

EBS ERP v6.1.0.3

EBS ERP ®

New features and extensions

Contents

1.	Inventory	4
1.	Hierarchical categorization of items	4
1.1.1	The purpose of hierarchical categorization	4
1.1.2	Creating a Hierarchical Tree	4
1.1.3	Assigning Categories to the Items	5
2.	Stock distribution to orders	7
2.	Invoicing policy	8
1.	Auto-application of item relations	8
3.	Viber integration	10
1.	Viber Business messages	10
3.1.1	"Send SMS" automation	10

Brief description of contents

Inventory

- Hierarchical categorization of items
- Stock distribution to orders

Invoicing policy

- Auto-application of item relations

Viber integration

- Viber Business messages

1. Inventory

1. Hierarchical categorization of items

Added the ability to create and manage the hierarchical structure of item categories, as well as the assignment of stock items to the corresponding categories. This new functionality concerns web applications with which EBS can be integrated and allows items to be organized at category and sub-category levels, creating a structured “tree” that can be used for easier classification and management of items.

The new screen is located in the [Inventory > Inventory items > hierarchical grouping](#) and from there there are 2 different options:

- **Category management:** The user can create a category and subcategory tree, organizing the items on multiple levels according to the structure and needs of the business.
- **Item Assignment:** The user can select the desired category from the hierarchical tree and classify the corresponding items.

1.1.1 The purpose of hierarchical categorization

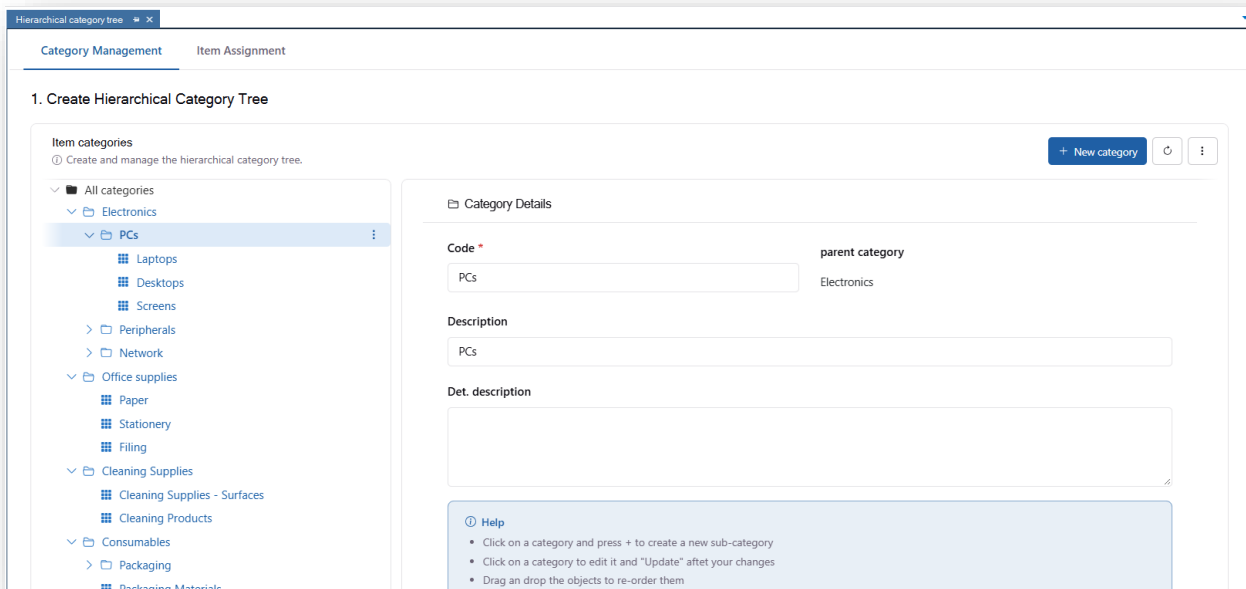
The new hierarchical structure was created so that the company can independently define its own categorization structure of items for use on **Web/eCommerce** products, without being limited by the commercial organization it uses in the EBS system.

In this way, the categories and subcategories displayed in the online store can be configured according to the needs of Web products, while the internal organization of items in EBS remains independent.

This approach offers greater flexibility and customization, avoiding the need for specific solutions per installation.

