consumptions*) it is also now possible to use the process for differences in stock counting of items that monitor item dimensions (color, size, lot, etc.). Dimensions have been created for the consumable items that have been counted using item dimensions and in consumption documents involved, the allocation process shall be executed only at dimensional level.

This means that

- The calculation of the actual balance shall be estimated from the item balances by dimension.
- Only consumptions with filled-in dimensions will be searched



Attention

- *If, even though counting has been carried out with filled-in dimensions, no consumptions with dimensions are found, then the allocation is not possible*
- *If counting was done without filled-in dimensions, the process will examine these items without taking the item dimensions into account.*

1.2 Mobile warehouse functions

Item lists

This functionality addresses the need for items to be included in item lists due to common invoicing data, such as period-specific discount items or offer lists for the to be informed about their characteristics.

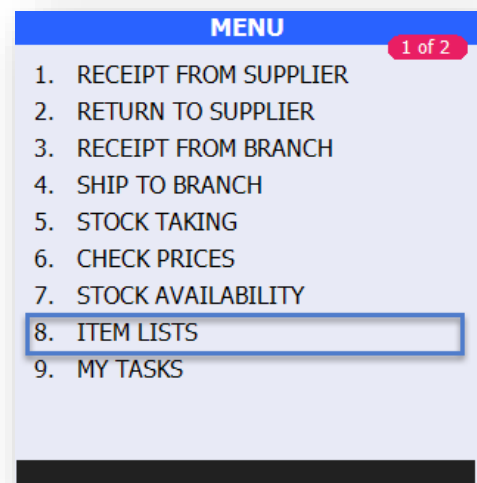


Item lists

The task is selected from the task menu.

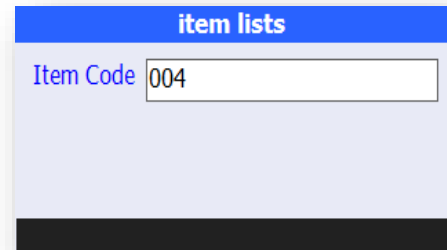
Specify task

Specify item



Select list

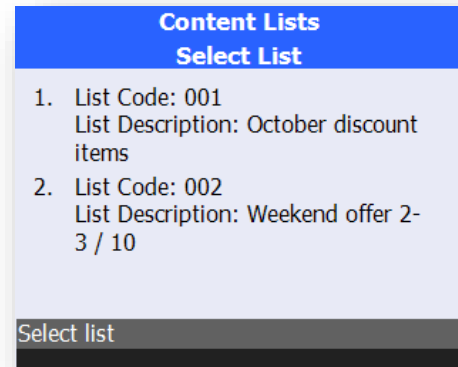
The item code is entered in this screen.



item lists

Item Code

This screen displays the lists to be selected, in which the item is involved, if there are more lists than one. If the item is found in a single list, then this screen is skipped.



**Content Lists
Select List**

- List Code: 001
List Description: October discount items
- List Code: 002
List Description: Weekend offer 2-3 / 10

Select list

Show information

This screen displays the information specified in the list.



**Contents List
002 - Weekend offer 2-3 / 10**

Code 004
Description: THAEOPAΣH SONY SG85
Discount 5%
Retail Price 105
Wholesale Price 50

Configuration



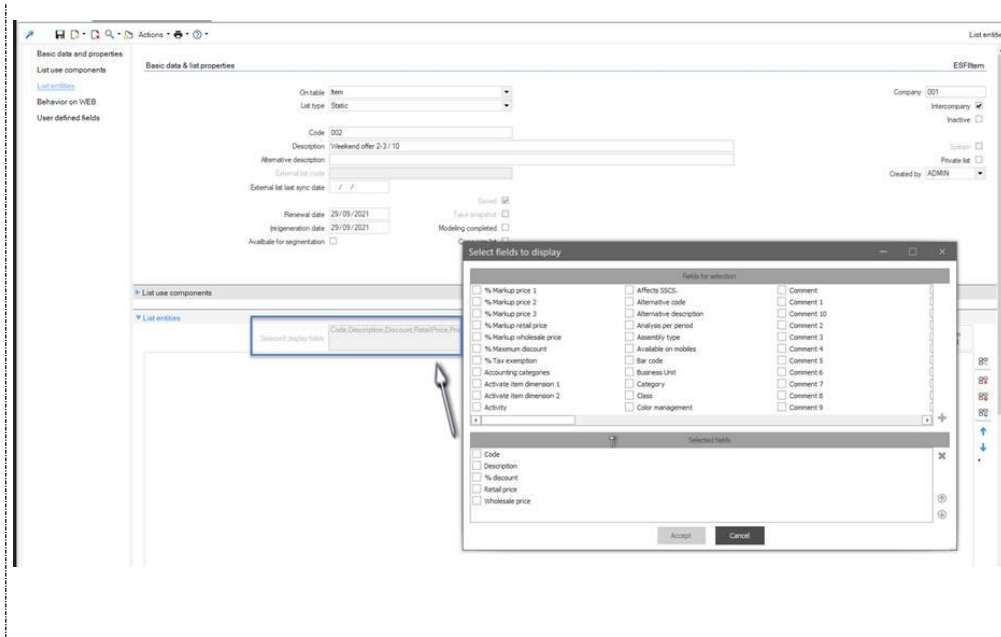
This section includes the process configuration points.

