

EBS Version 4 | ERP & CRM

Entersoft Business Suite[®] | Entersoft CRM[®]

New Features & Functionality

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1.Introduction

This document aims to report the new features and extensions of EBS Version 4 | ERP & CRM. First, the newly added functionality and features are briefly listed and, then, a detailed presentation follows. User guidelines and examples are provided where necessary.



Microsoft .NET Framework 4

EBS Version 4 | ERP & CRM is developed on Microsoft .NET Framework 4; hence, the installation of Microsoft .NET Framework 4 on workstations is a prerequisite, i.e. EBS Version 4 | ERP & CRM can only be used on workstations with Microsoft .NET Framework 4 installed.

2.New Features & Functionality (brief list)

2.1 Entersoft Framework

1. **New user Environment**
2. **Improved efficiency** of the various EBS/CRM processes
3. **Application menu**: New unified application menu (EPR - CRM).
4. **Entersoft Dashboards**: A new design and development tool that allows us to implement interactive composite application to manage and analyze the performance of business entities (operational and analytical business intelligence).
5. **Scales**: A new business entity that can be used to define limits used to calculate key performance indicators - figures.
6. **Expanders**: Expander support in dynamic forms.
7. **Toolbars in Dynamic forms**: Custom toolbar support in dynamic forms
8. **BITs and Cubes in dynamic forms**: Support for context BITs and Cubes in dynamic forms
9. **Intercompany automations** (commands).
10. Optional application of **complex password policy**.
11. **New version of Outlook Add-in**: The new version of Outlook Add-in is fully compatible with Microsoft Outlook 2010.
12. **OPOS Drivers**: Full support of devices compatible with OPOS Drivers.

2.2 Entersoft ERP

1. New, **specialized, dynamic forms** for Trade, Payment, Transit, and Adjustment **Documents**.
2. **Expenses allocation** to Cost Centers (as a Commercial Process)
3. **Depreciations allocation** to Cost Centers
4. Use of **Dynamic/Static Lists** in Invoicing policy conditions
5. **Analytic applications**: New interactive sales and profit analytic applications.
6. **New dynamic scenarios**: cross sell, down sell, up-sell scenarios; dynamic item proposals based on customers' past purchases as well as proposals based on top items filtered using different parameters.
7. **Suppliers' down-payments workflow**.
8. **Intrastat**: The contribution of **Operations with a view a processing under contract** (Nature of transaction: code 41-43) and **Operations following processing under contracts** (Nature of transaction: code 51-53) has now been incorporated.
9. **Credit policy**: It is now possible to check a Trade Account's Balance Overdue Time in a consolidated manner i.e. the Trade Account's balance in any other Company monitored in EBS.

2.3 Entersoft CRM

1. **Business Intelligence applications:**

- a. New interactive management and analytic applications for all modules.
- b. More than 40 interactive applications (dashboards & home pages) with more than 300 dashboard items.

2. **Role based UI:** Enhanced home page functionality for sales and service representatives.

- a. **Communications home page:** New interactive communications home page designed specifically for communications representatives

3. **Analytical model:** Enhanced analytical model with more than 50 key figures.

4. **Pipeline performance management:** Enhanced sales cycle performance management.

5. **Geographical data analysis:** Analytical and operational geographical data analysis (Google maps / Microsoft Bing maps)

6. **New dynamic forms:** New dynamic forms for all entities.

7. **Enhanced lead management:** no person account record required.

8. **Business rules and actions:** New business rules and enhanced command actions during record save / update.

9. **Analytic reports:** New key figure analytic reports for all modules

10. **Person / trade account investigation:** New simplified person / trade account investigation for dynamic forms

11. **Documentation:** Extensive documentation for all operational and analytical dashboard pages

3. User Experience in version 4

3.1 The new user environment

3.1.1 The philosophy

Entersoft philosophy revolves around two main axes:

- **Business:** the use and incorporation of tools and various business scenarios and business practices. The aim is to provide promptly, combined information in order to ensure, on one hand, the best possible response of your business to the circumstances and requirements of the present and, on the other hand, to substantially assist you in planning, deciding, and eventually establishing the future of your business.
- **User:** the user environment. A contemporary user environment is required to be flexible enough in order to correspond to the requirements and demands of any particular implementation, regardless its uniqueness. At the same time, it must be adjustable to the distinct desires and needs of every user. An adjustable, user friendly and adaptable environment can significantly contribute to the overall software effectiveness and efficiency.

Entersoft Business Suite® Version 4 utilizes current advanced, cutting-edge technology (Microsoft® .NET 4 etc.) in order to implement the above described philosophy. In the following pages, we will describe the progress and developments regarding the two axes and the benefits that can be derived at both business level and user level.



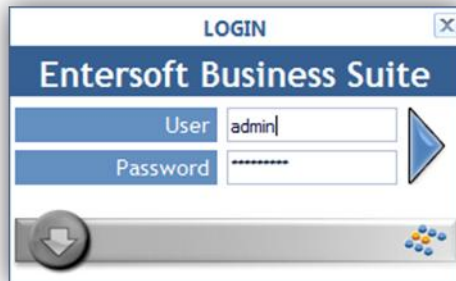
The activation of Version 4 User Environment can take place incrementally and it is reversible. There is a set of enhancements and improvements defined to be activated automatically, while another set of new functionality can be activated progressively and after explicitly deciding to proceed, since such functionality effects drastically the execution of the users' daily tasks.

3.1.2 Login

3.1.2.1 The new login screen

The login screen has been redesigned. The information requested and provided has been limited to the absolutely basic: the user is requested to provide only the password and, by selecting <Enter> or by pressing the button , the login is completed (Image 1).

Image 1: Simplified login screen



The Entersoft logo , available at the down right of the dialogue, is actually a hyperlink to the Entersoft web site. The button  provides access to the full login information (i.e. the Database, the Company, the Branch, the login date, the Language) which is configurable as before.

Image 2: Full login screen



If the Entersoft application search for the default Database fails (i.e. if the related information is not stored in the registry, according to the usage history), the login screen will automatically appear expanded in order for the user to provide the information.

3.1.2.2 Restricted DB access for selected workstations

It is now possible to restrict the access to some of the available EBS Databases to a selected subset of workstations. This feature will serve the requirement for providing access to particular DBs only to selected workstations. In order to activate this feature, it is required to create an xml file named: ESLoginLock.xml and store it in the CSConfig folder of

the terminal workstation for which you wish to restrict access. Such a file should not exist in the CSConfig folder at the Application Server. The structure of the file is defined as follows:

```
<ESLoginLock>

    <DBID>MyDB_2008</DBID>

    <CompanyID>001</CompanyID>

    <SiteID>1</SiteID>

</ESLoginLock>
```

Where:

- The DB name should be typed in the **DBID** tag
- The Company Code should be typed in the **CompanyID** tag
- The Site Code should be typed in the **SiteID** tag

3.1.2.3 User identification

The identification process has been improved by incorporating the optional increase of the password complexity. It is now possible to increase the security level, by applying the mandatory use of passwords that comply with distinct **security specifications**, which define the minimum acceptable password strength.

To activate this new functionality it is required to set as TRUE the value of the company parameter: "**Activate Complex Password Policy**" (in Customization: General / Company parameters, Category: Generic – Operational). The activation of the new feature results the activation of the default password specifications: A new password must be at least 4 to 8 characters long, and it must contain at least a number, a letter in lowercase, and a letter in uppercase.

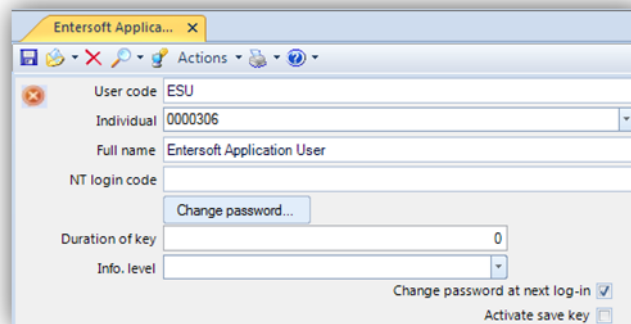
The default password specifications can be of course modified to match your distinctive requirements. This can be done by modifying accordingly the value of the company parameter: "**Complex Password Policy - Regular Expression**" (in Customization: General / Company parameters, Category: Generic – Operational); here, a regular expression needs to be defined, that describes the rules of your password policy.



Note that...

To facilitate the transition to your newly defined Complex Password Policy, Entersoft recommends activating the field: "Change password at next login", for every user. This way, at their next login, the Entersoft application users will be notified that their password needs to be changed and they will be provided with the corresponding UI to proceed with the change.

Image 3: Change password at next login

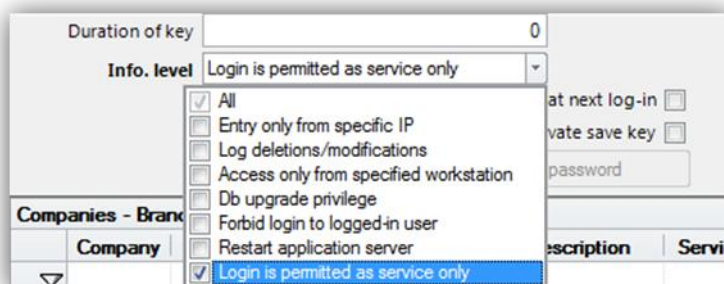


The screenshot shows the 'Entersoft Application User' configuration window. The 'Change password at next login' checkbox is checked, and the 'Activate save key' checkbox is unchecked. The 'Duration of key' is set to 0.

3.1.2.4 User identification during process execution

In order to increase security, it is now possible to clearly define the users that have actual access to the ES Application and distinct them from the users that have no actual access to application and can only access and execute specific processes or tasks (scheduled or not), i.e. 'service only' users (Image 4).

Image 4: Info. Level: Login is permitted as 'service only'



The screenshot shows the 'Info. level' dropdown menu. The 'Login is permitted as service only' option is selected. The 'Duration of key' is set to 0. The 'Companies - Branch' table is visible at the bottom.

Company	Description	Service

This way, it is guaranteed that even if the credentials of this type (i.e. 'service only') become known, such a user will not be able to obtain actual access to the ES Application.

Furthermore, it is now possible to allow some users to actually access some of the ES Companies and Branches whilst they will be able to access other Companies/Branches as 'service only'. This feature can be proven useful if there users that must access a Company/Branch e.g. to execute a intercompany transition while they will not be able to view or edit

any data. To activate this feature, select 'Login is permitted as service only' at the Company – Branch view, as shown in Image 5.

Image 5: Access Level | Companies-Branches view

Companies - Branches						
	Company	Name	Code	Description	Services profile	Access level
1	ES	ENTERSOFT...	ATH	Athens Headquart...		Login is permitted
*					☒ Login is permitted as service only	

3.1.3 User environment - Activating the new features...

After the upgrade and first the login, we will be asked to select whether we wish to activate the fully upgraded User Environment, available in version 4. The activation decision can be postponed (option "Postpone activation of new User Environment") until the next we manually call the activation dialogue or at the next login (option "Display upon login").

The alternative option "Test only" is also available. By selecting it, we have the opportunity to fully experience the new environment during the current session; the application will automatically revert to the previous environment at the next login.

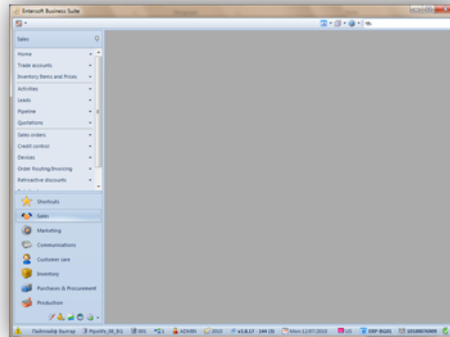
Image 6: User environment – activation of new features...



The New Environment is characterized mainly by two major changes:

- New, **Role-based menu**: The new menu is completely restructured and it effectively brings together the ERP and CRM operations (page 21).
- **New forms** for main / master entities and CRM Tasks (page **Error! Bookmark not defined.**).

Image 7: The new user environment

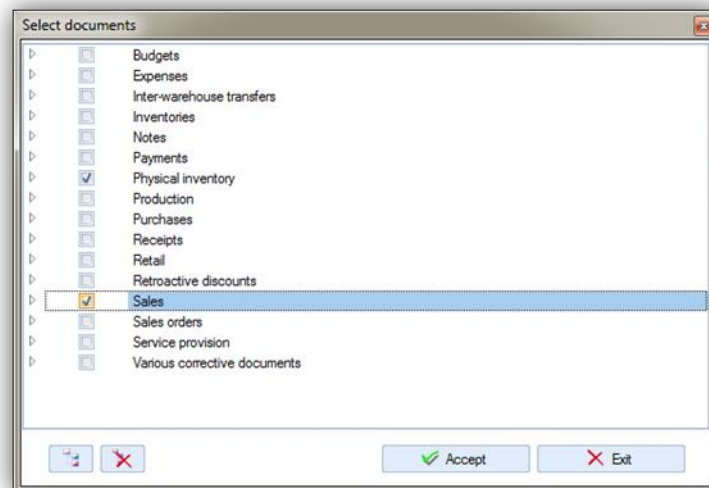


- Optionally the new, **dynamic Document forms** can be activated (presented below, page 20).

3.1.3.1 Activating the new, dynamic Document forms

In the "activation of new features ..." dialogue, there is a hyperlink that leads us to the Document Type selection. The activation may involve the specific, listed Document Types (to "select all" click on the button: ; a "select none" button  is also available), or specific document categories (e.g. Sales, Production etc., Image 8).

Image 8: Activate new UI for selected document types



The activation of the new, dynamic form for a particular document type, actually results the assignment of a dynamic form to the selected Document Type (field: "Form code", dialogue: "Document Type"/tab page: "behavior"). The new form can be deactivated at any time by simply deleting the form code from the field.

Furthermore it is possible to make changes and adjustments on the default form in order to ensure that it corresponds fully to any special business or/and user requirements (use the Entersoft "Windows form designer" tool).

3.1.3.2 Available Templates

There are four additional, dynamic Document Forms available with the version, which are provided as **templates**. You can use them as a starting point and adjust them to specific business or user requirements. The layout of forms listed below is exactly the same as the layout of the Document forms before version 4.0.0.0.

- **ESFIDocumentAdjustment_DEF**, for Adjustment Documents.
- **ESFIDocumentTrade_DEF**, for Trade Documents.
- **ESFIDocumentCash_DEF**, for Payment Documents.
- **ESFIDocumentStock_DEF**, for Transit Documents.

3.1.4 New menu

3.1.4.1 The new explorer bar menu

The most obvious enhancement of the new User Environment is that of the new, vertical, **explorer bar menu**. The new menu incorporates, effectively and efficiently, the ERP and CRM operations and processes, reflecting thus a renewed, more customer-centered viewpoint. The structure of the new menu corresponds to the structure of a contemporary business organization and its operations **per department and role**; the menu is essential for the implementation of the **Role-based UI**.

At the first level the following menu sections are available: «Sales», «Marketing», «Communications», «Customer Care», «Inventory», «Purchases & Procurement», «Production», and at the overflown, horizontal bar¹: «Projects and Contracts», «Accounting», «Budgets», «Business Intelligence». The top menu section is the "Shortcut list"; i.e. the explorer bar menu integrates the shortcuts while it fully preserves all the existing settings and previously available administrative functionality. The last section is the "Customization" for adjusting the application features and functionality to the special requirements and needs of each implementation.

The menu sections correspond to the 1st level of the menu and are all used similarly. Inside each section, the available (2nd level) menu entries are of three types (Image 9):

- Menu entries that lead to a third level** etc. (e.g. Sales / Trade Accounts). The classic menu and the related sub-entries appear.

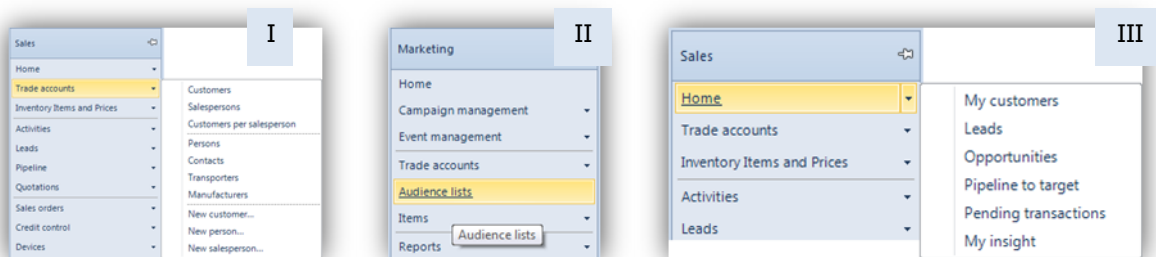
¹ Overflown menu sections: which 1st level menu sections are visible can be defined (temporarily, per session) by clicking on the menu options: .

II. **Direct menu entries** (e.g. Marketing / Audience lists)

III. **Dual menu entries** (e.g. Sales / Home); i.e. menu entries that can either lead the user to the next menu level or can be themselves direct menu entries.

Finally, the menu can be minimized in order to maximize the working area ().

Image 9: Menu entries | Types



3.1.4.2 The new horizontal menu

Some basic functionality was decided to be preserved at the new horizontal menu in order to keep it simple and meaningful: Search , Help , Macros administration  and windows .

The "Windows" menu includes three new alternative color schemes (Office 2010 color schemes): Black, Silver, and Blue. The default color scheme is the Blue one. The "General" menu is accessible through the icon: .

3.1.5 Preview

A new, important feature is the **Preview** feature. This is available on:

- Views (**Preview**, page 28) and
- Forms (**Preview**, page 27)

It aims to provide direct and targeted information, for viewing exclusively. The information provided is determined at implementation level and it is intended for providing safe access to typical information. Consequently, the users do not have to specialize in accessing all kinds of exhaustive data; hence, the time needed for them to be familiarized with the application is significantly reduced. Training time is also expected to be reduced. Furthermore, the saved training time can be used for focusing to the aspects of main interest for each user group.

The information presented in a Preview form, is achieved by clicking on the  button, which opens the related Preview list. The Preview List columns correspond (automatically) to the fields presented in the Preview form.

**Note that...**

To add a Preview form on a View, do the following:

- The Entity **GID** (where we wish to add the preview form) should be defined as 'visible'.
- Use the **GridX** control. At the column property 'HeaderToolTip' set `<#Entity | EntityGID>`². Additionally, set the 'column type' as **Link**.
- In case it is required to use a General View (i.e. a View that refers to more than one entity), then the field that contains the information that differentiates one entity from another (commonly, a 'type' field) must be included and it must be defined as 'visible'. Specifically:
 - If the **ESFItem** View is to be used (which includes expenses, services, fixed assets etc.), then the Item Class must be included as a 'visible' column.
 - If the **ESFTradeAccount** View is to be used (which includes customers, creditors, suppliers, debtors), then the Trade Account type must be included as a 'visible' column.
 - If the **ESFIDocument** View is to be used, then the Document Class be included as a 'visible' column. (Ensure that you will use the ESFIDocumentType³ table).

It possible to access: a) the related map from a Preview form (, if the coordinates are available on the preview list) and b) the full form ().

² E.g. #ESFTradeAccount|fTradeAccountGID

³ If more than one Document Types are included in the View, it is possible to use the generic form ESFIDoc instead coalesce using the DocumentClass fields of the particular Document Types.

Image 10: "Customer" Preview

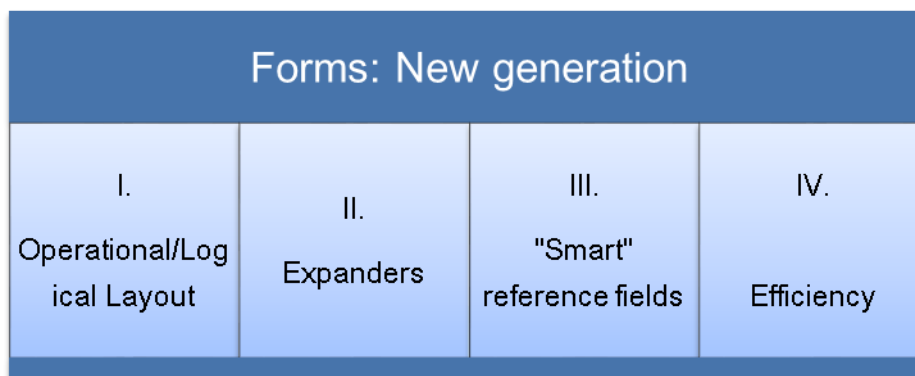


Customer: CUS00004 - Mauritius Oil Refineries Ltd.			
Name	Mauritius Oil Refineries Ltd.	T.R.N.	094123479
Profession	Food industry	Address	SEESTRAßE 7072 Mörbisch arr
Telephone	24650-24695 24650-24700	Mobile	-
E-mail	info@elopak.eu	Web Site	www.elopak.gr
Supervisor	Sameera Chattun	Salesperson	SAL-KAR - Anita Martin
Payment method	Deposit	Deliv. Method	

3.1.6 Forms: New generation

The full activation of the new User Environment v4 includes the immediate, automatic activation of new dynamic forms for master entities (e.g. Stock Item, Customer etc.) and various CRM Task Types (e.g. Lead, Opportunity, etc.). Similar are the changes implemented for the document forms; However, it is important to remember that the new document forms are activated selectively and not automatically (page 20).

The main axes of the incorporated improvements are:



I. Layout redesign

The **Operational / Logical Layouts** of forms have been redesigned; i.e. the arrangement of the UI controls was reconsidered in order to effectively correspond to any business case.

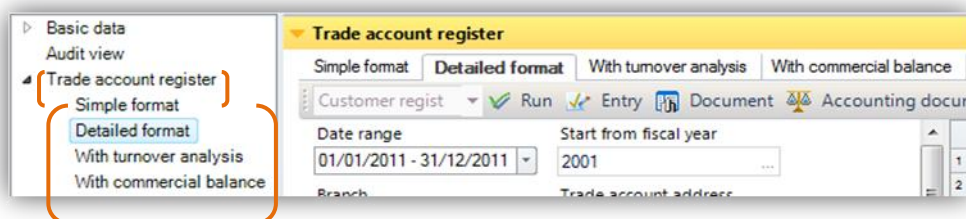
II. Expanders

Expanders were incorporated in order to use the available space the best possible way; the user can minimize / maximize entire form sections, depending on the particular, in progress use cases.

- The use of expanders in **Transaction forms** (e.g. Document forms) contributes to the effective presentation of the most important sections of each form. The aim is to accentuate the essential information, to project related information when most needed, to guide the user in an effective and efficient way in order to focus to the most crucial parts of each transaction.
- Expanders provide focused presentation of information, **effective and subtle user guidance** and assistance, fast and accurate data entry and editing.
- As regards master entities, the implementation of expanders provides capabilities for viewing information simultaneously and, hence, **combine and utilizing the available information**. Each expander corresponds to a node of the navigation tree available to master entities (at the left of the form). The second level nodes of the navigation tree correspond to the Tab Pages of which an expander comprises (Image 11). The vertical scrolling is familiar to every contemporary user, since the contemporary extensive use of web while any technical limitations related to web are absent.

The integration of expanders is the first major step towards future, extensive improvements and new functionality regarding the easy and quick adaptability of Entersoft Applications to the particular business and user requirements. We currently plan new, revolutionary functionality for quick and easy **customization / configuration without the necessity to redesign the forms**; functionality that will allow the user to adapt a form according to his or her preferences and needs with simple and straightforward actions such as e.g. drag & drop, etc.

Image 11: Expanders and Tab pages



III. «Smart» Reference fields

The fields that refer to grouping/classification tables (e.g. categories, zooms etc.) can now present in concatenated manner the **Code** or/and **Description** of the referenced record, saving thus valuable layout space and, primarily, facilitating the investigation, which can consequently involve both fields.

The particular functionality is also available for the following Entities⁴:

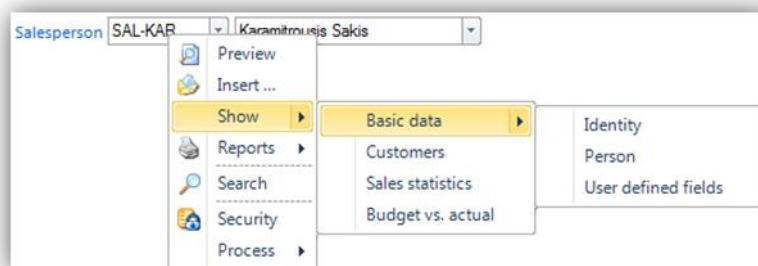
1. Invoicing policy (Trade Accounts, Contract, Documents)

⁴ Form Designer Property: **DisplayMember**.

