

Entersoft Expert v5.11.0.0

Entersoft Expert®

New features and extensions

Contents

1.	Budgets	4
1.1	Budget sheet selection for comparison.....	4
2.	Data import	5
2.1	Data import from multiple companies	5
3.	Promotions	6
4.	Various Improvements	8
4.1	Systems integration	8
4.2	Trial balance (w/ balance analysis).....	8
4.3	Branch replenishment proposal	8
4.4	Photo collection - CRM	8
4.5	Revocation of the HASP hardware	8

Brief description of contents

Budgets

- Budget sheet selection for comparison

Data import

- Data import from multiple companies

Promotions

Various Improvements

- Systems integration
- Trial balance (w/ balance analysis)
- Branch replenishment proposal
- Photo collection - CRM
- Revocation of the HASP hardware

1. Budgets

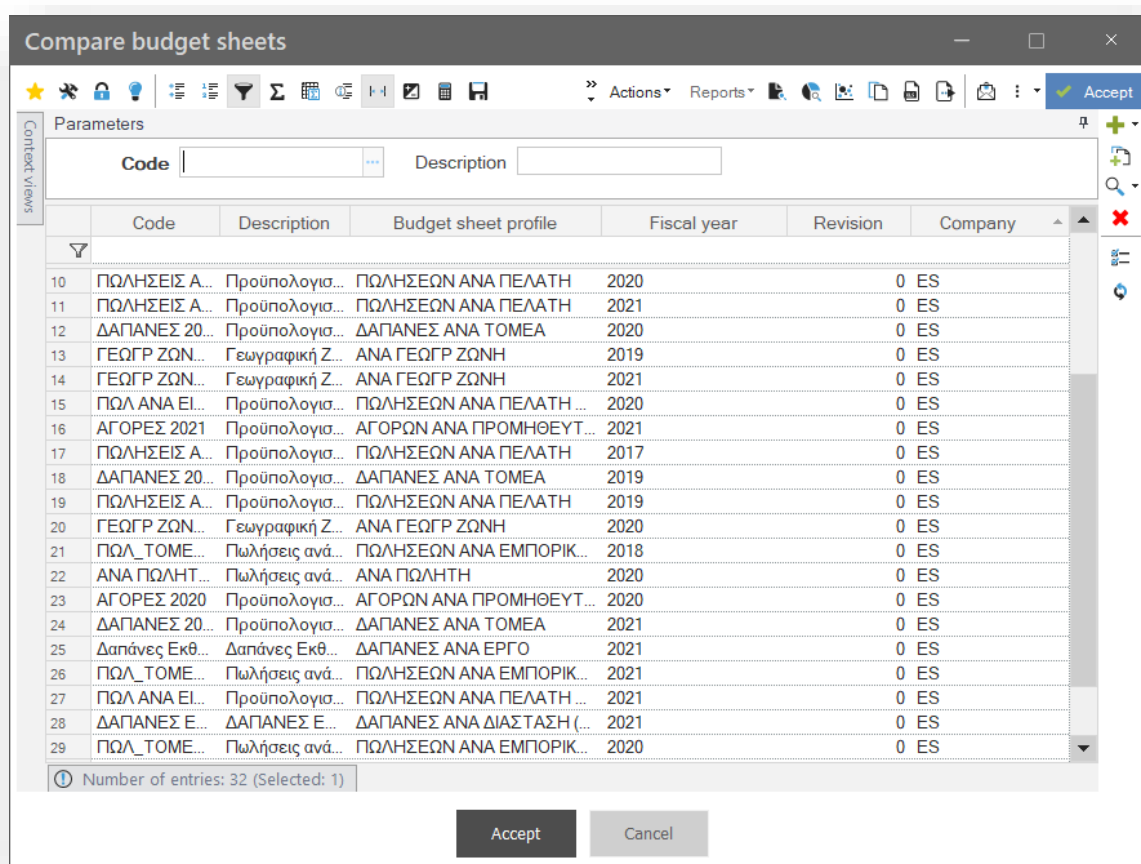
1.1 Budget sheet selection for comparison

To better serve budget needs, the previous budget comparison screen was replaced by a scroller where it is now possible to make multiple selection with check box and get multiple sheets.

Multiple selection is done as before, i.e. with the Ctrl key.

The use of the new scroller is as follows:

Go to *Budgets > Comparative Results > Search...* to the Budget Sheets. Select one or more sheets and click *Accept* in the top right of the criteria, to display the selected sheet in the scroller. Finally, click on *Accept* at the bottom of the scroller.