List of items

Display fields

The display of fields on the final process screen is dynamic and is specified on the list, in the "Selected display fields".

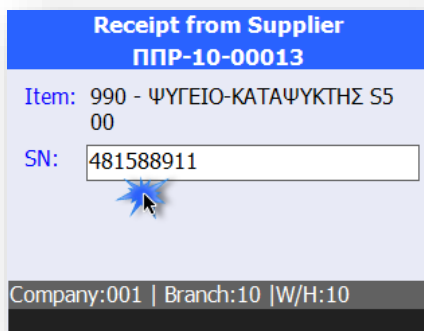
Their display order is alphabetical, apart from the code and item description that, if selected, always appear first.



Serial numbers

The ability to manage serial numbers has been integrated into document processes.

Once the serial item & barcode has been entered, a check runs to determine whether it exists. If it is not found, the process proceeds to create and incorporate it into the registration movement and, of course, into the final document.



It is necessary to enable the [Assign Item Serial Number Code](#) rule,



Entity	Serial number	Rule	Assign Item Serial Number Code
1	☐	☐	

1.3 ESRetail

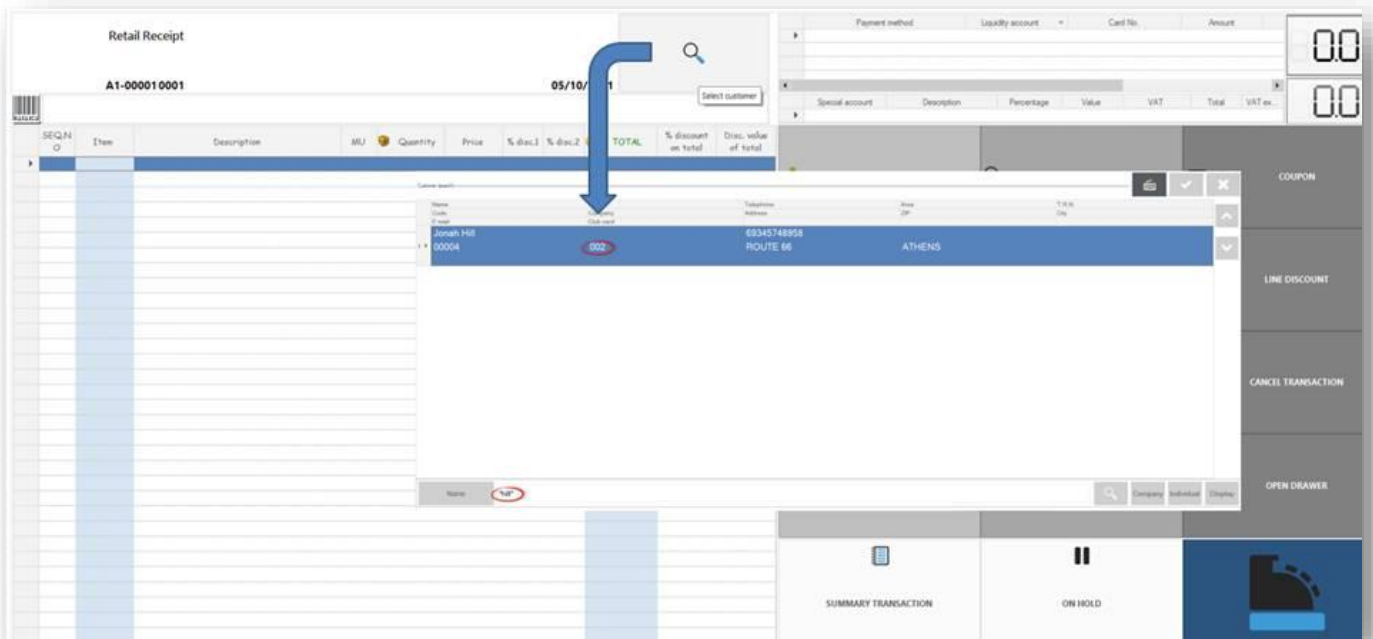
Copy customer from another company

It is now possible to [search and copy a customer from another company](#).

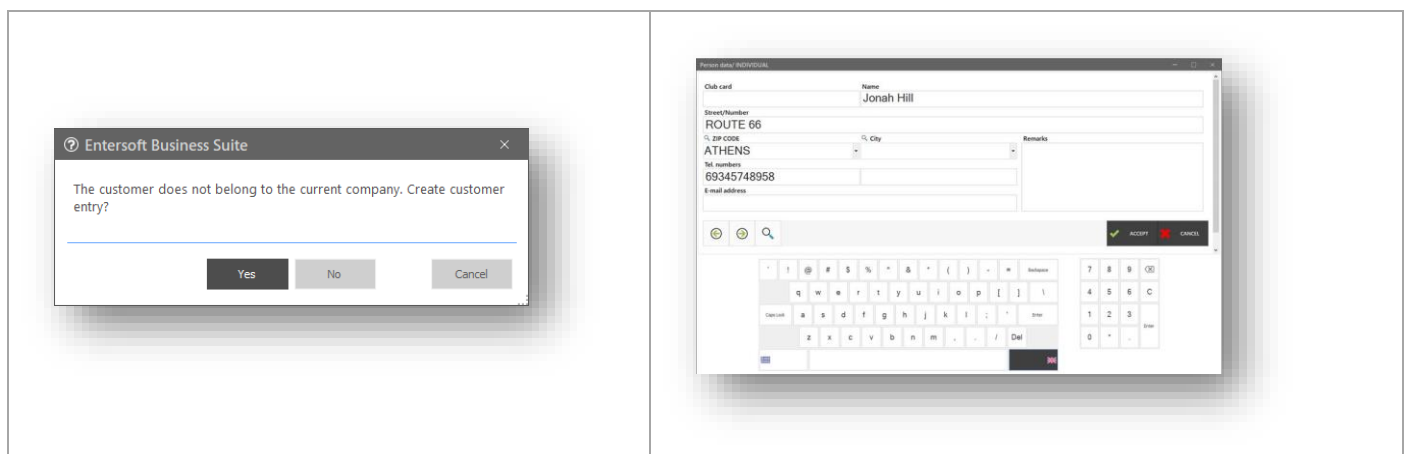
This functionality serves retail businesses of a multi-corporate scheme, with joint business activity. During the sale, we may wish to:

- ✓ identify the customer from any company/branch
- ✓ if the customer is found in a different company, create them in the current one, in a quick and easy way

In the retail receipt entry, records of all the companies matching the search details are displayed during search. The company is also displayed on the information grid. If an entry is found in the current company, then other companies' entries are hidden.



If other company entries are found, then the user can immediately create a new customer using Company Individual the actions. The entry screen displays the filled in person's details and allows the user to save additional information if they wish. The new customer will connect to the same person.





Attention

If no content is provided in the search field, then the search will performed exclusively in the current company entries.

This functionality can be enabled via the new general parameter:

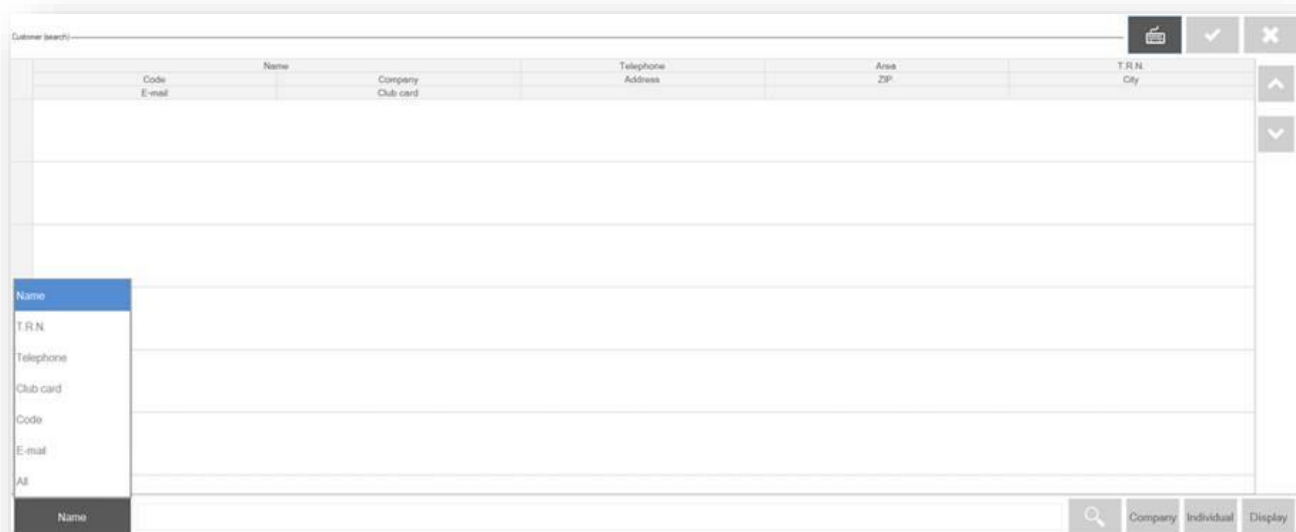
Contact administration			
1	Mass Retail: New customer auto creation from another company entry	Vertical	AUTO_CREATE_NEW_CUSTOMER True

For cases where we wish that certain companies are involved in the search, instead of all companies hosted in the database, their codes should be specified as a comma-separated list (without the current one), in the new general parameter:

Contact administration			
1	Mass Retail: Companies participating upon customer search	Vertical	RETAIL_CUSTOMER_CROSS_COMPANY_INVESTIGATION 002

Default customer search field

It is now possible to specify a [default search field](#), on the customer selection screen, from retail receipt.



A default search field is the Customer Name (Full name), but the user can select one of the available fields, depending on the typical business operation method.

This setting must be filled in by document type, in field [DefaultTradeAccountInvestigationField](#), in the CSConfig\ES00RetailDocuments configuration file [CSConfig\ES00RetailDocuments](#).

The available values are:

0 - Name

```
<RetailDocumentSettings>
  <ID>1</ID>
  <DocTypeCode>ES.12200.01</DocTypeCode>
  <DocSeries>A1</DocSeries>
  <DocCancelingSeries>A</DocCancelingSeries>
  <DocSeriesOffline />
</RetailDocumentSettings>
```

1 - TRN	<FormID>ESFIDocumentTrade_RTL_MiniMarket_DEF</FormID>
2 - Telephone	<Layout>0=1M-12000R;8=1R-ES.12000.02;6=6C-ES.12000.02</Layout>
3 - Club card	<IsTransaction>true</IsTransaction>
4 - Code	<IsInvoice>false</IsInvoice>
5 - email	<IsRetail>true</IsRetail>
	<TransactionOverview>true</TransactionOverview>
	<TransactionOverviewAutoCloseInSec>0</TransactionOverviewAutoCloseInSec>
	<IsMenuAvailable>true</IsMenuAvailable>
	<MenuCaption>New Receipt</MenuCaption>
	<MenuOrder>1</MenuOrder>
	<DocClass>0</DocClass>
	<AutoDisplayQuantities>false</AutoDisplayQuantities>
	<DefaultTradeAccountInvestigationField>2</DefaultTradeAccountInvestigationField>
	</RetailDocumentSettings>

Finally, search by telephone number has now been extended to all person telephone fields.

1.4 Miscellaneous

Mean time rest in stock

Two new prints have been added to calculate the **mean time rest in stock**:

-  **Mean time rest in stock by color-size** (menu: *Inventory/Reports by dimension*) . Calculates the mean time rest only for items that monitor color and/or size.
-  **Mean time rest in stock by warehouse** (menu: *Inventory/Stock Metrics*) . Calculates and displays the mean time rest of stock items in WH per **Warehouse**

Entersoft price checker

Entersoft Price Checker (ESPriceChecker.exe) is a new software component, available in the application directory. By using it, it is possible for **price control devices** to communicate with the Entersoft Application Server, in order to obtain information on the item identified through the scanned barcode. More information about its use and configuration can be viewed on the [Entersoft wiki](#)

Branch Time Zone

A new "**Branch Time Zone Name**" field has been added to the company's branch details. You can use it to enter the time zone name that corresponds to the specific branch.

