Entersoft Expert v5.0.8.0

Entersoft Expert®

New features and functionalities

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- Collaboration | improvements in message editing (Links & Formatting)
- User | Salespersons & resources Dashboards associated with the user
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- Context information | Customer Scorecard extensions
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Next up, the new functionalities & improvements catalog is broken down per category, along with use instructions & examples.

1. Commercial and Financial administration

1.1 Fiscal printer – Additional information on fiscal print outs

The option to print additional information on a fiscal receipt from the fiscal devices is now available. Such information may be printed on fiscal receipt's header or footer. It is highlighted that such information cannot be related to the fiscal or financial information (e.g. quantity, price etc).

There is no need for any new configuration of the document series. However, in order to define the additional data that feed the printer in the fiscal printing, a new xml file must be configured properly and placed in the CSPOS\FiscalPrinter folder in the client application. If a such file exists, the information included in the xlm will be included in the print out of the transaction with the fiscal information. The xml file is associated to the fiscal printer provider and the fiscal document type. The name of the xml file must be ***FP_ELTRADE_xx*** or ***FP_DATECS_xx.*** The "xx" suffix must be replaced with the fiscal document type e.g. ***FP_ELTRADE_02*** for the retail transaction or ***FP_ELTRADE_03*** for the sale invoice.

Structure of the file

The file provides the information regarding the sources of the data in the sale document (esfidocumenttrade). The specific number of fields may be used.

Source Table	Element	Format
ESFIDocumentTrade (HEADER)	<Field1></Field1> <Field2></Field2> <Field3></Field3>	Table.Column e.g. *ADCode* or Table.Relation.Column e.g. *FK_ESFIDocumentTrade_ESFITradeAccount.Name* or Formula e.g. *<Field9>C#(if ([ADDateField2] != null) { return "Дата на данъчно събитие"; })</Field9>*
ESFIDocumentTrade (FOOTER)	<Field9></Field9> <Field10></Field10>	Table.Column e.g. *Price* or Table.Relation.Column e.g. *FK_ESFILineItem_ESFIItem.Description*

Example:

In the sale invoice transaction, the date of tax event along with a standard text is needed. The field must be printed only if the tax date is not the issue date.

Template	Example	Result
<?xml version="1.0" encoding="utf-8" ?> <Configuration> <!-- ESIDocumentTrade --> <Field1></Field1> <Field2></Field2> <Field3></Field3> <!-- ESIDocumentTrade --> <Field9></Field9> <Field10></Field10> </Configuration>	<?xml version="1.0" encoding="utf-8" ?> <Configuration> <!-- ESIDocumentTrade --> <Field1></Field1> <Field2></Field2> <Field3></Field3> <!-- ESIDocumentTrade --> <Field9>C#(if ([ADDateField2] != null) { return "Дата на данъчно събитие"; })</Field9> <Field10>C#(if ([ADDateField2] != null) { return Convert.ToDateTime([ADDateField2]).ToShortDateString() ; })</Field10> </Configuration>	

In case of expression…

- Each expression must be contained in C#().
- Each field-part of expression must be in brackets [].

Note that

There is the template file **NFP_template_xx**.xml in the folder ESPOS\FiscalPrinter. The file follows the structure with empty values.

Copy it in the CSPOS\FiscalPrinter, renamed it based on your fiscal device, and configured it accordantly.

1.2 Trade promotion programs

The trade promotion programs are used by companies that engage in retail sales, wholesale sales, Retail and sales from representatives. A promotional action takes place within a specific time period and aims to:

- ✓ Increase company capital
- ✓ Increase popularity and market share
- ✓ Improve product image
- ✓ Increase sales volume

- ✓ Launch new products or product line

In this version, you will find a number of new features to help you easily and quickly create new promotion programs like that, as well as integrate them directly into the app and have immediate availability for use in the sales workflow.

In general, the promotion programs you can create carry out actions intended to reward with **discounts** or **a free product** to the customers or the point of sales that meet certain conditions at the time of sale. In addition, the various active promotional actions at the time of sale are can be communicated via **newsletter** with the customers they concern.

The new functionality is here to fully replace the functionality of promotional actions B2B feature to date, adding new features, beyond B2B promotional actions.

Step-by-step instructions for using, activating and configuring the app in order to use this new feature can be found in document CRM_MarketingPromotionPrograms_EN.pdf available in the app's **ESbooks**.

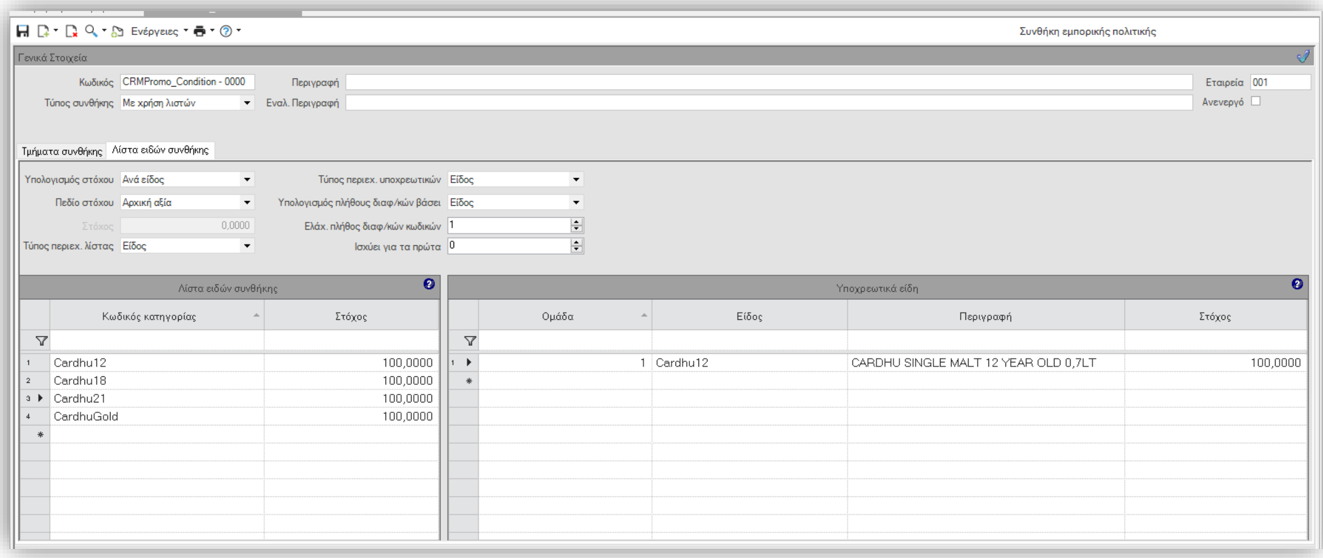
1.3 Commercial policy

1.3.1 New "Using Lists" condition type

A new type of **commercial policy condition type** has been added, to support offers enabled by the selling items as a group with a specific composition and quantity.

Typical such examples are:

- ❖ *By buying a 1-piece pack from the A product category and a 2-piece from the B category, there's a X% pack discount*



- ❖ *By buying 5 pieces of product the A or B category, there's a discount of X%*
- ❖ *By buying a pack of products for x Euro of the A or B product category, the pack is X% off*

Enabling such offers in the commercial policy can be implemented through the special condition type "Using lists". The new condition type is not based on the use of "standard conditions". Upon creating a condition by selecting the new type, the "Condition items list" page is activated, with a number of fields used to configure the condition.

Calculate target.

Using this field, it is possible to can define how the target described in the condition is being calculated. There are two values available:

- **By item**
- **In total**

When the target is defined by item, then the condition processes each item code separately and calculates the target for each item separately. The conditions configured for the “by item” target refer to groups of the same item code.

<u>Example</u>:
Purchase of 3 pieces in the item family “Menswear”.
If items A and B belong to the family “Menswear”, then:
- If 3 pieces of item A are purchased in the document, the items will receive the offer
- If 6 pieces of item A are purchased in the document, they will receive the offer twice, one for each 3-piece
- If 7 pieces of item A are purchased in the document, 6 pieces of them will receive the offer, i.e. twice for each 3-piece
- If 2 pieces of item A and 1 piece of item B are purchased in the document, then no item will receive the offer, since the target is “by item” and none of these has been purchased in the minimum quantity, which is 3
- If 3 pieces of item A and 3 pieces of item B are purchased in the document, then the target was met for both item A and item B once, and they will receive the offer.

When the target is defined in total, then the condition processes all of the condition types together and calculates the target for all of the items together. The conditions configured for the “In total” target, create groups with codes of any of the items belonging to the condition items

<u>Example</u>:
Purchase of 3 pieces in the item family “Men’s clothing”.
If items A and B belong to the family “Menswear”, then:
- If 3 pieces of item A are purchased in the document, the items will receive the offer
- If 6 pieces of item A are purchased in the document, they will receive the offer twice, one for each 3-piece
- If 7 pieces of item A are purchased in the document, 6 pieces of them will receive the offer, i.e. twice for each 3-piece
- If 2 pieces of item A and 1 piece of item B are purchased in the document, then both item A and item B will receive the offer, since the target is “In total” and the minimum quantity of the target, which is 3, has been reached, that is 3 in total from codes A and B together.
- If 3 pieces of item A and 3 pieces of item B are purchased in the document, then the target was met for both item A and item B once, and they will receive the offer.
- If 4 pieces of item A and 3 pieces of item B are purchased in the document, then the target was achieved for both item A and item B once and they will receive the offer; in this case, the target achieved 2 times, but the items that will eventually be included in the offer is random, as it may be **3 pcs A and 3 pcs B, 4 pcs of A and 2 pcs of B**

Target field. You can select the field of the item line to be used for the target calculation. The goal can be quantitative or related to value.

Target. Here the user enters the number symbolizing the target, in case the target is set “In total”. When the target is by item, then it is entered in a specialized field in the condition items list, as the target may vary per item in case it is set by item.

List content type. The types that are included in the offer an constitute condition items can be entered either as individual item codes or using one of the grouped fields of the item: Family, Group, Category and subcategory. Defined item tables are also supported. You can only select <u>**a single item field**</u> to enter condition items.