Compare budget sheets

Parameters

Code: [] Description: []

	Code	Description	Budget sheet profile	Fiscal year	Revision	Company
10	ΠΩΛΗΣΕΙΣ Α...	Προϋπολογισ...	ΠΩΛΗΣΕΩΝ ΑΝΑ ΠΕΛΑΤΗ	2020	0 ES	
11	ΠΩΛΗΣΕΙΣ Α...	Προϋπολογισ...	ΠΩΛΗΣΕΩΝ ΑΝΑ ΠΕΛΑΤΗ	2021	0 ES	
12	ΔΑΠΑΝΕΣ 20...	Προϋπολογισ...	ΔΑΠΑΝΕΣ ΑΝΑ ΤΟΜΕΑ	2020	0 ES	
13	ΓΕΩΓΡ ΖΩΝ...	Γεωγραφική Ζ...	ΑΝΑ ΓΕΩΓΡ ΖΩΝΗ	2019	0 ES	
14	ΓΕΩΓΡ ΖΩΝ...	Γεωγραφική Ζ...	ΑΝΑ ΓΕΩΓΡ ΖΩΝΗ	2021	0 ES	
15	ΠΩΛ ΑΝΑ ΕΙ...	Προϋπολογισ...	ΠΩΛΗΣΕΩΝ ΑΝΑ ΠΕΛΑΤΗ ...	2020	0 ES	
16	ΑΓΟΡΕΣ 2021	Προϋπολογισ...	ΑΓΟΡΩΝ ΑΝΑ ΠΡΟΜΗΘΕΥΤ...	2021	0 ES	
17	ΠΩΛΗΣΕΙΣ Α...	Προϋπολογισ...	ΠΩΛΗΣΕΩΝ ΑΝΑ ΠΕΛΑΤΗ	2017	0 ES	
18	ΔΑΠΑΝΕΣ 20...	Προϋπολογισ...	ΔΑΠΑΝΕΣ ΑΝΑ ΤΟΜΕΑ	2019	0 ES	
19	ΠΩΛΗΣΕΙΣ Α...	Προϋπολογισ...	ΠΩΛΗΣΕΩΝ ΑΝΑ ΠΕΛΑΤΗ	2019	0 ES	
20	ΓΕΩΓΡ ΖΩΝ...	Γεωγραφική Ζ...	ΑΝΑ ΓΕΩΓΡ ΖΩΝΗ	2020	0 ES	
21	ΠΩΛ_ΤΟΜΕ...	Πωλήσεις ανά...	ΠΩΛΗΣΕΩΝ ΑΝΑ ΕΜΠΟΡΙΚ...	2018	0 ES	
22	ΑΝΑ ΠΩΛΗΤ...	Πωλήσεις ανά...	ΑΝΑ ΠΩΛΗΤΗ	2020	0 ES	
23	ΑΓΟΡΕΣ 2020	Προϋπολογισ...	ΑΓΟΡΩΝ ΑΝΑ ΠΡΟΜΗΘΕΥΤ...	2020	0 ES	
24	ΔΑΠΑΝΕΣ 20...	Προϋπολογισ...	ΔΑΠΑΝΕΣ ΑΝΑ ΤΟΜΕΑ	2021	0 ES	
25	Δαπάνες Εκθ...	Δαπάνες Εκθ...	ΔΑΠΑΝΕΣ ΑΝΑ ΕΡΓΟ	2021	0 ES	
26	ΠΩΛ_ΤΟΜΕ...	Πωλήσεις ανά...	ΠΩΛΗΣΕΩΝ ΑΝΑ ΕΜΠΟΡΙΚ...	2021	0 ES	
27	ΠΩΛ ΑΝΑ ΕΙ...	Προϋπολογισ...	ΠΩΛΗΣΕΩΝ ΑΝΑ ΠΕΛΑΤΗ ...	2021	0 ES	
28	ΔΑΠΑΝΕΣ Ε...	ΔΑΠΑΝΕΣ Ε...	ΔΑΠΑΝΕΣ ΑΝΑ ΔΙΑΣΤΑΣΗ (...)	2021	0 ES	
29	ΠΩΛ_ΤΟΜΕ...	Πωλήσεις ανά...	ΠΩΛΗΣΕΩΝ ΑΝΑ ΕΜΠΟΡΙΚ...	2020	0 ES	

Number of entries: 32 (Selected: 1)

Accept Cancel

2. Data import

2.1 Data import from multiple companies

In the *Configuration > Import/export data > Import data (advanced)*..., the EMI was expanded to allow the user to import data from multiple companies, i.e. the system to respect the fCompanyCode column where the data is stored and to open/manage the sessions internally.

