ENTERSOFTONE

Expert v5.13.0.0

Expert ®

New features and extensions

Contents

Brief description of contents

Promotions

- New tables
- New actions for lists

Budgets

- Forecast monitoring
- The resource as a dimension

Miscellaneous improvements

- Login screen values
- Payment terms
- Context menu - OLAP Designer
- Connection protocol - Logged-in users
- Other improvements

1. Horizontal functionality

1.1 Rebranding – ENTERSOFTONE

Upon completion of the merger of the two companies, the rebranding of ENTERSOFTONE within the application is completed. Read more about the completion of the merger of the two companies and visit our new website.

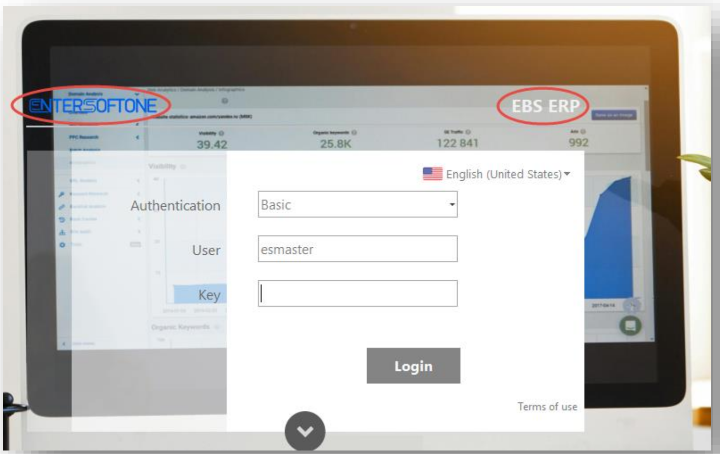
1.1.1 New product names

As part of the corporate rebranding, our products change name:

- Entersoft Business Suite becomes => EBS ERP
- The Entersoft Expert => Expert
- Entersoft CRM => EBS CRM

1.1.2 New logos

The user will now meet the new corporate and application logos on the login screen, the home screen, the main menu of the application as well as on the Wiki.



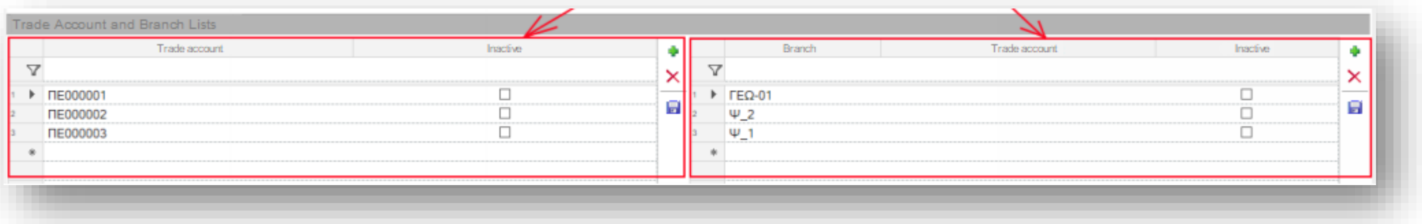
New logos on the login screen

2. Promotions

2.1 New tables

Two new tables have been added to the promotion documents:

1. “Promotional action - Trade Account List” and
2. "Promotional action - List of trade acc. branches".