2. Pricelist (Trade Accounts, Contract, Documents)
3. Payment method (Trade Accounts, Contract, Documents, project)
4. Special Account Groups (Items and Trade accounts)
5. Credit Policy (Trade Accounts)
6. Interest rate on arrears (Customer)
7. Project (Documents, Contract, Budget Sheet and Budget Sheet Profile)
8. Profile (Items and Trade accounts of any nature)
9. Cost element type (Item, Expense)
10. Control profile (Items)
11. Calendarization Profile
12. Item Dimensions (Inventory Items)
13. Commission profile (Sales person)
14. Trade account matching rule
15. Journal (Accounting Document)
16. Allocation profile (Account)
17. Depreciation rule (Fixed Asset)
18. Allocation Profile (Item)
19. Property set (Item, Trade Account)

Moreover, the reference fields now have an **enriched right click menu** which provides capabilities for **switching directly** to related information and reporting (Image 12), i.e. to:

Image 12: Right click menu



- Sections (expanders) or tab pages of the referenced entity (Menu: **Show**)
- Alternative views and reports, either product or custom (distinctively presented). The default view/report is highlighted (Menu: **Reports**).

- Preview (Menu: **Preview**, Image 10, page 24). The Preview can be also accessed simply by clicking on the field label. The particular functionality is available when the label is presented in **blue** color and the mouse pointer turns into .

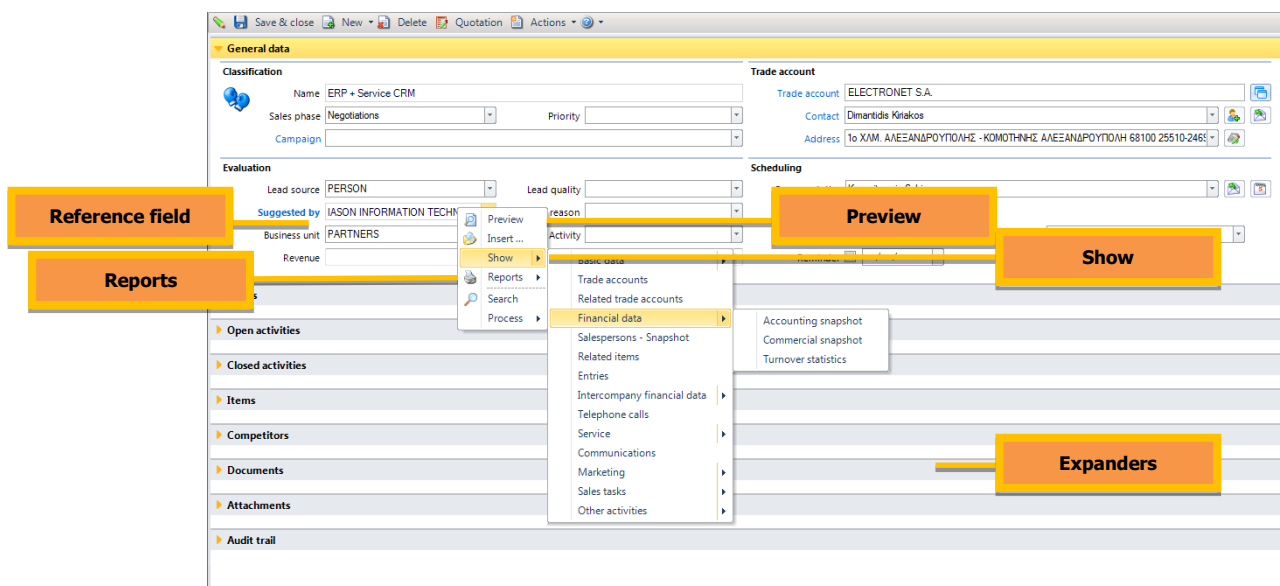
IV. Efficiency

There is a noticeable reduction of the time required for loading ES Forms such as: Document forms, Item forms, Trade Account forms, and so forth.

V. Additionally...

- Further interventions for the improvement of the User Experience and, specifically, for maximizing the available space involve the restriction of the form **toolbar** (left alignment) and form **title** (right alignment) in one, single line.
- The '**minimize / maximize**' of each form's **navigation tree** has been simplified.

Image 13: An Example: Sales Opportunity

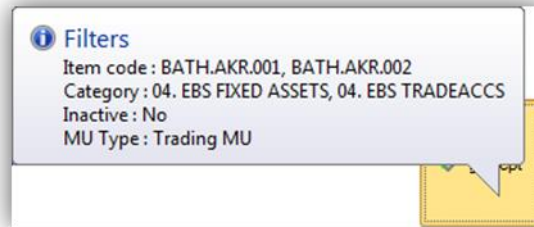


3.1.7 Lists & Views (Entersoft Scrollers)

Entersoft Lists and Views (context or not) have been enhanced for the benefit of the user experience. Specifically:

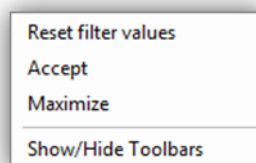
- Balloon tooltips** that display additional information have been incorporated in the List Filters. In particular, the selected filter values are displayed at filter level, and 'on mouse over' the "Accept" Button the tooltip displays the filters' values that were used to filter the records selected and presented in the list (Image 14).

Image 14: Balloon tooltips



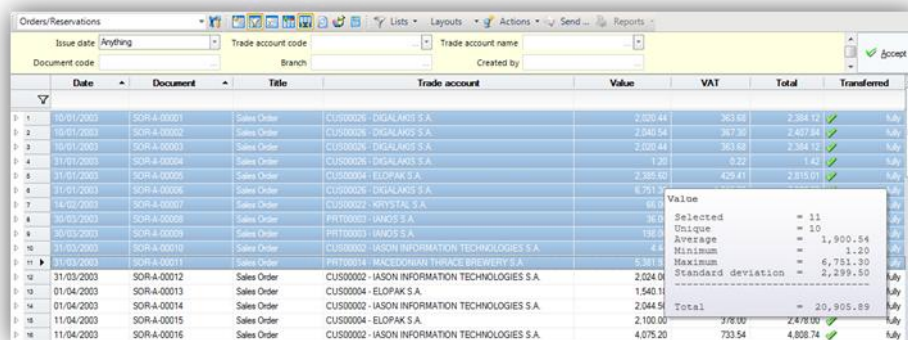
- A new, **right click menu** has been added to the Filter panel (Image 15) which provides access to the new actions: **Reset filter values**, resets to default the selected by the user values; **Accept** executes the query and displays the list of records that corresponds to the selected filters; **Maximize/Minimize** the advanced filters; and **Show/Hide Toolbars** depending the current requirements for maximizing the height of the list or configuring the list attributes.

Image 15: List filters | Right click menu



- The **Preview** (Image 10, page 24) of a (referenced) entity is available at the list level too, when the mouse pointer turns into  and it is accessible by <alt> + <left mouse click>; e.g. "Orders/Reservations" list, "Trade Account" column.

Image 16: Totals | Selected Records



Date	Document	Title	Trade account	Value	VAT	Total	Transferred
10/01/2003	SOR-A-00001	Sales Order	CUS00026 - DIGALAKOS S.A.	2,020.44	363.88	2,384.32	July
10/01/2003	SOR-A-00002	Sales Order	CUS00026 - DIGALAKOS S.A.	2,040.54	367.30	2,407.84	July
10/01/2003	SOR-A-00003	Sales Order	CUS00026 - DIGALAKOS S.A.	2,020.44	363.88	2,384.32	July
31/01/2003	SOR-A-00004	Sales Order	CUS00026 - DIGALAKOS S.A.	1.20	0.22	1.42	July
31/01/2003	SOR-A-00005	Sales Order	CUS00004 - ELOPAK S.A.	2,385.80	429.41	2,815.01	July
31/01/2003	SOR-A-00006	Sales Order	CUS00026 - DIGALAKOS S.A.	6,751.30			July
18/02/2003	SOR-A-00007	Sales Order	CUS00022 - KRISTAL S.A.	98.00			July
30/03/2003	SOR-A-00008	Sales Order	PHI100002 - JAKOS S.A.	130.00			July
30/03/2003	SOR-A-00009	Sales Order	PHI100003 - JAKOS S.A.	4.00			July
31/03/2003	SOR-A-00010	Sales Order	CUS00002 - IASON INFORMATION TECHNOLOGIES S.A.	5,381.8			July
31/03/2003	SOR-A-00011	Sales Order	PHI100014 - MACEDONIAN THRACE BREWERY S.A.	2,024.00			July
31/03/2003	SOR-A-00012	Sales Order	CUS00002 - IASON INFORMATION TECHNOLOGIES S.A.	1,540.11			July
01/04/2003	SOR-A-00013	Sales Order	CUS00004 - ELOPAK S.A.	2,044.50			July
01/04/2003	SOR-A-00014	Sales Order	CUS00002 - IASON INFORMATION TECHNOLOGIES S.A.	2,100.00	378.00	2,478.00	July
11/04/2003	SOR-A-00015	Sales Order	CUS00004 - ELOPAK S.A.	4,075.20	733.54	4,808.74	July
11/04/2003	SOR-A-00016	Sales Order	CUS00002 - IASON INFORMATION TECHNOLOGIES S.A.				July

Value

Selected = 11

Unique = 10

Average = 1,900.54

Minimum = 1.20

Maximum = 6,751.30

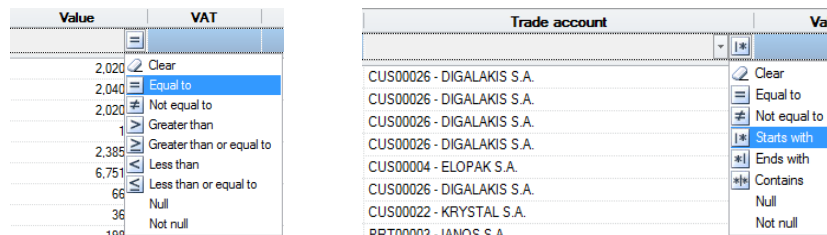
Standard deviation = 2,259.50

Total = 20,905.89

- It is now possible to obtain a quick view of some base statistics and totals for a selected number of records. The user may select some records (use ctrl + click to select non-sequential records) and 'on mouse over' a column that contains numeric data (e.g. Quantity, Value) a tooltip is displays the information regarding the number of the selected records, the number of the distinct / unique numbers, the average, the minimum and the average, the standard deviation and the sum. The tooltip is active for approximately seven seconds.

- The records' seq. number has been included in all views and lists.
- The auto filter options have been enriched depending on the field type (Image 17). Specifically, the auto-filter that can be applied on text fields automatically presumes the [*] (i.e. anything) character at the end of the queried string (Image 17).

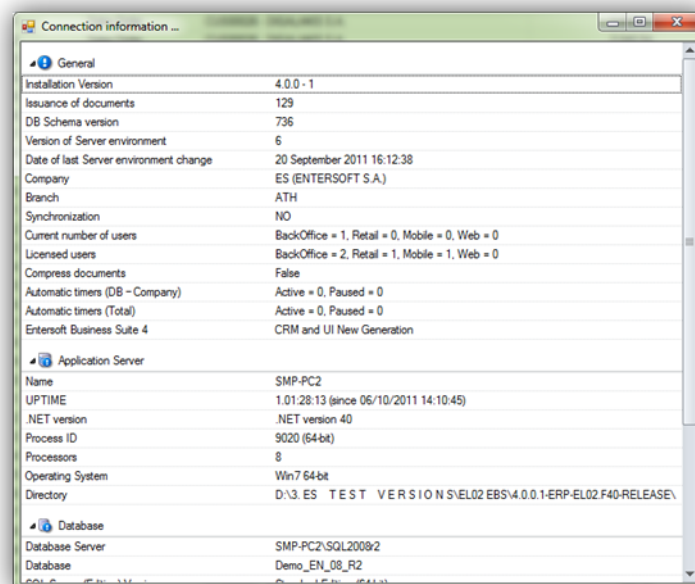
Image 17: New auto-filter options depending on the field type | two examples



3.1.8 Status bar

The DB name that we have currently logged-in has been included and is presented at the status bar, second from the left.

Image 18: Connection Information



The status bar has been enhanced in order to support single left mouse click for accessing the generic Connection Information, the login information etc. By clicking either on the DB Name or on the Company/Branch name the renewed Connection Information is displayed (Image 18). The information is now enriched and organized in sections: "General", "Application Server", "Database", "Workstation".

3.1.9 Licensing

- The **EL01** (Greek only) version has been permanently dropped and replaced by the **EL02** (Greek and English) version. The transition from the EL01 version to the EL02 version is automatic, and the no further actions needs to be taken during the upgrade.
- The licensed application users are now differentiated per S/W Product::
 - Back office Users
 - Retail Users
 - Mobile Users
 - WEB Users

The above Users' Classification allows a more effective Licensing control. E.g. if there two back office and one Retail user licenses have been activated it will not be possible for the three users to login to the back office system simultaneously.

3.1.10 More...

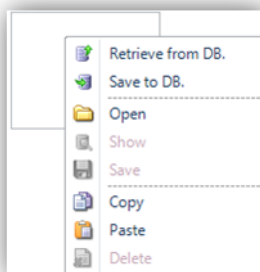
- The close [x] command of tab pages is now placed on the Tab.

Image 19: Tab page | Close



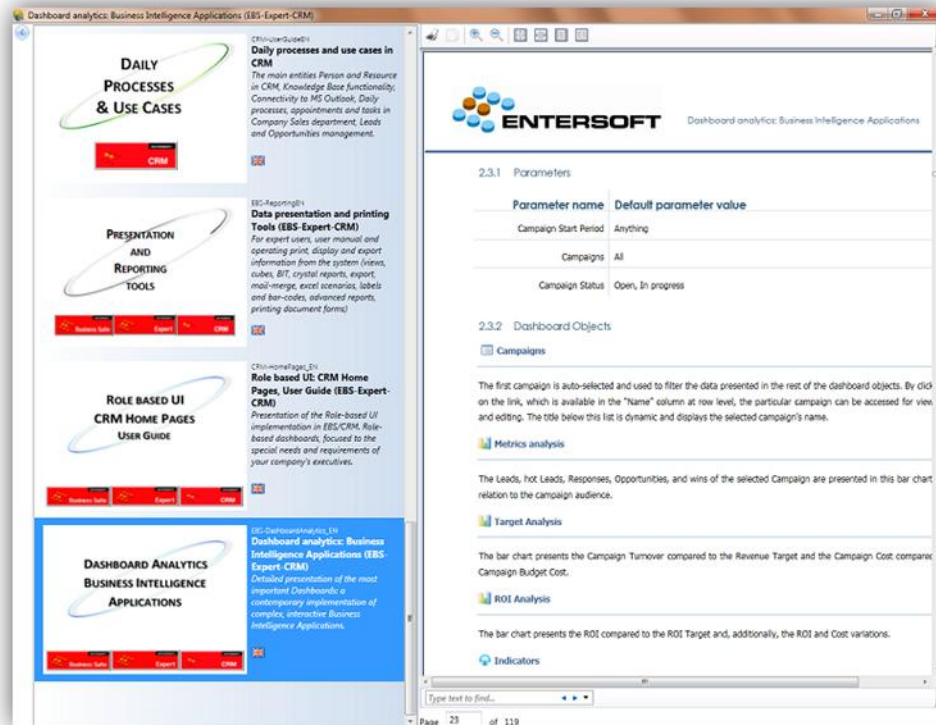
- **Picture control:** the toolbar has been replaced by a right click menu in order to save valuable space.

Image 20: Picture control | Right click menu



- **Documentation:** The ES Application Documentation has been organized and is now available and accessible through easy-to-use and intuitive navigation functionality, inside the ES Application environment (Anó Horizontal menu: **Help**  / **Documentation**).

Image 21: Documentation



3.2 Introducing Entersoft dashboard elements

Entersoft Business Suite dashboards comprise of a variety of UI objects; each object type is used in relation to the data or the information to be presented and can be interactive. The available Object Types are listed next.

3.2.1 Object Types

3.2.1.1 Charts

Charts ([Image.22](#)) are used mainly for presentation purposes. In addition, charts can be used as interactive objects, i.e. by clicking on a data point of a chart the selected data point is highlighted and the system provides focused, detailed information that corresponds to the selected point; i.e. this action is essentially equivalent to visual and dynamic filtering. The filtering maybe applied either on the chart itself or on other objects of a particular dashboard. Colored labels (memo) and data labels (shown on data points) complement the presentation. An informative tooltip is also available when moving the mouse over charts. The presented information includes the values, groupings, totals etc. The available chart types are: Pie chart, bar chart, doughnut chart, stacked chart etc., and any meaningful combination ([Image.23](#), [Image.24](#), [Image.25](#)).

Image 22: Chart - an example

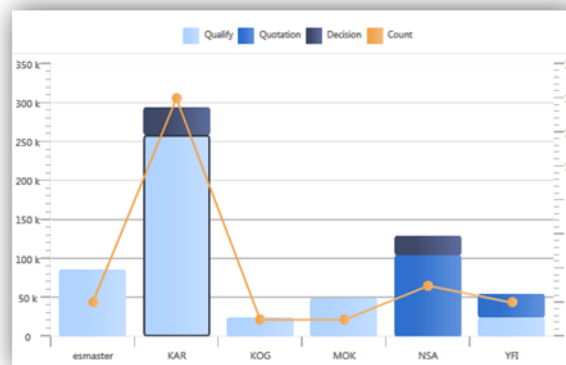


Image 23: Doughnut and Pie Chart examples

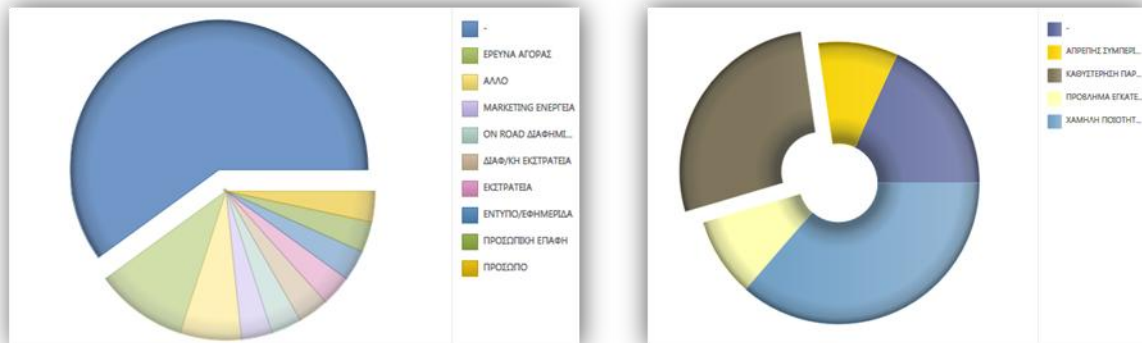


Image 24: A bar chart

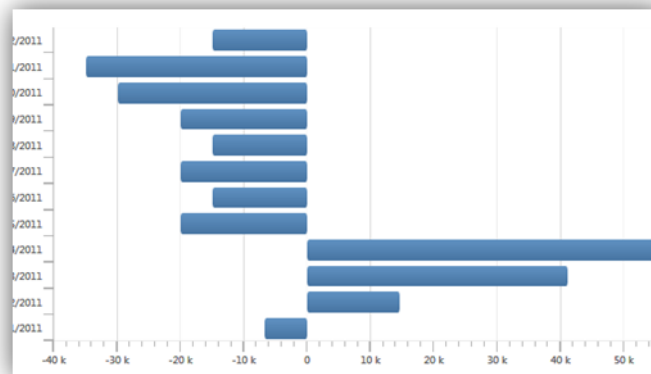
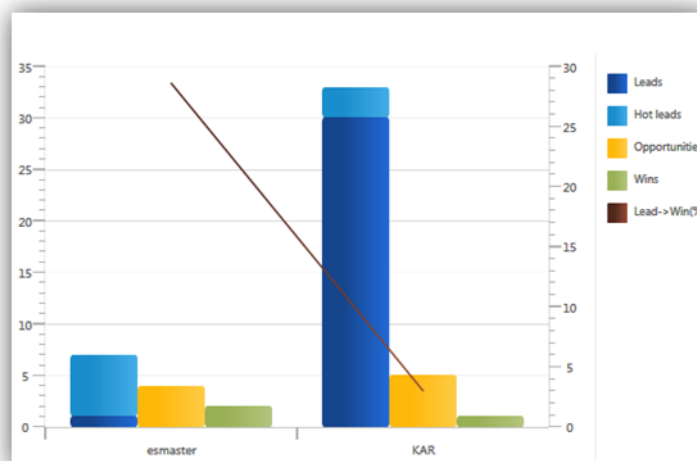


Image 25: Combined chart types



If an axis exceeds the predefined width of the Dashboard Object, a scrollbar will appear automatically. In order to ensure that all values will be presented at once, without the scrollbar, the user can use the mouse device to drag one end of the scrollbar to the full width of the dashboard object window (Image 26).

Image 26: Scrollbar | drag one end of the scrollbar to view all at once



3.2.2 Lists

A list (Image 27) too is an object that can be used both for data presentation and interactively, i.e. (as described previously in 3.2.1.1) by clicking on a data row of a list the selected row is highlighted and the system provides focused, detailed information that corresponds to the selected row; i.e. this action too can be equivalent to visual and dynamic filtering. The filtering maybe applied either on the object itself (e.g. on an alternative view) or on other objects of a particular dashboard. Underlined data in blue denote a link to the UI form of the selected record (for viewing/editing). The list title is either predefined (static) or it is formulated dynamically, depending on the applied filters. Sorting functionality is also available by clicking on the column title.

3.2.3 Action links

Action links provide users with additional functionality and accessibility. The combination of (a) interactive presentation of information and (b) action links provides the basis for informative and prompt response to any developments.

- In the context of a list (Image 27), the functionality commonly provided by action links is access to the corresponding full list and new record creation.
- In the broader context of a particular dashboard, action links are commonly used as predefined filters that are applied to all of the objects contained in the particular dashboard.
- Action links can also be used in order to provide connections to the operational environment of a dashboard (Image 28). I.e. action links are incorporated in dashboards to represent workflows, to place a dashboard in the context of a workflow.

Image 27: A list and the corresponding action links

Date	Description
15/06/2011	Ηλιάδης Κώστας@AGROSKY A. E. 12 ecom & web design
03/03/2011	Σωτηρίου Χρήστος@SENSO PER LEI crm...
15/06/2011	Βασιλειάδης Γεώργιος@BLACK-RED-WHITE ΕΛΛΑΣ Α.Ε. Entersoft ERP-CRM-ECOMMERCE Campaign
15/06/2011	Βασιλειάδης Γεώργιος@BLACK-RED-WHITE ΕΛΛΑΣ Α.Ε. Entersoft ERP-CRM-ECOMMERCE Campaign
15/06/2011	Πέτρου Νίκος@CONTROL SYSTEMS S.A. Ενδιαφέρον για B2B
15/06/2011	Ηλιάδης Κώστας@AGROSKY A. E. 12 ecom & web design
15/06/2011	Ιακώβου Βασίλειος@ΔΑΪΟΣ ΠΛΑΣΤΙΚΑ ΑΕΒΕ Entersoft ERP-CRM-ECOMMERCE Campaign
15/06/2011	Πέτρου Νίκος@CONTROL SYSTEMS S.A. Ενδιαφέρον για B2B
15/06/2011	Ιακώβου Βασίλειος@ΔΑΪΟΣ ΠΛΑΣΤΙΚΑ ΑΕΒΕ Entersoft ERP-CRM-ECOMMERCE Campaign
01/03/2011	Σωτηρίου Χρήστος@SENSO PER LEI EPR ενδιαφέρον
15/06/2011	Ηλιάδης Κώστας@AGROSKY A. E. 12 ecom & web design
15/06/2011	Ιακώβου Βασίλειος@ΔΑΪΟΣ ΠΛΑΣΤΙΚΑ ΑΕΒΕ Entersoft ERP-CRM-ECOMMERCE Campaign
15/06/2011	Ηλιάδης Κώστας@AGROSKY A. E. 12 ecom & web design

Full list New lead Reset

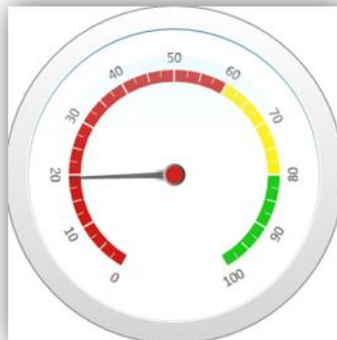
Image 28: Action link - connection to the operational environment

[Contracts to be invoiced \(1\)](#)

3.2.4 Indicators - gauges

Indicators present a single value (usually a percentage) which represents a performance measurement in relation to a colored scale that designates a poor (in red), average (in yellow), or high (in green) performance. The indicator may be dynamically filtered by other objects in a dashboard.