Condition items list. Here, based on the content of the “List field type” you have selected, enter the codes of the items/categories included in the promotion/condition. You can set as many values as you like, which, if the goal is “in total”, will be processed using

OR logic. If the target is set "By item", each content of the condition items list is examined individually as described above. In particular, in case category codes are entered, the processing is carried out again by item code, belonging to that category. Basically, in the case of "by item" target, entering an item category is equivalent to entering all items belonging to that category. Apart from the category value, the target is also entered in this window, when it set by item. The target designated next to an item category is automatically the target of each item belonging to the selected category.

Mandatory items. It is possible to define some additional rules to be satisfied by the other items included in the document. For example, an offer may be valid for 3 pieces of items in the "Menswear" category, but the 3 pieces must contain at least one item of group "Pants" or the group "Shirt". Therefore, in the list of mandatory items item codes or category codes are entered to describe such rules.

The type of content in the mandatory items list is defined in the "**mandatory item list content type**" field, which functions just as the corresponding field for the condition items list does. However, it is always allowed to enter items regardless of the list content type in the mandatory items list.

The processing of this list's contents is done using AND logic. However, it is possible to define sub-groups that are processed with OR logic. In the following example:

Υποχρεωτικά είδη

	Ομάδα	Κωδικός κατηγορίας	Είδος	Περιγραφή	Στόχος
1	0	CognacBrandy			1,0000
2	1	WHISKEY			1,0000
3	1	VODKA			1,0000
4	2		Johny Blue Whiskey	Johny Blue Label Whiskey	2,0000
5	2		Johny Gold Label Whiskey	Johny Gold Label Whiskey	1,0000

If the target is in total, the following mandatory rules are described in the creation of offer item groups:

- 1 piece of the CognacBrandy category must be included
- **AND** either 1 piece of WHISKEY or 1 piece of VODKA
- **AND** either 1 piece of the Johny Gold Label Whiskey item, or 2 pieces of the item **Johny blue Whiskey**

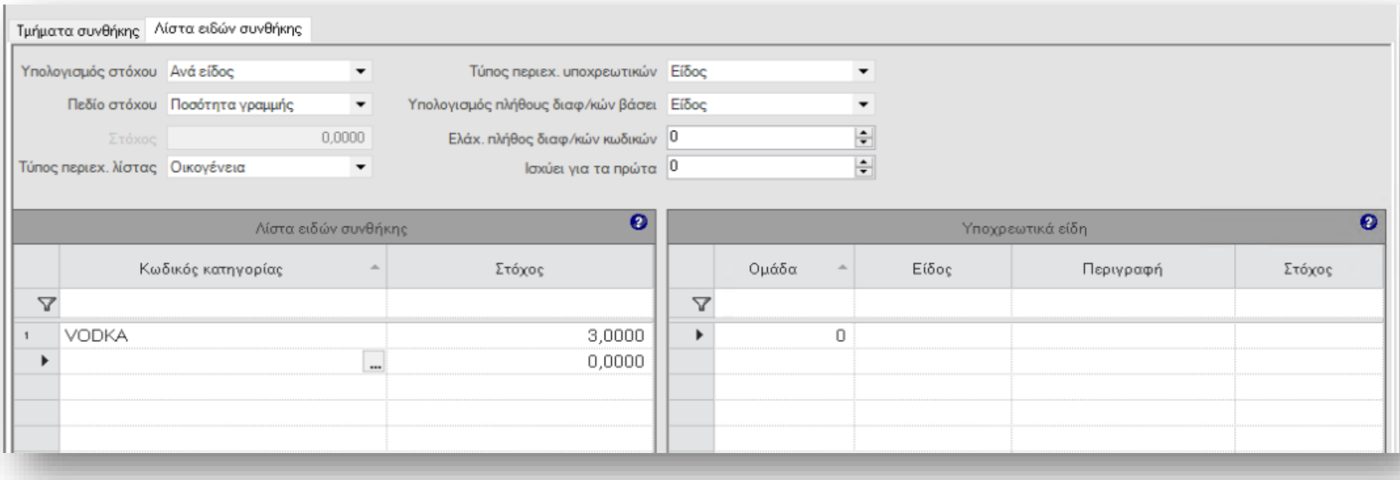
When the target is set "by item", then the above mandatory rules concern the document content in its totality and are not exclusively examined for the condition items.

Calculate unique number based on. By using this field in conjunction with the "Minimum number of different codes" field, you can also activate a difference condition, either in the contents of the condition types, if the target is set "in total", or in the document contents if the target is "by item". The aforementioned can be used in case where we wish, for example, to purchase 3 items of the "Menswear" category, but 3 different item codes have to be purchased. Therefore, in field "Calculate unique number based on" we will select value "item code" and in the field "Minimum number of different codes", value 3. When calculating the difference, options are of course also available for the rest of the item categories.

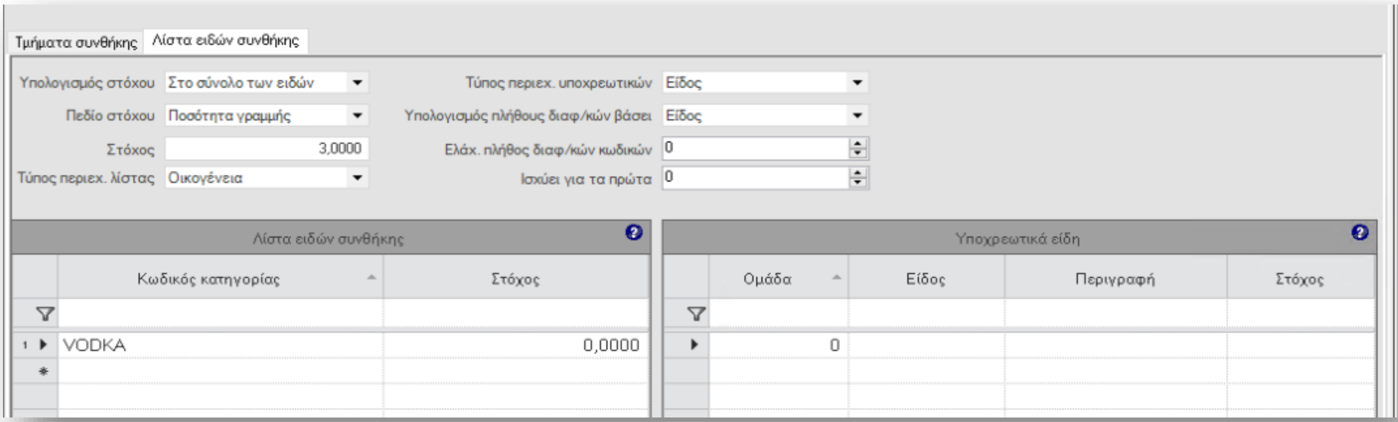
Valid for first. By selecting an appropriate value for this field, we can select the number of times that the offer can be enabled within the same document. So regardless of how many discounted sets of items one can ultimately purchase, the offer can only be applied one or more times.

Examples

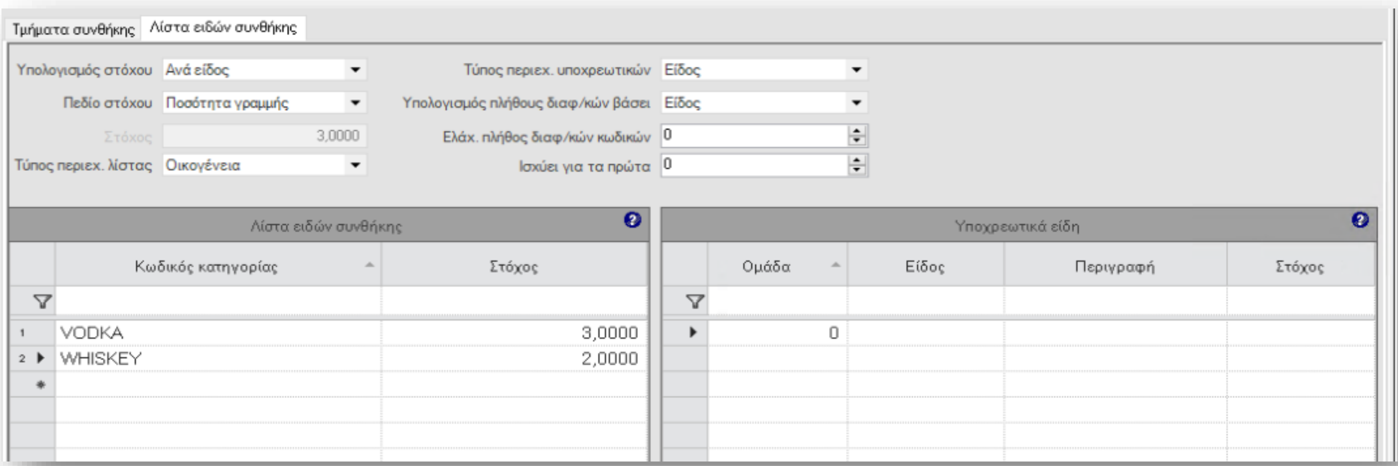
1. For every 3 bottles of Vodka, but of the same type



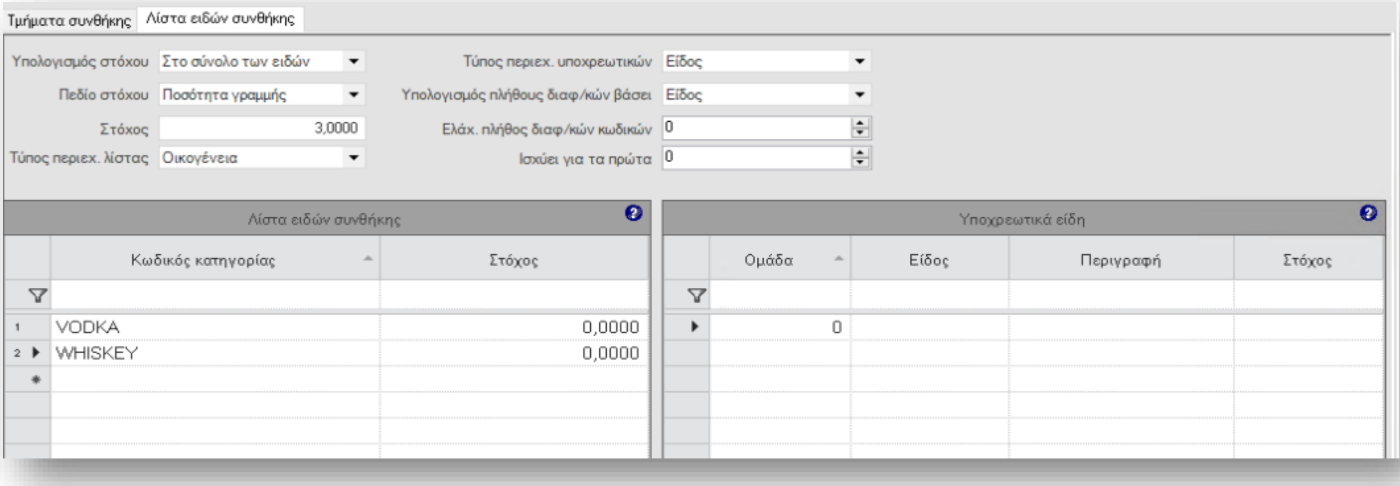
2. for every 3 bottles of Vodka, of any type