1.1.2 Creating a Hierarchical Tree

Through the new “Category management” screen, the user can create their own **category hierarchy** by adding main categories and sub-categories.



Creating a hierarchical category tree

When the screen appears, the main categories (roots) of the tree are displayed, while the user can expand the individual levels to navigate the full structure.

The following features are available on this page:

- Create central category
- Add sub-category (each category/sub-category includes a Code, Description and Detailed description and Parent category that is automatically updated)
- Disable category/sub-category
- Delete and keep sub-categories
- Delete with subcategories

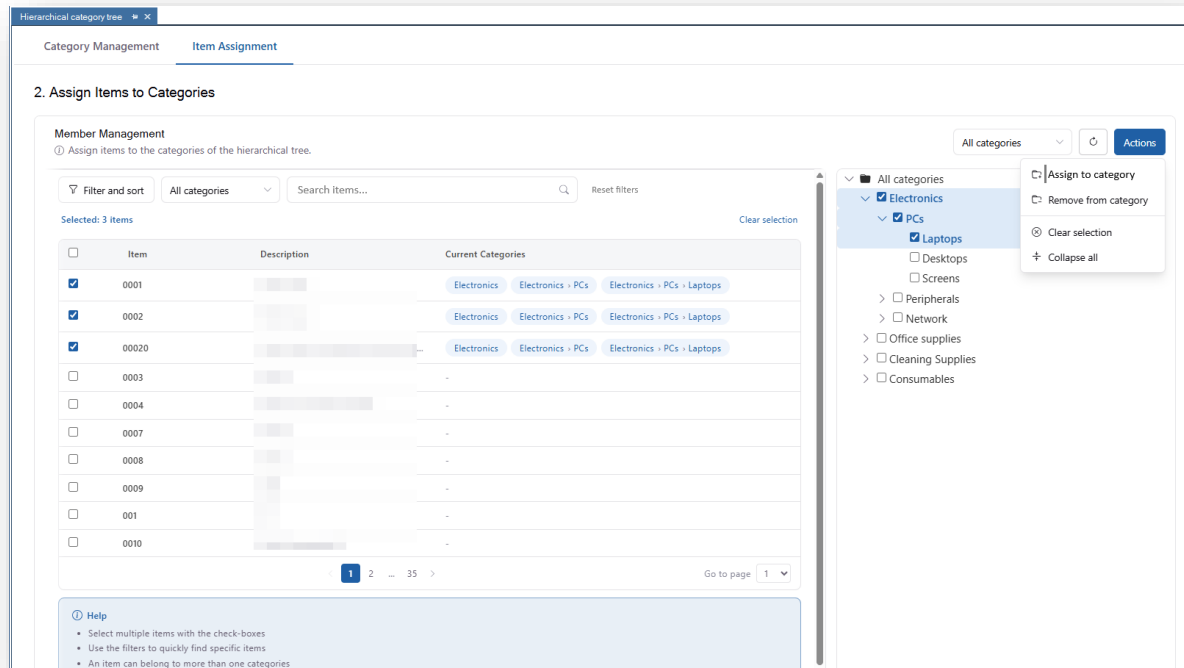
Basic Instructions:

- Click a category and press + to create a new sub-category or select the button "New Category"
- Click on a category to edit it and press the "Update" button after your changes
- Drag and drop the Categories to rearrange them
- Disable a category by pressing the off button to prevent items from being assigned to it
- By clicking "Delete with sub-categories" you delete the category and its sub-categories, otherwise they are left without a parent.
- The relevant icons next to the categories indicate whether they have sub-categories (folder icon) or not (dots icon)

1.1.3 Assigning Categories to the Items

At the same time, a special screen was added to assign hierarchical categories to inventory items.

The user selects the desired category from the hierarchical tree and can then classify the corresponding items. In this way, each item can be placed in the appropriate position of the hierarchy, allowing for more organized classification and grouping of the item, according to the structure of the enterprise.