Image 29: Indicators - Gauges



3.2.5 ★ Scorecards

Scorecards present groups of KPIs. Each group contains indicators that are assigned with a particular weight. This weight is used for calculating the scorecard results. Scorecards provide a concise overview of company activity performance.

Image 30: A scorecard

	Actual price	Target	Weight	Score
Financial			60	8.03% ★
ROI	794.72	12,400.00	40	6.41% ★
Revenue	12,973.50	200,000.00	30	6.49% ★
Cost	1,450.00	320.00	30	11.72% ★
Effectiveness			40	★
Lead->Win	50.00	100.00	30	50.00% ★
Audience to win conversion rate			30	
Lead->Opportunity	100.00	100.00	15	100.00% ●
Audience to response conversion rate		100.00	15	

3.2.6 🗺 Map

A map shows the analysis of geographical related data. The analysis can be grouped by geographical region, district, city and a specific longitude and latitude. The data can be analyzed in two dimensions using a balloon. The bubble radius is proportional to the first dimension. The color of the bubble denotes the second dimension. The color dimension is used to represent the performance of the key figure presented by the diameter of the bubble.

Image 31: A map object on a dashboard



3.2.7 Web browser

A Web browser is available on selected dashboards for direct access to online information.

3.2.8 Search

Search functionality within a Dashboard. The search is effective on Lists and, specifically, the visible information in list records.

Image 32: Search



3.2.9 Basic functionality

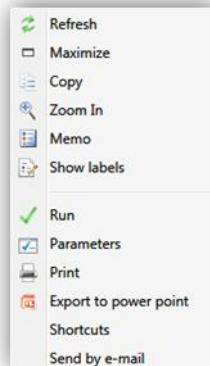
The basic functionality for using Entersoft Business Suite dashboards includes is available on the right-click menu. As shown in Image 33, the available actions are grouped in two main sets. The first group refers to the object of focus, and the second one refers to the dashboard as a whole.

3.2.9.1 Per Object

The following actions are available:

- **Refresh:** Refreshes the data of the selected object.
- **Maximize:** Maximizes the window that contains the selected object.
- **Copy:** Captures the selected object as an image.
- **Zoom in:** Available in Charts only. Zooms in the displayed data for detailed viewing. When selected, it is replaced by the corresponding **Zoom out** action.
- **Memo:** Available in Charts only. Shows / Hides the chart memo (i.e. the colored labels shown on the chart margin).
- **Show/Hide labels:** Available in Charts only. Displays or hides the data labels that correspond to the Y axis.

Image 33: Right click menu



3.2.9.2 Per dashboard

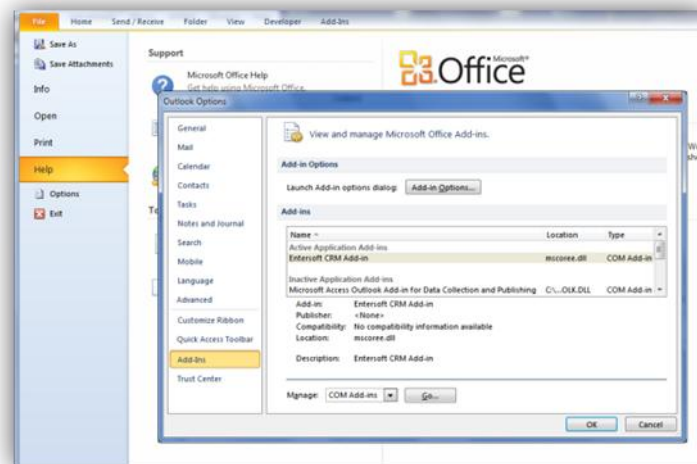
The following actions are available:

- **Run:** The dashboard is executed again.
- **Parameters:** Displays the parameter panel. The menu action is available only when parameters exist. In general, a dashboard can be either auto-executable or the user might be required to execute it. When a dashboard is auto-executable, then the parameters panel is hidden; else, the panel is minimized immediately after execution. The parameters panel can be (un-)pinned (📌).
- **Print:** The print dialogue is displayed. There a particular object can be sent to printer, the page setup properties can be adjusted. Print preview is also available.
- **Export to PowerPoint:** This action automatically creates a PowerPoint presentation with the selected Objects (titled).
- **Shortcuts:** Creates a shortcut on the Shortcut list.
- **Send by e-mail:** Creates a new e-mail within the ES application environment; the e-mail body contains the dashboard objects.

3.3 Outlook add-in: new version

The new version of **Entersoft Outlook Add-in** is now compatible to **Microsoft Outlook 2010**. The **Outlook Add-in Options** are available at: Application: Outlook, menu: **File / Options**, Section: Add-Ins (View and manage Microsoft Office Add-ins), button: 'Add-in Options'.

Image 34: Outlook Add-ins



The ribbon tab "Add-ins" contains the Custom Toolbars group where the «Entersoft CRM» functionality is available.

Image 35: Outlook Ribbon | Add-ins: Custom Toolbars



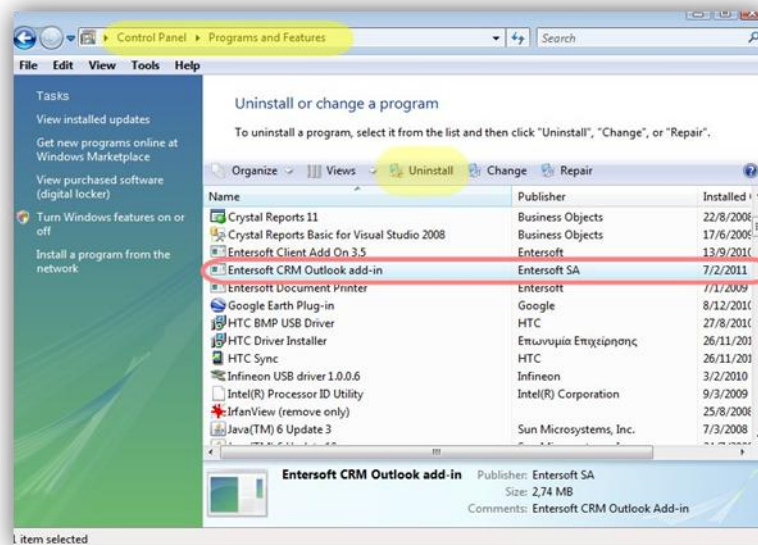
Due to the upgrade of the ES Applications to the .NET Framework 4, for upgrading the Entersoft Outlook Add-in, please follow the procedure described next.

3.3.1 Uninstall Outlook add-in

3.3.1.1 Version .NET4 Entersoft Apps

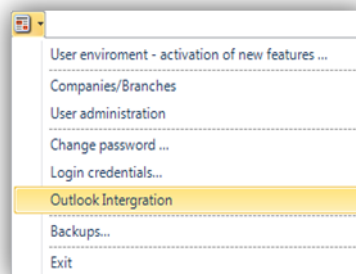
1. Before the installation, it is required to uninstall the existing Entersoft CRM Outlook add-in version (Control panel, Programs & Features, [Image 36](#)) from all workstations and the application server.

Image 36: Control Panel | Programs and Features



- After having uninstalled the existing version, install the new one through «Outlook Integration» (Image 37).

Image 37: Outlook Integration



- Next, copy the outlook.exe.config file (available in [Entersoft Knowledge Base](#)) into the Outlook installation folder (i.e. in the folder where the Outlook.exe is located) in all workstations and the application server.

You may continue with the installation of the newer version, even if for any reason the previous version of the Outlook add-in fails to be uninstalled; however, the previous Add-in will still appear in the Control Panel / Features and Programs list. In this case, you may use a utility (e.g. Microsoft installer cleanup) to uninstall it.

3.4 OPOS Drivers

It is now possible to connect with Point of Sales devices (i.e. fiscal printers, cash registers etc.) with OPOS / UPOS drivers. The OPOS drivers use OLE / COM technology (32bit) and they are compatible with OS Windows 95 or later. Many manufactures upgrade the old OPOS drivers to .NET (32bit & 64bit) technology, based on the updated specifications defined by the UPOS standards.

3.4.1 OPOS Drivers in EBS and Entersoft Retail

3.4.1.1 Introduction

OPOS (i.e. OLE Point of Sale) was the first widely-adopted standard to help integrate POS hardware into applications for the Windows family of operating systems. OPOS uses COM technology, and is therefore language independent. UPOS (Unified Point of Service) is the evolved OPOS. OPOS / UPOS support 36 different device types that can potentially be used for Retail or Self-Service purposes. The goal is to allow retailers freedom of choice in the selection of POS peripheral devices by the creation, utilization, and promotion of standardized connectivity.

3.4.1.2 OPOS Drivers

The vast majority of the POS manufacturers provide OPOS/UPOS drivers. OPOS drivers are based on the OLE / COM technology (32bit) and they are compatible with OS Windows 95 or later. Many of them are currently upgrading the previous generation of OPOS drivers to .NET (32bit & 64bit), based on the updated specifications defined by the UPOS standards.

EBS can connect to any fiscal printer, cash register etc. providing that OPOS / UPOS drivers exist and are available. Additionally, EBS can now support more device types that are defined by OPOS.

3.4.1.3 OPOS architecture

The installation of an OPOS / UPOS driver provides an additional layer between the device and the S/W application. This layer is responsible for the device's technical administration while, at the same time, it provides API interfaces to the S/W for managing and controlling the device.

EBS uses a common API (defined by OPOS per device type) with the need of complicated command set and print forms. Additionally, the connection and communication is simplified and, hence, EBS may communicate concurrently with the device and display real time information about any issue that may occur.

3.4.1.4 OPOS Drivers

Only one driver per system must exist; the existence of more than one driver is problematic since these will attempt to connect and access the device at the same time.

After the installation, the OPOS driver is responsible for the device administration. EBS is not required to communicate using files or through ports; instead it can use the API interface installed by the OPOS driver. This API is common for all devices of the same type regardless the manufacturer. The drivers can be usually found in the Device DVD/CD or can be downloaded from the manufacturer's web page.

3.4.1.5 Fiscal Printer vs. POS Printer

There two printer categories defined by OPOS: fiscal printers and POS printers. Fiscal printers support Z reports, Item sales etc. while POS printers support e.g. barcode printing, logos etc.

If EBS does not recognize a printer as Fiscal then it is possible that the manufacturer has not implement the necessary API defined by OPOS for fiscal printers but the one that corresponds to simple thermal printers. In this case, it is the manufacturer's responsibility to create the OPOS drivers for the specific purposes.

3.4.1.6 Device installation / OPOS drivers

Each device is normally acquired along with a CD that contains the device drivers. It is possible that this CD will not include the OPOS drivers and you need to download them from the manufacturer's Web Site. Additionally, the CD commonly contains a device administration application. You may use this to configure the device e.g. in the case of Fiscal Printers you need to define your TRN, etc.

Please, consult the device manual to install the OPOS driver and to configure the device. If the Windows identify the new hardware automatically, ignore the message and select 'cancel'. If you have already installed the DOS / Windows drivers, you need to uninstall them first. After the installation, it is required to configure the OPOS language and code-page settings, the port (COM, USB, LPT etc.) and define the device (logical) name.

Many manufacturers give the option to select whether you prefer to use the manufacturer's OCX or the Monroecs CCO (Common Control Objects). Even though EBS can recognize and use both, we recommend to use the CCO since these are considered more stable than the OCX.

3.4.1.7 OPOS device settings (Entersoft Retail)

In the Entersoft application folder, there is a new folder named: ESPOS. Depending on the device type, you can use the existing expression files as these are provided or you may use them as templates for defining your own, customized

expressions; in order for these to be available for use by the EBS / Retail, it is required to make a copy of the ESPOS folder as CSPOS (shadowing).

Launch the ESRetail.exe and select **Operations \ Menu** to activate the Ribbon; and then **Operation Parameters \ Configuration of Devices**.

The Document Series for which the configuration of devices should take place is the Series of the daily Z report for the workstation, provided that the user must have been granted sufficient privileges.

If there are transactions in progress, you will be asked to either cancel these or complete them before the configuration of the devices. If no transactions in progress exist, the foreground process will close and the device configuration dialogue will be displayed.

You may choose manual configuration or select the «Automatic Recognition» button for every single device type that you have installed OPOS drivers and is supported by EBS.

Furthermore, you may select «Device Inspection» for checking whether the device can be used by the EBS application. Note that it is possible that the device will return a valid error message to EBS: if the device is or is connected to a line display, then the correct message will be displayed on the line display. This depends solely on the choices the manufacturer has made when creating the OPOS driver.

By selecting "accept" the changes you made on the Document Series are stored and all the system cache is updated automatically.

3.4.1.8 OPOS Devices Configuration (EBS)

A new Tab Page is now available on the Document Series, named «Peripheral Devices». There you can activate and configure the line display and the cash register. The checkbox for the activation of the line display and the cash register is now placed on this Tab Page and it is now presented as a combo box.

To ensure compatibility, no changes were made on the configuration at the «Print - Correspondence»; however, the functionality has been enriched so if a command set that corresponds to an OPOS is device is selected, the expressions listed next will be displayed on the Print Form field.

The Sets of Commands that correspond to the OPOS Fiscal printers are:

- OPOS-FP-CCO: Command set through OCX / CCO

- OPOS-FP-Micrelec: Legacy implementation of the OPOS interface. To be used for devices compatible to the Micrelec OPOS driver, e.g .ERGOSPEED.

3.4.1.9 Fiscal printer expressions

The expression files for the Fiscal Printer are available in the `.\ESPOS\FiscalPrinter` folder. In order to use them, these should be available in the `.\CSPOS\FiscalPrinter` folder.

The expression file is an XML file that contains declarations, definitions and expressions for the receipt segments that will be requested by the printing mechanism. The segments are fixed and not dynamic as in a Print Form. The "ReceiptItem" segment concerns the sale of an Item whereas the "ReceiptTotal" segment concerns the totals and the payments.

Each segment contains expressions that are executed dynamically and provide to the printing system the information about the particular transaction / line. This file contains EBS expressions explicitly and corresponds to the new print form format that the EBS uses for issuing receipts through OPOS.

No escape characters exist anymore or paper size / character etc. All these are now administrable through the device S/W, hence, are now redundant in the EBS environment. Now, the EBS Application focuses on issuing receipts exclusively, i.e. on the transactional data that will be send to the device and that will be logged on the fiscal memory etc.

3.4.1.10 Line display Expressions

The Line display expressions are available in the `.\ESPOS\LineDisplay` folder. In order to use them, these should be available in the `.\CSPOS\LineDisplay` folder.

Line displays have their own special expressions in order to decide what to present to the customer when served. Each file provides messages and fields that are required by EBS.

The file contains four types of messages:

- ItemMessage: for item sale
- TotalMessage: for displaying the receipt total
- TotalAndChangeMessage : for displaying the total and change
- FinishMessage: For completing the transaction

For every expression (FormulaDef) the following are defined: the ID (the message type), the line that is to be shown, the column in the previously mentioned line, the field alignment, and the expression/formula. E.g.:

```
<FormulaDef ID="TotalMessage" Line="1" Column="1"
Align="Left"><![CDATA["TOTAL"]]></FormulaDef>
```

```
<FormulaDef ID="TotalMessage" Line="1" Column="1"
Align="Right"><![CDATA[RowC("ADTotalValue")]]></FormulaDef>
```

This will show on line 1 and column 1 the word "TOTAL" and on the same line the total amount (e.g. 100,00) with right alignment. You may add more lines if supported by the line display.

3.5 Miscellaneous

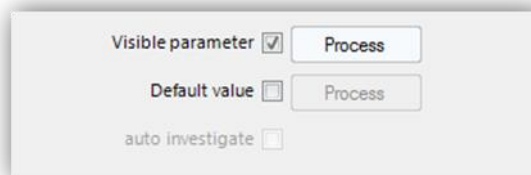
3.5.1 Check Record Relations

A new process has been added for checking the DB relations between the master records and the auxiliary tables (zooms). The action is available at: **Tools and Configuration\System Administration - DB\Check record relations**. This process aims to resolve any integrity issues that might have emerged in cases when records of the auxiliary tables (zooms) are modified or deleted while having been used in master records; as a side effect the application returns error messages when attempting to modify the master records. The process locates the DB records that contain values that reference non-existing auxiliary table records and inserts them into the auxiliary tables.

3.5.2 Automations

- In "automation parameters" is now possible to define by an expression the default value of parameters and the conditions under which the parameters will be visible.

Image 38: Automation parameters



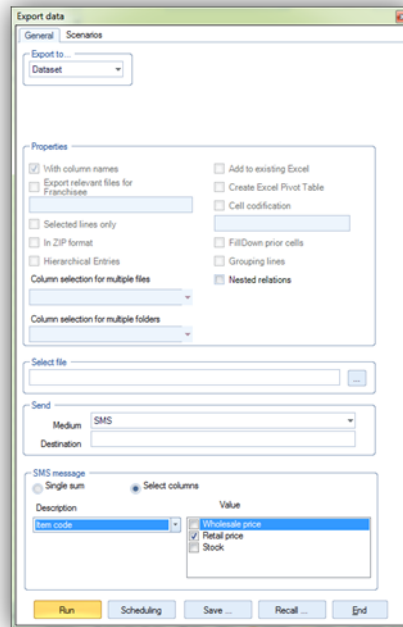
Visible parameter	☒	Process
Default value	☐	Process
auto investigate	☐	

- It is now possible to define the condition under which the target entity form will be displayed or not; therefore, in an automation that inserts a new or updates an existing record it is now possible to define whether this record will be shown or not.
- Auto-investigate if one single parameter exists for a particular automation, and the parameter has been set as auto-investigate; in such cases the user intervention is not required.
- Intercompany automations are now supported; i.e. automations that create or update records in more than one company, other than the current.

3.5.3 Send information

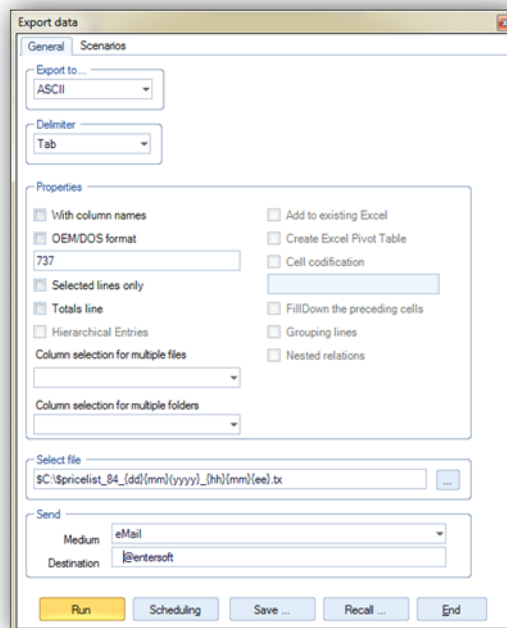
- The Data export functionality (Send...), available for the application lists and reports, is now enriched by the new feature for supporting information distribution by SMS (select SMS medium and then select the fields you wish to be included in the SMS).

Image 39: Export to: "Dataset" | Medium: SMS



- If the user has selected to export information to an ASCII file and the name is dynamically formatted, then if the medium is e-mail then the produced e-mail will include as attachments all the ASCII files that will be generated by the export.

Image 40: Export | customizable name



3.5.4 Windows forms designer

- **OLAP and BIT as context reports:** It is now possible to use an OLAP or a BIT report as context. This improvement concerns any reports that have been developed as context i.e. the existence of the ISUDGID parameter is a prerequisite.
- **Available transitions:** It is now possible to use this new action, which is available as a document action. Its use will display a list of all the available transitions of the selected document type.
- **New entities that support customizable forms:** Fixed Assets, Expenses and Services can now be adapted to your special requirements.
- **New actions:** "Insert new Address" and "Insert new Recipient" for Trade Documents.
- New control for **Resource Scheduling** (CRM)
- **New properties** for defining the behavior of "**Sections**":

Property	Comments
Display menu	The property defines if the contents tree will appear (True) or not (False).
Expander	The property defines whether a section: (a) is to be included in the Navigation Tree (values: True or Hidden) or not (value: False) and whether (b) it will provide expand-collapse functionality (value: True) or not (values: False or Hidden).
Layout mode	The property defines the screen area that a section will cover. Whether it will cover the entire screen (value: FullScreen) or the predefined area that results from section's row weight (value: Default)
Hide on new	The property defines whether a section will be visible when inserting a new entry (value: False) or not (value: True)



Note that

The **EBS-DynFormsBestPractices** document provides some valuable and useful tips for incorporating the newly added functionality when designing a dynamic form. The document is available in the: **.\ESDocumentation** folder.

3.5.5 Investigation customization

It is now possible to customize the investigation on various reference fields. If desired, it is possible to enforce the use of a set of criteria, in order to improve the application response time and efficiency, since it will prevent the users from full search investigation.

The customization is possible through the Company Parameter **Field Search: automatically append the special character: [*]** available in the **Generic - Operational** category. If you select not to automatically add the [*] character at the end of the terms, then the users will not be able to run investigation without typing in some search text or the [*]. The application today does not require the use of the [*] character since this automatically added when searching.

The alternative parameters values are:

- **Always.** The [*] character is appended automatically in all field investigations.
- **Auxiliary fields.** Ο χαρακτήρας [*] character is appended automatically in all field investigations that reference auxiliary tables (i.e. Zooms).
- **Never.** The [*] character is not appended automatically in any field investigations.

Furthermore, by using the Company Parameter **List of entities where the character: [*] is not automatically appended**, available in the **Generic - Operational** category, you may define (in a comma separated list) the entities for which the [*] characters will not be automatically added during investigation.

4. Entersoft ERP

4.1 Credit Policy

The Credit Policy control method of **Balance Overdue Time** is now enriched by two additional flags. The system provides capabilities for checking a Trade Account's balance in a consolidated manner i.e. the Trade Account's balance in any other Company monitored in EBS. Depending on the customization of the installation, two options are available:

- **Intercompany control.** By activating this flag, the check is applied to all trade accounts, in all companies, with identical **Code** and of same **Nature** (i.e. payable, receivable).
- **At person level.** By activating this flag, the check is applied to all trade accounts, in all companies, under a common **Person** and of same **Nature** (i.e. payable, receivable).

Image 41: Credit Policy and Balance overdue time

Amounts		Control method	Check source	Turnover months	Intercompany control	In person level
Accounting balance limit	€20,000.00	Warning	Past months gross turnover	6	☐	☐
Limit with own notes	€25,000.00		Past months gross turnover	6		
Commercial balance limit	€40,000.00		Past months gross turnover	6	☐	☐
Maximum amount per transaction	€15,000.00	Message with excess option				
Risk limit		Warning	Orders w/ step for risk control	1. For approval	2. Approved ap	
Balance overdue time	Days 55	Warning	Minimum outstanding amount	€10,000.00	☐	☐

4.2 Allocation of expenses to cost centers

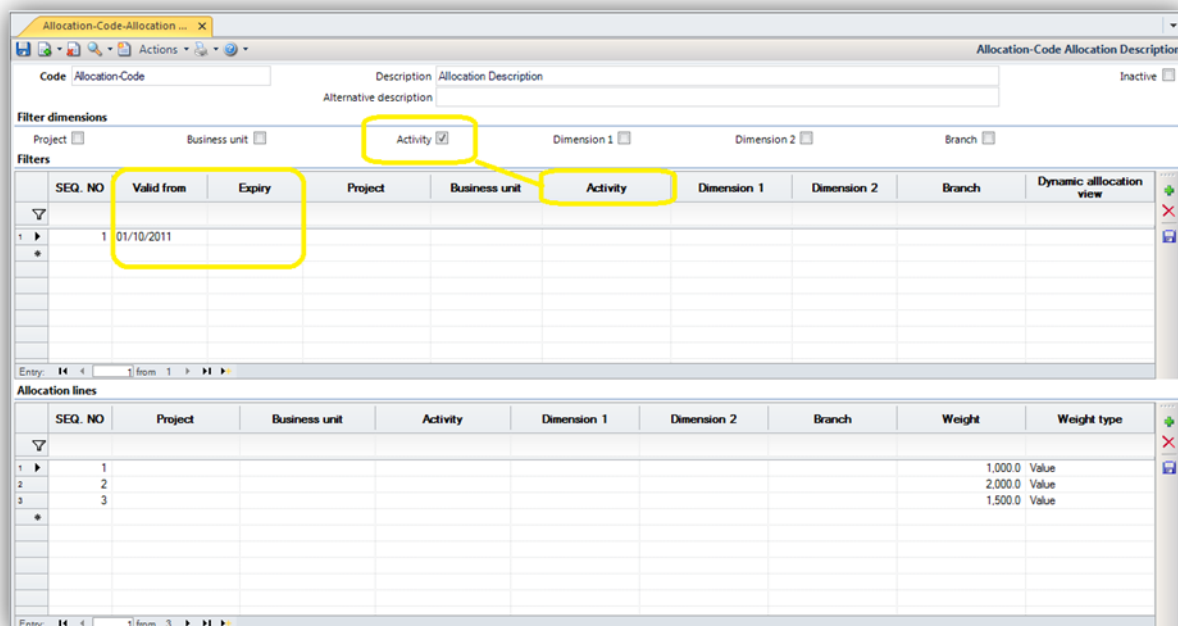
It is now possible to allocate expenses to cost center by using processes outside the Accounting Subsystem; until the previous EBS version the functionality was available only in the Accounting Subsystem by using allocation profiles.

