Entersoft Expert v5.2.0.0

Entersoft Expert®

New features and extensions

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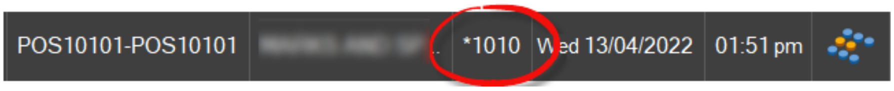
Next up, the new functionalities & improvements catalog is broken down per category, along with use instructions & examples.

1. Invoicing and Financial administration

1.1 Retail - Online/ Offline

In retail systems (ESRetail) that use an **online and offline server**, switching between offline and online mode has been improved. When the station is in offline mode in the status bar, a "*" appears in front of the logged-in branch indication, to indicate the Offline mode.



By clicking on the branch information, a check will be performed on the connection to the online server. If the communication is successful, a message will appear allowing the user to select whether they wish to toggle to online mode. Switching to the Online server initiates a new transaction to be registered online.

Terminal configuration

The above feature requires the ESClientConnect.xml file, where the Online server needs to be specified, to be appropriately configured.

```
<ESClientHostInfo>
            <AppServerID>LOCAL ONLINE</AppServerID>
            <AppServerDescr>LOCAL ONLINE</AppServerDescr>
            <Host>127.0.0.1</Host>
            <PortNumber>8091</PortNumber>
            <Offline>LOCAL OFFLINE</Offline>
</ESClientHostInfo>
<ESClientHostInfo>
            <AppServerID>LOCAL OFFLINE</AppServerID>
            <AppServerDescr>LOCAL OFFLINE</AppServerDescr>
            <Host>127.0.0.1</Host>
            <PortNumber>8093</PortNumber>
            <Online>LOCAL ONLINE</Online>
</ESClientHostInfo>
```

1.2 Customers

The functionality of mass updating of customer details was given by the ANAF service. Added the Retrieving Person Registration Data automation to the customer list. By executing it, the selected entries are updated with the data declared in the service.

1.3 Using multiple Courier accounts

In a previous version, it became possible to use **multiple accounts for the same courier provider**, different account per branch. This release better utilizes this feature and now allows the user to **select the account** to be used when creating the shipment, or to perform another function related to the shipment.

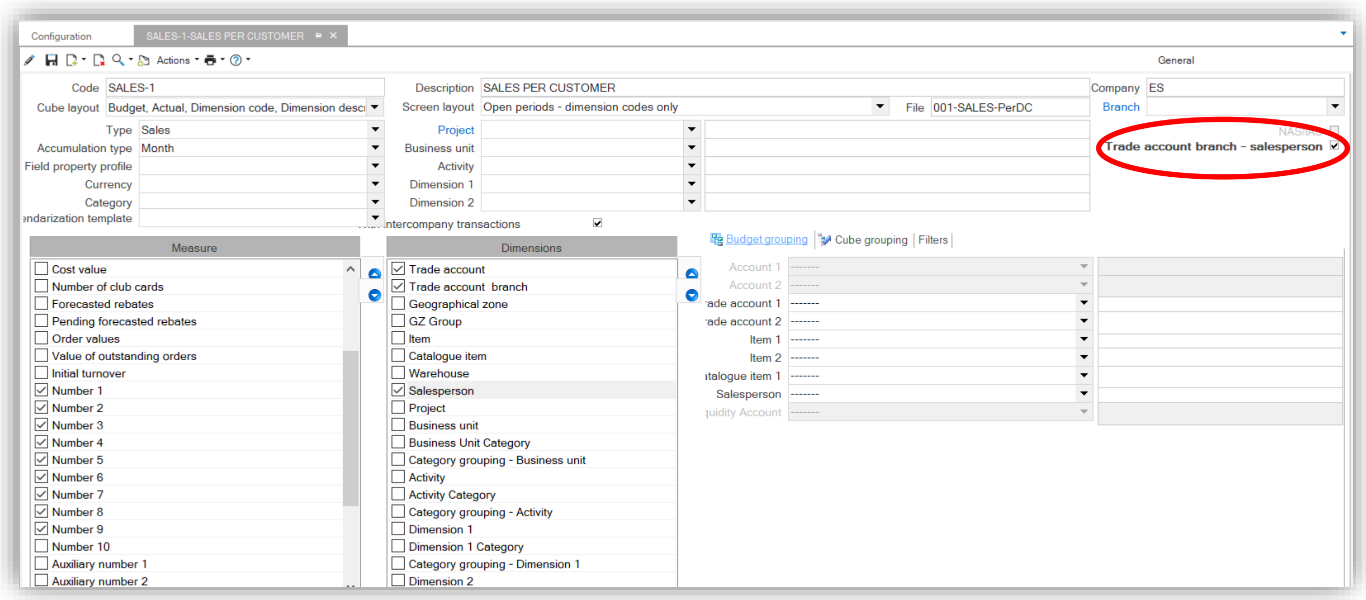
The account can be selected, if more than one account has been specified for the selected provider, using the "**Account**" field, added to all available actions of the shipment.