Assigning categories to items

The following features are available on this page:

- Category filtering
- Item filtering
- Item assignment to categories/sub-categories
- Clear options, Expand category, Refresh

Basic Instructions:

- Select multiple items using the check-boxes, select one category or more categories, and from the actions button assign to a category
- Use the filters to quickly find specific items
- An item may belong to more than one category

2. Stock distribution to orders

In order to meet the need in the stock distribution to orders process for the expected from production, a new implementation was carried out. It's now possible to configure the stock to be distributed, so that the exact need of the user can be factored in. For this reason, the *Custom* option was added to the field "Stock calculation based on" ([Sales > Sales orders > Stock distribution to orders](#)):

This parameter uses a new scroller, the "Stock availability for allocation - Custom" (ESFilters\ESFIAvailableStockAllocation\ESXEntry_ESXPeriodics).

The user can modify the scroller through the [Development & customization tools](#) of the [Tools & Settings](#) menu, according to the needs of each installation.



A prerequisite is that 1) the fields and 2) the names of the fields that the scroller returns, as well as 3) the product parameters of the scroller remain as they are.

2. Invoicing policy

1. Auto-application of item relations

Until now, when importing gift items through the **Invoicing Policy** functionality, item relations were not activated. That resulted in the associated items (e.g. bailments) were not automatically imported and using Business Rules was required to meet the needs of process.

In this version, the Invoicing Policy functionality has been extended so that, during symmetric import or gift item import, the relations of the items are also enabled. This automatically imports all associated items (e.g. bailment items), without requiring implementation through Business Rules.

This implementation aims to:

- ✓ reduce the need for custom implementations,
- ✓ simplify customization and
- ✓ ensure uniform behavior through manual item import.

It particularly serves installations that manage a large number of bailment items.

Example:

Let's say there a specific offer is in force, that when the customer orders more than 10 pieces of water, they get one more as a gift. This 1 water should come along with the 1 bottle that corresponds to it (as bailment). The water will have a 100% discount, while the bottle is charged as normal.

1. Create the document as usual:

2. In the Invoicing policy on the “Miscellaneous” tab, a relevant condition must be set:

- The condition must define that when the quantity of this specific item is ≥ 10 , then another gift is given:

- Finally, on the “Item relations” tab for the item in question, you must have specified that each unit of the item corresponds to a Bailment of 1 bottle, so that the following is automatically calculated:

Identity Organization Transfer Dimensions <u>Item relations</u> User defined fields Properties MyData parameters Attachments							
	Relation type	To item	From item MU	Quantitative relation	Related item MU	Pricing relation	Comment
1	BAILMENT	BOTTLE	PCS	1.000	PCS		
*							

3. Viber integration

1. Viber Business messages

As of July 14, Rakuten Viber introduces the use of templates for transactional messages as part of its improvements in the end-user experience¹. Transactional messages are those that are directly related to a user action and are informative in nature.

For example:

- order confirmation
- shipment updates
- payment or appointment reminders
- status request updates

Their role remains the same: **inform the user in a clear and direct manner**. Proper template use helps to keep messages priced as transactional. Otherwise, **they will be charged as promotional**.

3.1.1 "Send SMS" automation

In this context, the "Send (SMS)" automation available in the "Bulk communications" scroller of the Communications Center (Communications) was improved.

When the automation is executed and provided that no template has already been selected, the new parameter "Select Viber Template" appears. The new automation parameter is only available if the following company parameters have been set up as follows:

Entersoft Viber Provider = 0 (Yuboto)

Viber business messages integration - Send SMS = 1 (Send with Viber)

	Parameter (description)	Parameter grouping	Parameter	Parameter value
1	Entersoft Viber APIKey	Vertical	ES_VIBER_APIKEY	
2	Entersoft Viber Provider	Vertical	ES_VIBER_PROVIDER	0
3	Entersoft Viber SenderID	Vertical	ES_VIBER_SENDERID	
4	Message delivery settings - Viber delivery with Fallback to SMS		ES_SMS_MSTAT_OMNI_CONFIG	10 1440
5	Viber business messages integration - Send SMS	Completed	ES_SMS_MODE	1
6	Viber business messages integration - Viber Sender		ES_VIBER_SENDER	

By clicking on the three dots icon, the available Templates that are stored in the customer's account on the Viber platform are displayed.

By executing it, the automation assigns values to the fields: name, surname, email and of course the template code.

Automation parameters

E-mail type

Select Viber Template

Accept

Cancel

¹ More information: <https://messaging.yuboto.gr/templates-transactional-messages>