The business dimensions (i.e. Business Unit, Activity, Project, and Dimensions 1 & 2) and the Branch can be used as Cost Centers. When registering trade transactions that involve expenses, the value of the expenses can be allocated to the selected Cost Centers and then, the application reporting will present the expenses per cost center.

4.2.1 Allocation Profiles

The administration and configuration of Allocation Profiles is available at [Configuration and Tools \ Customization: Organization parameters \ Business Dimensions \ Allocation Profile](#). An Allocation profile contains the following sections:

Image 42: Allocation Profile



The screenshot shows the 'Allocation-Code-Allocation' window. It has a top section for 'Filter dimensions' and a bottom section for 'Allocation lines'.

Filter dimensions:

- Code: Allocation-Code
- Description: Allocation Description
- Alternative description:
- Inactive: ☐
- Filter dimensions: Project ☐ Business unit ☐ Activity ☒ Dimension 1 ☐ Dimension 2 ☐ Branch ☐

Filters:

SEQ. NO	Valid from	Expiry	Project	Business unit	Activity	Dimension 1	Dimension 2	Branch	Dynamic allocation view
1	01/10/2011								

Allocation lines:

SEQ. NO	Project	Business unit	Activity	Dimension 1	Dimension 2	Branch	Weight	Weight type
1							1,000.0	Value
2							2,000.0	Value
3							1,500.0	Value

4.2.1.1 Filters

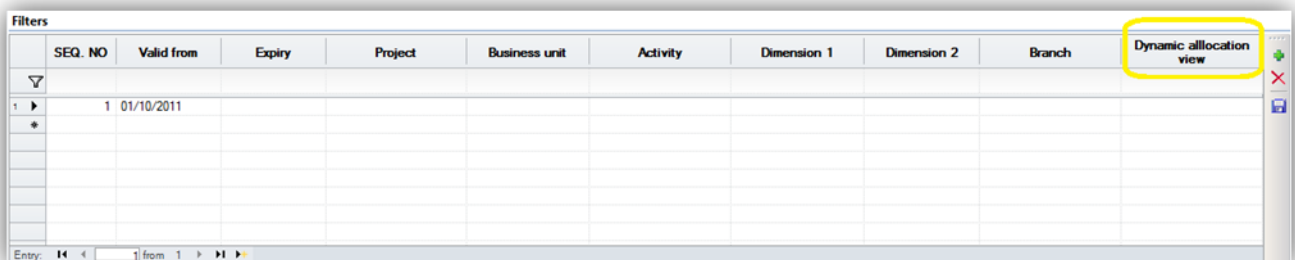
Here it possible to define a date range for which the allocation is effective, and a set of values for the selected Business Dimensions. When an allocation profile is used on Document Expense Lines, these filters will be applied to check whether the lines correspond to the defined filters; if the result is positive, then the expenses will be allocated to the business dimensions described in the Allocation Lines section..

4.2.1.2 Allocations

The allocation weight and the business dimensions are described in the Allocation Lines section. The 'Weight' field the percentage or a value may be defined. If the selected Weight Type is 'value', then when applying the allocation profile the values will be converted to percentages (i.e. the share of the value to the sum of values expressed as percentage).

Furthermore, you may define a dynamic allocation view (available at the 'Filters' section). In order to select a view this must be available in the corresponding area (i.e. "Allocations - dynamic views").

Image 43: Dynamic Allocation View



	SEQ. NO	Valid from	Expiry	Project	Business unit	Activity	Dimension 1	Dimension 2	Branch	Dynamic allocation view
1	1	01/10/2011								

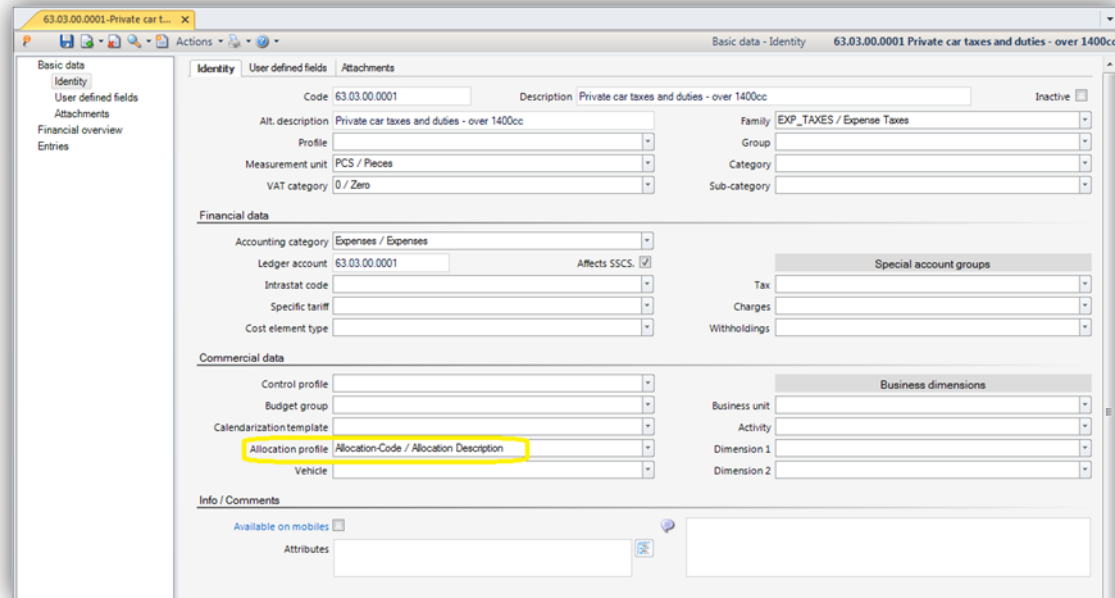
Such views must contain columns with the **reserved** names listed below:

- **Project**
- **Business Unit**
- **Activity**
- **Dimension1**
- **Dimension2**
- **Site** for the Branch Code
- **Date**, i.e. a queried Date Range field which will be used for selecting the corresponding transactions.
- **Weight**, i.e. a numeric column that contains the weight for the selected dimensions of the records in the view.

4.2.2 Allocation profiles and Control profiles on Expenses

An allocation profile can be set as *default* on the Expenses (Image 44).

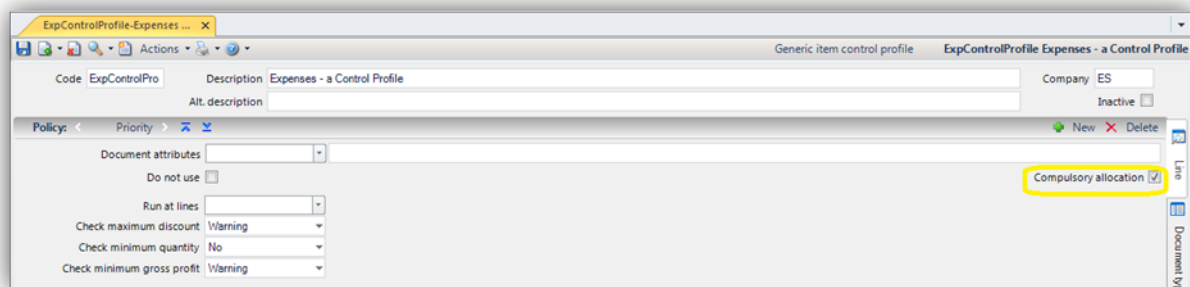
Image 44: Default allocation profile for an expense



The screenshot shows the 'Basic data - Identity' window for the item '63.03.00.0001 Private car taxes and duties - over 1400cc'. The 'Allocation profile' field is highlighted in yellow, showing 'Allocation-Code / Allocation Description'. Other fields include 'Code', 'Description', 'Family', 'Group', 'Category', 'Sub-category', 'Accounting category', 'Ledger account', 'Intrastat code', 'Specific tariff', 'Cost element type', 'Control profile', 'Budget group', 'Calendarization template', 'Vehicle', 'Business unit', 'Activity', 'Dimension 1', and 'Dimension 2'.

Finally, it is possible to define the Allocation as Compulsory, on the Expense control profile (field: **Compulsory Allocation**) for the relevant Document Attributes. This way, when registering a transaction that involves an expense for which it has been defined that the Allocation is compulsory, the allocation of the expense will be automatically applied to the selected Cost Centers.

Image 45: Control Profile | Compulsory Allocation



The screenshot shows the 'ExpControlProfile-Expenses' window. The 'Compulsory allocation' checkbox is checked and highlighted in yellow. Other fields include 'Code', 'Description', 'Alt. description', 'Policy', 'Priority', 'Document attributes', 'Do not use', 'Run at lines', 'Check maximum discount', 'Check minimum quantity', and 'Check minimum gross profit'.

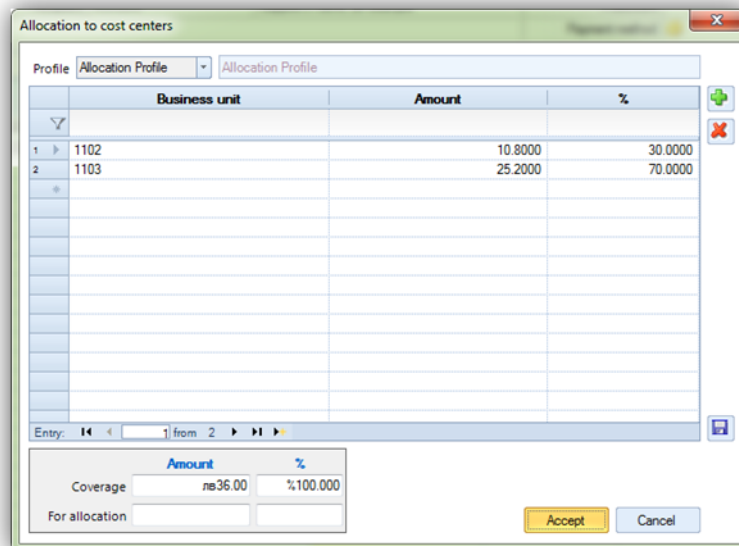
4.2.3 Applying the Expense Allocation

The allocation can be applied:

- **After the user's corresponding action:** One of the available actions of an Expense Line is the 'Allocation to Cost Centers' action.

- **While saving the document:** If an Allocation Profile is found for the Expenses involved in the document, this will be used for the allocation of expenses. If the application fails to locate an allocation profile while the allocation is set as compulsory, then the document save will fail to be completed.

Image 46: Allocation of Expenses to Cost Centers in a Transaction



	Business unit	Amount	%
1	1102	10.8000	30.0000
2	1103	25.2000	70.0000

Entry: 1 from 2

Coverage: 36.00 %100.000

For allocation:

Accept Cancel

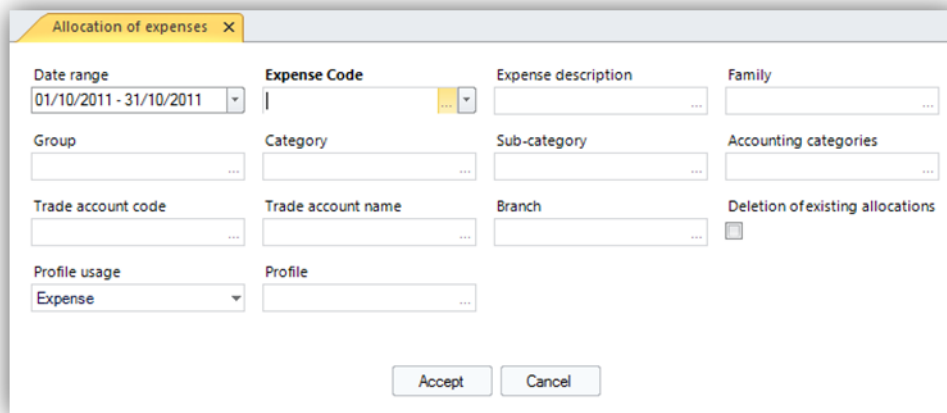
What the Allocation Profile defined serves mainly as the default, while various adjustments are possible on the 'Allocation to Cost Centers' action's dialogue. However, it needs to be emphasized that it is required to ensure that the sum of the weights must be equal to 100 when the weight type is set as 'Percentage'. Mixed weight types are too not allowed.

When a Document that contains Expense Allocation Lines will be posted to Accounting, each line created in the Expense Subsystem and in Cost Accounting will have as "Originator line" the Allocation line and not the expense line. This way, the documents that contain one expense line will be reported with that many lines as many are the allocation lines. The expense line will have no values set on the dimensions that have been used for expense allocation purposes. If the 100% of an expense is to be allocated on a single Cost Center, then the application will not create a new allocation line but it will update the expense lines with the appropriate Business Dimensions.

4.2.3.1 Bulk application

The new functionality "**Apply cost allocation profiles**" is now available at: [Accounting / Expenses / Apply cost allocation profiles](#).

Image 47: Apply cost allocation profiles



This functionality can be used when:

- The allocation profile must be assigned to the existing Expenses.
- The Control Profile option for compulsory allocation is inactive.
- The recalculation of the expense allocation is desired due to changes made on the Allocation Profile.
- By selecting **Deletion of existing allocations** and defining which allocation profile should be used (i.e. the one defined as default on each expense or the one specified on the form) the allocations will be re-created.

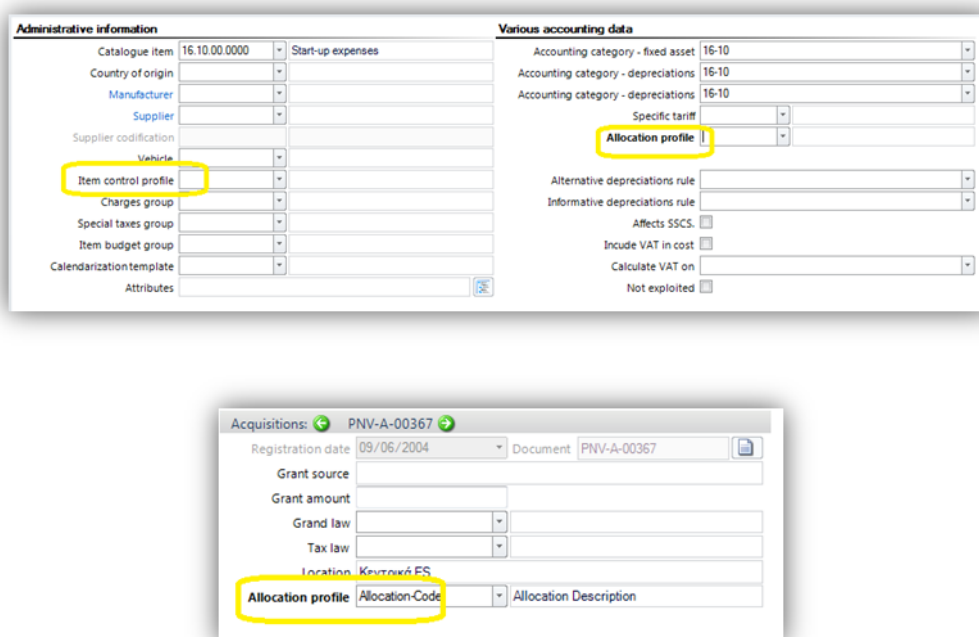
4.3 Fixed Assets

4.3.1 Allocation of the value of Depreciation to Cost Centers

The Calculation of Depreciations can now automatically allocate the value of the depreciations to Cost Centers. This can be done by using this new functionality of defining an Allocation Profile, as described in the previous section (see section 4.2.1).

In the case of Fixed Assets Depreciation is sufficient to set the preferred Allocation Profile: on the Fixed Assets or on every Depreciable acquisition of the Fixed Assets you want to be involved in the allocation. Additionally, it is required to select a Control Profile that defines the allocation as compulsory. Along with the calculation of Depreciations, EBS will also allocate value of Depreciations, as defined by the selected profiles.

Image 48: Allocation of the Value of Depreciation | Fixed Asset and Acquisition

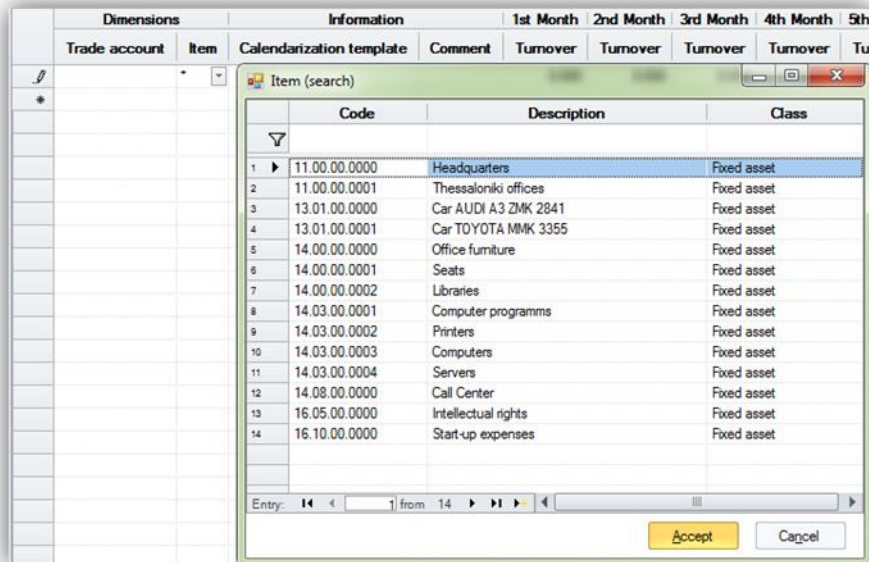


The image displays two screenshots from the EBS software interface. The top screenshot shows the 'Administrative information' and 'Various accounting data' tabs. In the 'Administrative information' tab, the 'Item control profile' is highlighted with a yellow box. In the 'Various accounting data' tab, the 'Allocation profile' is highlighted with a yellow box. The bottom screenshot shows the 'Acquisitions' form for document PNV-A-00367, with the 'Allocation profile' field highlighted by a yellow box.

4.3.2 Fixed Assets Purchases and Sales: Budget Compilation

It is now possible to create Budget Sheets for the purchases and sales of Fixed Assets; i.e. in a Budget Sheet for Sales or Purchases where one of the dimensions is the 'Item', among the selectable items now are the Fixed Assets (Image 49). The cube 'Comparative results' reports the related information for Fixed Assets too.

Image 49: The dimension 'Item' and the selection of Fixed Assets for budgeting Sales or Purchases



4.3.3 Depreciations

- The new Company Parameter **Contribution of Informative Cost to Alternative Depreciations**, in the Fixed Assets Subsystem category, allows to control whether the Informative cost will contribute to the calculation of the Depreciable Value of the Alternative Depreciations. Besides the calculation of the alternative depreciations, this also reflects to the various reports.
- The format of the results presented in the **Annual alternative depreciations** report has been altered and from now on the results are grouped by Acquisition and not by Fixed Asset. Furthermore, a new column has been added: the column displays the depreciations value to-date.
- A new report has been added: **Annual informative depreciations**, available at: **Business intelligence \ IAS Accounting \ Annual Depreciations**. The report presents information about the Informative Depreciations cost, grouped by Acquisition.

4.4 Documents

4.4.1 Customization

- When the Document Type with International Code: **MHB - Stock counting entry** involves Raw Materials or Secondary Raw Materials, **Consumption** is the default Difference Type.



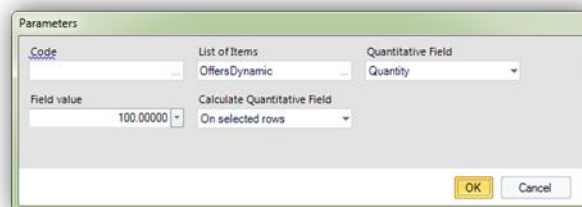
Note that...

In order to activate this improvement, it is required to "Import from Entersoft XML" the Field Property Profile with Code: 4-MHB

4.4.2 Invoicing policy conditions and Dynamic/Static Lists

When creating an Invoicing Policy Condition that requires the selection of Item Codes, it is now possible to (alternatively) use Dynamic or Static Lists of Items; hence, it is now possible to manage the Items that participate in Invoicing Policies in a more effective and efficient way.

Image 50: Invoicing Policy Condition Parameters: Based on numeric field and Item



This customization is possible through the Invoicing Policy Conditions dialogue, if the condition is based on a template condition where Condition Parameters are: **Based on a numeric field and Item**.

4.4.3 Intrastat

The contribution of **Operations with a view a processing under contract** (Nature of transaction: code 41-43) and **Operations following processing under contracts** (Nature of transaction: code 51-53) has now been incorporated. Delivery-Receipt Notes with the abovementioned natures are included in the Intrastat transactions. The Net value is typed-in by the user directly on the Delivery-Receipt Notes. The Statistical value calculation is based on the sum of the Net Value and the Expenses (up to the borders). It is not required to close the Import Folders.

Specifically, the Deliveries Intrastat includes:

- Suppliers' transactions (Nature of transaction: code 41-43)
- Customers' transactions (Nature of transaction: code 51-53)

Whereas, the Arrivals Intrastat includes:

- Suppliers' transactions (Nature of transaction: code 51-53)
- Customers' transactions (Nature of transaction: code 41-43)

4.4.4 Barcode and Multiple code

When selecting Items in a Document, the Multiple Code field of the line is updated with the value of the Barcode field of the selected item if this is not empty; else it is updated with the Item Code.

4.4.5 Salesperson periodics: new counters

Two new counters have been added to the Periodics of Salespersons; both are related to pending actions related to Sales; specifically the related "**Pending orders**" and "**Pending invoices**" have been included.

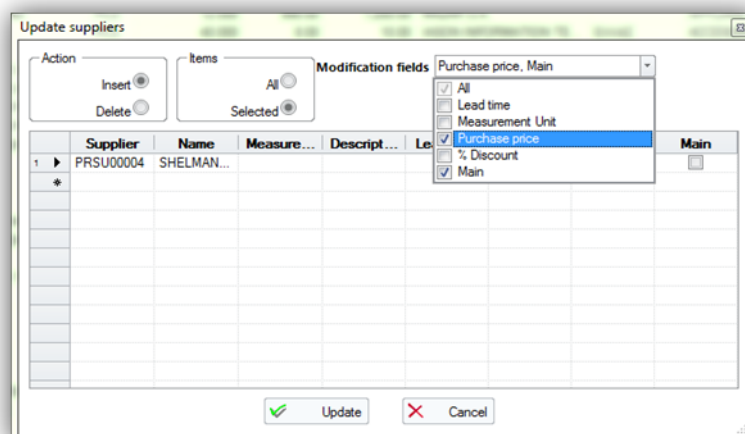
4.5 Inventory Items

4.5.1 Update suppliers and Modification fields

The **Update Suppliers** action, available at the Inventory Items Lists and Views, now provides functionality for updating Suppliers' information in a direct way, by updating Suppliers' fields, besides only linking suppliers to the (selected) Inventory Items.

This functionality is available through the new parameter: **Modification Fields**, where the user may select the fields that will be modified. On the Suppliers' list, the user can set the preferred values specifically for each field and supplier. The Insert process will both link the selected suppliers and update them accordingly. If the Supplier is already linked to the (selected) items then the process will only update the selected suppliers' fields.

Image 51: Update Suppliers and Modification fields



4.5.2 Catalogue Items

The 'Catalogue Item' entity now includes the following information: **Created on**, **Modified on**, **Created by**, and **Modified by**.

4.5.3 BOMs

It is now possible to define Item Dimensions for the consumables in a BOM, specifying thus the dimensions for the consumption. In particular, the dimensions **Color**, **Size**, **Dimension 1**, and **Dimension 2** are available at "Add/remove Columns" and can be included in the layout.