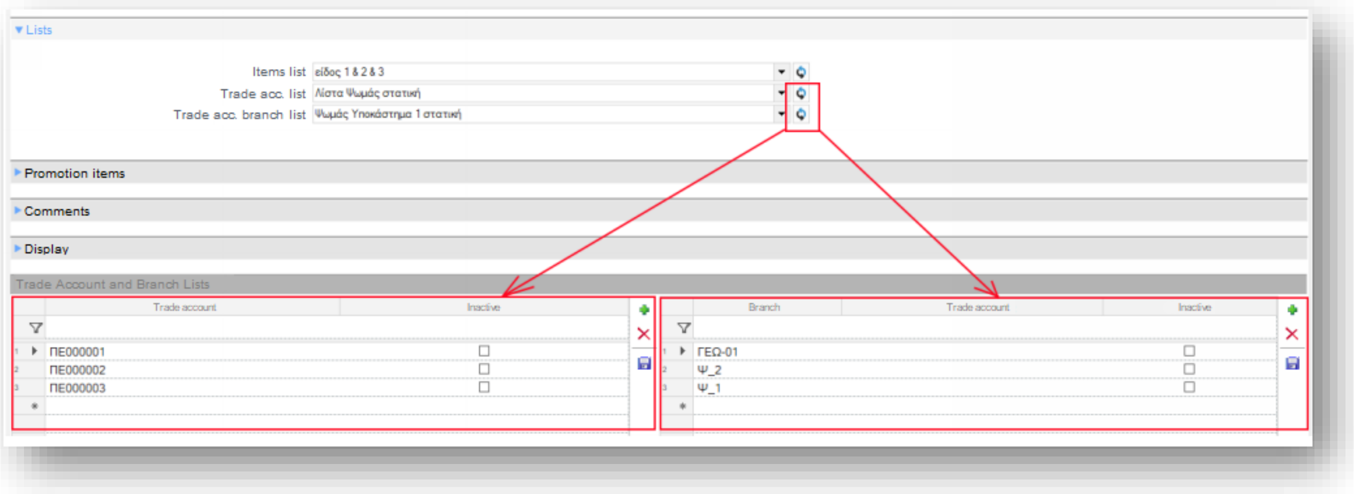


Two new tables

Keep in mind that the new table "**Promotional action - Trade Account List**" fills up in case a list of trader accounts has been declared in the Promotion and contains the trader accounts included in the list.

2.2 New actions for lists

Two actions were also added to the promotion screen, to update the new tables from the corresponding lists. These actions are the *Refresh Trade account list* and the *Refresh Branch list*.



When the user selects the promotion **"Trade acc. list"** and/or the **"Trade acc. branch list"** one, the question appears *("Do you wish to add the Trade accounts/Branches of the list??*") to update the new tables from these lists. If the user selects “YES” the detail will be populated, while with “NO” it will not be created, as is the case for the list of items.

The promotion will be valid either for any list created within the promotion at the 3 details, otherwise it will refer the entries of the list outside of the offer.