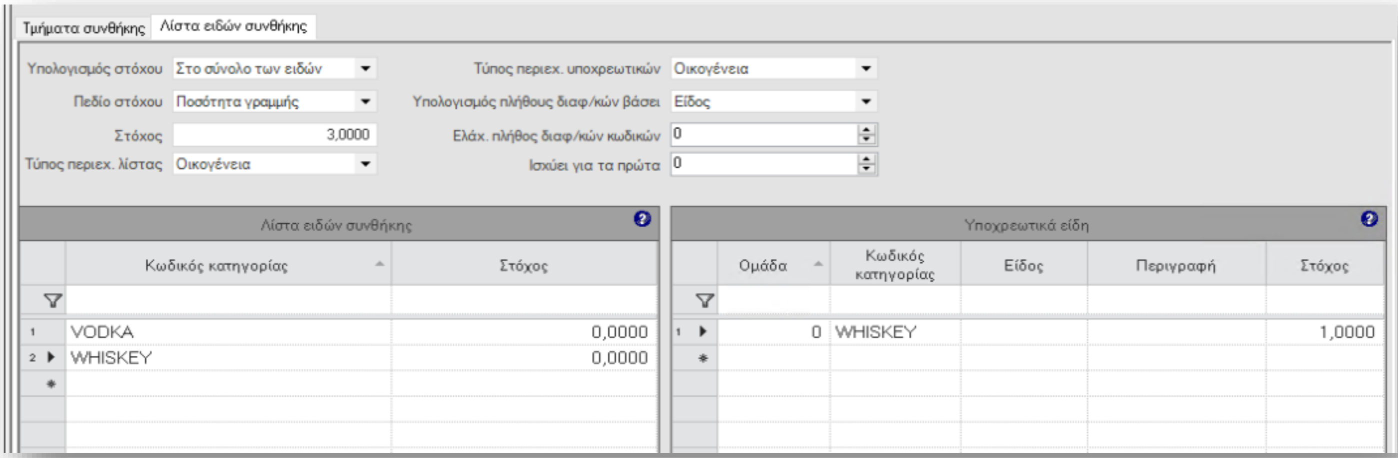
3. For every 3 bottles of Vodka or 2 bottles of Whiskey



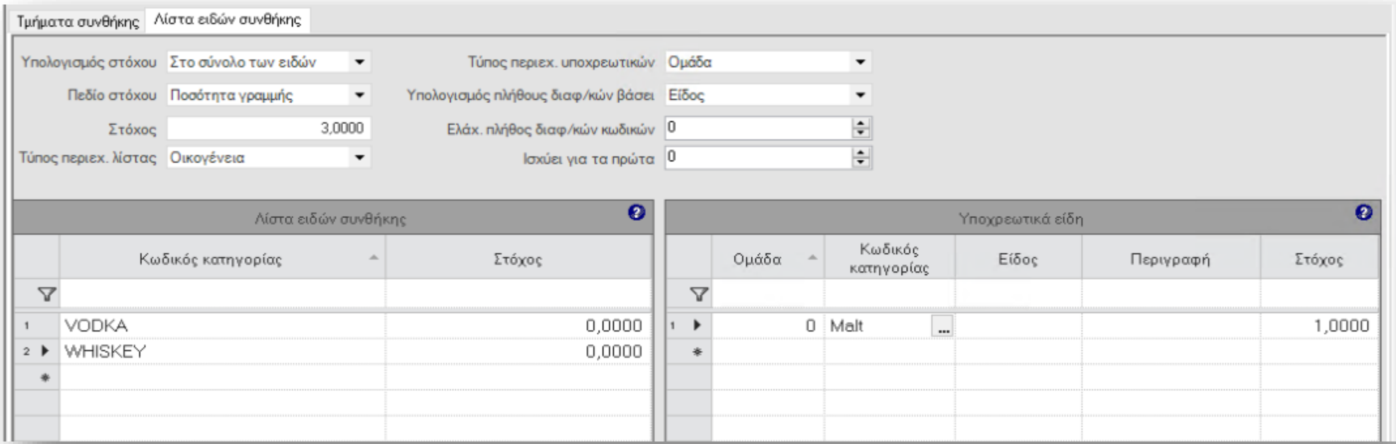
4. For every 3 bottles that may consist of any type of Vodka or Whiskey



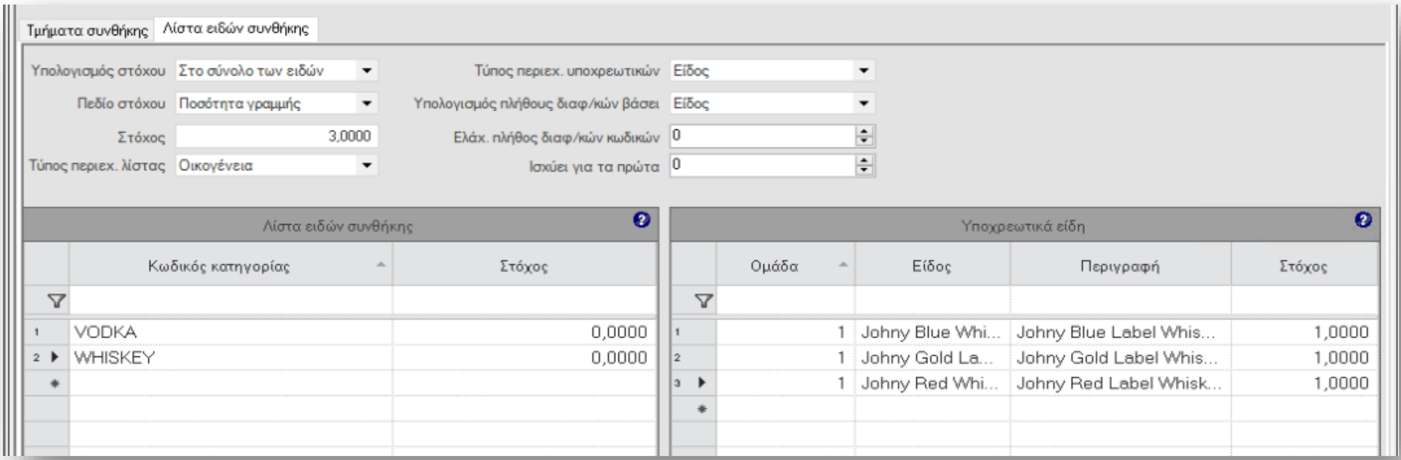
5. For every 3 bottles of Vodka or Whiskey, but at least one Whiskey must be purchased



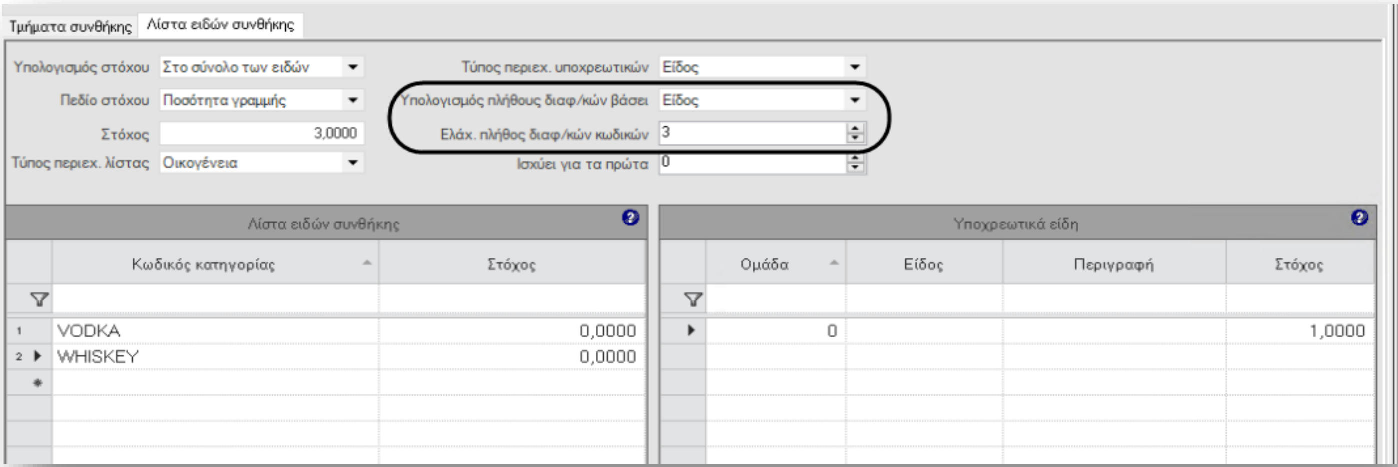
6. For every 3 bottles of Vodka or Whiskey, but at least one Malt Whiskey must be purchased