1.4 Budgeting

- In sales budgeting, wherever the "**Salesperson**" has been chosen as a dimension, it can now be automatically filled in, as long as the relevant salesperson is associated with a customer branch. Therefore, if, apart from the salesperson and Trade account, one of dimensions **Trade account branch** and/or **Business unit** have been selected as a dimension, then once the Trade account and/or the Business unit are entered, the salesperson is then automatically filled in with the one specified either in the trade account branch or the selected business unit, respectively.

  The salesperson auto-suggestion can be enabled by selecting the new option in the budget sheet type

  Salesperson of trade account branch



- In **multi-company devices**, on the **Comparative Results** report the user can now display results from all companies simultaneously, as long as the following conditions are met:
  - They belong to the same sheet type
  - The companies can be found in the same database
  - Furthermore, it is no longer necessary for all companies to have the same base currency, as long as the budget sheets have been compiled using a single currency

- In the "Create budget forecasts" process (menu: *Budgets/Update Cash Flow)*, in the sheet selection area for generating cash flow forecasts, the information for the Scenario and its Description have been also added

1.5 Item dimensions

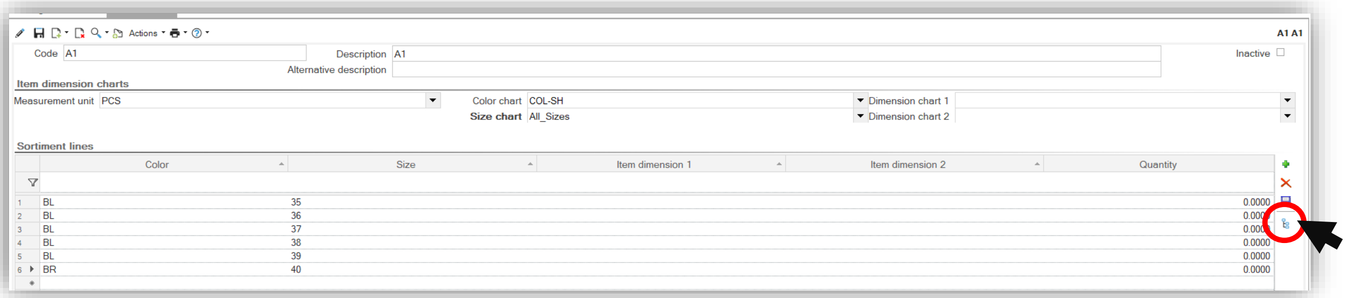
- In documents, when using **the F12 grid** to enter quantities, in items that only monitor color as a dimension, the grid can now be displayed in a specified sorted order, in order to make saving and monitoring quantities easier

  Sorting can now be done using the new company parameter:

Items/Barcodes: sort by quantity on grid (F12) only when the color dimension is displayed

  When enabled, and if the item only monitors the "Color" dimension, the grid will be **"descending"** based on quantity.

- On the **Sortiment** management screen (menu: *Configuration/ Stock Items/ Item dimensions*) it's now possible to auto-fill the sortiment contents, with all dimension combinations. The Auto Analysis action is available on the grid toolbar



  In previously saved sortiments, using the action "**fills in**" the sortiment with all dimensions combinations that have not been saved.

- In the item management screen, at the **measurement unit** grid, in the available toolbar actions, a new Display sortiment Action has been added. You can select it to edit the contents of a measurement unit that constitutes a sortiment.

