

Entersoft Expert v5.0.4.0

Entersoft Business Suite®

New features and functionality

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Outline

Commercial & Financial

- Several improvements

CRM

- Entersoft surveys

Horizontal functionality

- The Hotfix installation tool is also available through the ESConfig.EXE
- New built-in function in automations and rules for calculating sentiment score using text sentiment analysis service.
- Design & development of views (Scroller designer) | SQL additions and expressions editor upgrade

New functionalities & functionalities are thoroughly presented along with the necessary user guidelines and examples.

1. Entersoft EPR

1.1 Fiscal year splitting

In the process of splitting fiscal years, the feature for **omitting backup** has been added. Hence, at the beginning of the process a message is shown, asking about if a Database backup will be taken. The above feature is useful in installations running on Azure cloud where backup is not supported by the application.

1.2 Document transitions

The customization feature for **collapsing analysis lines** with filled out lot has been added to the execution of transitions. This way you can choose whether the analysis lines with filled out lot will be grouped and collapsed below the same item line.

The regulation of this behavior is done through the company parameter

Items/Barcodes: Analysis line with filled out lot grouping during transition

in Document management parameter area. The default parameter value is NO, so that there is no change in the behavior of the application.

1.3 Item relations / Related items

In the configuration of the related items, the use of a **different measurement unit** for the related item was supported, in contrast to the current mandatory use of the measurement unit of the initial item in the related item.

The **Related item MU** has been added to the Inventory and Catalog item forms in the “Item relations” tab, where you can select the measurement unit that will be used in the related item line.

Identity Organization Movement Dimensions Item relations User defined fields Properties Attachments							
	Relation type	To item	From item MU	Quantitative relation	related item MU	Pricing relation	Comment
▶	Contains	Bottle	Box	12	Pieces		

The picture above, shows a typical example of using the new feature, where the content-packaging relation is 1 to 12, i.e. 1 box of beers contains 12 bottles. In the aforementioned example, when an item line is inserted to the document for the beer with quantity 1 box, then automatically a line of bailment good with 12 bottles will be inserted.

1.4 Import data

The **Import data from external sources** process has been improved. Hereafter, all the related processes of importing data, emi, bank transactions, etc. follow the configuration that has been defined in the company parameter (General / System): **Data migration - default directory for temporary files**.

It is reminded that the parameter need to be filled out only if you wish to use another directory for saving temporary files, except for the **ESNoSync\ImportTempPath** which is automatically used by the system when the parameter has not been defined.

1.5 Stock valuation

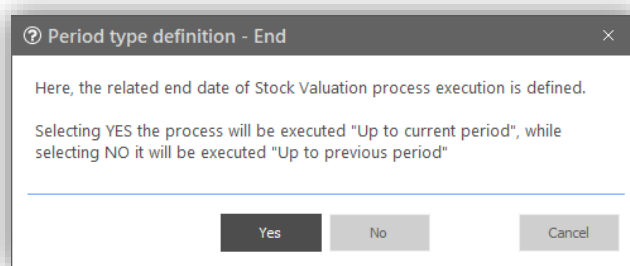
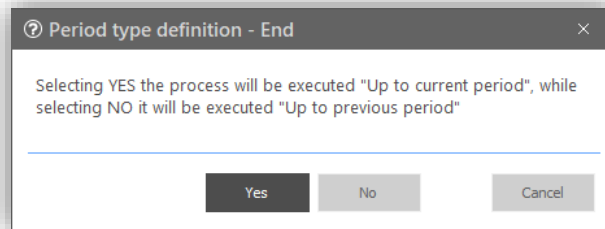
The scheduling of valuation process has been improved by adding new features. Hereafter, it is possible to schedule the execution of the process once, as during scheduling and creation of the scheduled task you can set to "Up to execution period" the **previous or current period at the time of execution**. Until now, the scheduling for execution was supported with a fixed "Up to period", the one that had been chosen at the time of the creation of the scheduled task.

Hence, during the scheduling, the following messages are displayed:

If you select YES in the next message then the created task will always be executed for the "Up to period" you have selected in the execution process window.

If you select NO, the following message will be displayed:

If you wish the process to be executed each time "Up to current period" corresponding to the date of execution of the task, select YES. By selecting NO the "Up to period" will be calculated each time as the previous period of the execution date.



1.6 Trial Balances / Registers

The feature of restricting access to the criterion of selecting **Branch and Warehouse** has been added to BIT, trial balance and register reports. The configuration can be done through the new security right: **Show results from all sites** (*All protected options / actions / financial management*).

Users who are not granted the above right, can only execute the reports for the branch which they are connected and can select Warehouses to display among the warehouses of the branch they are connected.

1.7 Copy to other Companies

The "Copy to other Companies" action is also available for **Dimension combinations profile** entity (Menu: *Tools and configuration/ Customization/ Inventory items/ Measurement units/ Packages*).