In Documents, when the Product's BOM that includes such information (i.e. consumables with specified dimensions), the consumables will be inserted in the Document with the specified dimensions as these were defined in the BOM. Since the dimension values have been specified at the BOM level, these will not be modifiable in the Document.

4.6 Trade Accounts

4.6.1 Suppliers' down-payments administration

This new workflow is equivalent to the existing workflow for managing the Customers' down-payments. The workflow principally aims in invoicing the open suppliers' down-payments (Section 4.6.1.1); next, the invoiced down-payments participate in the corresponding Purchase Documents (Section 4.6.1.2).

4.6.1.1 Invoicing Down-payments

A Generic Item \ Expense is used in order to invoice the down-payments and define the Net Value and the VAT value of the down-payment. A new Accounting Category with Code "**Advance_Supplier**" must be created and assigned to the aforementioned Generic Item \ Expense, in order to use it for the particular purpose.

Image 52: The new Accounting Category

Reference table		Document type	
Reference table	Item		
5	Item	Advances	ABAHC
			412
			Customers Advances
6	Item	Advances_Supplier	ABAHC
			402
			Suppliers A...

The new view "**Not invoiced suppliers' down-payments**" (available at: **Purchases and Procurement\Pick-ups Receiving and Purchase invoices**) presents the open down-payments and the delay days, grouped by Supplier. The open down-payments can be invoiced through the new automation "**Advance payments invoicing**", which is available at the view.

Image 53: "Not invoiced suppliers' down-payments"

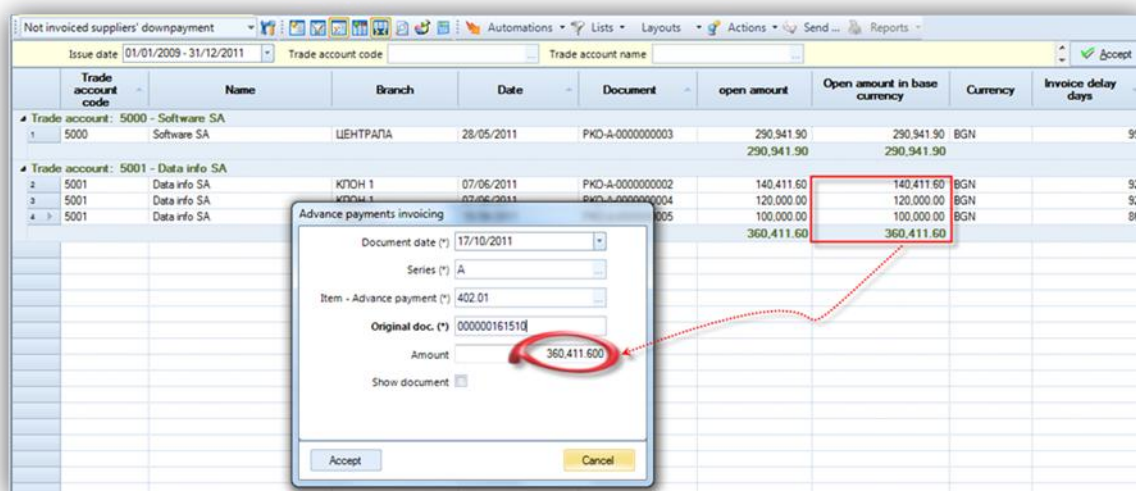
Trade account code		Name	Branch	Date	Document	open amount	Open amount in base currency	Currency	Invoice delay days
Trade account: 5000 - Software SA									
1	5000	Software SA	ЦЕНТРАЛА	28/05/2011	PKD-A-0000000003	290,941.90	290,941.90	BGN	99
						290,941.90	290,941.90		
Trade account: 5001 - Data info SA									
2	5001	Data info SA	КЛОН 1	07/06/2011	PKD-A-0000000002	140,411.60	140,411.60	BGN	92
3	5001	Data info SA	КЛОН 1	07/06/2011	PKD-A-0000000004	120,000.00	120,000.00	BGN	92
4	5001	Data info SA	КЛОН 1	15/06/2011	PKD-A-0000000005	100,000.00	100,000.00	BGN	86
						360,411.60	360,411.60		

The automation dialogue requests the following information:

- **Document date** (Default value = Current date)
- **Series** (Default value = The first on the list)

- **Item-Advance payment.** The Generic Item \ Expense with the Accounting Category “**Advance_Supplier**” is proposed automatically.
- **Original Document.** To be typed-in by the user.
- **Amount.** The sum of the selected transactions of a single Supplier is automatically proposed as the invoice amount; however, the user can modify the default value if partial invoicing is required.
- **Show document.** By activating this option, the target document will open for review or further editing.

Image 54: Advance payments invoicing



The screenshot shows a window titled "Not invoiced suppliers' downpayment" with a table of transactions. The table has columns: Trade account code, Name, Branch, Date, Document, open amount, Open amount in base currency, Currency, and Invoice delay days. The data is grouped by Trade account code (5000 and 5001). An "Advance payments invoicing" dialog box is open, showing fields for Document date (17/10/2011), Series (A), Item - Advance payment (402.01), Original doc. (000000161510), and Amount (360,411.60). The Amount field is highlighted with a red circle, and a red arrow points from the "Open amount in base currency" column of the table to this field.

Trade account code	Name	Branch	Date	Document	open amount	Open amount in base currency	Currency	Invoice delay days
Trade account: 5000 - Software SA	Software SA	ЦЕНТРАЛА	28/05/2011	PKD-A-0000000003	290,941.90	290,941.90	BGN	99
Trade account: 5001 - Data info SA	Data info SA	КТОХ 1	07/06/2011	PKD-A-0000000002	140,411.60	140,411.60	BGN	52
5001	Data info SA	КТОХ 1	07/06/2011	PKD-A-0000000004	120,000.00	120,000.00	BGN	52
5001	Data info SA				100,000.00	100,000.00	BGN	86
					360,411.60	360,411.60		

4.6.1.2 Closing the invoiced down-payments

The closing of a down-payment will associate the invoiced down-payment to a Purchase Document. This way, the total value of the Purchase Document will be reduced correspondingly i.e. by the amount of the invoiced down-payment. The user can also associate one or more open down-payments to a Purchase Invoice while inserting / editing a particular Purchase Invoice through the “**Settle advance payment**” automation.

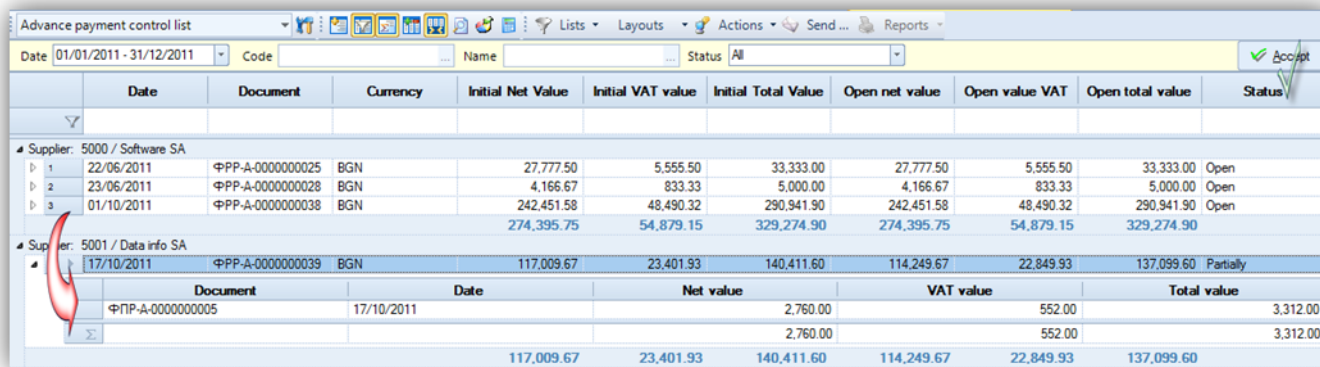
If the value of the invoiced down-payment is greater than the value of the Purchase Document, then the user may associated to the Purchase Document and modify the specific value in the document (which will be available in the Purchase Document as a 'Reverse Transaction').

4.6.1.3 Advance payment control list

In order to monitor the invoiced down-payments, the view “**Advance payment control list**” is now available at **Purchases and Procurement\Pick-ups Receiving and Purchase invoices\Information**.

The view presents the open (partially or fully) invoiced down-payments in selected period of time. The second level of the report presents the corresponding Purchase Documents, if the down-payment has been associated to one.

Image 55: Advance payment control list



	Date	Document	Currency	Initial Net Value	Initial VAT value	Initial Total Value	Open net value	Open value VAT	Open total value	Status
Supplier: 5000 / Software SA										
1	22/06/2011	ΦPP-A-0000000025	BGN	27,777.50	5,555.50	33,333.00	27,777.50	5,555.50	33,333.00	Open
2	23/06/2011	ΦPP-A-0000000028	BGN	4,166.67	833.33	5,000.00	4,166.67	833.33	5,000.00	Open
3	01/10/2011	ΦPP-A-0000000038	BGN	242,451.58	48,490.32	290,941.90	242,451.58	48,490.32	290,941.90	Open
				274,395.75	54,879.15	329,274.90	274,395.75	54,879.15	329,274.90	
Supplier: 5001 / Data info SA										
	17/10/2011	ΦPP-A-0000000039	BGN	117,009.67	23,401.93	140,411.60	114,249.67	22,849.93	137,099.60	Partially
		Document	Date		Net value		VAT value		Total value	
		ΦΠP-A-0000000005	17/10/2011		2,760.00		552.00		3,312.00	
					2,760.00		552.00		3,312.00	
				117,009.67	23,401.93	140,411.60	114,249.67	22,849.93	137,099.60	



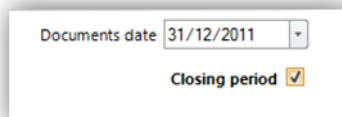
Note that...

A corresponding view is now available for the existing workflow for managing the Customers' Down-payments.

4.6.2 Retroactive discounts, closing period and forecasted rebates

It is now possible to create new documents for Forecasted Rebates in the Closing Period, through the Calculation process of retroactive discounts (**Sales** or **Purchases & Procurement / Retroactive Discounts / Data Calculation**). This can be achieved if the **Fiscal Year-End date** is defined as the **Document date**.

Image 56: Retroactive Discounts: Closing Period



Documents date

Closing period ☒

Then, by activating the **Closing Period** check box, the documents will be created in the Closing Period.

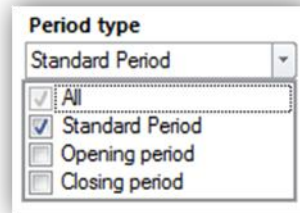
4.6.3 Credit control and arrears

When running **Credit control** for Trade Accounts, the check regarding the time of arrears now takes into account the **login date** and not the date on which the document was issued.

4.7 Reports

- Report: **"Trial Balance columns justification"**. The **Item type** και **W/H not valued** were added at the item entries level.
- The **"Quantity Type"** filter (In base MU / Alternative MU) has been added to the reports under the **"Item register"** expander of the **Inventory Item** form.
- Report: **"Item audit view"**. The following information has been also included: **"Created on"**, **"Last purchased on"**, **"Last sold on"**, and **"Last purchase price"**.
- **Trade Accounts' Balance justification** reports: **Trade Account's Branch** has been included.
- Sales Report: **Outstanding orders**. The **Workflow step** has been included.
- New report (Cube): **Expenses per cost center**. The report is available at **Business Intelligence \ Purchase - Expense Statistics \ Expenses per cost center** and it may be used when it is required to monitor expenses, outside the Accounting subsystem, per Cost Center (i.e. Business Dimensions: (Business Unit, Activity, Dimension 1 & 2, Project, Branch)).
- Additional filters have been included in the investigation lists of not-counted Items: **Alternative Code**, **Main Supplier** and **Season**.
- **Intercompany reports** now present the results grouped by Company. The reports are:
 - Accounts Payable Registers
 - Payables Trial Balance
 - Receivables trial balance
 - Accounts Receivable Registers
 - Inventory Costing Balance
- **Trade Accounts' reports (Journal/Trial Balance)** now include filter for the **Period Type**. The filter's values are:
 - Standard period
 - Opening period
 - Closing period
 - All

Image 57: New filter: "Period Type"



Period type	
Standard Period	
☒	All
☒	Standard Period
☐	Opening period
☐	Closing period

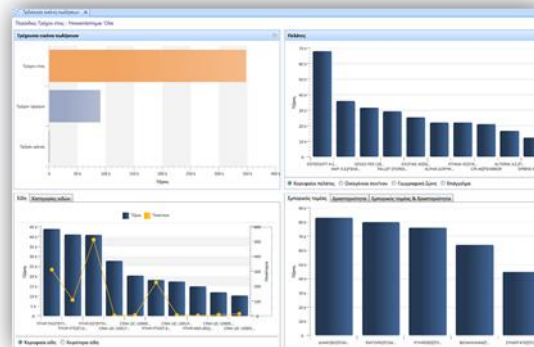
4.8 Sales & Profitability Dashboards

Sales and profitability dashboards help sales executives to analyze various key figures and business dimensions/entities in real time. The interactive pages included in sales and profitability analytics allow sales professionals to trigger the right actions to resolve issues and to meet sales quota targets.

4.8.1 Current sales insight

It presents an overview of sales in current year.

Image 58: Current sales insight



4.8.2 Item categories

You can use this interactive page to analyze the turnover and the gross profit based on item groupings.

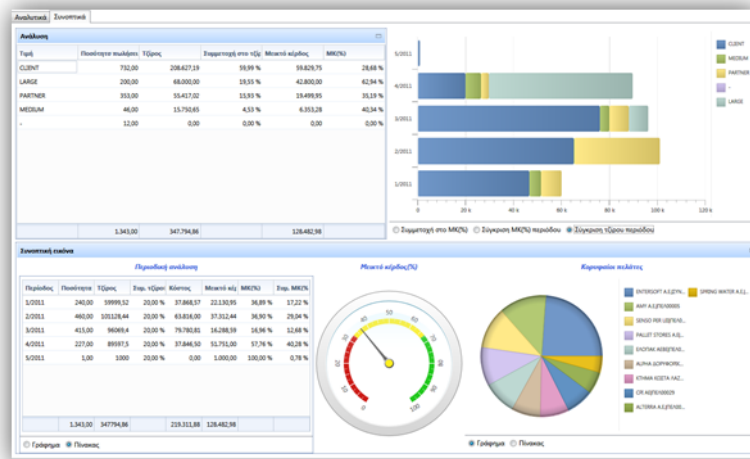
Image 59: Item Categories



4.8.3 Customer categories

You can use this interactive page to analyze the turnover and the gross profit based on customer various groupings.

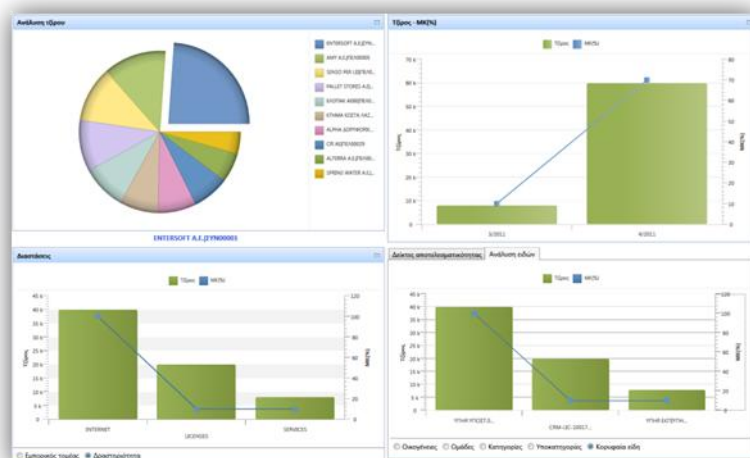
Image 60: Customer Categories



4.8.4 Top customers

You can use this interactive page to analyze the turnover and the gross profit of the top ten customers.

Image 61: Top Customers



4.8.5 Sales dimensions

You can use this interactive page to analyze the turnover and the gross profit based on company's business dimensions

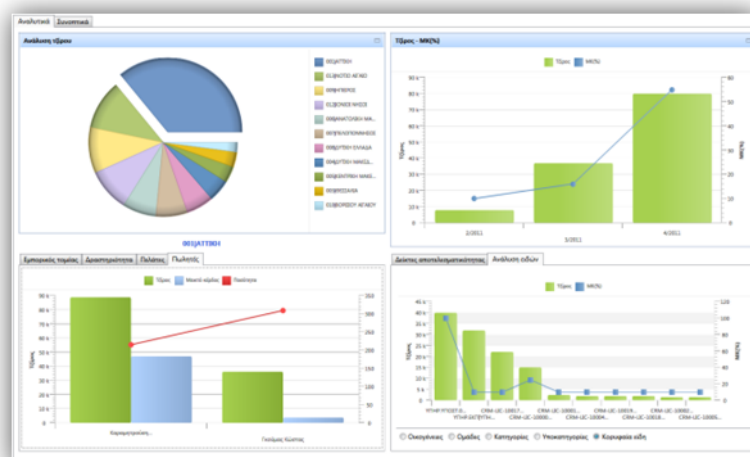
Image 62: Sales Dimensions



4.8.6 Geo zones

You can use this interactive page to analyze the turnover and the gross profit of various geo zones.

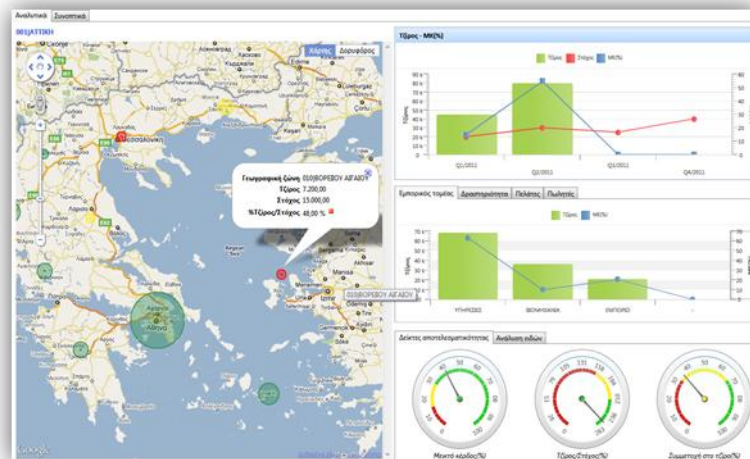
Image 63: Geo Zones



4.8.7 Geo zones to target

You can use this interactive page to analyze the turnover of various geo zones compared with their sales quota targets.

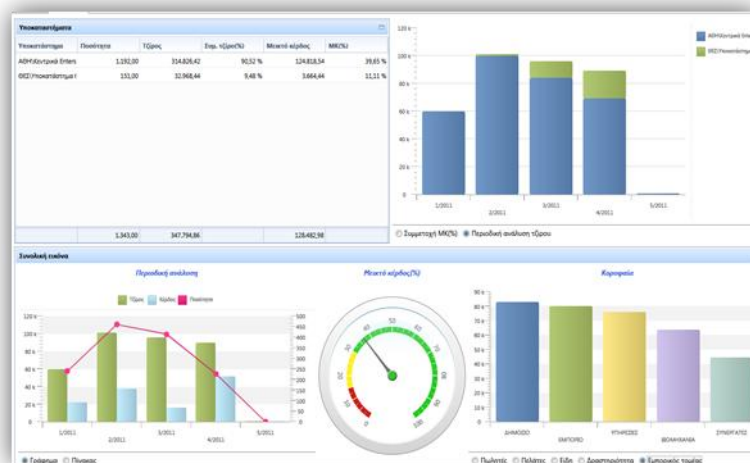
Image 64: Geo Zones to Target



4.8.8 Branches

You can use this interactive page to analyze the turnover and the gross profit achieved by the different company branches.

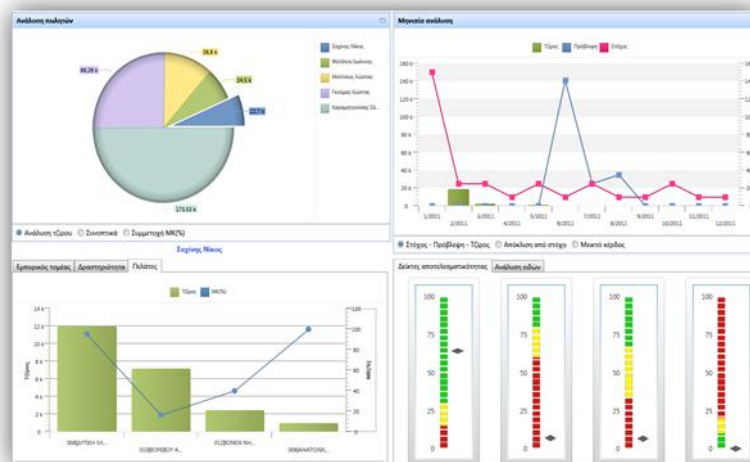
Image 65: Branches



4.8.9 Sales representatives / Target

You can use this interactive page to analyze the turnover achieved by sales executives compared with their sales quota targets.

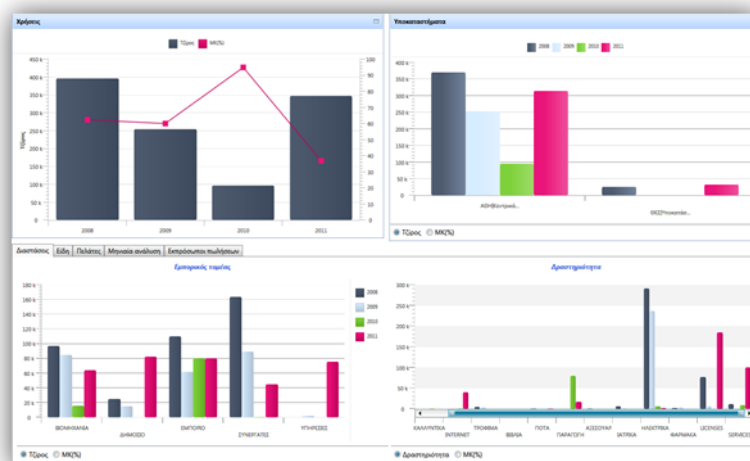
Image 66: Sales representatives / Target



4.8.10 Sales comparison

You can use this dashboard to compare the turnover and the gross profit between different fiscal years.

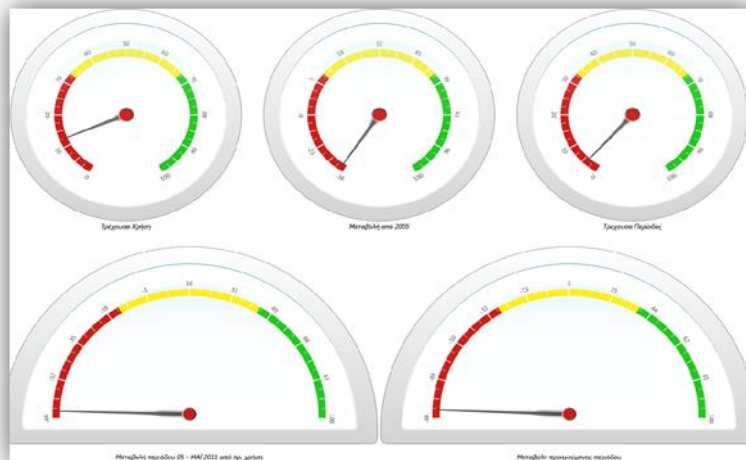
Image 67: Sales Comparison



4.8.11 Performance and profitability key figures

You can use this dashboard to examine the performance of various key figures like turnover, customer retention rate, and cost margin.

Image 68: Performance and profitability key figures



4.8.12 Market basket analysis

You can use this dashboard to analyze specific retail sales key figures.

Image 69: Market basket analysis



5. Entersoft CRM

5.1 General enhancements

5.1.1 Task type

- New parametric field duration monitoring configured per task type. After the upgrade of Entersoft Business Suite v4, all the opportunity and service request class task updated with monitoring of field named 'Status'. The following fields are supported: Status, Category 1... 10, Assigned To, Owner. Moreover the field 'Repaired item location' is supported for service request class.
- Resource wizard has been moved to → `\Configuration\Task type management\Tasks`
- Resource list has been moved to → `\Configuration\Task type management\Tasks`
- Opportunity templates have been moved to → `\Configuration\Task type management\Tasks`
- Outlook integration has been moved to → `Top toolbar\General`

5.1.2 Dynamic forms and Custom Toolbars

Using this feature, new form tailor-made toolbars can be implemented. All the dynamic toolbars are located in the folder .\ESToolbars. These toolbars does not support shadowing mechanism. In case where a custom toolbar must be created or an existing toolbar must be customized with a new action then a new toolbar must be created with a name like "CSMyToolbar.xml". The relative dynamic form property should be updated with the new csmytoolbar.xml toolbar.