- When **configuring BOMs** of products that monitor item dimensions and consume materials that also monitor dimensions, the dimension of the material consumed is often the same as the dimension with which the product is produced. E.g. the red t-shirt consumes red string, red fabric and red buttons. The configuration of such a BOM requires the creation of Item dimension chart with **1-1 dimension matchings** of the product with each material. This is still necessary, of course, but now these Item dimension charts can be created automatically upon saving a BOM, where appropriate matchings are created for the product and the materials.

  You can use the new company parameters in the "Inventory Items":

Items-BOMs - Auto 1-1 matching of material colors with product
Items-BOMs - Auto 1-1 matching of material sizes with product
Items-BOMs - Auto 1-1 matching of material dimension 1 with product
Items-BOMs - Auto 1-1 matching of material dimension 2 with product

  to enable this feature for any dimensions you wish. When saving the technical specification, and as long as:

  - ✔ The product monitors dimensions
  - ✔ There are materials that monitor dimensions
  - ✔ There are materials that monitor a common dimension with the product, and no Item dimension chart matching has occurred for this dimension.

If such materials are present, a new item dimension chart matching is created with a **From** and **To** item dimension chart of the product.

The newly-created code for the matching has the following format:

{BOM code}+{-}+"COLOR"

Where, accordingly, if it concerns size , the last part changes to SIZE, DIM1, etc.

- On **Match dimension chart** screen (menu: *Configuration/ Stock items/ Item dimensions/ Item Dimension Chart - Combinations)* a new action has been added to the grid toolbar **Update matchings**. This action automatically adds any missing "**from**" dimensions to the matching. Furthermore, if the matching has been declared as 1-1, then it automatically fills in the "**to**" dimensions.

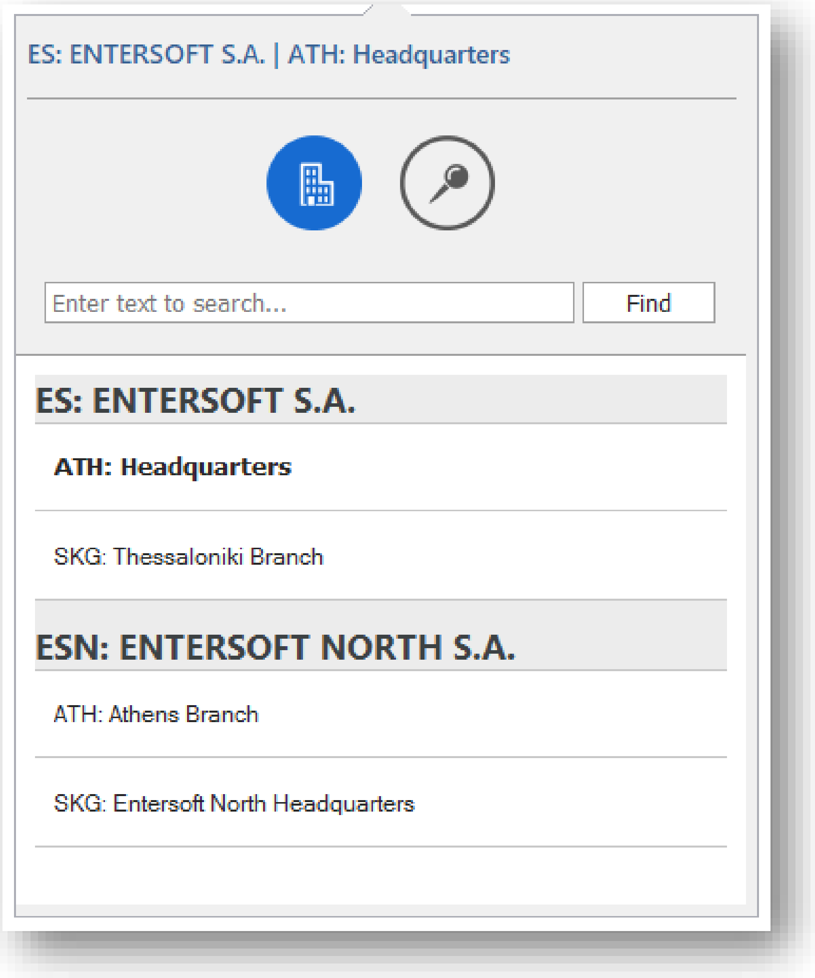
2. Horizontal functionality

2.1 Login screen

In this version, the default login image is super summery!