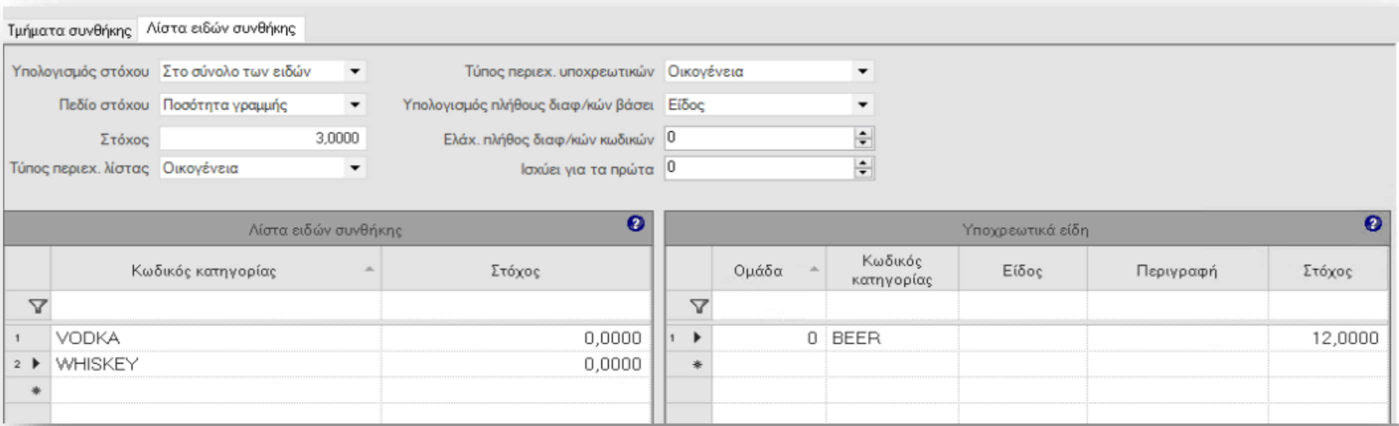
7. For every 3 bottles of Vodka or Whiskey, but at least one bottle of any Johny Walker whiskey must be purchased



8. For every 3 bottles of Vodka or Whiskey, but all three bottles must be of a different type



9. For every 3 Vodka bottles or 3 Whiskey bottles, and as long as 12 bottles of any beer are also purchased



1.3.2 Commercial policy actions

A number of improvements have been made to commercial policy actions, mainly to better cover offer scenarios based on the new "List-based" condition type.

Available n-Tuples balance. this field has been added to all actions related to item line assignments. A check is executed for this field value when the condition that caused the action execution is a new "List-based" type condition. In this case, therefore, a number of item groups (n-tuples) have occurred from the condition being processed, in which groups the action will be executed. Before the action is applied, a check runs for the field value, so that the action will not be executed for all condition n-tuples, but only for those that have arose from the field's content.

Added specialized parameters to the

New parameters in actions. A number of new parameters have been added and can be used in the expressions of actions. They relate to the application of the new condition

- With an expression of **Cc("<condition field>")** form, we can use a field value of a new type condition, as long as it's been used. For example, the expression CC("TargetValue") concerns the **Target** field entered in the condition items list.
- With the expression **NumberOfCombos**, it is possible to find out how many times (n-tuples) the goal has been achieved

To an action of value allocation. It is now possible to calculate the value to be allocated using a formula.

In assignments to the condition lines, there is now a specialized assignment type "To voucher lines, cumulatively". This way, regardless of how many times 'n-tuples, the offer has been enabled, the assignment to the relevant voucher line will only be executed once

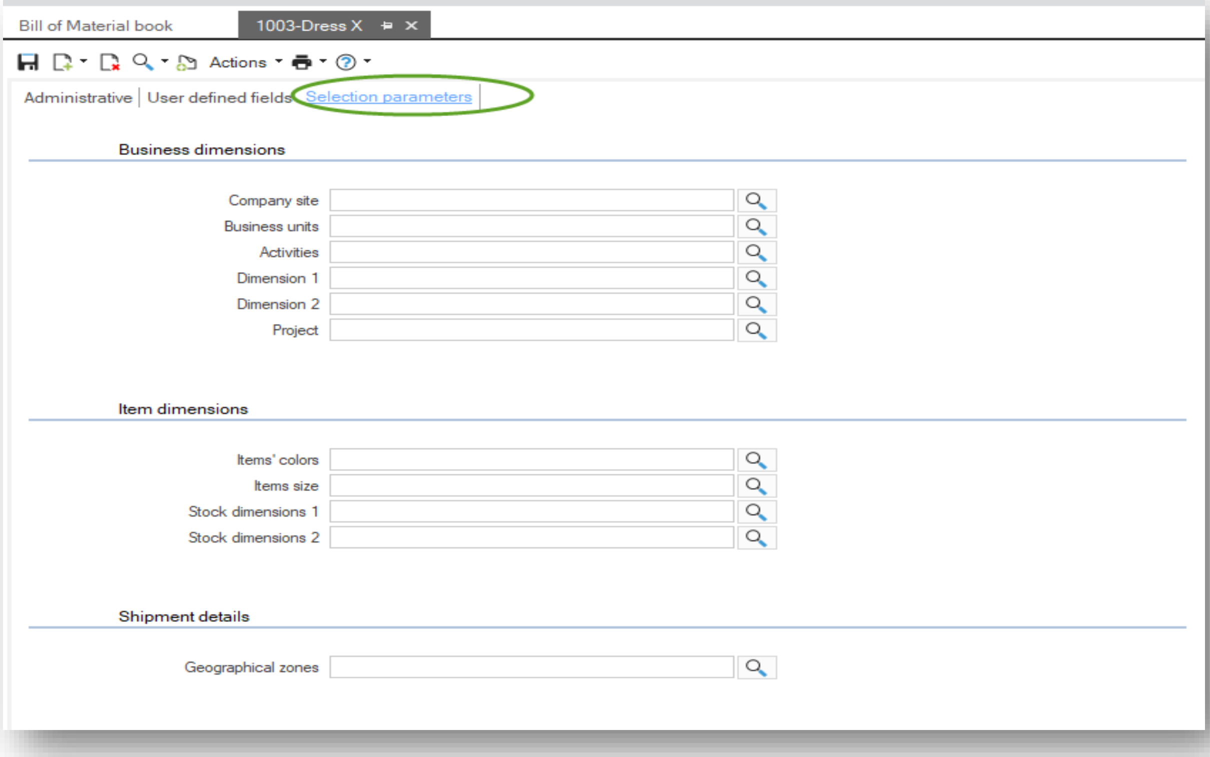
New action type "Promotional action - Input item". It is a specific type of action that can only be used with a specific configuration done in the context of using the new CRM Promo subsystem.

1.4 Technical specifications

A number of improvements and extensions have been made to the technical specifications, mainly concerning the management of products and materials which monitor item dimensions (color, size, etc.)

Selection parameters

A new "**Selection Parameters**" page has been added to the **technical specifications** management screen . It contains a number of parameters that can be selected and serve two purposes. On one hand, by selecting values in these parameters it is possible to characterize the technical specifications by designated the dimensions concerned. This makes it easier to manage multiple BOM for the same product. On the other hand, using **a new mechanism** integrated in the documents, it is possible **to automatically select, based on the selected dimension values**, the "most appropriate BOM for the item.



The following parameters are available:

- **Company branches**. Select the branches for which the technical specification is valid
- **Business unit, Activity, Dimension 1,2 and Project.** Select the company dimensions for which the technical specification is valid
- **Colors, Sizes, Dimensions 1 and 2**. When the product monitors some of the item dimensions, then you can select the dimension combinations for which the technical specification is available.
- Geographical zone. If the technical specification is associated to shipments to specific Geographical zones, then select these zones here.

Select BOM in document

In documents, where so far, the BOM field was being filled out automatically with the **main item BOM**, an attempt is now being made to select one of the **alternative BOMs**, based on the “selection parameters” values, if these have been entered in the alternative BOMs. The BOM selection will be made by comparing the values of the selection parameters with those of the corresponding fields, as these are entered in the document.

There is a relative priority of the filled-in fields according to the following list:

1. Colors
2. Sizes
3. Item dimensions 1
4. Item dimensions 2
5. Company sites
6. Business units
7. Activities
8. Dimension 1
9. Dimension 2
10. Project

11. Geographical zones

In practice, this means that BOMs with filled-in values in the above fields of the list are checked first and their values are compared to the values in the document fields.

If, in the end, one of the alternative BOMs is not selected, the main one is recommended.

Consumptions per product dimension

It is now possible to set material consumptions by product dimension combination. Until now, this option has been reserved for matchings of item dimension charts.

The feature is available in BOM consumption lines, by means of a new action "**Set consumptions per product dimension**" added to the toolbar. The set consumptions option appears regardless of whether the selected material is monitoring an item dimension.

The dialog shows all available combinations of product dimensions, when no values are selected in the "Selection Parameters" page, in the item dimensions. When values are selected there, the dimension combinations are exclusively executed on the selected ones on this page.

Enter consumptions in items that do not monitor dimensions

The "Enter consumptions" mode has been improved, for consumptions of items that are not monitoring any dimensions. Setting consumptions is still done using matching of dimension charts, but now both the creation and management of the matching is done quickly and in an easier way, via the BOM.

On the BOM screen, on the toolbar of the "set consumptions" window, 4 new actions were added:

- **Color matching**
- **Size matching**
- **Dimension 1 matching**
- **Dimension 2 matching**

Actions shall be active for materials that monitor item dimensions and as long as the product monitors dimensions. By selecting the action corresponding to a dimension, the dimension chart matching screen appears to edit a dimension chart matching, if either "Import new" has been already selected or if no matching has been selected in the material line.

For example, if the "Color matching" action is selected, then the matching screen appears, in order to designate which material color will be selected for each product color. If nothing is selected in the matching field, then the process of entering a new dimension chart matching starts. In the "**From Dimension chart**" field, it is possible to select only one of the **product dimension charts**, either the color one, or the size on, etc. In the "**To Dimension chart**" field, only dimension charts associated with the selected action can be selected. Meaning, if the action is color matching, only color charts, etc.

A significant improvement made in the matching screen that appears using the new actions, is that the dimension charts that can be selected are NOT only the ones set in the consumption item, but in **any dimension chart** that concerns that dimension and belongs to another item. This allows us to use, for example, matchings created for other item color charts, but at least one of the colors must be common between the color chart of the material and the one of the selected size chart. With this change, we ultimately succeed in maintaining fewer dimension chart matchings that can be selected in more items.