The field does not include predefined values for selection and can be filled in openly. It is recommended to use values that are accepted by the SQL server. See [here](#)

VAT on payment

It is now possible to **exempt transactions** pertaining to a specific document type, from the VAT regime on payment. This can be done by selecting the attribute for the document types you wish to exempt:

VATonPaymentExcluded

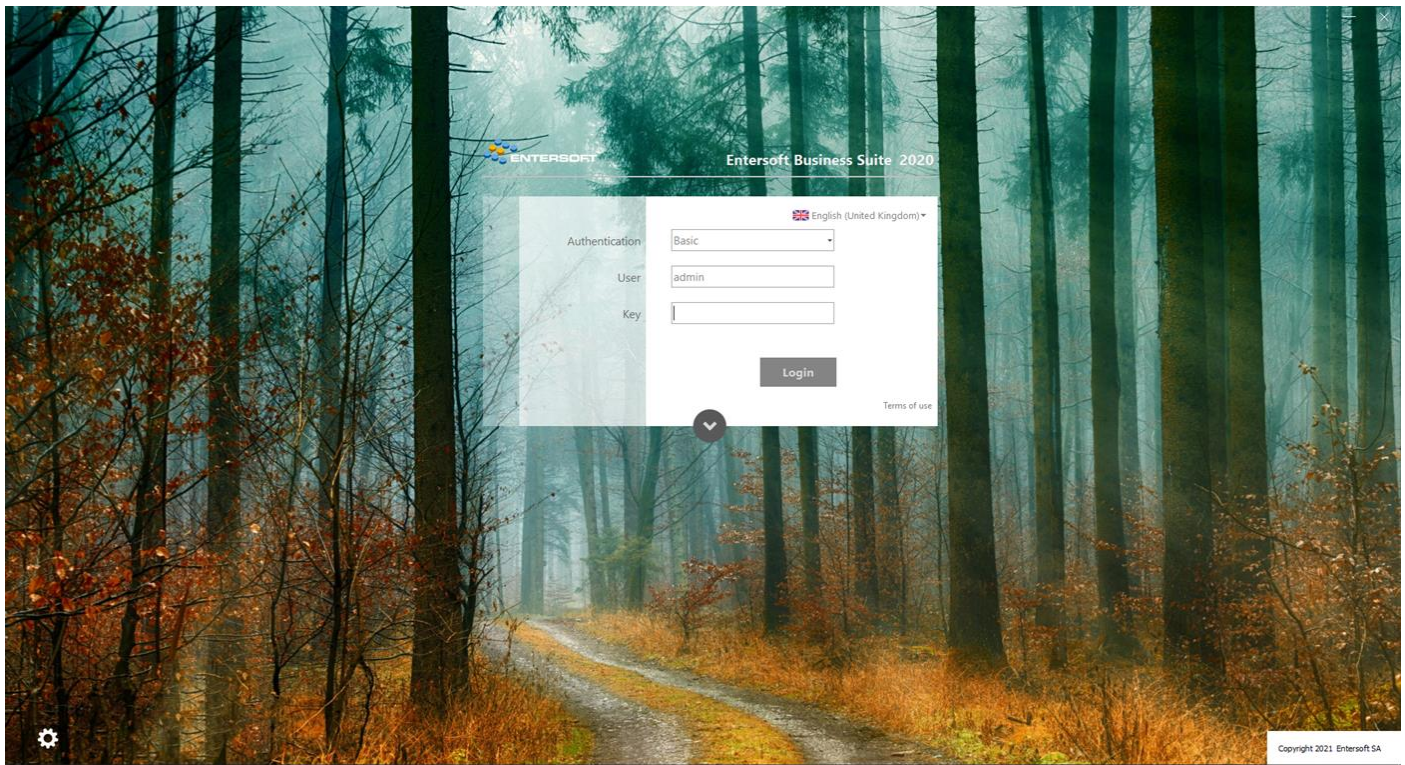
Person info

Fields for **social network accounts**, more specifically Facebook and twitter, have been added to the persons info. These fields have also been part of the customer info. By adding a new trade account and linking them to a person, these fields are also passed on to the trade account.