1.8 Entersoft Retail

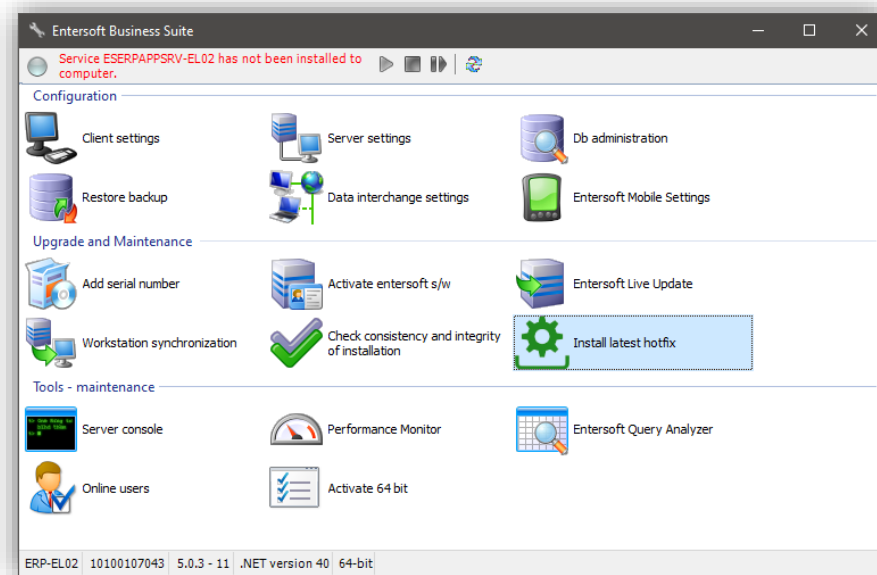
The dialog box for inserting weight is hereafter displayed in ESRetail **forweighed items**, if the barcode scanned does not contain weighing information.

The configuration is done at the workstation through the AutoDisplayQuantities_CheckWeight parameter in ES00RetailParams.xml and requires the appropriate configuration for displaying the weighing quantity on the entry dialog box.

2. Horizontal functionality

2.1 Hotfix installation

Overall, to ESConfig.exe, which provides access to individual management tools of Entersoft Application Server, Clients and Database has been updated. Additionally, the hotfix installation tool is now available here as well, in the “Upgrade & Maintenance” section, as long as the selected desktop role is (and) the Application server.



2.2 New sentiment analysis built-in function

A new built-in function has been added to the automations and rules (Business rules): [Calculate text sentiment score](#) (CalculateSentimentScoreFunction).

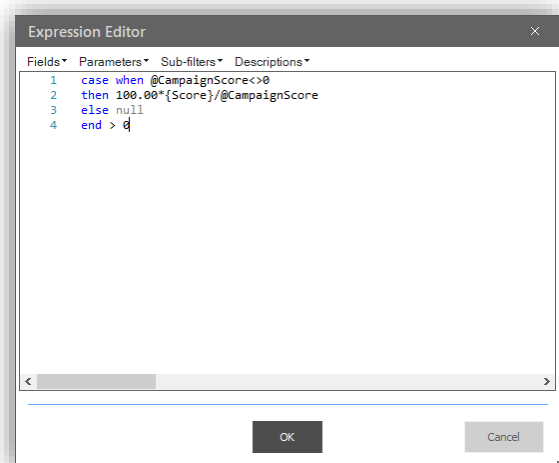
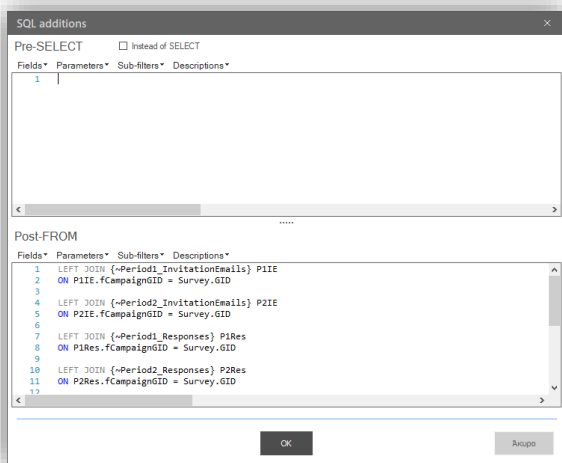
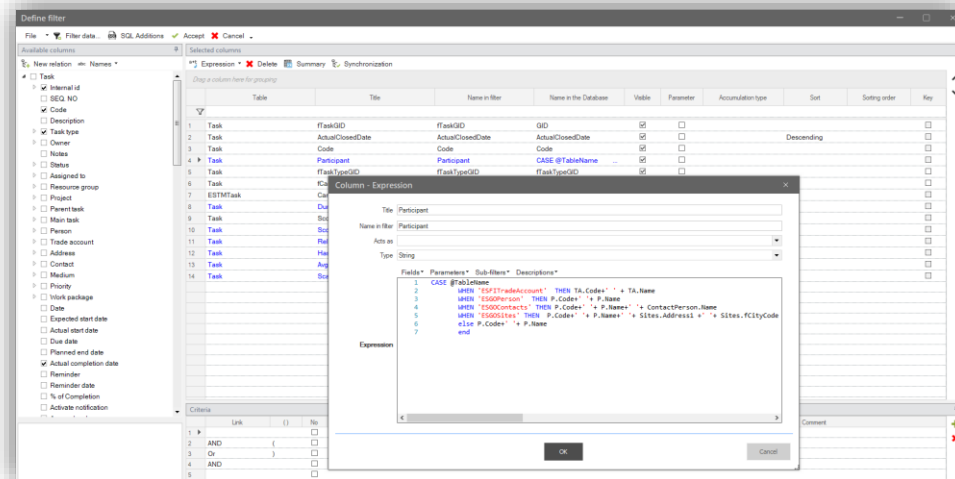
The function takes as parameter a text or an alphanumeric field and returns the calculated score, so it is saved in a numeric field. This gives the feature of automated utilization of the specific [cognitive tool](#) and its results.