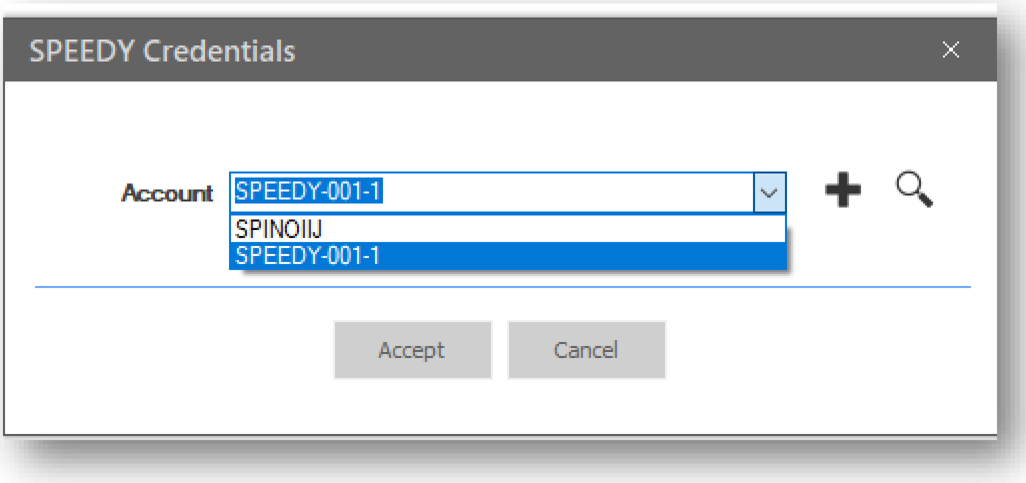
The possibility of selecting and matching size charts that do not include the dimension chart of the consumption item is also supported in the matching selection fields of the consumption line.

1.5 Connection to courier providers

For all supported courier providers, the possibility to use multiple login profiles to their services is now supported. This allows different login accounts to be stored, for example per branch.

In connection to the above feature of possible accounts, the way login credentials are stored has also changed. These are no longer saved in an .xml file per installation, but are stored in the Courier login credentials (ESFICourierAccount) database.

Login credentials are managed from the same *menu* points*:* **Configuration and Tools/System integration.** Upon selecting the login credentials configuration, a new window appears. Using the "account" field, you can select the account whose details you wish to edit. An already registered account can be viewed and edited by selecting the search icon, next to the Select Account field.



Using the "Insert" icon, you can create a new Account for the selected provider.

Select an account during the shipment process

When more than one account is registered for a provider, the account used when creating a shipment must be selected. For each branch, an account must be set as the default account. This is done by the following steps:

1. Open the provider's window of to edit the accounts
2. Select the account you wish to select from the list, as recommended for the branch that has been designated in the account.
3. Select the "**Accept**" button

This is the process one needs to follow each time we need to change the default account for a provider per branch.

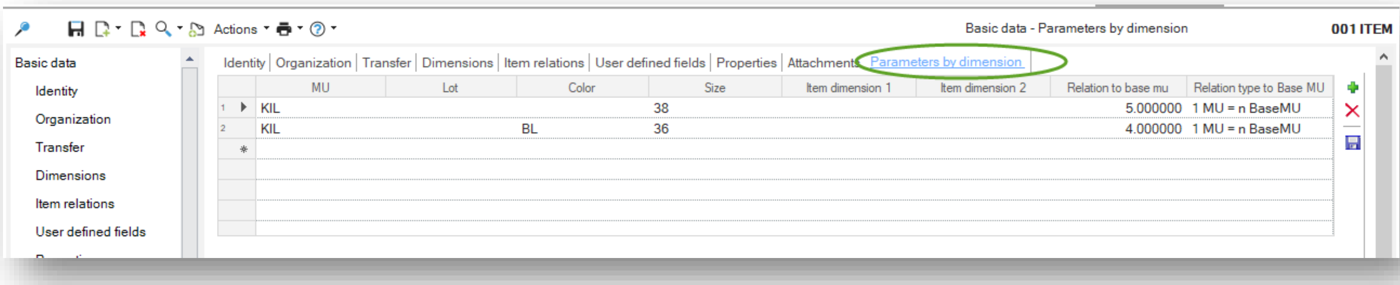
When updating the installation to this version, the configuration set up and saved in .xml will be automatically transferred to the database and no additional action will be required on your behalf.

1.6 Others

1.6.1 Stock items

It is now possible to configure the parameters of **item Measurement Units** by item dimension for any items that monitor dimensions. This allows you to differentiate between MU relationships with the main item unit by dimension or combination of dimensions. So, if, for example, some item size differs from the others, then we can set the weight by dimension.

This feature is available via the specialized Parameters by dimension field that can be added to the item screen. The configuration and function of this feature is similar to the "values by dimension" function. However, here we can set a different relationship per item monitoring MU to the MMU, for the combinations of dimensions we wish to differentiate. For any combinations of dimensions and MUs with no entry found in this detail, the relation set in the item is used.



1.6.2 Item control policy

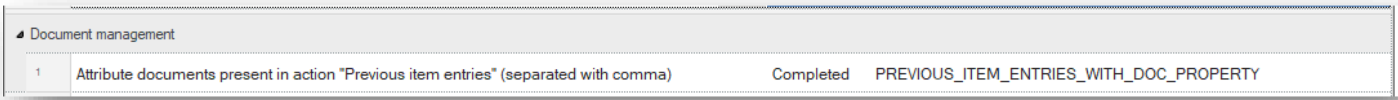
The Service MU field has been added to the fields that can be defined in the item control profile.

1.6.3 Credit control policy

It is now possible to define a customer's credit control as "Inactive". This ensures that it will not be available for selection when investigating. The definition of a credit policy as inactive is made through the homonymous field added to the sceen of the credit policy.

1.6.4 Previous item entries

It is now possible to configure the entries that appear in the action "Previous item movements" in item lines in documents. For this purpose a new company parameter was added in category Document management:



It defines the comma separated list of document attributes, of which the item entries will be taken into account in the query returning the previous entries.

If the parameter value is not defined, all the item entries are displayed.

1.7 Reports

1.7.1 Trial Balances with Commercial balance

A new Period balance column was added to the **Receivables/Payables trial balances with commercial balance**, for the notes/cheques in the following BIT:

- **Payables trial balance (with balance analysis)** (*menu: Accounting / Accounts payable / Trial balances)*
- **Receivables trial balance (with balance analysis)** *(menu: Accounting / Accounts receivable / Trial balances)*

The new column was also added to the Crystal Report available in the above BITs.

1.8 Enable context information in views

Context information has been (re)activated in a number of views, using also Context information indicator, available since version 5.0.6.1. It should be noted that, by activating this indicator, the icon to the left of the column data is displayed, as an indication of available context information (Preview, and/or Scorecard and/or Timeline and/or Gantt chart, depending on the entity).

Sales / Sales orders

- Outstanding orders

  (Menu > Sales > Sales orders > Outstanding orders), where the context information was added to the Customer column, at the first level, and to the item column, at the second level.

- Delayed shipments statement

  (Menu > Sales > Sales orders > Delayed deliveries), where the context information was added to the Customer column and the Item column.

- Outstanding orders (detailed)

  (Menu > Sales > Sales orders > Outstanding orders (detailed)), where the context information was added to the Customer column and the Item column.

- Orders/Reservations

  (Menu > Sales > Sales orders > Orders/Reservations), where the context information was added to the Customer column, at the first level, and the Item column, at the second level.

- Sales and Distribution status

  (Menu > Sales > Sales order > Sales and Distribution status), where the context information was added to the Customer column and the Item column.

Order Routing/Invoicing

- Sales/Shipments

  (Menu > Sales > Order routing/invoicing > Sales/shipments), where context information is available in the Customer column, at the first level, and the Item column, at the second level.

- Loading Status

  (Menu > Sales > Order routing/invoicing > Loading Status), where context information is available in the Customer column, at the first level, and the Item column, at the second level.

- Pending customer invoicing

  (Menu > Sales > Order routing/invoicing > Pending invoicing), where the context information was added to the Customer column.

- Invoicing documents

  (Menu > Sales > Order routing/invoicing > Invoicing documents), where the context information was added to the Customer column.

2. CRM

2.1 Visit planning features

Using the new features, you may achieve the following:

- Optimize the daily visit routing
- Minimize the travel cost

Business address visit priority has been changed to support multiple priority ranking by assigning any weight you wish to your different points of visits. Higher weight means higher priority.

2.1.1 Calculate Distance (Google Services)

To calculate business address distance, navigate to menu item Sales \ Activities \Calendar management\Update business address distance.

The view provides the following actions:

- Update business address coordinates - the calculation is based on column AddressQuery which provides the required data as Address1,ZipCode,CountryIsoCode
- Update distance based on the selected company branch (view parameter). Upon closing the task bar, the view is refreshed to display the calculated distance in kilometers.
- Map - Display a map with markers based on business addresses

The parameter company branch returns only company addresses info with updated coordinates.

2.1.2 New algorithm – by business address priority and distance

A new algorithm has been added that proposes visits based on priority (descending) and distance (ascending).

The context views Based on sales cycle & My customers new support data based on Territory management. To enable this feature, you need to set the value 1 to the mobile parameter MobileDataBasedOn.

