

Entersoft Business Suite v5.12.0.9

A Romanian version is available here:

<https://sites.google.com/bitsoftware.ro/ebs-ro/note-de-versiuni/5-12-0-9-11-2025>

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Enhancements

1. Budgets

1.1. Forecast monitoring

In the budget 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.

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.)

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:

Dimensions		Info	January	February	March	April	May	June
Branch	Resource	Calendarization template	Turnover	Turnover forecast	Turnover	Turnover forecast	Turnover	Turnover forecast
10	ΤΕΧΝΙΚΟΣ ΑΒΑΝΑΣΙΟΥ		0.00	0.00	0.00	0.00	0.00	0.00
20	ΣΥΜΒΟΥΛΟΣ ΠΑΣΧΑΛΑΚΗΣ		0.00	0.00	0.00	0.00	0.00	0.00

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.

Authors						
	Author	Responsible for drafting	Responsible for preliminary approval	Responsible for final approval	Finalization supervisor	
1	admin	☒	☐	☐	☐	☒ Days after the period start 10
	esmaster	☒	☒	☒	☐	☐ Inactive 0

For users who have 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**.

1.2. 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.

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 through the configuration of the document type, by selecting the roles that must be assigned in the resource, for it to be selectable during the search.