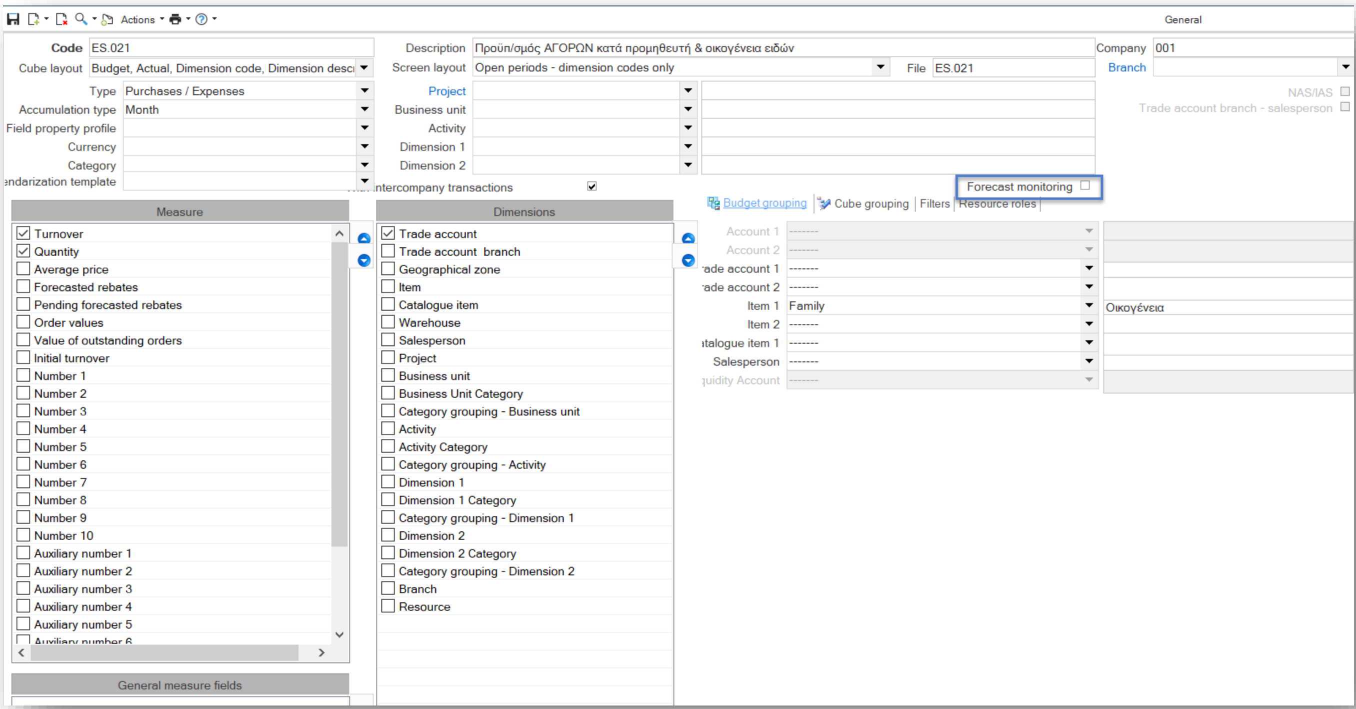
3. Budgets

3.1 Forecast monitoring

In the budgets sub-system, it is now possible to fully monitor forecasts. This concerns both adding forecasts, as well as downloading results in all of the available sheet types.

3.1.1 Sheet configuration

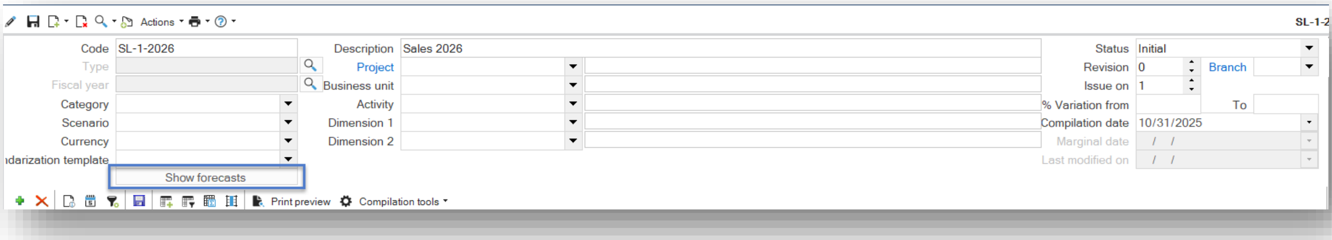
In the sheet type configuration (Menu: *Budgets / Configuration*), the "Forecast monitoring" option has been added, which the user must select for the budget sheets where they wish forecasts addition to be supported. No additional configuration is required to add forecasts in budgeting. With this option for each sheet measure, additional fields will be added to add your forecast.



In addition, in the budget sheet type the user can choose whether, by default, to also display forecast information, by selecting in field "Cube layout", the information concerning Forecasts (Forecasts, Forecast deviation, Cumulative forecasts, etc.)