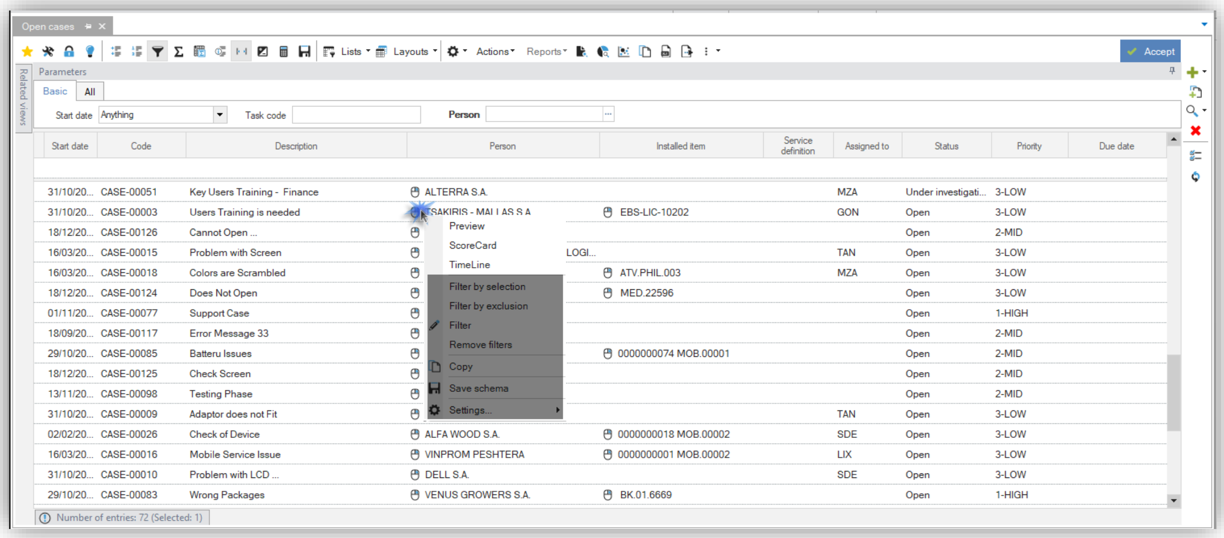
2.2 Previewing an entity, scorecard and entity timeline

The icon for previewing an entity, scorecard and entity timeline has been added to the CRM service operational reports listed in the following table. This icon indicates that you can right-click on the column in which the icon is displayed and see further actions. The available actions are the following:

- Entity preview
- Preview entity's scorecard
- Preview entity's timeline

Report	*Customer*	*Installed item*
Open Cases	√	√
Overdue cases	√	
Closed Cases	√	√

Open jobs	√	√
Overdue jobs	√	
Closed jobs	√	√



2.3 Audience participation in survey analytic report

The new Audience participation in survey has been added to the survey form. Through this report you can monitor the behavior of each member of the selected list. Specifically, you can monitor the following:

- Name
- Last participation (days) - How many days have passed since the last participation. It is calculated based on the planned start date of the selected survey and the last response date.
- List member - In how many audience lists they were a member.
- Number of responses
- Response rate = Number of responses / list member count

If you wish to see the detailed list of the surveys in which a member participated in, then you need to click on the investigation button. The detailed list has the following information:

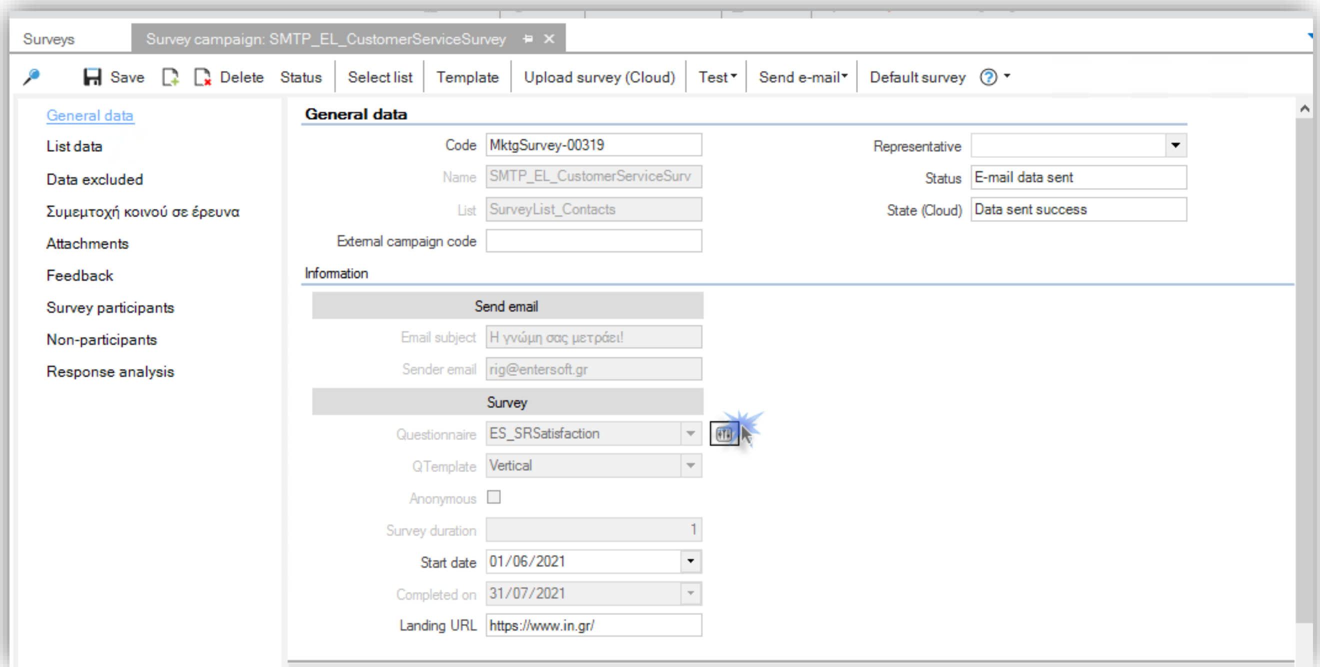
- Code
- Description
- Start date

Response - If icon is shown, then the member did not respond to the survey. If icon is shown, then the member responded to the survey.

After reviewing the behavior of the members of the selected list, you can easily remove one or more of them from the list by clicking on the Remove from list button. This action is applicable only to static or dynamic saved lists.

2.4 Working with questionnaire

The button for creating/previewing a questionnaire has been added to the survey campaign form. To create a new questionnaire, click on the button. The questionnaire form is shown in which you can design your questionnaire. The new questionnaire is automatically assigned to the field Questionnaire in the survey campaign form. To preview or change an already assigned questionnaire, click on the button.



2.5 Promotion programs

A promotion program is a marketing activity used by industries that sell into the retail channel or through dealers or wholesalers. A trade promotion takes place within a specific time period and aims to:

- Increase brand capital
- Increase brand awareness & market share
- Improve product image
- Increase sales volume
- Launch new products or product lines

The newly added features and extensions aim to help you create promotional programs easier and faster.

A promotional program may include several sales promotional actions. A sales promotion action defines a condition - reward combination that is valid for a specific time period to sell specific items to a specific target group of point of sales.

Additionally, the promotional actions can be communicated to the audience of a target group using the provided newsletter functions.

Marketing promotional actions are fully integrated with ERP sales orders. In this context, during the creation of a sales order advanced functions are provided for determining a promotion offer.

A detailed presentation of the aforementioned features and extensions, accompanied by user guidelines and examples are provided where necessary, in the following sections.

- Working with marketing promotional programs & sales actions
- Working with planning program sales or / and spends
- Newsletters
- Launching promotional actions
- Order promotion determination
- Promotional program reports

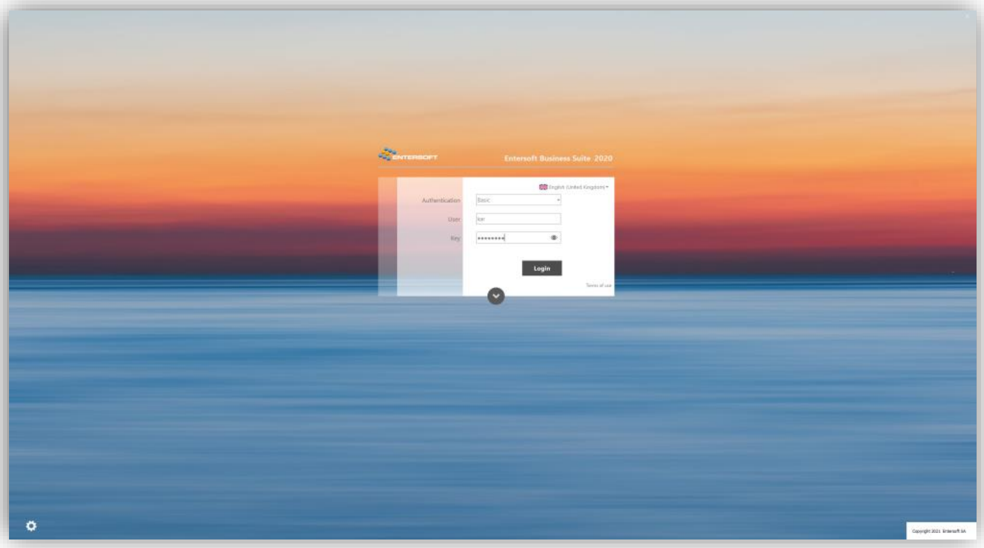
This new subsystem replaces the B2B promotion programs.

For further information about the new promotion program subsystem, refer to the CRM Marketing Promotion Programs of the documentation of the application.

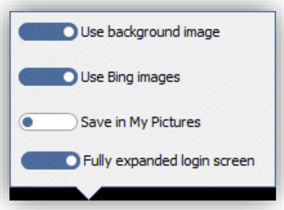
3. Horizontal functionality

3.1 Login screen

From this version forward, the default background image is a photo of sunrise at the sea.



A new option has also been added to the login screen: Fully expanded login screen. The option is saved per workstation and, if enabled, will result in the login screen always being fully expanded in order for every element to be visible, such as the server, etc.



3.2 Horizontal menu

3.2.1 M.I.S. Navigator

In the Horizontal menu > Help > M.I.S Navigator, the search tool for the most important system reports is now available. The M.I.S Navigator returns updated in terms of user interface but mainly in terms of content, enabling the user to learn about the purpose and content of reports and to see sample images.

In connection with its update, it should be pointed out that this tool includes reports, views, OLAPs and now dashboards that serve the main workflows, legal obligations and Managerial Reporting. Reports are categorized mainly by user roles and user task types .