2.2 Toggle company/branch screen

The screen for quick switching between companies was re-designed with the main goal of increasing its functionality, make it respond more quickly and easier to use. So, from this version on, it’s also possible to select another branch, in addition to switching company. This is very useful for facilities with a large number of branches. It's also easier to make a selection, with all branches per company appearing in an updated panel, and faster, as toggle times have improved considerably.



The new screen consists of the following parts:

- the current login company & branch
- selection between 2 panels
- search
- and available companies and branches

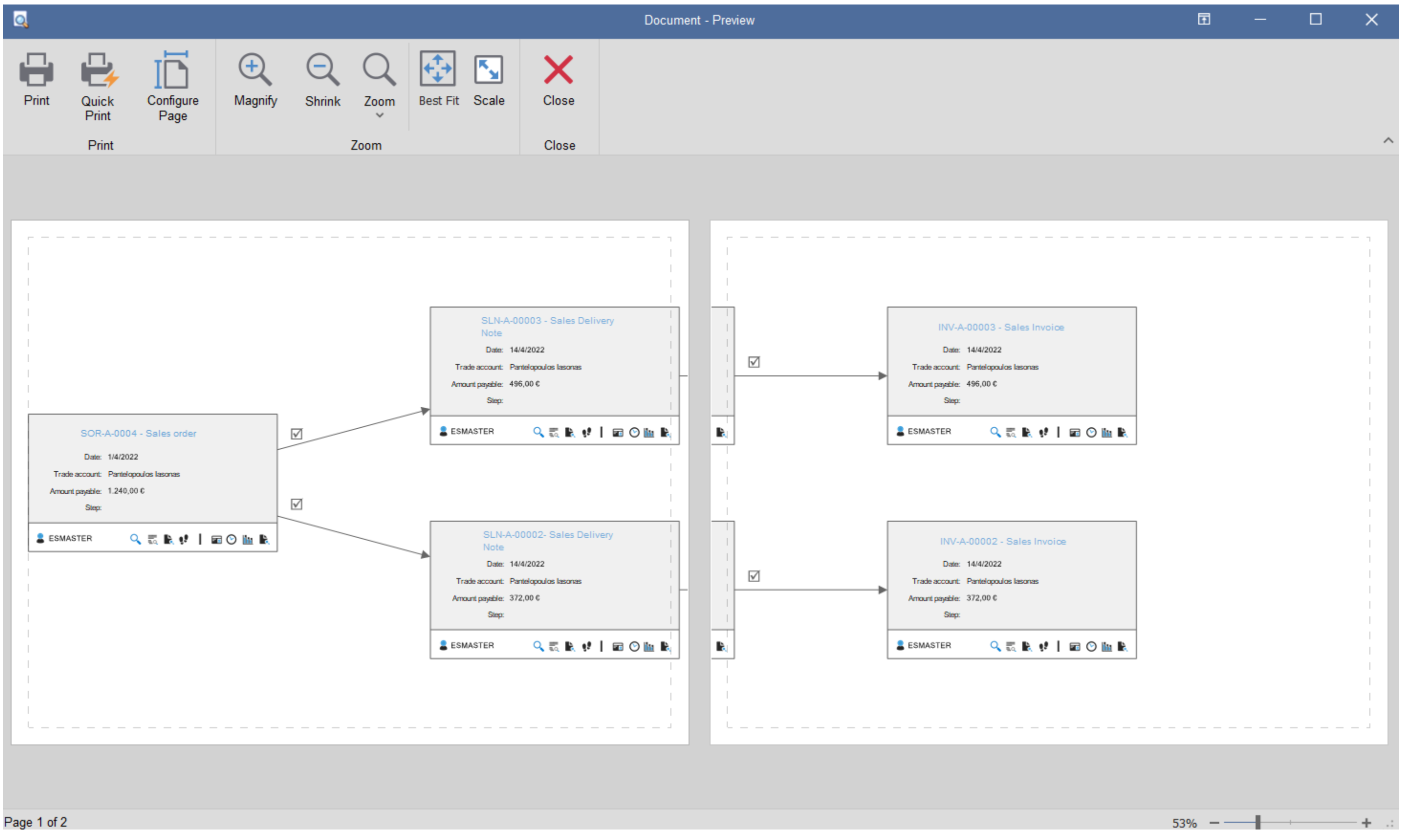
The 1st panel shows the companies and branches that the user has access to. Branches are grouped with the company to which they belong. Initially, at the top, the login company with the login branch appears. Then, the rest are sorted in alphabetical order.