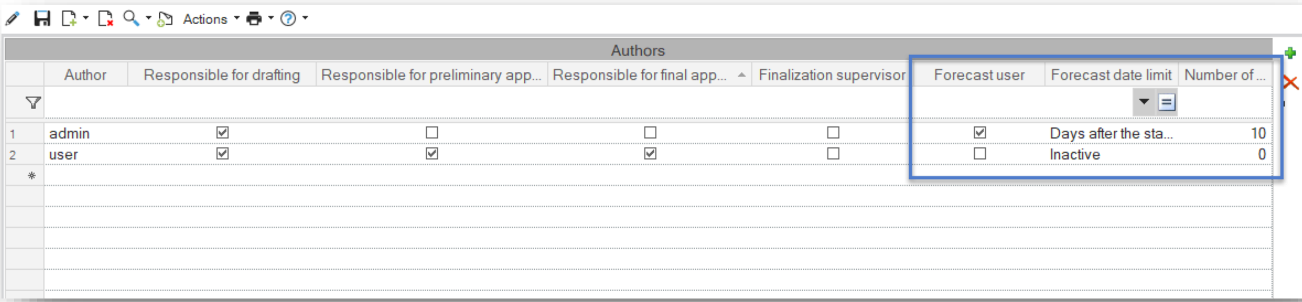
3.1.2 Budgeting

When editing a budget sheet with "Forecast monitoring" selected in the type, a new option "Show forecasts" appears, with which the user can display or hide the extra columns for forecast addition in each measure. In the following example, with the forecast display option, next to the unique measure "Turnover" and for each period, a "Turnover forecast" is displayed, where the **turnover forecast** is added:



3.1.3 Forecast user / Privileges

In the sheet type configuration, it is possible to define at a user level the users who have permission to add forecasts. The configuration is done though the new options added for this purpose, in the "User privileges" page in the sheet type and budget sheet.

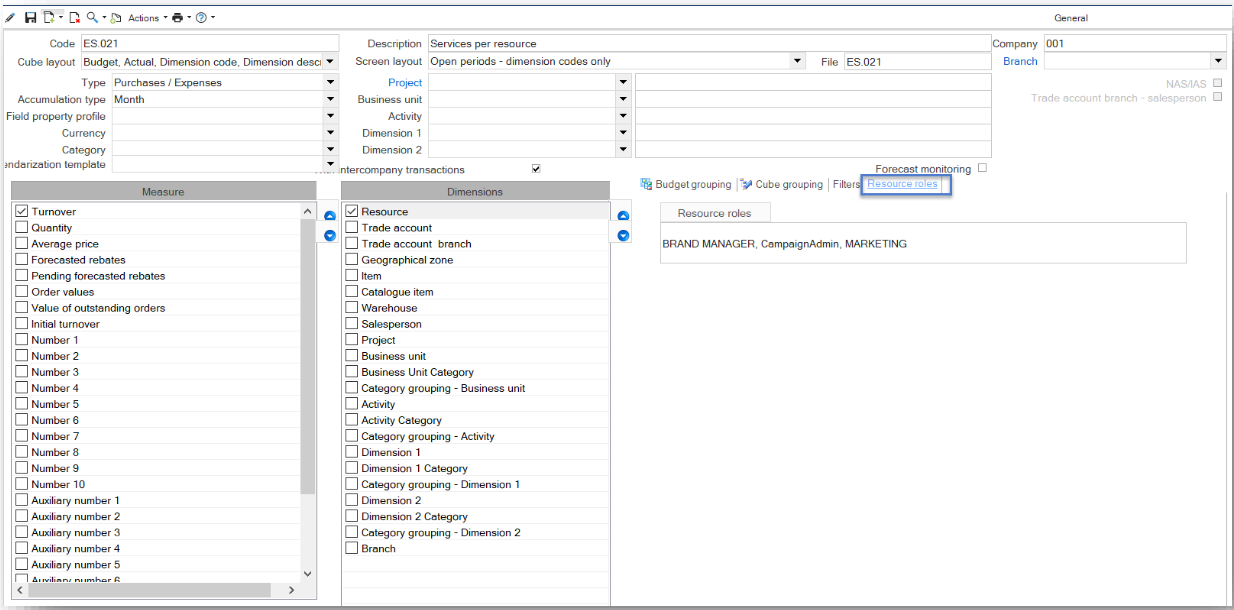


For users who have the permission to add forecasts, the user must select the following fields, in addition to the other fields related to budgeting:

- Forecast user. Select the field for the number of users to be specified as the forecast users
- Forecast date limit. This field allows the user to "lock" forecast addition when a certain period of time has elapsed since the start of the period. There are three possibilities:
  - **Inactive.** The user is allowed to update the forecasts without a date limit
  - **Before the start of the period**. Forecasts may only be added in periods with a starting date greater than the current date, i.e. the system date. This means that forecasts cannot be added in the current period and in all the previous ones.
  - **Until the end of the period**. Modifications are allowed in the current period (based on the system date) and in all subsequent periods. Adding forecasts is not allowed in periods prior to the current one.
  - **Days after the start of the period**. In this case the user must also enter the number of days in the relevant field, which will be used in the check. Modifications are allowed in the current period up to N days from its start, where N is the number of days specified in the relevant field. Adding forecasts is allowed in all subsequent periods. Adding forecasts is not allowed in periods prior to the current one, as well as in the remaining days until the end of the period, after the selected N days are removed.
- Number of Days. Enter the number of days to be used for the check, in case the forecast date limit is set to "Days after the start of the period"

3.2 The resource as a dimension

It is now possible to use the Resource as a dimension in Purchases / Expenses and sales budget sheets. For this purpose, the Resource has also been added to the available dimensions of these sheets. In addition, it is possible to use a filter in the resource search (F3) on the budget sheet. The filter concerns the resource **roles** and can be selected through the "Role" selection area, which is enabled when the resource is selected as the sheet dimension.



In addition, the resource dimension is now also supported in the review cube layout, where the results are displayed based on the selected resource. The ability to obtain the "actual" results in the cube, when the resource is selected as a dimension, is based on filling in the new resource selection field in the documents, as described in the next paragraph.

3.2.1 Adding a resource in documents

The "Resource" field has been added in all document categories in the item, service, expense and fixed asset lines. The field is available for import in the "Add/remove columns" of the aforementioned grids. The resource that will be selected in the document lines is also transferred to the movements of the aforementioned entities, so that (actual) results can be obtained in the budget sheets that use this dimension.

As described above concerning the budget, the documents provide the possibility to apply a filter for the selection of the resource on the document lines. This is done though the configuration of the document type, by selecting the roles that must be selecte din the resource, for it to be selectable during the search.

4. Miscellaneous improvements

4.1 Login screen values

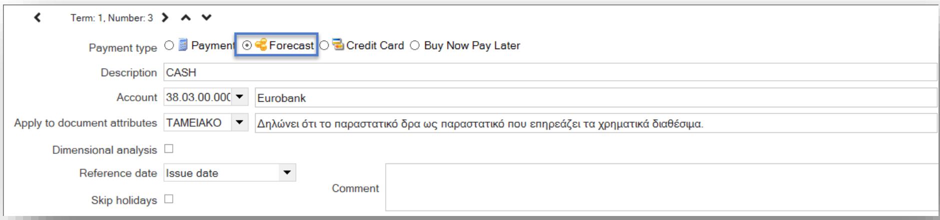
The default values on the Login screen (Server, Database, User, etc.) are now suggested based on the application folder, like its main screen location. This implementation improves the login suggestions in environments with multiple installations.

The fields suggested in relation to the last login in the same application folder are the database, user, company & branch.