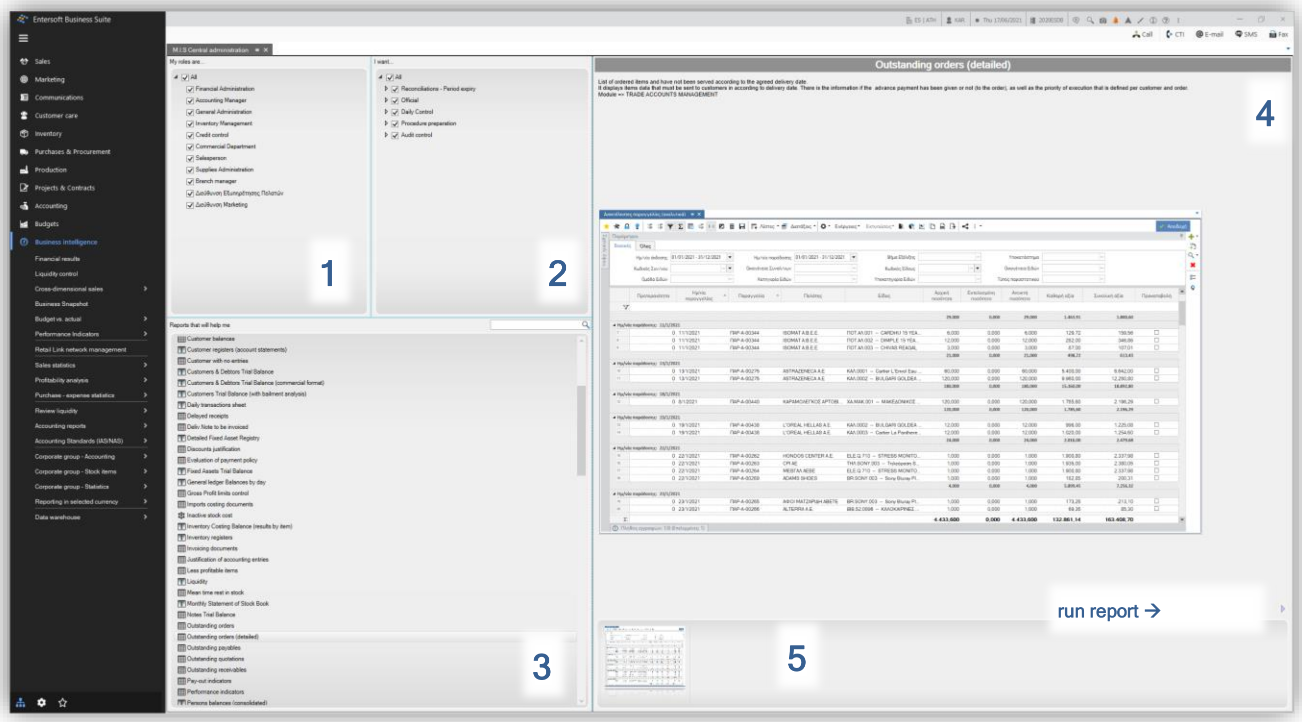
Each report describes its meaning, contents and alternative formats, where it's address to, when it's usually received, what is its use, which module it belongs to, and finally, lists one or more of its samples. It is possible to immediately execute all reports.

You can:

- select the user role (1) for which you want to see the associated reports
- select the type of task you are interested in (2)
- select a report from the list of found reports (3) for the above purposes

- view detailed information about the report you selected (4) and select an alternative format
- of the selected report from area (5) of the screen to view it.

Roles have been defined on the basis of traditional corporate responsibilities, e.g. CEO, CFO, Commercial Director, Store Manager, Credit Control Officer, etc., while the tasks have been divided into 5 categories (Reconciliations, Official books, Daily check, Preparation process and Audit Control). Especially in the “preparation process” category, very general and common procedures have been defined for all company procedures (e.g. customer communication, invoicing, debt settlement), but also the more specialized (e.g. order acceptance, stock replenishment). The user can perform multiple roles at the same time or request information for more than one workflow.



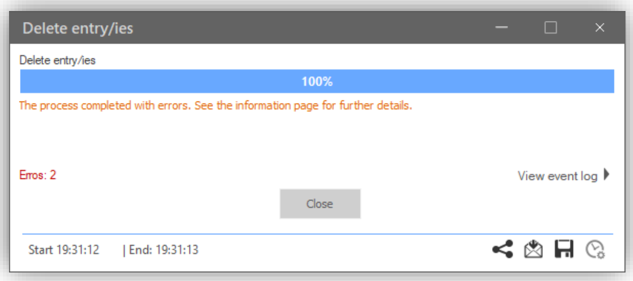
3.2.2 More

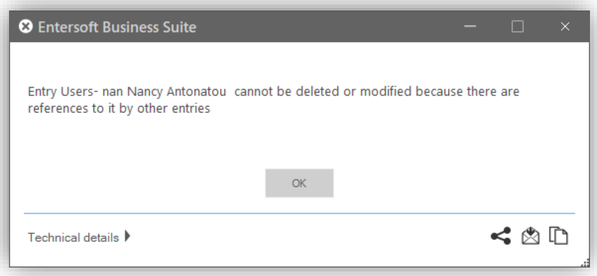
- The login DB is now visible to standard users too, so there is no need to visit the Horizontal menu > Information.
- In case of hasp being used, additional information on the hasp Serial number has been added to the dialog with Connection information

3.3 Collaboration | Chat

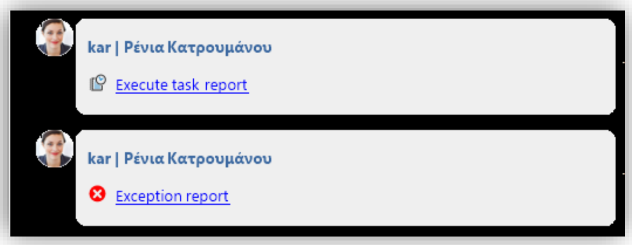
3.3.1 Sharing error and task execution reports

In the Execute task report (Task feedback) dialog and the Exception report, the ability to share technical details of the messages (in .etl and .txt format respectively) was added by selecting the relevant icon.





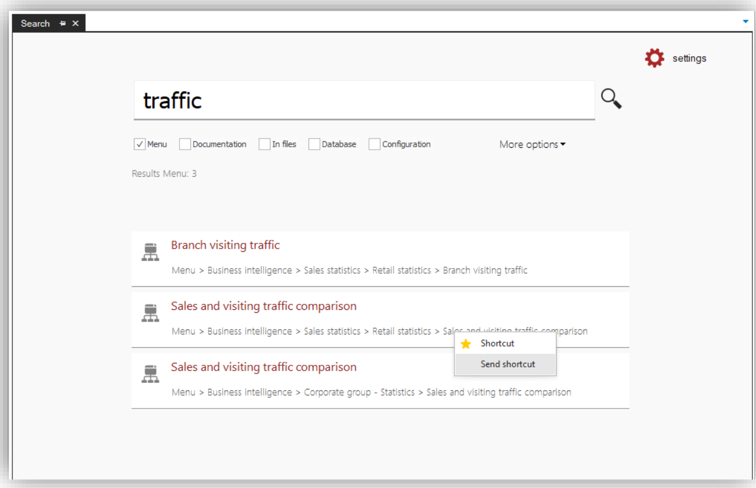
This should facilitate user communication with the System administrator on any issues that may arise in the course of their day-to-day tasks and for which guidance or support may be required.



The recipient can open and study the files in the Chat environment by clicking on the link, to respond immediately.

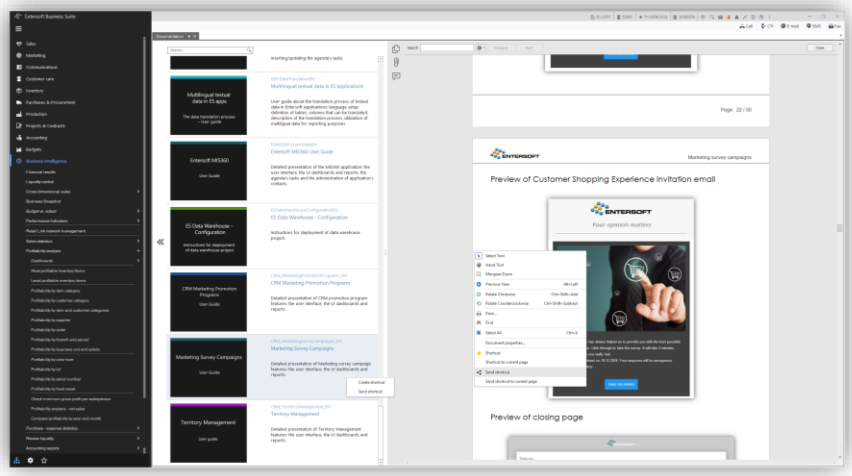
3.3.2 Sharing search results

By right-clicking on a search result, the user can send the search result shortcut (invoke) to their contacts, as shown in the next image.



3.3.3 Sharing documentation material

By right-clicking on the documentation list of texts or right-clicking on the text, a user can send the shortcut to their contact or, more importantly, send a specific page of the text, in order to share instructions and to enhance the quality and efficiency of cooperation between EBS users.



3.3.4 By writing a chat message

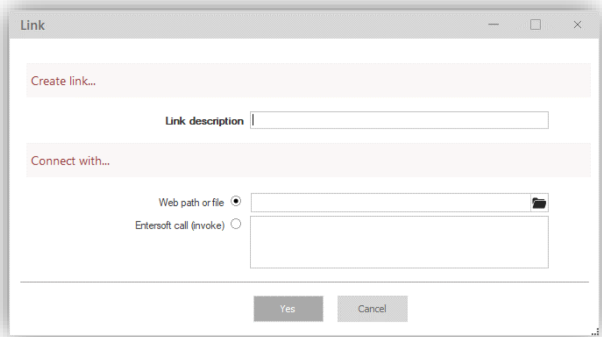
In this version, the chat messages were upgraded structurally. This means that, if you were using the chat in previous versions of the app, upon user login (which is also a chat user), their messages will be upgraded to the new structure. The process is not time-consuming, but it is proportionate to the number of pre-existing messages.

This structural upgrade brings significant administrative benefits.

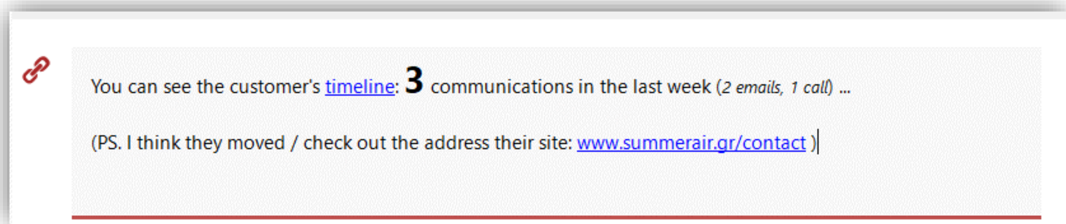
Create and Send links

...when typing a message:

- either by using the new, specialized link creation dialog on a website, file, or Entersoft invoke.