2. Horizontal functionality

2.1 Login screen

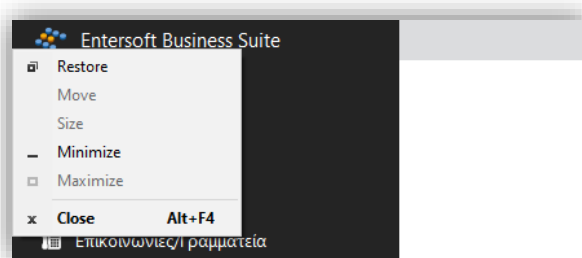
- From this version onwards, the default background image is a photo of a street, in the forest, during fall.



- Is now possible to minimize the Login screen window, using the relevant button at the top right.

2.2 Application window management

- The basic window management menu in the upper left corner of the application has been enabled, which can be accessed either by clicking on it, or by using the following key combination: `<windows key> + <alt> + <space>`.



- The application window now also responds to standard window management commands via keyboard. For example:
 - Windows key + M: Minimize all open windows.
 - Windows key + Shift + M: Restore minimized windows.
 - Windows key + Home: Minimize all windows apart from the selected or currently active one.
 - Windows key + Shift + Up arrow key: Maximize selected window.
 - Windows key + Shift + Up arrow key: Maximize an active window vertically, while maintaining its width.

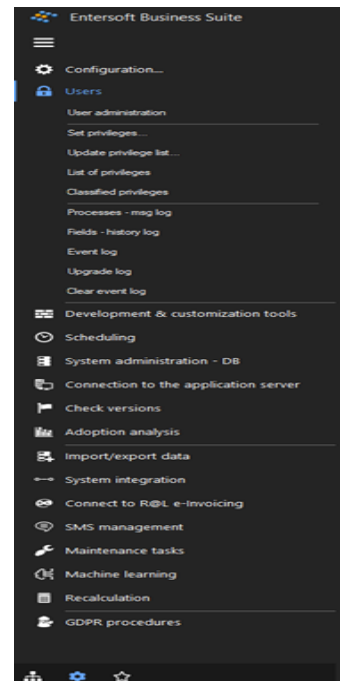
- Windows key + Up arrow key: Minimize selected window.
- Windows key + Up or Left arrow key: Position selected window on the left or right half of the screen, respectively.
- etc.

If the user, via the above commands or manually, adjusts the size, status and location of the application window, these options are stored (per ES application folder, @ windows user roaming profile) and in a subsequent login, the main application window will open at the same size and location. The application login screen specifically has been configured to open on the same monitor as the main application window.

2.3 Application menu

A number of improvements were also implemented in the application's main menu (navigation menu):

- The tooltips now appear where it makes sense, i.e. the text is not fully visible, but is trimmed due to the width of the Navigation menu.
- In the navigation menu footer, where the user can select between the main application menus, in the settings menu or the shortcuts, a selector is now displayed to make it visually clearer which one of the sub-menus is selected.
- Finally, when we exit the application, the navigation menu status (per ES application folder, @ windows user roaming profile) is also saved, i.e. whether it is minimized or maximized, so that in a subsequent login, the relevant status is recommended.



2.4 Manage users

For security audit reasons, log entries of add / remove user from user groups are supported, both via the management form and via the relevant automations, on the main user view. The log import takes place in the Event log (menu: [Settings > Users > Event log](#)), with event code: [ESUSERADDGROUP](#) and [ESUSERGROUPDELETE](#), respectively.

2.5 Collaboration | Chat

- [Progressive message loading](#) is now supporting in a chat, in batches of 200 messages. More specifically, when the user visits a chat, the 200 most recent messages will be loaded initially and, as they move 'backwards' (that is, moving up by scrolling through the previous chat messages), the next 200 will be loaded, and so on. This change results in a significant improvement to the speed of opening chats with a big history log.
- In the meantime, it should be noted that a number of memory management optimizations have been implemented, ultimately aiming to more efficiently manage chats in terms of [performance](#).
- The [audio](#) and [visual notifications](#) for new messages now cover more cases, ensuring a better level of relevant user alerting. This means that user will be notified whenever they receive a new message, unless at the time the new message is received, the application window and the chats page are the selected and active window/page.