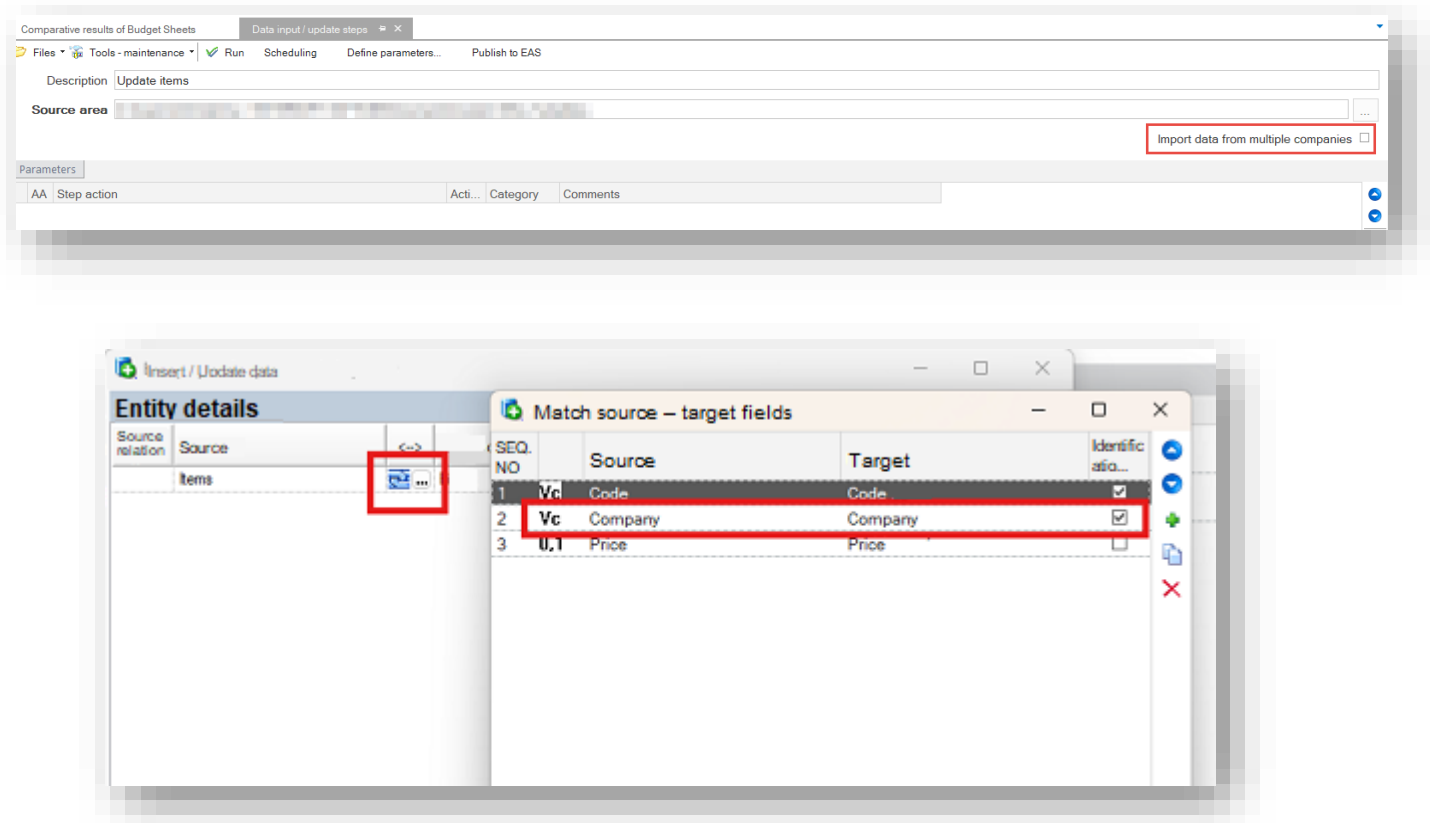
This need arises as we need, in a DI scenario, to support data transfer from headquarters to a branch for 9 companies, where the DI is supported via:

- 9 databases (not acceptable)
- 9 data types, 1 for each company (not acceptable)

The extension adds the "Import data from multiple companies" option to the EMI. In field mapping when an entity is imported, the entity's Company field must be assigned to an import source field. This company will then be used when adding the entry. Either the current branch will be used as branch (if it belongs to the other companies for which data is imported), or alternatively a branch to which the user has access.