For instance, by calculating the sentiment analysis when inserting a complaint and saving the score in a decimal field, a related report with statistics (such as average, variance, etc.) can be generated on the calculated scores by complaint category, in date range.

2.3 View (Scroller) design & development

In the scroller designer, in the Select or the Where (Expression Editor), as well as the SQL Additions, acquired the same editor as the query in the database. Also, the zoom feature is activated with the combination <ctrl> + mouse wheel. This greatly facilitates their writing and reading.

For example:



2.4 New session parameter

The following parameter is now available for use in queries in the database (for scroller design, dashboards, etc.),

New parameter ##(ESFICALYEARBASECURRENCYSYMBOL)



The parameter returns the currency symbol of the current fiscal year (e.g. €, \$ etc.) from the ESGOZCurrency. If the symbol is not set, it returns the currency code.

2.5 Interaction profile

The suggested email settings by provider has been updated, according to the latest data.

Interaction profile

Communication bar

CTI settings

[e-mail settings](#)

SMS settings

Fax settings

Chat settings

Users - profile

CTI settings | [e-mail settings](#) | SMS settings | Fax settings | Chat settings

Activate e-mail ☐

Register all e-mails ☐

Email / Send email settings

Email / SMTP settings

SMTP authentication None

Email settings

SMTP address

Port 25

User name

Access password

SMTP encryption None

SMTP Domain

Sender reply

Reply address

Delivery report ☐

Read receipt ☐

3. Entersoft CRM

3.1 Entersoft surveys

A survey is a research method used for collecting data from a predefined group of respondents to gain information and insights into various topics of interest. Each survey has a specific purpose. For example, you may execute a customer satisfaction survey in order to understand your customer's satisfaction levels with your organization's products, services, or experiences.

Entersoft marketing survey is an online cloud service which can be used to execute online surveys over the internet. Using the service you may upload a survey campaign for a specific target group. In this way, the responder completes a questionnaire through a web form provided by the Entersoft survey cloud service. The web form is rendered based on the selected survey questionnaire. The feedback can be anonymous or not.

Entersoft surveys support the following processes:

- Define questionnaire
- Define survey welcome and closing pages
- Define invitation email body html file
- Define target group
- Create survey campaign template
- Create survey campaign
- Upload campaign to cloud app service
- Test email invitation
- Test survey on web browser
- Send an email invitation to the audience of the target group
- Collect feedback
- Examine non responders and send reminder invitation email
- Analyze survey feedback using advanced weighted scoring and sentiment analysis
- Analyze survey items performing analysis by question or cross question analysis
- Create new target groups based on weighted scoring level or for all responders for further post actions.

This document describes the above processes in order to help you to gain a deep understating of how to design, execute and analyze a marketing survey.

For detailed information about the aforementioned features and functionality, please read the document [Marketing survey campaigns](#) in the ESBooks application folder.

Feedback							
Παράμετροι							
Περίοδος: 01/06/2020 - 07/12/2020							
Κωδικός	Ημ/νία	Συμμετέχων	Σχετικά με	Διάρκεια έρευνας (λεπτά)	Score	Ποσοστό (%)	Μέσο score συναισθήματος
on-demand-Docs_SMTF_EL_ShoppingExperienceSurvey							
SVA-00617	24/11/2020 13:28:08	0000090 Riga Maria	TΔA-1-00006	0,47	20,00	50,00	50,00%
SVA-00618	24/11/2020 13:28:37	0000090 Riga Maria	ΑΠΑ-1-00012	0,37	4,00	10,00	5,21%
SVA-00619	24/11/2020 13:29:10	0000090 Riga Maria	TΔA-1-00009	0,42	25,00	62,50	5,32%
SVA-00622	24/11/2020 13:30:55	0000089 Karazanos Helias (POS)	TΔA-1-00007	0,28	9,00	22,50	78,64%
SVA-00625	24/11/2020 13:32:13	0000096 Riga Mary	TΔA-1-00010	0,87	40,00	100,00	92,53%
				0,48	19,60		