Image 70: Appointment & Sales Appointment Forms

The screenshot displays the Microsoft Dynamics CRM 2011 user interface. At the top, a navigation bar includes tabs for 'Αντιβιοίωση', 'Νέο', 'Διαγραφή', 'Follow up', 'Νέο lead', 'Νέο εμπόριο', 'Αυτοεργαστήριο', and 'Ενότητες'. Below this, the main window is divided into two panes. The left pane shows a contact record for 'ΕΠΕΝΔΥΣΗ' (Investment), with fields for 'Όνομα' (Name) set to 'ENTERSOFT A.E.', 'Εταιρεία' (Company) set to 'ΛΕΩΦΟΡΟΣ ΣΥΓΓΡΟΥ 362 ΑΘΗΝΑ 11574 276', and 'Διεύθυνση' (Address). The right pane shows a 'Χρονοδιάγραμμα' (Calendar) view for the contact, with a date range from 7/6/2011 to 7/6/2011. Below the calendar, there is a 'Σχετικά με' (About) section with fields for 'Ανάλυση' (Analysis), 'Αποδοχή' (Acceptance), and 'Εξέλιξη' (Evolution). At the bottom, a 'Προγραμματισμός' (Scheduling) section shows a calendar for July 2011, with a list of events including 'Καταγραφή Σημάτων' (Signal Recording), 'επιμελέσει' (will edit), 'Καταγραφή Σημάτων' (Signal Recording), 'Παράδοση Κινημάτων' (Delivery of Movements), 'Μετακίνηση Κινημάτων' (Movement of Movements), and 'Συνάντηση Νέας' (Meeting New).

5.1.3 Appointment & Sales Appointment Forms

A new timeline schedule control has been embedded to the appointment forms. Using the aforementioned control now we can schedule the required resources for an appointment. The new timeline embedded schedule control can be configured during the design time of the form with which task type should be filtered during the resource selection.

5.1.4 Person - Trade Account Fields

The person and trade account fields have been removed from all dynamic forms. The person and trade account search is supported from a new unified control mechanism. The new search mechanism is supported through a new unified view where for each person row the associated trade account information is presented.

During search, if the selected row contains information about the trade account then the system populates the values to the relative hidden fields (person and trade account). Then new control displays the name of the person/trade account. The label of the control automatically changes to "Trade account", if a person with trade account info is selected.

5.1.5 Activity status update

For most activities the status is updated during the save process. During save the user can select if the status of the record should be updated to 'In progress', 'Closed' or 'Cancelled' state. All the task types of communication class support this feature. Moreover the following specific task types support the auto status update feature:

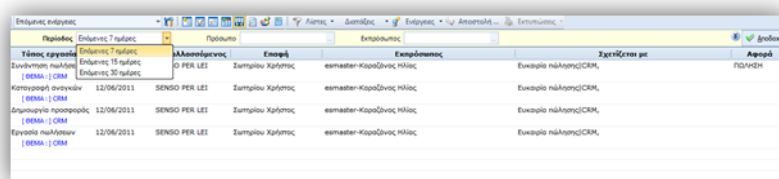
- To do
- Sales to do
- Quotation follow up
- Presentation/Demo

5.2 Sales

5.2.1 Sales Activities

- **Next activities:** This report can be used to view the next activities that have been scheduled by sales representatives. The next activities can be filtered for the next seven (7) - fifteen (15) or thirty days (30).

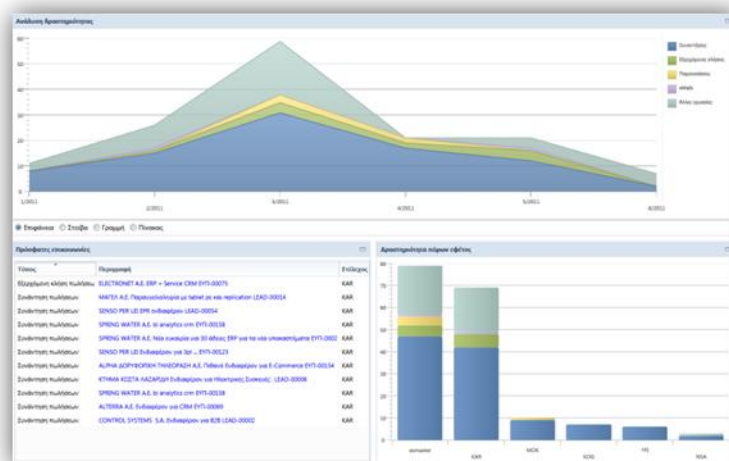
Image 71: Next activities



Τύπος εργασιών	Προβλεπόμενη ημερομηνία	Αποστολέας	Επίπεδο	Επιχειρηματικός	Σχεδιάζεται με	Αποστολή
Συνέντευξη πελάτη	12/06/2011	IO PER LEI	Συμπλήρω Χρήματος	esmaister-Karadonovs Hllos	Ευκαρίοη μάλλονCRM,	ΠΩΛΗΣΗ
Καταγραφή συνέντευξης	12/06/2011	SENGO PER LEI	Συμπλήρω Χρήματος	esmaister-Karadonovs Hllos	Ευκαρίοη μάλλονCRM,	
Διευκρινιστική παρουσίαση	12/06/2011	SENGO PER LEI	Συμπλήρω Χρήματος	esmaister-Karadonovs Hllos	Ευκαρίοη μάλλονCRM,	
Ενημέρωση πελάτη/των	12/06/2011	SENGO PER LEI	Συμπλήρω Χρήματος	esmaister-Karadonovs Hllos	Ευκαρίοη μάλλονCRM,	

- **Activity analysis:** You can analyze the sales activities of the sales representatives. The dashboard contains three (3) items: a) Activity analysis by month, b) Activity analysis by representative for the current year c) Recent communications.

Image 72: Activity analysis



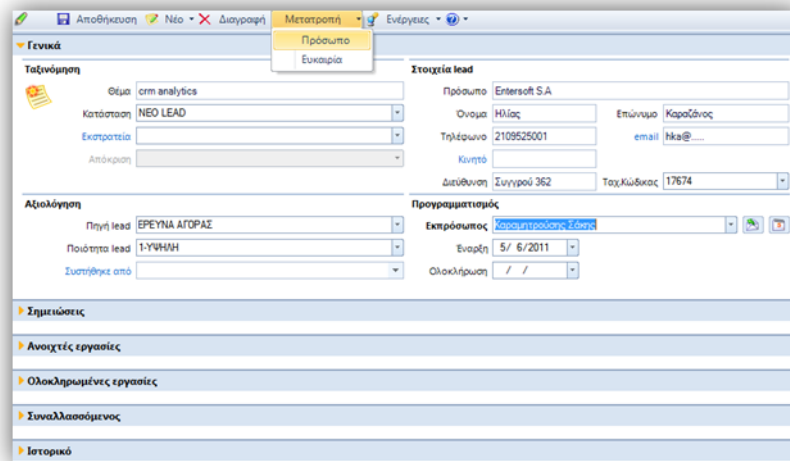
5.2.2 Lead management

- **Lead dynamic form:** A new lead can be created with person details with no existing person account record. The new lead record form provides specific fields to store the required person /contact information. A new command action name 'Convert to Person' can be used later to convert the lead person/contact details to a person/contact account. The command action mentioned above can create the person/contact record based on the following rule:

- For the field 'Person' a legal person is created.
- For the fields 'Name' and 'Surname' a physical person is created
- A new relation for the legal and the physical person is created.
- The address record is created
- The lead record is updated with the new persons

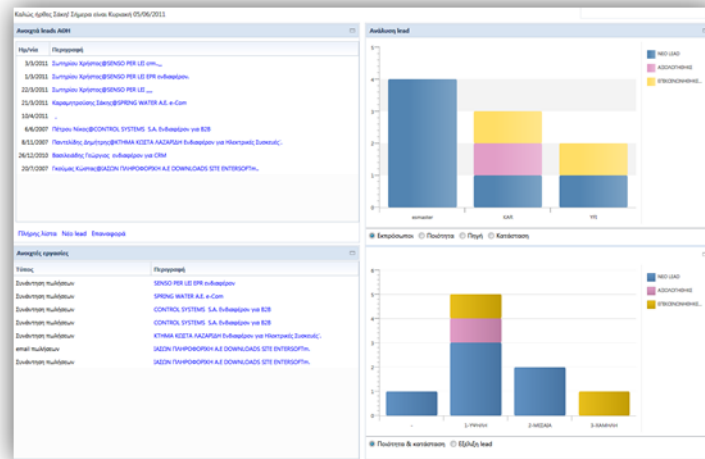
When the lead record is associated with a person account the 'Lead details' related fields are populated with the selected person /contact info.

Image 73: Lead dynamic form



- **Lead management:** The lead home page can be used by sales managers to manage the open leads. This page contains interactive chart items that can be used to filter the open leads and their associated child activities. Some questions that can be answered are the following:
 - Which is the average duration open lead stage in days?
 - Which is the lead- win conversion rate for each sales rep?
 - Which are the hot leads (high quality leads)?

Image 74: Lead management



- Lead performance:** This interactive page can be used to analyze the lead performance. The performance can be examined for different dimensions - entities. The dimension-entity to be analyzed can be selected using the relative filter parameter. The following key figures are calculated by the dashboard:
 - Number of leads by qualification level
 - Number of leads converted to opportunities and wins
 - Lead to opportunity / lead to win conversion rates
 - Opportunity to win conversion rate
 - Lead turnover contribution (%)

Image 75: Lead Performance



- **Lead status analysis:** This report shows the following figures: a) number of leads by status, b) average days in that status. Use the drill down feature of 'Code' column to see the associated leads.
- **Lead quality analysis:** You can use this analytic report to analyze the lead performance. The performance is examined for using different business dimensions/entities. The associated filter parameter can be used to select the dimension/entity to be analyzed.

Image 76: Lead quality analysis

Ενότητα	Χωριό	Χωριό	Μονάδα	Υψόμετρο	Εκταrek	Ρυθμός μετακίνησης σε ετήσια	Μέγιστο	Ρυθμός μετακίνησης σε μήνη	Ρυθμός μετακίνησης lead σε μήνη
Γεωγραφική ζώνη	0	1	0	0	1	100,00%	1	100,00%	100,00%
ΔΥΤΙΚΗ ΜΑΚΕΔΟΝΙΑ	2	0	0	1	1	33,00%	0	0,00%	33,00%
ΑΤΤΙΚΗ	2	1	0	3	4	66,00%	2	50,00%	33,00%
ΕΠΙΧΕΙΡΗΣΕΙΣ	1	1	1	1	1	25,00%	0	0,00%	25,00%
ΝΟΤΙΟ ΑΙΓΑΙΟ	3	0	2	0	1	20,00%	1	100,00%	20,00%
ΗΠΕΙΡΟΣ	2	0	2	6	4	40,00%	1	25,00%	10,00%
ΚΕΝΤΡΙΚΗ ΜΑΚΕΔΟΝΙΑ	1	0	2	4	4	57,00%	0	0,00%	0,00%
ΠΕΛΟΠΟΝΝΗΣΟΣ	3	0	2	2	4	57,00%	0	0,00%	0,00%
ΔΥΤΙΚΗ ΕΛΛΑΔΑ	1	0	3	2	4	66,00%	0	0,00%	0,00%
ΑΝΑΤΟΛΙΚΗ ΜΑΚΕΔΟΝΙΑ & ΘΡΑΚΗ	0	0	1	0					
ΚΡΗΤΗ	2	0	0	0					

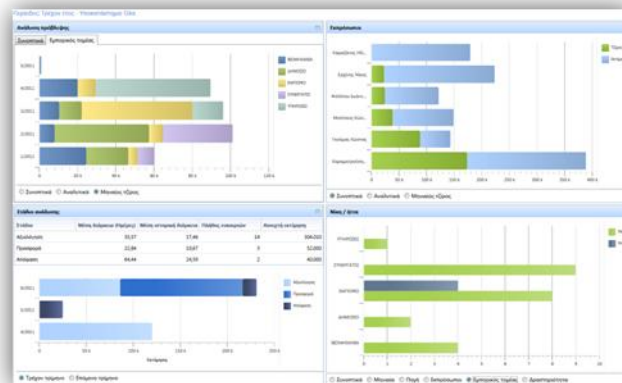
Pipeline management is an interactive application that helps sales executives to manage and analyze the performance of the sales cycle in real time. The pages included in pipeline management allow sales professionals to trigger the right actions to resolve issues and to meet sales quota targets. The PM can be used to do the following:

- Opportunity and their associated sales activities management.
- Analyze the performance of the sales cycle.

The following sub-applications are provided:

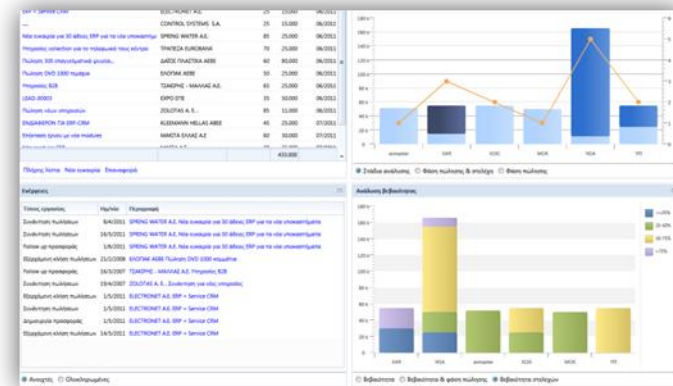
- **Pipeline overview:** This dashboard allows you to get a consolidated sales performance overview to the following areas:
 - Current year achieved revenue - forecasted sales volume by month
 - Current year achieved revenue - forecasted sales analyzed by business unit and sales executive
 - Pipeline stage analysis for the current and the next quarter
 - Win / Loss analysis group by different key pipeline characteristics

Image 77: Pipeline Overview



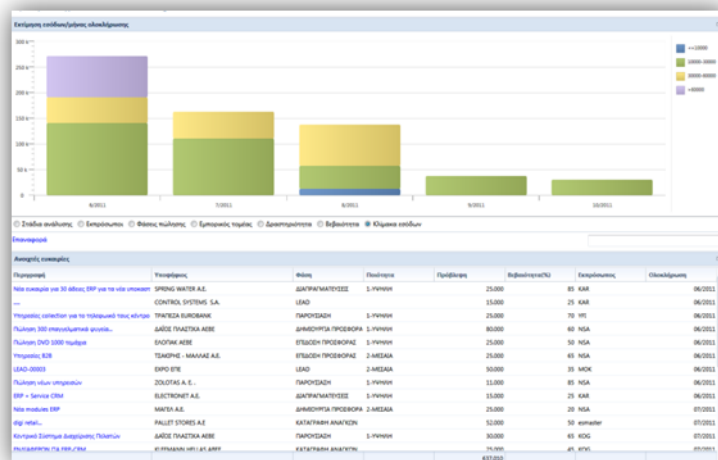
- **Opportunity management:** This interactive page allows you to manage the open opportunities and their associated activities. This page is targeted to sales managers.

Image 78: Opportunity management



- Pipeline by closing date:** You can use this interactive page to manage and analyse the sales pipeline by grouped by closing month. The page contains seven interactive chart pages which can be used to manage the forecasted sales volume using the following business dimensions/characteristics: pipeline stage analysis, sales representative, sales phase, business unit, business activity, certainty scale as well as revenue scale.

Image 79: Pipeline by closing date



- Sales representative analysis to target:** This dashboard allows us to analyze the performance of each sales executive compared with the target set by its sales manager. The page contains interactive items that can be used to filter the opportunity list. The dashboard shows also the year to date performance of each sales rep. The dashboard page requires sales quota targets to be set up in a monthly basis.

Image 80: Sales representative analysis to target



- Stage analysis to target:** Using this page we can analyze the sales pipeline compared with the target quota values. Moreover specifically, we can compare the forecasted sales volume group by the analysis stages with the target. The dashboard page requires sales quota targets to be set up in a monthly basis.

Image 81: Stage analysis to target



- Pipeline change:** Using this analytic report we can monitor the changes in the sales pipeline in a specific period. The report shows changes to the following opportunity fields: a) sales phase, b) sales certainty of success, c) closing date and d) sales expected volume. Changes are marked with a red or green arrow to indicate how the value has changed. The green arrow indicates increased sales volume or/and increased sales certainty or/and an earlier closing date or/and a next sales phase. Using the drill down icon the column 'Subject' we can see the full audit trail record history for each field.

Image 82: Pipeline change

Όνομα	Υποχρέωση	Σταθμός	Φάση πώλησης	Προβλεπόμενη ολοκλήρωση	Εκτιμώμενη αξία	Πιθανότητα
Νέα εταιρεία για 30 άτομα ERP για τα νέα...	SPRING WATER A.E.	Καταμετρήσεις Σάβας	ΔΙΑΓΡΑΦΕΥΣΕΙΣ	12/6/2011	25.000,00	85,0
Entersoft ERP-CRM-ECOMMERCE Campaigns	SENDO PER LES	Φωλιόπου δωάνης	ΠΑΡΟΥΣΙΑ	3/9/2011	12.000,00	20,0
Nico Epyo EBS για Royalties του ονόμα...	ANEX LINES A.E. LINES A.E.	Φωλιόπου δωάνης	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	9/9/2011	30.000,00	75,0
Διαχείριση διαπραγματεύσεων εισπραξι...	SENDO PER LES	esmaster	LEAD	6/10/2011	30.000,00	25,0
Υπερβολή collection για να τηρηθούν το...	ANCI MATZARLI ABETE	Μαρούσιος Κίμωνας	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	1/8/2011	45.000,00	60,0
Πώληση 300 εισαγωγικών φύλλων...	TRAFICA EUROBIANK	Φωλιόπου δωάνης	ΠΑΡΟΥΣΙΑ	30/4/2011	25.000,00	70,0
ASP υπηρεσίες CRM	ΣΑΙΟΣ ΠΛΑΣΤΙΚΑ ΑΕΒΕ	Σαζάνης Νίκος	ΔΗΜΙΟΥΡΓΙΑ ΠΡΟΒΟΡΑ	30/6/2011	80.000,00	60,0
Πώληση DVD 1000 τεμάχια	EPILIFE A.E.	Μαρούσιος Κίμωνας	ΕΠΙΛΟΧΗ ΠΡΟΒΟΡΑ	31/8/2011	15.000,00	50,0
Ενδεικτική για 3η...	ΕΛΙΟΥΚ ΑΕΒΕ	Σαζάνης Νίκος	ΕΠΙΛΟΧΗ ΠΡΟΒΟΡΑ	30/6/2011	25.000,00	50,0
Υπερβολή B2B	SENDO PER LES	esmaster	ΔΗΜΙΟΥΡΓΙΑ ΠΡΟΒΟΡΑ	4/8/2011	2.000,00	20,0
LEAD-0003	TEKAPHE - MAVAZ A.E.	Σαζάνης Νίκος	ΕΠΙΛΟΧΗ ΠΡΟΒΟΡΑ	30/6/2011	25.000,00	65,0
Πώληση νέων υπηρεσιών	EXPO ETE	Μαρούσιος Κίμωνας	LEAD	30/6/2011	50.000,00	35,0
Αγορά Αναλυτικών	ΖΟΛΟΤΑΣ Α.Ε.	Σαζάνης Νίκος	ΠΑΡΟΥΣΙΑ	30/6/2011	11.000,00	85,0
ERP, CRM, Analytics	ΜΑΖΩΝ ΠΥΡΡΟΠΟΡΩΝ Α.Ε.	Σαζάνης Νίκος	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	31/8/2011	35.000,00	70,0
ΕΠΙΔΕΙΞΗ ΓΙΑ ERP-CRM	ALTERRA A.E.	esmaster	LEAD	31/10/2011	0,00	0,0
Εκτέλεση έργου με νέα modules	ALTERRA A.E.	Καταμετρήσεις Σάβας	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	3/10/2011	45.000,00	30,0
CRM	ELEMANH HELLAS AEE	Γεωργίου Κίμωνας	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	29/7/2011	25.000,00	45,0
Nico modules ERP	ΜΑΚΤΑ ΕΛΛΑΣ Α.Ε.	Φωλιόπου δωάνης	ΕΠΙΛΟΧΗ ΠΡΟΒΟΡΑ	29/7/2011	30.000,00	60,0
EBS - CRM - Sales - Service	SENDO PER LES	esmaster	LEAD	17/9/2011	10,00	90,0
ERP - Service CRM	MATEA A.E.	Σαζάνης Νίκος	ΔΗΜΙΟΥΡΓΙΑ ΠΡΟΒΟΡΑ	29/7/2011	25.000,00	20,0
ΕΠΙΔΕΙΞΗ ΓΙΑ ERP-CRM	ROLLINE A.E.	Καταμετρήσεις Σάβας	ΠΑΡΟΥΣΙΑ	31/8/2011	10.000,00	60,0
digit refact...	ELECTRONET A.E.	Καταμετρήσεις Σάβας	ΔΙΑΓΡΑΦΕΥΣΕΙΣ	1/6/2011	15.000,00	25,0
bi analysis CRM	ANCI MATZARLI ABETE	Μαρούσιος Κίμωνας	ΔΙΑΓΡΑΦΕΥΣΕΙΣ	30/4/2008	15.000,00	80,0
300 άτομα υπηρεσίες service CRM	PALETT STORES A.E.	esmaster	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	31/7/2011	52.000,00	50,0
Εκτελεστικό Σύστημα Διαχείρισης Πληροφο...	SPRING WATER A.E.	Καταμετρήσεις Σάβας	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	30/4/2011	20.000,00	50,0
...	ΣΑΙΟΣ ΠΛΑΣΤΙΚΑ ΑΕΒΕ	esmaster	LEAD	22/11/2011	25.000,00	0,0
...	CONTROL SYSTEMS S.A.	esmaster	ΠΑΡΟΥΣΙΑ	29/7/2011	30.000,00	65,0
...	ELECTRONET A.E.	esmaster	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	3/10/2011	0,00	0,0
...	...	...	LEAD	29/4/2011	100.000,00	60,0

- **Revenue forecast analysis:** This interactive page can be used to analyze the expected sales volume in a specific period. The dashboard shows different analytic chart items to filter the opportunity list.

Image 83: Revenue forecast analysis



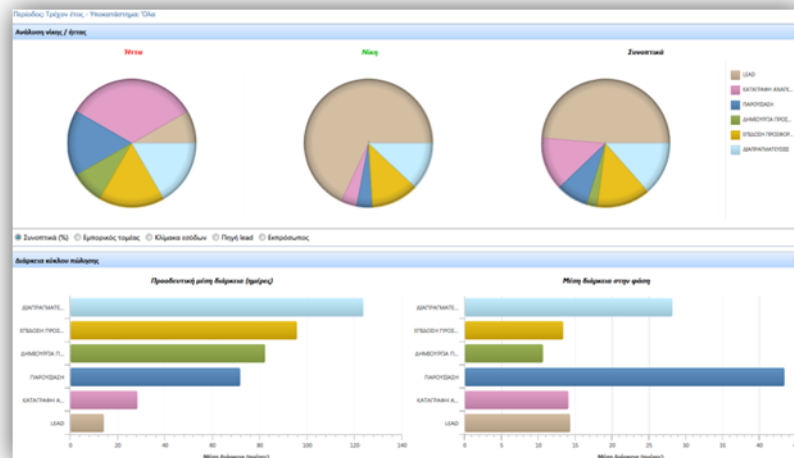
- **Closed revenue analysis:** This interactive dashboard allows us to analyze the pipeline closed revenue. The analysis can be done using different business dimensions to filter the closed deals.

Image 84: Closed revenue analysis



- **Sales phase analysis:** You can use this dashboard to get different business insights of win / loss analysis. The analysis is based on the phases of the sales cycle. Moreover, it shows the average duration (days) of each sales phase for the closed opportunities.