The login branch appears in bold letters and cannot be selected, only pinned and moved to favorites (2^{nd} panel).

The 2nd panel displays the user preferences consisting of the branches selected and pinned on the 1st panel. They are displayed in the order they were selected (pin). When such preferences exist, the toggle branch screen focuses on the 2nd panel. There are also the options of sorting alphabetically and removing them from the preference list.
The selected branches are stored per user and product.

2.3 Transitions

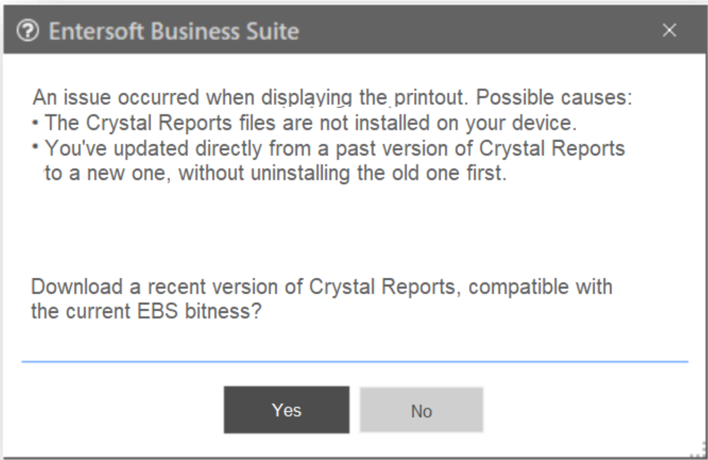
The ability to preview the "Show transitions" print (available in series 4) has also been added to Series 5. This allows the user to view and print their Transitions log in a document, but before doing so they can view the print preview and make the necessary changes to its appearance.



2.4 SAP Crystal reports engine instead of Client addon msi

Ended the use of ESClientAddOn64bit.msi that had to be installed on every terminal to successfully print via ERP (Crystal reports). The SAP Crystal reports runtime engine for .NET framework 32bit or 64bit will be used from this version on, depending on the EBS bitness.

A new EBS terminal, upon the first attempt to print a Crystal Report from within the application, displays a relevant **message**, prompting the user to make the appropriate installation.



In old installations, where ESClientAddOn64bit.msi already exists, Crystal reports will continue to function through ERP as usual, but for compatibility reasons it is recommended that it is uninstalled from the "Uninstall programs" of Windows and that the above process is followed.

At the same time, if there is a Crystal reports version in a different bitness to EBS, a message appears so that users can restart the application in another bitness without having to install additional software.

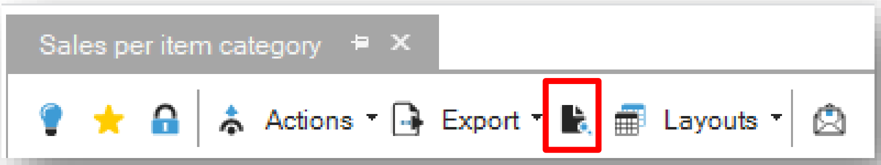
2.5 Report Designer Advanced | Improvements

Changes were made to the Advanced forms Designer, to improve its functionality. In detail:

1. Added multiple field selection option when inserting fields from the Insert field icon. This can be done by pressing control + click on the fields.
2. Resolved an issue upon which inserting fields from the Insert field icon the fields caused them to not appear on the form.
3. Resolved an issue upon which inserting a field would cause a large gap to appear on the form, up to the point where the field would be automatically placed.
4. Resolved an issue upon which selecting the Company Logo from the designer did not display the photo set to the Login Company person.