4.2 Payment terms

The payment types have changed in the existing payment terms with the latest version. For example:

- In payment term CARD changed from "Credit card" to "Payment"
- In payment term CASH changed from "Payment" to "Forecast"

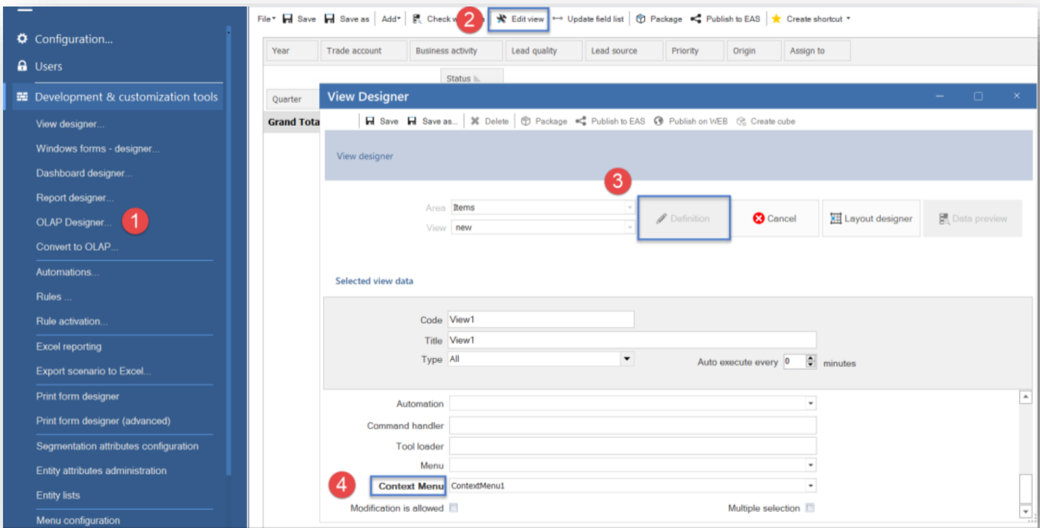


4.3 Context menu – OLAP Designer

In version 5.13.0.0, OLAP the Designer was expanded to support the following functionality:

By selecting *Development & customization tools > Menu configuration*, a menu is created and stored in the ..\CSMenus area. Its commands have the following format, e.g.: bInvoke|esmmstockitem|LOAD|{fItemGID}, where within the {..} the Datasource field must be entered.

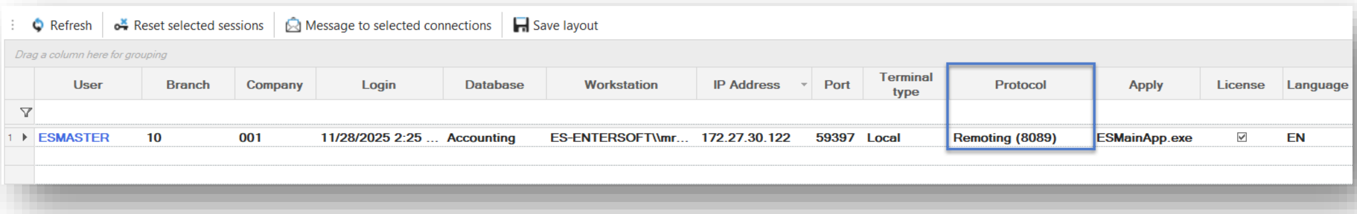
Then, through the *OLAP Designer > Edit view > Definition*, the stored menu can be selected as the "Context Menu". Right-clicking on an OLAP cell displays the context menu, where the cell value can be sent within an invoke.



4.4 Connection protocol – Logged-in users

On the connected users screen in the area (*Settings > Application server > Logged-in users*) it is now possible, by adding a new column, to view the protocol information with which a user is logged-in (e.g. .Net removing / gRPC).

For example, with .Net Remoting:



Protocol column - Logged-in users

4.5 Other improvements

- Item description: When there is an item description of with a number of characters greater than the allowed limit and the description is stored in a 1.1 document, the system automatically cuts the exceeding characters to prevent errors.
- ESCommand Monitor: New buttons were added with the "Select all" and "Deselect all" options in the ESCommand Monitor, in order to prevent excessive list navigation when the user wants to select the entire record.