Image 85: Sales phase analysis



- **Sales cycle analysis:** This dashboard can be used to analyze the performance of sales cycle. The chart items shows us the following a) Average sales cycle duration compared with the win rate by month b) Lost revenue contribution group by certainty of sales success scale c) The lost revenue by month compared with the loss rate(%) d) win/lost revenue by reason e) Win/Loss revenue analysis by sales phase c) Win/Loss revenue analysis by revenue scale

Image 86: Sales cycle analysis



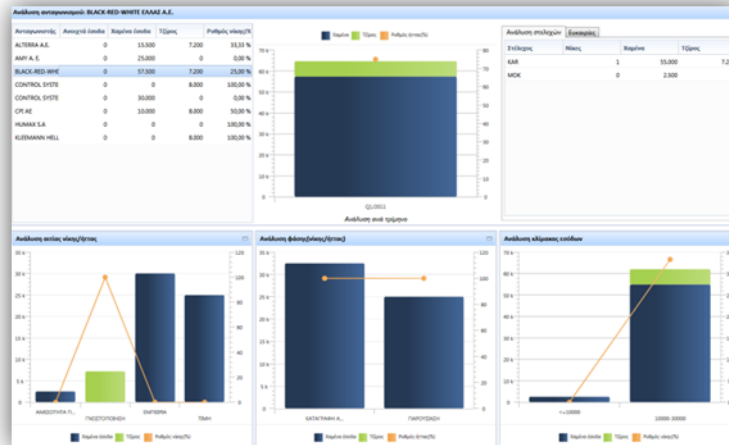
- Sales rep performance analysis:** This interactive dashboard can be used to analyze the performance of sales reps. It contains two different views. The first analytic view can be used to examine the basic key performance indicators for each sales representative. Moreover you can monitor the monthly variance from target quota values as well a monthly analysis the turnover compared with the target and the forecasted opportunity sales volume. The second view is a consolidated interactive page.

Image 87: Sales rep performance analysis



- Competition analysis:** You can use this interactive dashboard to analyze the performance against the main competitors using different key figure. Some of the keys figures that use to compare the performance against a competitor are the following: a) win revenue/loss revenue b) win rate c) win/lost revenue by sales stage d) win/lost revenue by deal revenue scale d) win/lost revenue by quarter, e) win/lost revenue by reason

Image 88: Competition analysis



5.2.4 Pipeline stage analysis

The analysis stages of the sales cycle are the following:

- Decision
- Quotation
- Decision

Each stage represents the status of the sales cycle in which specific activities are executed with regard to an opportunity. Moreover the analysis stages group the opportunities as well as the forecasted sales -expected revenue based on the sales phase of each opportunity.

The sales phases based on the zero based configuration are grouped as follows:

Qualification	Quotation	Decision
Lead	Create quotation	Negotiations
Requirements capture	Quotation	
Demo/Presentation		

The analysis stages are configured in the main customization screen under the category / Tasks.

Image 89: Company parameters | Analysis stages

ΚΑΤΗΓΟΡΙΑ: CRM - Θέματα			
1	PipelineAnalysisDecisionStage - Φάση απόφασης	Διεύρυνση	6
2	PipelineAnalysisQualityStage - Φάση αξιολόγησης	Διεύρυνση	1,2,3
3	PipelineAnalysisQuotingStage - Φάση προσφοράς	Διεύρυνση	4,5

For each analysis stage the sequence numbers of the relative sales phased are defined using comma separated values. Each integer number represents the sequence number defined in the status collection values (sales phases) of the opportunity task type. In case where different sales phases must be defined then the associated pipeline analysis stages should be updated.

5.2.5 Pipeline scales

Pipeline performance management provides dashboards that use scales to calculate different key figures. The scales that are used during pipeline analysis are the following:

- **Opportunity revenue scale:** You can use this scale to define the limits of the opportunity/deals that are managed during sales cycle.
- **Certainty scale:** This scale is used to define the analysis limits of the certainty/probability or chance of sales success.
- **Pipeline - Target Achievement:** This scale is used to define the limits for the key figures that used to analyze the performance of the sales cycle.

The scales of the system can be found under the page of central configuration, in Organizational Parameters.

The calculation of the associated scale line is based on the following rule:

$$\text{Minimum scale line value} < \text{Value to be checked} \leq \text{Maximum scale line value}$$

The scale line that has minimum value or maximum value equal to zero are calculated as $-\infty$ και $+\infty$ infinite respectively. In case when change to scale value is required then the cash of the system should be renewed.

5.2.6 Pipeline analysis filters

The data showed by a dashboard can be filtered based on the following two ways:

- All sales representatives
- Based on the sales team of the sales manager that uses the dashboard

The second filter choice is based on the resource group entity structure. A resource group can be used to set up a sales team. For each sales team a leader can be defined. More than one team can have the same leader - sales manager.

5.2.7 Pipeline reports

The following pipeline reports can be used to manage and analyze the sales cycle.

- **Pipeline analysis:** This report can be used to analyze the sales pipeline by grouping the key figures by different business entities/dimensions. The entity/dimension that is used to analyze the sales cycle can be selected using the relative parameter. The calculated key figures are the following
 - Number of open/ won/ lost opportunities
 - Open expected sales volume, won revenue, lost revenue
 - Average duration of sales cycle (days)
 - Win rate (%)
 - Forecasted sales volume/revenue (%)

Image 90: Pipeline analysis

Γεωγραφική Ζώνη	Ανοικτές	Νίκες	Υστερές	Ανοικτή πρόβλεψη	Τζίρος	Χαμένα έσοδα	Ρυθμός νίκης	Μέση διάρκεια κύκλου -	Τζίρος/Πρόβλεψη
ΑΤΤΙΚΗ	4	5	0	256.000,00 €	69.000,00 €	0,00 €	100,00%	435	80,23%
ΝΟΤΙΟ ΑΙΓΑΙΟ	4	2	2	231.000,00 €	37.560,00 €	79.000,00 €	50,00%	239	27,92%
ΗΠΕΙΡΟΣ	8	6	4	375.000,00 €	32.180,00 €	95.000,00 €	60,00%	745	14,63%
ΔΥΤΙΚΗ ΜΑΚΕΔΟΝΙΑ	1	4	2	180.000,00 €	22.200,00 €	30.000,00 €	66,00%	422	16,44%
ΠΕΛΟΠΟΝΝΗΣΟΣ	4	5	2	150.500,00 €	22.000,00 €	8.000,00 €	71,00%	515	25,73%
ΔΥΤΙΚΗ ΕΛΛΑΔΑ	5	4	1	310.000,00 €	8.000,00 €	10.000,00 €	80,00%	883	8,00%
ΘΕΣΣΑΛΙΑ	1	1	1	30.000,00 €	8.000,00 €	10.000,00 €	50,00%	1348	40,00%
ΙΟΝΙΟΙ ΝΗΣΟΙ	1	1	0	38.000,00 €	8.000,00 €	0,00 €	100,00%	771	266,67%
ΒΟΡΕΙΟΙ ΑΙΓΑΙΟΙ	0	0	0	40.000,00 €	7.200,00 €	0,00 €	100,00%	1269	18,00%
ΑΝΑΤΟΛΙΚΗ ΜΑΚΕΔΟΝΙΑ & Θ...	1	0	0	125.000,00 €	0,00 €	0,00 €	0,00%	1506	0,00%
ΚΕΝΤΡΙΚΗ ΜΑΚΕΔΟΝΙΑ	2	3	1	150.025,00 €	30.000,00 €	30.000,00 €	75,00%	268	0,00%
ΚΡΗΤΗ	0	0	1	50.000,00 €	50.000,00 €	0,00 €	0,00%	1380	0,00%

- **Competitor analysis:** You can use this report to analyze the performance against the main competitors using different key figures. The key figures are the following:
 - Number of open/ won/ lost opportunities
 - Open expected sales volume, won revenue, lost revenue
 - Average duration of sales cycle (days)
 - Win rate (%)

- Won revenue/lost revenue (%)

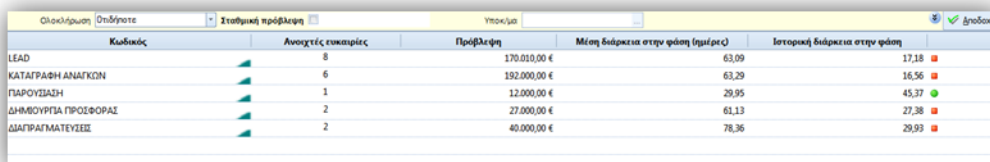
Image 91: Competitor analysis



Ανταγωνιστής	Ανοχές	Νίκες	Ήττες	Ανοχόμενη πρόβλεψη	Τζίρος	Χαμένα έσοδα	Ρυθμός νίκης	Τζίρος/Χαμένα έσοδα	Μέση διάρκεια κύκλου ...
HUMAX S.A.	0	1	0	0,00 €	8.000,00 €	0,00 €	100,00%	100,00%	245
CRPAE	0	1	1	0,00 €	10.000,00 €	10.000,00 €	50,00%	80,00%	518
BLACK-RED-WHITE ΕΛΛΑΣ Α.Ε.	0	1	3	0,00 €	7.200,00 €	57.500,00 €	25,00%	12,52%	705
CONTROL SYSTEMS S.A.	1	2	0	20.000,00 €	8.000,00 €	0,00 €	100,00%	100,00%	995
ALTEIRA A.E.	0	1	2	0,00 €	7.200,00 €	15.500,00 €	33,00%	46,43%	1219
KLEEMANN HELLAS ABEE	0	1	0	0,00 €	8.000,00 €	0,00 €	100,00%	100,00%	1413
CONTROL SYSTEMS S. A.	0	0	1	0,00 €	30.000,00 €	30.000,00 €	0,00%	0,00%	1428
AMY A. E.	0	0	1	0,00 €	25.000,00 €	25.000,00 €	0,00%	0,00%	1429

- **Sales phase analysis:** report to examine the sales phase of the open opportunities in a specific period. The progress of an opportunity is measured in the number of days that it spends in a sales phase. For each sales phase the following key figures are calculated:
 - Number of open opportunities
 - Open expected sales volume (or weighted sales volume forecast using the relative report parameter)
 - Average days in phase
 - Historic duration with a marked icon to indicate a faster (green) or slower (red) move in the sales cycle

Image 92: Sales phase analysis



Κωδικός	Ανοχές/εκαπαίριος	Πρόβλεψη	Μέση διάρκεια στην φάση (ημέρες)	Ιστορική διάρκεια στην φάση
LEAD	8	170.010,00 €	63,09	17,18
ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	6	192.000,00 €	63,29	16,56
ΠΑΡΟΥΣΙΑΣΗ	1	12.000,00 €	29,95	45,37
ΔΗΜΙΟΥΡΓΙΑ ΠΡΟΣΦΟΡΑΣ	2	27.000,00 €	61,13	27,38
ΔΙΑΤΡΑΓΜΑΤΕΥΣΕΙΣ	2	40.000,00 €	78,36	29,93

- **Top open opportunities**
- **Top deals-wins**
- **Lost opportunities:** It shows information about the sales phase, lost revenue and the competitor who the deal.

5.2.8 Sales home pages

The following interactive applications provide a personalized view for a sales executive user.

- **Sales home page:** Use that interactive home page to manage the scheduled/open activities, the sales pipeline and the leads that are assigned to you.

- **Leads:** my lead home page
- **Opportunities:** my opportunity home page
- **Pipeline by closing date:** You can use this personal page to manage the sales cycle by expected closing date
- **Pipeline to Target:** You can use this interactive dashboard to analyze the closed revenue - expected sales volume compared with the quota target value
- **Pending transactions:** You can use this dashboard to manage the open quotations, the open orders, the pending invoices as well as the unsettled sales documents
- **My insight:** This page shows the historic closed revenue by quarter, the year to date versus the previous year performance compared with target by month

The sales home pages are further analyzed in the document 'EntersoftCRMHomePages_EN'.

5.2.9 Business rules

The following rules are provided to support and automate the everyday sales activity management. The rules are the following:

- **Opportunity rules:** fill in the winner competitor during loss
- **Mandatory fields opportunity rules:** description (opportunity name), closing date, sales forecast, certainty of success(%)
- **Mandatory fields lead rules:** fill in description
- **Update opportunity sub tasks:** (during closing state)
- **Update lead sub tasks:** (during closing state)
- **Update opportunity with win sales phase** → after save (insert or update) of a sales document (invoice document)

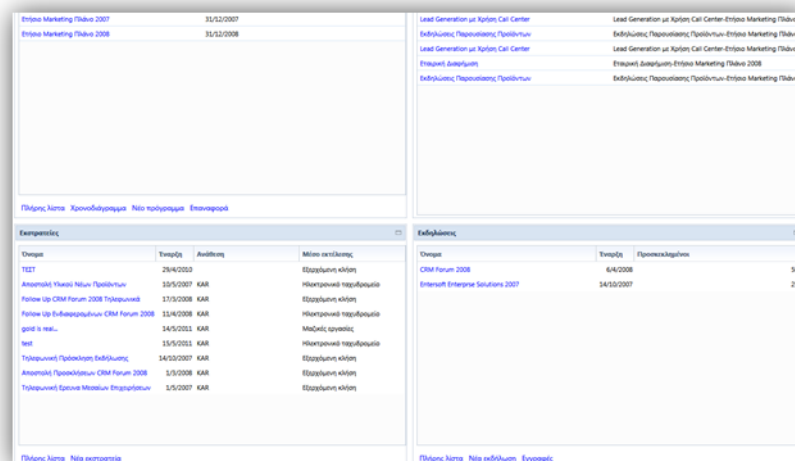
5.3 Marketing

5.3.1 Marketing home page

You can use this interactive page to manage the marketing projects. The page contains the following four (4) tables:

- Marketing programs - click a row to see the associated data
- Program stages - click a row to see the associate data
- Campaigns
- Events

Image 93: Marketing Home Page



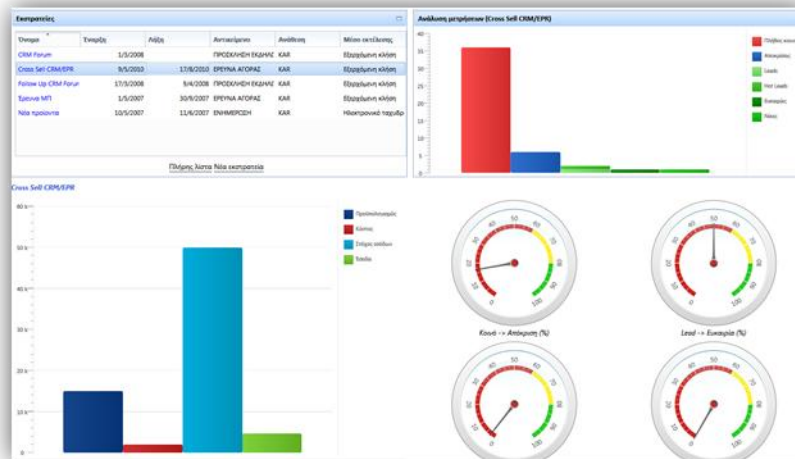
Όνομα	Ημερομηνία	Αντικείμενο	Μέγεθος
TEST	26/4/2003	Εργαστήριο	Εργαστήριο
Αποστολή Ηλεκτρονικού Ταχυδρομείου	10/5/2007	KAR	Ηλεκτρονικό ταχυδρομείο
Follow up CRM Forum 2008 Τηλεφωνικά	17/3/2008	KAR	Εργαστήριο
Follow up Ενθεματικού CRM Forum 2008	15/4/2008	KAR	Ηλεκτρονικό ταχυδρομείο
gold is real...	14/5/2011	KAR	Μαζική επικοινωνία
test	15/5/2011	KAR	Ηλεκτρονικό ταχυδρομείο
Τηλεφωνικά Πρακτικά Ενθυσιασμού	14/5/2007	KAR	Εργαστήριο
Αποστολή Ταχυδρομείου CRM Forum 2008	1/5/2008	KAR	Εργαστήριο
Τηλεφωνικά Εργαστήρια Ενθυσιασμού	1/5/2007	KAR	Εργαστήριο

Όνομα	Ημερομηνία	Προσμετρήσεις
CRM Forum 2008	6/4/2008	500
Entersoft Enterprise Solutions 2007	14/5/2007	250

5.3.2 Campaigns

This page is the central cockpit to manage the performance of the active campaigns. It shows in real time the key figures related with the campaign performance. By clicking a row in the relative campaign table you can see the associated key figures.

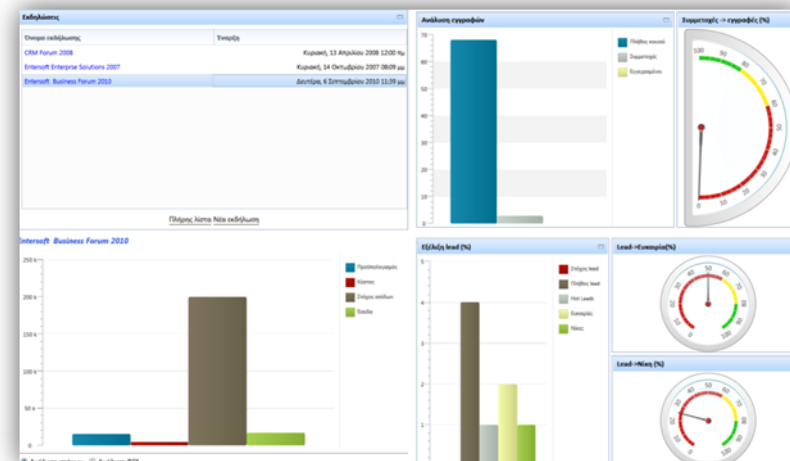
Image 94: Campaigns



5.3.3 Events

This page is the central cockpit to manage the performance of the events. It shows in real time the key figures related with the campaign performance. By clicking a row in the relative event table you can see the associated key figures.

Image 95: Events

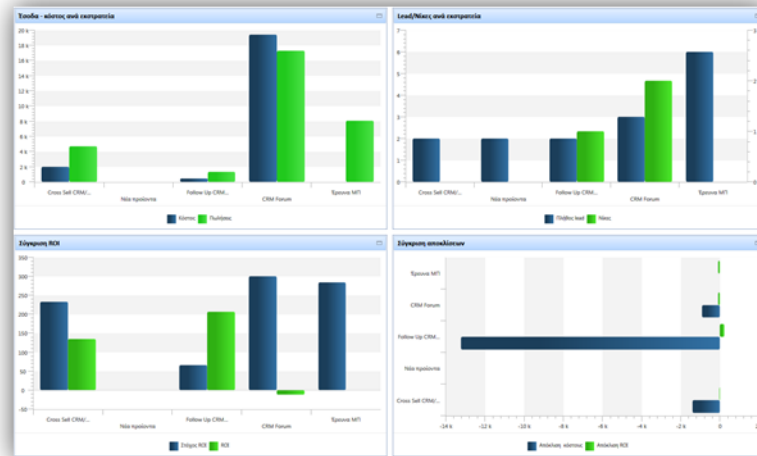


5.3.4 Marketing analysis

Marketing analysis provides interactive applications that help marketing executives to manage and analyze the performance of the marketing activities. The pages that included in marketing analysis allow marketing managers to trigger the right actions to resolve issues and to meet their targets. The dashboards that included in marketing analysis are the following:

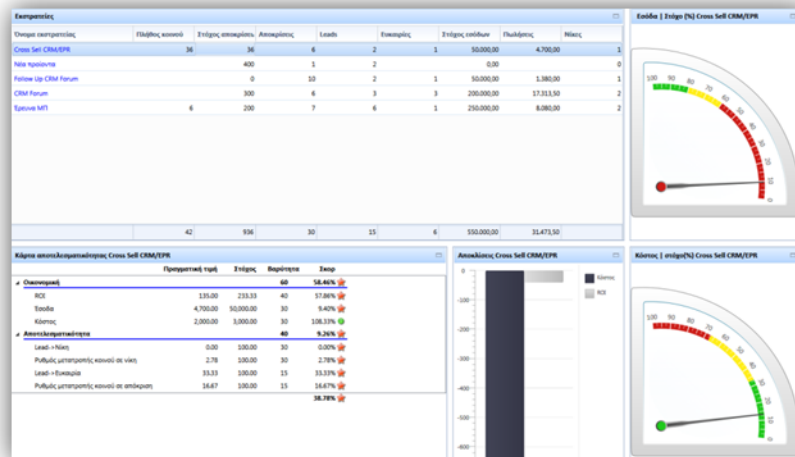
- **Campaign comparison:** You can use this dashboard to analyze and compare campaign performance.

Image 96: Campaign comparison



- **Balanced scorecards:** You can use this interactive dashboard to analyze the campaign performance. The scorecard shows the key figures (KPIs) for financial and the operational objectives. The gauges show a) closed revenue/target (%) and b) cost/budget (%)

Image 97: Balanced scorecards



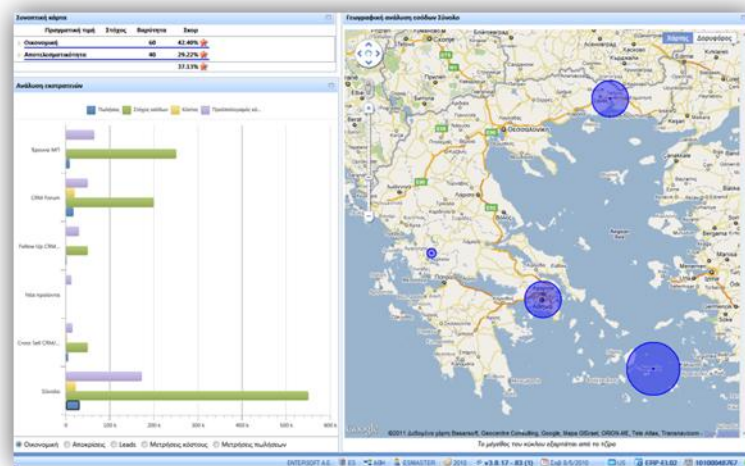
- **Customer figures:** This page shows the following customer related key figures:
 - Customer retention rate
 - Customer acquisition rate
 - Average customer life

Image 98: Customer figures



- Marketing performance:** This interactive page allows us to analyze the marketing performance. The key figures presented by the dashboard shows a) a consolidated marketing view using a balanced scorecard to analyze the financial and the operational objectives b) An analytical view through interactive charts. Using the interactive charts we can filter the geo maps to analyze financial, response and lead based key figures.

Image 99: Marketing performance



5.3.5 Marketing scales

Marketing management provides dashboards that use scales to calculate different key figures. The scales that are used during analysis are the following:

- MarketingGeoTargetAchievement:** This scale is used to define the limits for the key figures that used to analyze the geographical marketing performance.

- **CampaignTargetAchievement:** This scale is used to define the limits for the key figures that used to analyze the campaign performance.

5.3.6 Marketing reports

- **Campaign lead quality:** You can use this report to analyze the quality of leads generated by a campaign. This report shows us the basic key figures related with campaign lead conversion rates.

Image 100: Campaign lead quality

Όνομα καταστάσεως										Εξέλιξη
Όνομα καταστάσεως	Χωρίς αξιολόγηση	Χωρίς αξιολόγηση	Μεταπειστικότητα	Υψηλή πιστότητα	Ευκαιρίες	Ρυθμός μετατροπής σε ευκαιρία	Μίκας	Ρυθμός μετατροπής ευκαιρίας σε νίκη	Ρυθμός μετατροπής lead σε νίκη	
Τηλεφωνική Προσέλευση -	0	0	1	2	3	100,0%	0	66,00%	66,00%	
Απευθείας Προσέλευση -	0	0	1	1	2	100,0%	1	50,00%	50,00%	
Τηλεφωνική Επικοινωνία Μετα-	1	0	3	2	5	83,00%	0	0,00%	0,00%	
CRM Forum 2008	0	0	0	1	1	100,0%	0	0,00%	0,00%	
Follow Up CRM Forum 2008	0	0	0	1	1	100,0%	0	0,00%	0,00%	

- Responses:** This report shows the last response received from a person/contact grouped by response. For each row we can see the marketing activity as well as the response date.