The process is carried out as usual, except that we first activate the option "Import data from multiple companies" and then click "Run".

For example:



3. Promotions

The Promotions is an alternative subsystem for applying rate or value discounts to documents. Their special feature is that they are applied directly to the document, depending on the conditions that apply and always with user intervention.

From this version on, a significant extension applies to the offers and it concerns the possibility of adding a **gift** to the document.

For this reason, in the promotion configuration screen is now added:

- The type of promotion with values:
 - Item discounts and
 - Free product
- The item-gift and its quantity
- The gift quantity in the "Reward data" detail

Each time such an offer applies to a document, that is to say, it covers its target - and if the user selects it through the special form (see details on that in the ReadMe of version 5.7.0.0 <https://wiki.entersoft.eu/wiki/ERP-EL02-5.7.0.0>), the free product is added to the specified quantity.

At the same time, "Reward data" defines the additional possibility of differentiating the quantity of the free product according to different values of the target field. For example, if the target of a promotion concerns the quantity of specific items and it's achieved, then up to quantity X 1 piece of the free product is given, while if the target extends up to quantity Y, 2 pieces of the free product are given and so on.

Here are some points that apply with this new feature:

- In a new promotion entry, the default value in the Type field is: Item discounts.
- In case the promotion type is Item discounts, the fields of the item-gift and quantity are disabled, while respectively, if the promotion type is Free product, the fields related to discounts are disabled (reward, discount % and discount type).
- Like discounts, the free product is awarded if the target of the offer applies. The promotion target consists of a target field, a document line value field such as line quantity, value, etc. and a target numeric field, which must be achieved to give the reward.
- In the case of a gift item, the "reward field" is by default "Discount1 %" and in the "Reward" field the default value is 100%
- The free product after application and acceptance of the promotion by the user is transferred to the line of the document with 100% discount 1
- When the target is set per line, then each item line that reaches its target receives the gift.

Additional changes to the Promotions subsystem

- If a document has been awarded a discount on a item through the promotions application subsystem, then in the table with the discount analysis, the field "Update source type" received the new Promotion value, while until now it received the Invoicing policy price.
- The Promotion application form now displays two different indications for progress regarding the offer application. These are:
 - Promotion evaluation (lines)

- Promotion evaluation (header)
- When initializing a document in which the declared display form is a form with promotions, nothing will appear in the list of "Available promotions" if no customer selection has been made. Promotions will appear once the customer is entered in the header of the document and they're the ones to which the selected customer belongs, as well as those that do not have a list of trader accounts

4. Various Improvements

4.1 Systems integration

In *Configuration & Tools > Systems Integration*, the 11 different "Connection Settings" options for all courier services have now been reduced to one, titled "Courier - Connection Settings" and are now accessible via a sub-menu.

4.2 Trial balance (w/ balance analysis)

In order to better serve the accounting needs, we created the "Trial Balance (w/ balance analysis)" bit, during the export of which the relevant columns with the balance are displayed: 1. Debit balance - Balance, 2. Credit balance - Balance, 3. Final - Balance. The bit is located in the same folder as the Trial Balance (Accounting > Accounting Reports) and it's accessible from the drop-down menu in the bit title. For the new Bit, only one report was created, with the same columns as the Bit. This change was made in order to meet the need to monitor various different traders with the same TRN.

4.3 Branch replenishment proposal

The "Branch Replenishment Proposal" process (from the *Inventory > Replenishment process*) is a fairly complicated and time-consuming process. During the execution of the process, there was no indication of the process progress and the estimated time of completion, which caused confusion among users.

For this reason, we added:

- a message in the start of the process warning the user of its time-consuming nature and
- an informative bar showing its progress, as well as special button where the user can cancel it from

4.4 Photo collection - CRM

CRM | In the *Photo collection* action (*Marketing > Merchandise > Reports > Photos - gallery*) an improvement was made, so that if a photo does not exist, then the process continues and the final zip file is generated. The process produced an error and would not complete, if there was an http folder in company parameter "Photos from mobiles - Save in folder".

4.5 Revocation of the HASP hardware

As of version 5.11.0.0, the use of the HASP hardware (usb dongle) is revoked and the use of eHASP remains. Instructions on how to use eHASP are given by the Support department.