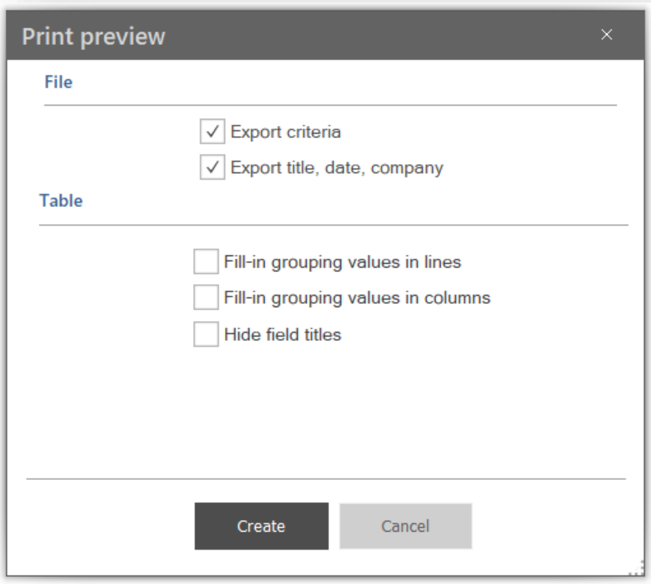
2.6 OLAP | Print Preview

Added the Print Preview feature to OLAP.



Pressing the icon allows the user to identify some elements of its appearance, such as:

- The criteria
- Date/Company details
- Fill in grouping values in rows (or columns)
- Hide the field heading



Print Preview has a relevant user privilege that can be set for each cube.

2.7 Context image control

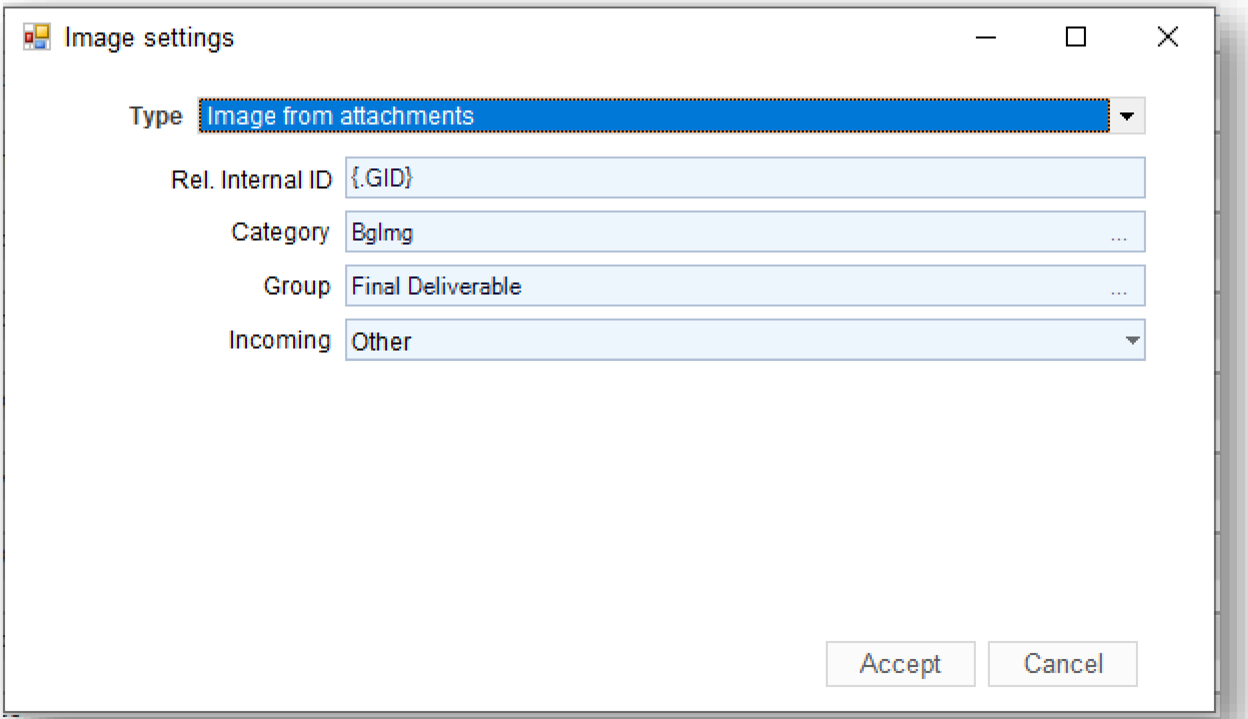
The context image control has been expanded. It is placed in the application's forms and used in case the user wants to display an image. Up until now, the alternative image sources belonged among the following options:

- image repository
- fIle
- blob data
- internet

In this release, it is possible for the photo to come from the entity's **Attachments** . Thus, in the control settings, the option "Picture from attachments" has been added to the Type field. The image file in the Attachments can either be saved in the database or on a designated path.