Image 101: Responses

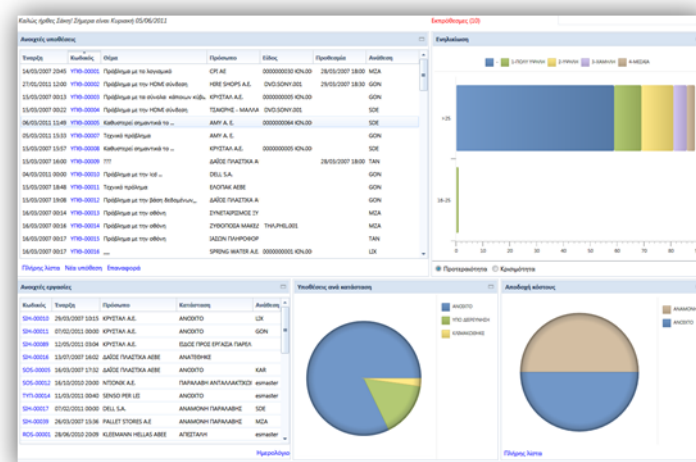
Αναζήτηση	Οδηγίες	Marketing ενότητες	Αποδοχές	Εκπαιδευτικές	Κοινωνικές
Ημερομηνία ανάθεσης	Marketing ενότητες	Πρόσωπα		Εκπαιδευτικές	Κοινωνικές
• Ανάθεση: ΑΙΤΗΣΗ ΠΡΟΣΩΠΙΚΗΣ ΠΛΗΡΟΦΟΡΙΑΣ (3)					
06/04/2008 21:45	Follow up CRM Forum 2008 Τηλεφ...	ZARNAKIS A.T.E.	N/A		Γεωργιάδου Αναστασία
08/04/2008 23:41	Τηλεφωνική Έρευνα Modules Εταιρ...	SPIRING WATER A.E.	KAR		Τσιλιράς Κωνσταντίνος
03/03/2011 22:27	Τηλεφωνική Έρευνα Modules Εταιρ...	PALLET STORES A.E.	emaster		ΑντωνίουΒασίλειος Βασιλείος
• Ανάθεση: ΑΙΤΗΣΗ CALL BACK (3)					
09/02/2011 02:30	CRM Forum 2008	ELECTRONET A.E.	emaster		Αβραμίδης Δημήτριος
• Ανάθεση: ΑΠΑΧΟΜΙΣΜΟΣ (3)					
01/03/2011 00:20	Τηλεφωνική Έρευνα Modules Εταιρ...	JANP A.E.	emaster		Καραγιάννης Νίκος
• Ανάθεση: ΔΕΝ ΕΠΑΝΕΛΘΕΙ (3)					
08/04/2008 14:03	Follow up CRM Forum 2008 Τηλεφ...	KLEMMANN HELLAS ABBE	KAR		Γεωργίου Θεόδωρος
• Ανάθεση: ΔΕΝ ΕΠΑΝΕΛΘΕΙ (2)					
08/04/2008 14:03	Follow up CRM Forum 2008 Τηλεφ...	SPIRING WATER A.E.	KAR		Τσιλιράς Κωνσταντίνος
08/04/2008 14:06	Ανεπιβεβαίωση Προσκόμισης CRM For...	XATOFNOY AGRI ABBE	KDG		Γεωργίου Κωνσταντίνος
• Ανάθεση: ΔΙΔΩΕΙ ΣΥΜΜΕΤΟΧΗ (12)					
08/04/2008 21:45	CRM Forum 2008	SPIRING WATER A.E.	KDG		Τσιλιράς Κωνσταντίνος
06/04/2008 21:45	CRM Forum 2008	MAREFA A.E.	KDG		ΑντωνίουΔανάη Εύθυνη
06/04/2008 21:45	CRM Forum 2008	CRN A/E	KDG		Καλαμπάκουλης Στέφανος
08/04/2008 14:03	Follow up CRM Forum 2008 Τηλεφ...	TEAKRINE - MAIAZAE A.E.	KDG		Νικολάου Νίκος
08/04/2008 14:03	Follow up CRM Forum 2008 Τηλεφ...	ΠΙΣΤΟΠΟΙΗΜΕΝΟΥΣ ΔΙΔΑΖΕΙΣ & WIDE O.I.E.	KAR		ΑντωνίουΒασίλειος Γεωργιάδου
08/04/2008 14:02	Follow up CRM Forum 2008 Τηλεφ...	XATOFNOY AGRI ABBE	KAR		Γεωργιάδου Στέφανος
17/03/2011 21:29	Follow up CRM Forum 2008 Τηλεφ...	AGRIOTI MATZAFINARI ABETE	KAR		ΑντωνίουΒασίλειος Γεωργιάδου
08/04/2008 14:03	Follow up CRM Forum 2008 Τηλεφ...	CRN A/E	KAR		Καλαμπάκουλης Στέφανος
09/04/2008 14:37	Ανεπιβεβαίωση Προσκόμισης CRM For...	ALEXANDRINETE-THOMAZEE A.E.	KAR		Γεωργιάδου Κωνσταντίνος
09/04/2008 11:13	Ανεπιβεβαίωση Προσκόμισης CRM For...	PARIZAE A.E.	KAR		ΑντωνίουΔανάη Εύθυνη
01/03/2011 00:20	Ανεπιβεβαίωση Προσκόμισης CRM For...	PERPLEX A.E.	KAR		Δελιγιάννης Κωνσταντίνος
08/04/2008 13:50	Ανεπιβεβαίωση Προσκόμισης CRM For...	CRN A/E	N/A		Καλαμπάκουλης Στέφανος
• Ανάθεση: ΔΙΑΤΡΑΦΗ ΑΠΟ ΜΕΛΑΝΟΚΙΤΟΣ ΕΚΤΡΑΡΤΗΣ (1)					
08/04/2008 14:03	Follow up CRM Forum 2008 Τηλεφ...	DEZALAKHS A.E.E.	KAR		Δανιηλίδης Κωνσταντίνος
• Ανάθεση: ΕΞΥΠΗΡΕΤΗΣ (3)					
08/04/2008 13:56	Ανεπιβεβαίωση Προσκόμισης CRM For...	ΕΛΟΤΑΚ ΑΒΕΕ	KAR		Βασιλείου Αντώνιος
• Ανάθεση: ΕΝΔΙΑΦΕΡΤΑΣ (2)					
08/11/2007 17:18	Τηλεφωνική Πρόσκληση Εκδήλωσης	HIRE SHOPS A.E.	KAR		Κ. Παπαδόπουλος Αθανάσιος
23/03/2008 15:32	Τηλεφωνική Έρευνα Modules Εταιρ...	ALPHA JOYNSONSHOP THALASSOPH A.E.	KAR		Μελιδίου Αναστασία

5.4 Customer care

The customer care module provided three interactive pages to manage customer cases as well as service in house and on site activities.

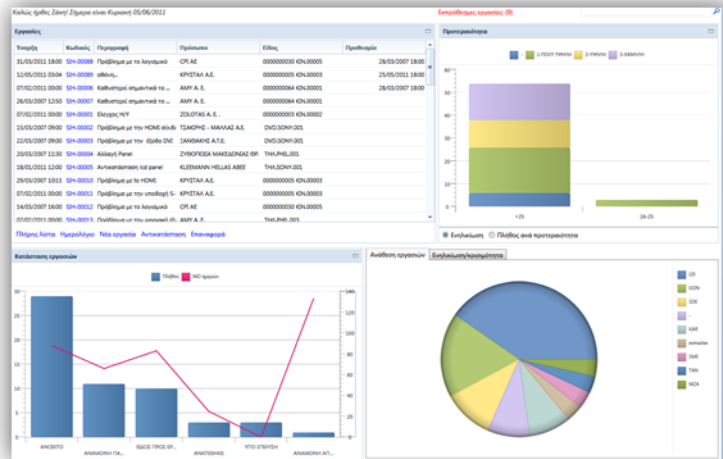
- **Case management:** It allows us to manage the customer cases/ service requests. It provides interactive charts to analyze the ageing of the open cases based on their priority /severity. It shows also the analysis by status. For each case the relative sub activities can be seen by clicking a case row in the related table. Moreover, we can manage the customer cost acceptance activities.

Image 102: Case management



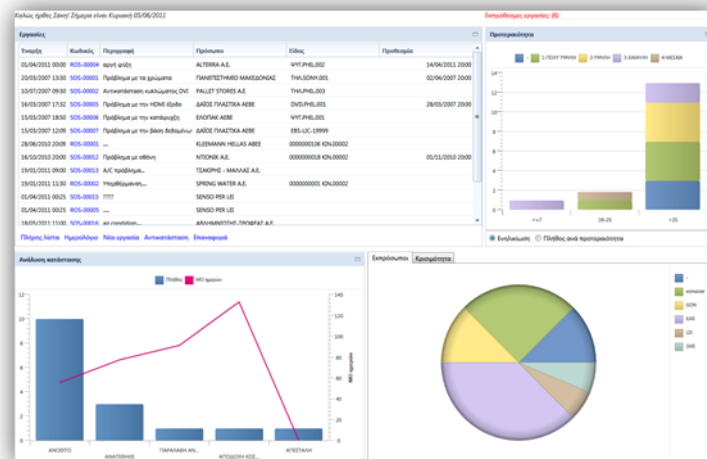
- **Service in house management:** You can use this page to manage the service in house activities. It provides interactive charts to analyze the ageing of the open in house activities based on their priority /severity. Moreover, it analyses the status of service cycle comparing the number of jobs with the average days that the current open activities remain at this stage. Additionally, provides interactive analysis of service activities grouped by their representatives. The due date link can be used to filter the past due activities.

Image 103: Service in house management



- **Service on site management:** You can use this page to manage the service on site activities. It provides interactive charts to analyze the ageing of the open in house activities based on their priority /severity. Moreover, it analyses the status of service cycle comparing the number of jobs with the average days that the current open activities remain at this stage. Additionally, provides interactive analysis of service activities grouped by their representatives. The due date link can be used to filter the past due activities.

Image 104: Service on site management



- **Service on site activity schedule based on geo sorting:** The service on site /swap on site activity forms provide a new action / mechanism to assign an onsite job based on the last known geo location of the service on site representatives. The service reps are sorted based on the geo location of the service request customer. The geo schedule form returns the top 5 representatives who are closer to the location of the service request customer. The location of a representative with no assignment is calculated based on its default branch.

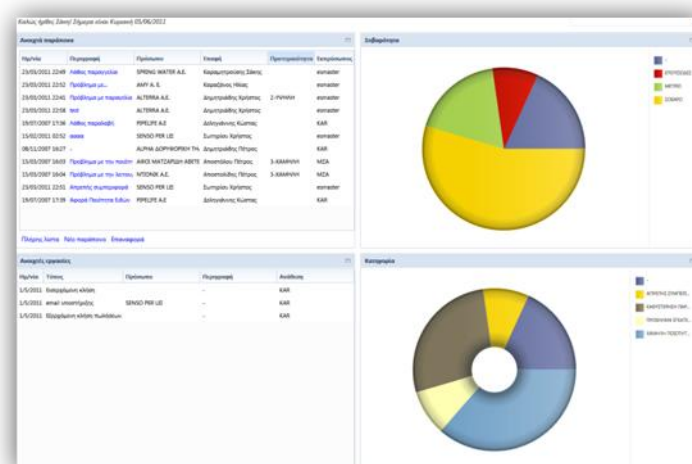
5.4.1 Complaint management

Customer complaints are managed through an interactive page which contains the following items:

- Open complaints
- Complaint related open activities
- Complaint analysis by category
- Complaint analysis by severity

The interactive charts can be used to filter the complaints and their open activities.

Image 105: Complaint Management



5.4.2 Customer care home pages

The following interactive home pages can be used to manage their cases and activities. These pages provide a personalized view of the displayed date.

- **Service in house:** My service in house home page
- **Service on site:** My service on site home page
- **Cases:** My cases home page

5.4.3 Customer service analysis

The analytic dashboards of customer service provide interactive applications that help service executives to manage and analyze the performance of the service cycle in real time. The pages that included in service analytics allow service managers to trigger the right actions to resolve issues and to meet targets set by the service management. The interactive service analytic pages are the following:

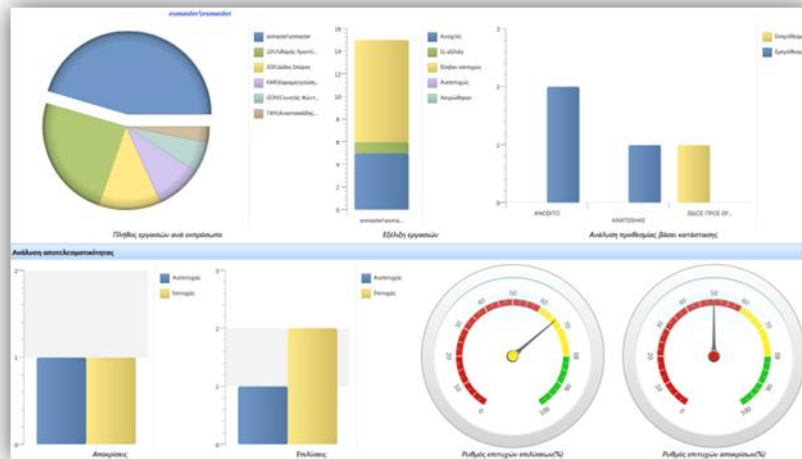
- **Case analysis:** You can use this dashboard to analyze and understand the performance of service department during the lifecycle of customer cases. The dashboard shows the case workload by day and hour or month. Moreover various service level key figures are calculated. Additionally, you can use this dashboard to analyze the current open cases grouped by the service representatives.

Image 106: Case analysis



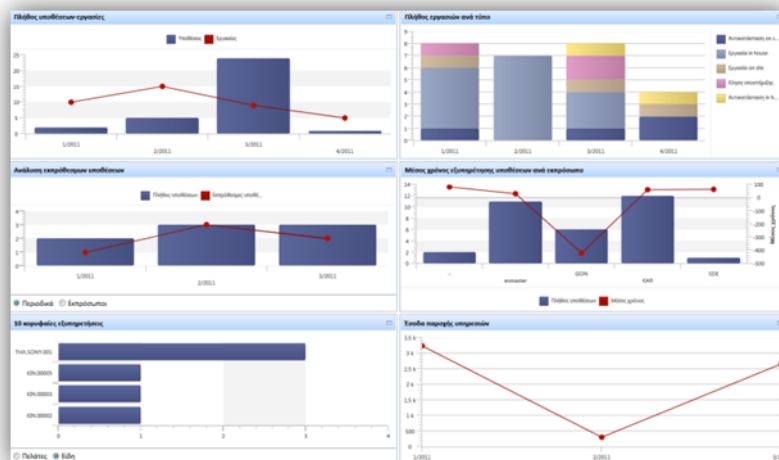
- **Service activities:** You can use this dashboard to monitor the performance of service representatives during the lifecycle of service activities. Moreover various service level key figures are calculated in the consolidated page of the dashboard. Additionally, you can use this dashboard to analyze the current open service activities based on their priority and other service related business characteristics.

Image 107: Service activities



- **Customer service:** This dashboard shows a consolidated view of the customer service.

Image 108: Customer Service



5.4.4 Service analysis scales

Service performance management provides dashboards that use scales to calculate various key figures. The scales that are used during analysis are the following:

- **ServiceJobAgeing:** This scale is used to define the limits for the ageing of service activities
- **ServiceTargetAchievement:** This scale is used to define the limits for the key figures that used to analyze the service activities performance.

Image 110: Service activity metrics

Περίοδος (Πρόγραμμα)	Ολοκλήρωση	Τύπος εργασίας	Υποκατάστημα	✓	Προσθήκη					
Τύπος εργασίας	Ανοχτές	Ολοκληρωμένες υποθέσεις	Ρυθμός επιθεωρητών ολοκλήρωσης	Εκπαιδευμένες απομαρτυρίες	Επιτυχίες απομαρτυρίες	Ρυθμός απομαρτυριών	Εκπαιδευμένες ενδοσκοπικές	Επιτυχίες ενδοσκοπικές	Ρυθμός ενδοσκοπιών	Μέση διάρκεια (ημέρες)
Device Request on site	3	1	25.0%	0	0	0.0%	0	1	100.0%	125
Ergasia on Site	11	9	10.0%	1	1	50.0%	1	3	75.0%	470
Ergasia In house	51	19	16.0%	1	2	66.0%	1	2	66.0%	727
Device Request in house	1	2	33.0%	0	0	0.0%	0	0	0.0%	44
Τηλεφωνική υποστήριξη	8	4	16.0%	0	0	0.0%	0	0	0.0%	764
	74	35	20.0%	2	3	23.2%	2	6	48.2%	

- **Analysis of service status:** You can use this report to monitor the status of the open service activities. For each status the following are calculated:
 - Number of open activities by type.
 - Average days in status by activity type.
 - Historic days in status by activity type with a marked icon to indicate a faster (green) or slower (red) move in the service cycle.

5.4.6 Business rules

The following rules are provided to support the service process

- Mandatory case fields: Subject, priority, severity
- Mandatory service activity fields: Subject, priority, severity

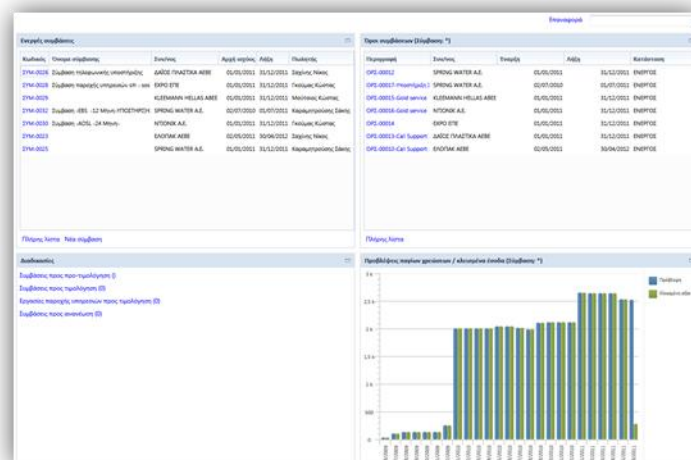
5.5 Service contracts

Service contract management provides an interactive page to manage the active service contracts as well as their service terms. Additionally, this page provides dynamic information about the procedures related with the lifecycle of a contract.

You can use this page to manage the following:

- Active service contracts
- Service terms
- Expected fixed charges / closed revenue by month
- Manage and execute the service contract related procedures (pre invoice, invoice, renewal, invoice service activities, transfer contract units through renewal process)

Image 111: Service contract management

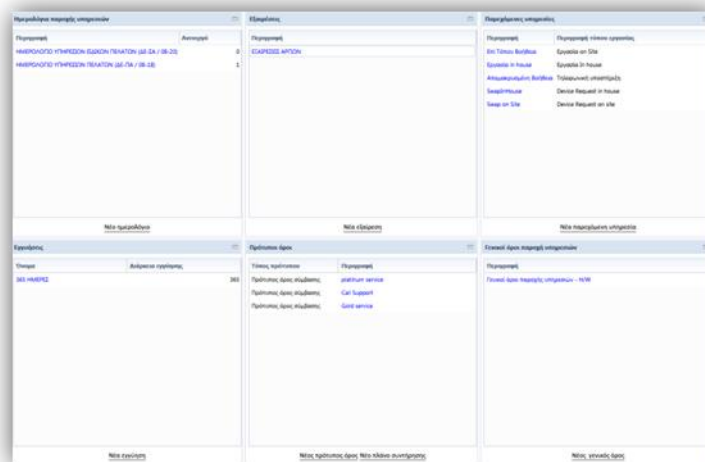


The various service related entities used during the customer service lifecycle can be managed and configured using the **service management** page. Using this page we can do the following:

- Define and manage service products/definitions
- Define various service calendars and exceptions
- Define warranty templates
- Define and manage contract term templates

- Define and manage preventive maintenance and service plans
- Set up service general terms

Image 112: Service management



5.5.1 Contract Term – Usage based

You can create and manage contract terms based on the usage of the covered installed items.

Scenario: You have agreed with a customer to lease printers where the charge of the associated contract term is based on the usage of each related printer. For this particular reason, you can create a template service plan to define the entitled service related to a counter usage activity, the activity execution period and a scale that defines the charges per printing usage. You can also associate each scale line with a category that defines if the line is related to color printing or b/w printing.

The following functions are provided:

- Definition of service entitlement based on a counter usage activity type (CUA)
- Definition of template service plans that are associated with a counter usage based activity and also with a usage scale that defines the charges.
- Creation of contract term based on a service plan that provides counter usage activity.

A service plan term can be related with usage based service entitlements and also with other entitlements that define planned services like preventive maintenance activities.

Using the relative follow up action you can create the future counter usage activities based on the period defined in the relative service plan template.

A counter usage activity is associated with the covered items of its contract tem. The following information is included:

- Serial number / item
- Last counter – it is completed by the action related with the charge calculation
- Current counter – It is filled in by the user.
- Charged quantity = Current counter – last counter - it is completed by the action related with the charge calculation
- Usage value: it is completed by the action related with the charge calculation
- Service entitlement

The lines of the counter usage activities can be invoiced periodically using the process of billing contract based service activities.

During the renewal process, the usage scale line is copied from the original term without any adjustment.

5.5.2 Custom billing plan

You can define, for a contract term, a custom billing plan to invoice recurrent fixed charges. To define a custom billing plan you have to select for the field 'Billing plan period' the value 'Specific invoice date'. When this value is selected the form displays a sub-view to define the custom billing plan. You can also use the provided automation 'Split term value' to split the term value to the selected invoiced dates.

5.5.3 Contract term cancellation

You can use the new cancellation rule to define a penalty when a contract term is cancelled. This penalty is applied to the value of each open period of the billing plan of recurrent charges.

The contract billing list, after the cancellation process, displays all the contracts that must be invoiced. The billing list shows all the cancelled lines with the penalty applied as a discount.

The cancellation penalty rule is not applied during the replacement of a contract term.

When the cancellation process is executed for a contract service plan then the open service activities defined by this plan can be deleted. This process is executed if the relative business rule is activated.

5.6 Term amendments

You can create an amendment for a service plan. The amendment can define new covered objects like serial numbers or person – sites.

You can create service activities according the entitlements defined by the service plan.

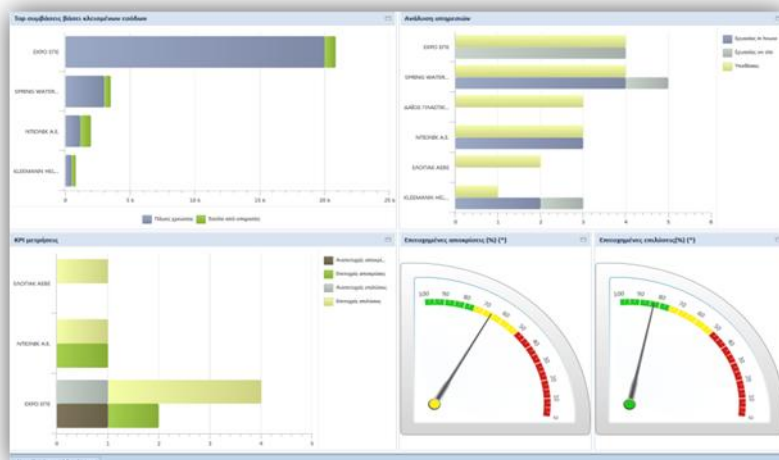
When a term that includes amendments is renewed the new service plan consolidates the covered objects of the old term and its amendments.

5.6.1 Service contract analysis

Service contract analysis is provided through an interactive dashboard named "Contract analysis". This dashboard contains the following items:

- Top contracts based on their revenue. Revenue is analyzed in terms of fixed charges as well as service related charges
- Number of case and service activities group by customer service contract
- Number of past due and in time responses and resolutions. With click in a data point we can see the associated response and fix rate.
- Response and fix rate

Image 113: Service contract analysis



5.6.2 Contract reports

- **Service case metrics:** You can use this analytic report to monitor the performance of the cases related to a service contract entitlement
 - Number of open and closed cases
 - Number of past due / in time responses and resolutions
 - Response / Resolution-fix rate
 - Daily closure rate
 - Average case duration in days

Image 114: Service case metrics

Περίοδος	Οριζήματα	Κωδικός σύμβασης	Όνομα σύμβασης	Σύμβαση	Ανοχτές	Ολοκληρωμένες υποθέσεις	Ρυθμός επιβεβαιωμένων ολοκληρώσεων	Εκπρόθεσμες αποκρίσεις	Επιτυχείς αποκρίσεις	Ρυθμός αποκρίσεων	Εκπρόθεσμες επιδόσεις	Επιτυχείς επιδόσεις	Ρυθμός επιδόσεων	Μέση διάρκεια (ημέρες)
ΣΥΜ-0006	NTSONIK A.E.	1	2	66,0%	0	1	100,0%	0	1	100,0%	0	1	100,0%	77
ΣΥΜ-0022	ΕΛΟΓΙΑΚ ΑΕΒΕ	2	1	37,0%	0	0	0,0%	0	1	100,0%	0	1	100,0%	63
ΣΥΜ-0021	ΕΛΑΡΟ ΕΠΕ	0	9	55,0%	1	1	50,0%	1	3	75,0%	0	3	75,0%	0
ΣΥΜ-0020	ΕΛΑΟΣ ΠΛΑΣΤΙΚΑ ΑΕΒΕ	0	1	100,0%	0	0	0,0%	0	0	0,0%	0	0	0,0%	0
ΣΥΜ-0034	ΚΛΕΜΑΝΝ HELLAS ΑΒΕΕ	2	0	0,0%	0	0	0,0%	0	0	0,0%	0	0	0,0%	343
ΣΥΜ-0025	SPRING WATER A.E.	1	6	57,0%	0	0	0,0%	0	0	0,0%	0	0	0,0%	220