At the same time, the chat access and notification button (in the horizontal application menu / actions menu) was enhanced, in order to make the notifications and amount of new messages more directly visible.

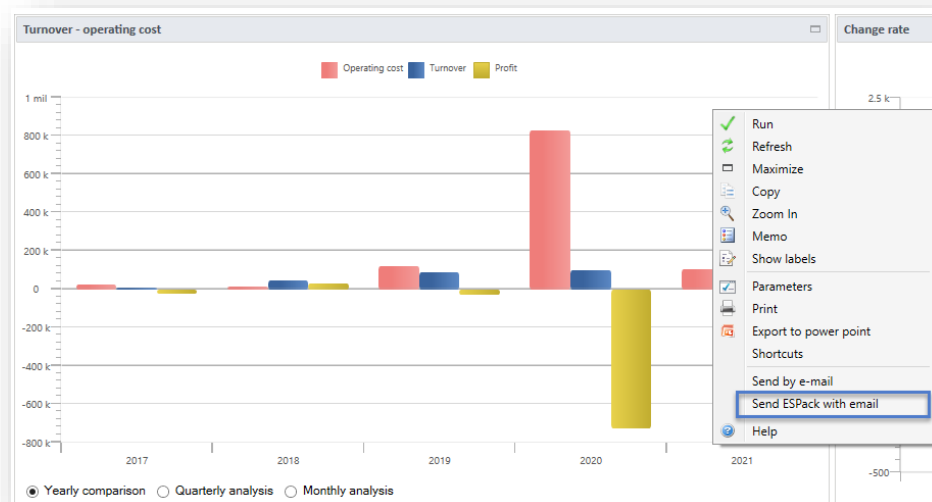
2.6 ESPak Packaging

- The single-view Package (ESPAk) now also includes any PQs that may be exist for this view.
- A option was added to the default view menu, the OLAPs and Dashboards: [Send ESPAk to email](#). By selecting this option, an ESPAk is automatically created for the current report and is attached to an email to be sent to one or more recipients.

View | Send ESPak

Stock items											
Parameters											
	Item code	Description	MU	Stock	Wholesale price	Retail price	Main supplier	Country of origin	Bar code	Family	Group
Merchandise											
1	I-00001	XFAST BLUE 7080 01	TEM	13,666.0...	30.00000	0.00000					
2	I-00002	XFAST BLUE 8080 01	TEM	23,952.0...	40.00000	0.00000					

Dashboard | Send ESPak



OLAP | Send ESPak

Year Branch Customer Customer name Send ESPack with email... Customer category Item group Item category Item sub-category

Month

Custom...	Geogra...	Items fa...	Turnover	Cost	% GP
Grand Total					

2.7 Screen configuration

New controls properties on the [Context View](#) and the [Context OLAP](#), in order to be able to determine whether the Parameter Panel will initially be expanded or collapsed. These new properties allow for a more accurate form design and better utilization of available space, especially in forms that need to incorporate a lot of information. More specifically:

- Context OLAP | The ParametersPanelState property has two values: Collapsed & Expanded. The default value is Expanded, which was also, so far, the parameter panel status of a context OLAP.
- Context View | The new ParametersPanelState property has three values: Default, Collapsed & Expanded. The preset Default value specifies that the parameter panel is collapsed or expired, based on the existing logic. In the Expanded and Collapsed values correspondingly, the existing logic is overridden and the params panel is displayed Expanded or Collapsed respectively. Obviously, if the parameter panel is not visible, the new property is irrelevant.

2.8 Addition properties (Property sets)

In the properties GRID of a property set (menu: [Configuration > Field customization > Additional properties > Property set](#)), the following columns are now available:

- [Related line](#): here, the user can select one of the current set's properties of the current set of the Option List or the Multi-select list type, by running a search (F4/F3).
- [List value - Related line](#): comma-separated column, where the user can identify one or more values of the property option list were selected as Related line, by running a search (F4/F3).

This extension aims to enable the implementation of properties whose existence makes sense, based on the value selected in another property. The Surveys is an example of where this is used.

Please note that all management takes place in the memory and filling in these columns does not require saving the Property Set being processed at the time.

2.9 Additionally...

- The icons in the create automation tool in the Entersoft Framework 5 series have been updated
- Multi-tab view organization and appearance customization in the select document rule lines (Rule sets) is now supported.