In the Relevant Internal ID field (obligatory), fill in the DataSet column path that will take the value for the fGID. For example, for Catalogue Items, fill in {ESMMCatalogueItem.GID} (including the brackets), or the Master row GID by typing it in this format {.GID} (including the brackets).

In addition, to further refine the selection of an attachment (in case there are multiple) define a Category, Group of the attachment and type (Incoming, Outgoing, Other). If multiple photos are found in the Attachments, the first one that meets the conditions is displayed.



2.8 Select upon opening attachment

Photos and pdf files stored in the Attachments open for viewing with the internal viewers of ERP. From this version on, the ability to select view via the default applications specified on the user's computer has been added.

To do this, it is sufficient that the ESConfig\ESExperimentalFeatures.xml file is transferred to CSConfig and set value External to the new properties PDF-viewer and Image-viewer. These properties determine whether the files in the Attachments are opened by our internal Viewers or by the default application selected on the computer.

2.9 Collaboration Chat

OpenFire Update

For the proper function of Collaboration Chat , it is required to upgrade OpenFire Server to version 4.7.1.

For installations still in an earlier version, the following actions should be performed in detail:

- Open a console or powershell in the same directory where docker-purpose.yml is located
- Run the docker-compose down command
- Open the docker-compose.yml file and the image line: entersoftsa/esopenfire:latest should be replaced with image: Entersoftsa/esopenfire:4.7 so, replace the latest with 4.7
- Open a console or powershell in the same directory where docker-purpose.yml is located, or in the same directory opened during Step 1, run the docker-compose up -d command

Keep chat log

From this version on, the user chat messages are retrieved and synchronized by the server, so that if the user changes terminal, the chats are not lost.

At the same time, a number of changes/optimizations were made to the user's local cache, such as loading messages progressively, so that memory is not overburdened.

A prerequisite for the smooth operation of the chat history is the correct configuration of the Archiving in the OpenFire Server settings. In Server > Archiving > Archiving Settings, the following must be checked: Archive one-to-one chats, Archive group chats, Archive stanzas for group chats. Once the above options are enabled, the server begins to keep a log of the user chats that clients are able to read.

Delete chat

It is now possible to delete a chat, by right-clicking on the active conversations. A confirmation dialog appears before deletion. It concerns data deletion from the local user login cache, not the data that is permanently stored on the server.

Additionally, if there is an active chat with a user not found on OpenFire, they appear as a deleted user, and of course the chat can now be permanently deleted.

2.10 Browser on ERP / Webview2

From this version on, and given the revocation of Internet Explorer 11, the new WebView2 browser will be used in all areas of the application where a browser is called (trade account websites, hyperlink in task texts, maps, etc). More specifically, the old IE6/IE11-based web browser control (trident engine) was replaced by the new Edge-based

WebView2 (chromium engine), supporting all the latest standards (html 5, css, javascript, etc). Device updates are supported directly from the Windows Update operating system.

A prerequisite for enabling WebView2 through EBS is that WebView2 exists in the operating system. Upon login to EBS, a check is run and the user is prompted to install WebView2 in the reminders area (Horizontal actions toolbar > Show reminders). After the installation, the application needs to be restarted.

Breakdown of some of the changes/improvements:

- Google and Bing maps support was rewritten based on the latest APIs v3.49 and V8 respectively.
- Fixed map-route layout issues.
- Fixed the toggle buttons from Google to Bing and vice versa, in order to follow the maps style and make them more visible.
- Balloons now follow the new styles.
- HighDpi mode activated in Bing maps.
- Fixed an issue during which Bing maps would not display marker icons correctly
- Bing map balloons now have a "close" button like in google maps
- Fixed the placing of balloons in Bing maps.
- Fixed focus on a specific marker or region in Bing maps
- Bing maps now come in the language and region of the app