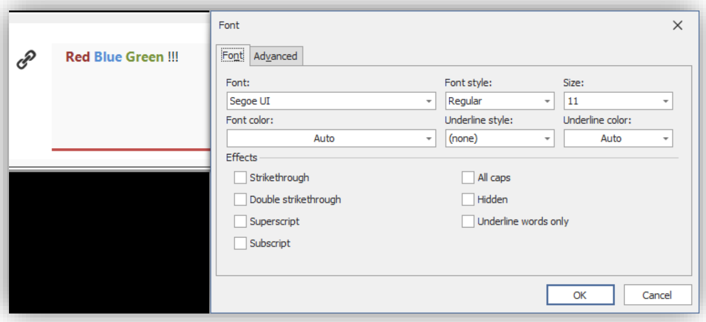
- or by simply typing a URL, it will automatically be converted to a link.



Formatting

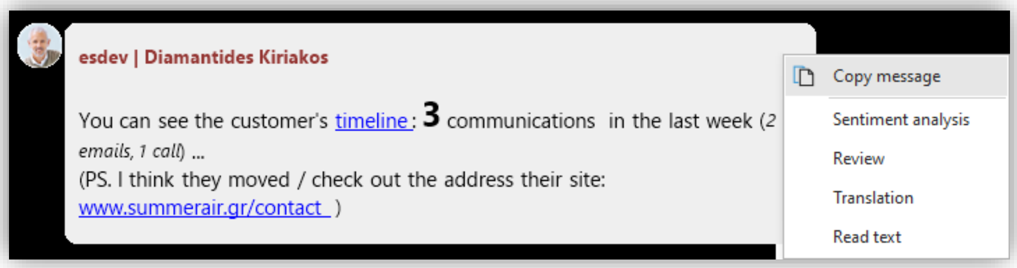
The previous image also shows that text formatting capabilities are provided (using their shortcut keys, such as ctrl+b, ctrl+I, ctrl+], and so on). The text formatting is retained in the message received by the recipient, thus contributing significantly to more expressive messages and better communication. For example, the previous message will reach the recipient as follows:

By using the ctrl+D key combination, a dialog appears that helps significantly in configuring a richer format.

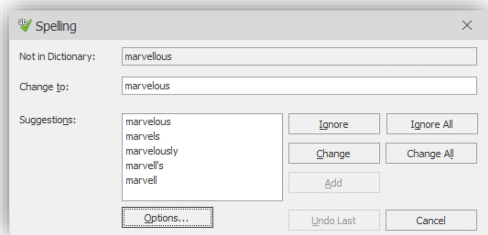


3.3.5 More

- There is not the possibility of copying the full text (text only) of a message by right-clicking > Copy message.



- A new spell check is now available when typing text (right-click > Cognitive tools > Spell check)



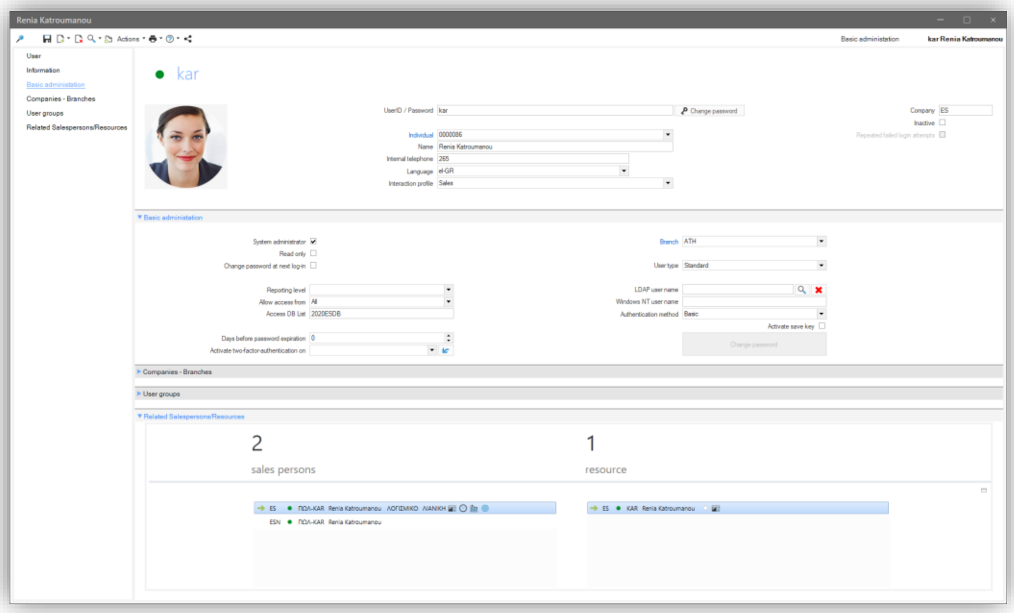
3.4 Application user

3.4.1 Dashboard of associated vendors & resources

In the user administration screen, a dashboard has been added displaying the vendors and resources associated with that user. the dashboard includes:

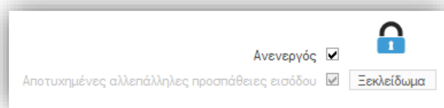
- The number of vendors associated with the user, through the Individual
- List of associated vendors. If the vendor belongs to the login company, they are accompanied by the icon and a number of additional features for immediate access
  - in the administration form

  and in the context information:
  - Timeline
  - Scorecard
  - Sales representative on focus
- The number of resources associated with the user, through the Individual
- List of associated resources. If the resource belongs to the login company, it is accompanied with the icon and is available to access directly from the administration form. In addition, there is an indication of whether the resource is an intercompany resource or not.

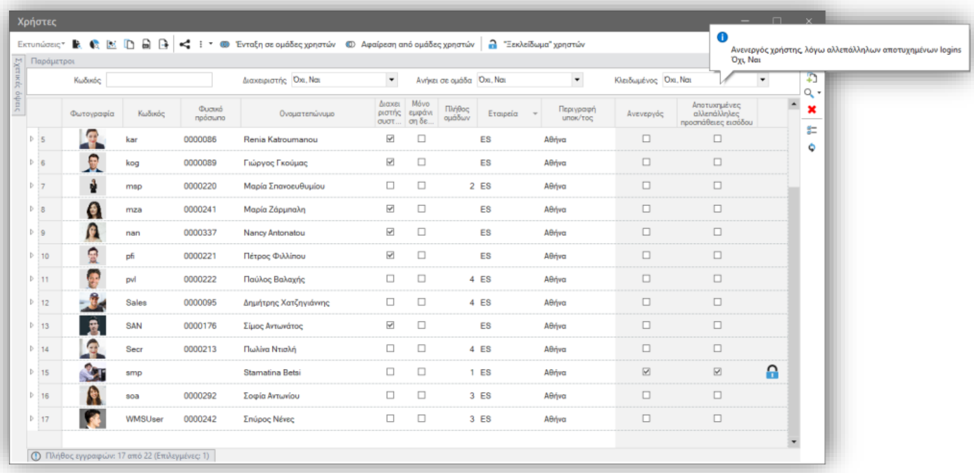


3.4.2 Manage "locked" users, due to repeated failed logins

In the User administration form, the multiple failed login attempts indication [1] in the application has been disabled and placed near the "Inactive" check box, to make its role clear as a possible justification that the user is "Inactive". If the user is locked, the same area of the form displays a relevant indication and an unlock action, available to system administrators.



In addition, a visual indicator and a related parameter was added to the main users view, to facilitate the detection of "locked" users, i.e. users who are inactive due to repeated failed login attempts.



"Locked" users can be selected and activated via the new "Unlock" users automation, which is available to system administrators.

3.5 Views:

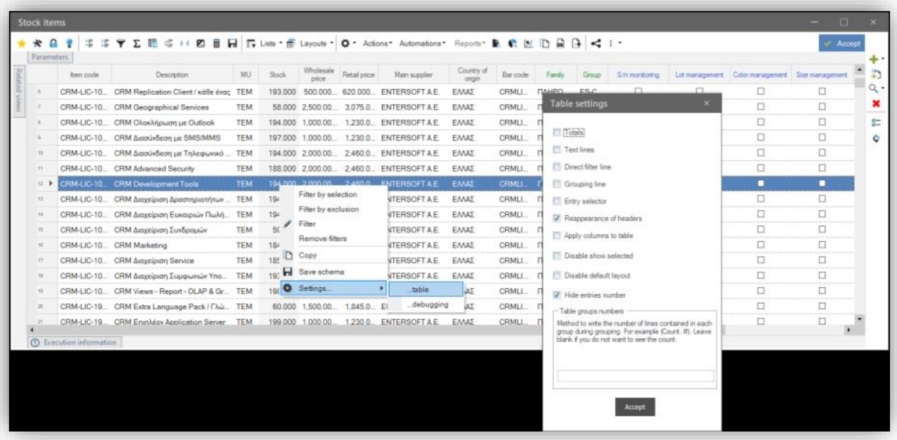
3.5.1 Export data to Excel

By selecting the <ctrl> + Export to Excel combination, the excel file with the data is automatically saved in windows temp folder. It should be noted that, the generated excel file is not saved by simply selecting Export to Excel.

3.5.2 Hide entries number

It was possible to hide the entries number information of a view and the number of selected entries on the view from the view's Execution information panel title .

[1] Meaning on top of the anything specified in the company parameter: Maximum number of application login attempts (ES_MAX_LOGIN_ATTEMTS)



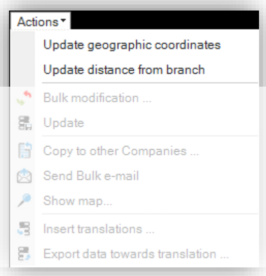
This feature is available in the right-click menu > Settings... > ...table. Once enabled, the panel title simply becomes: Execution information.

3.6 Google web services

There is an infrastructure provided to update map coordinates and distance from address (branch) via the following command handler:

New Command Handler for Views

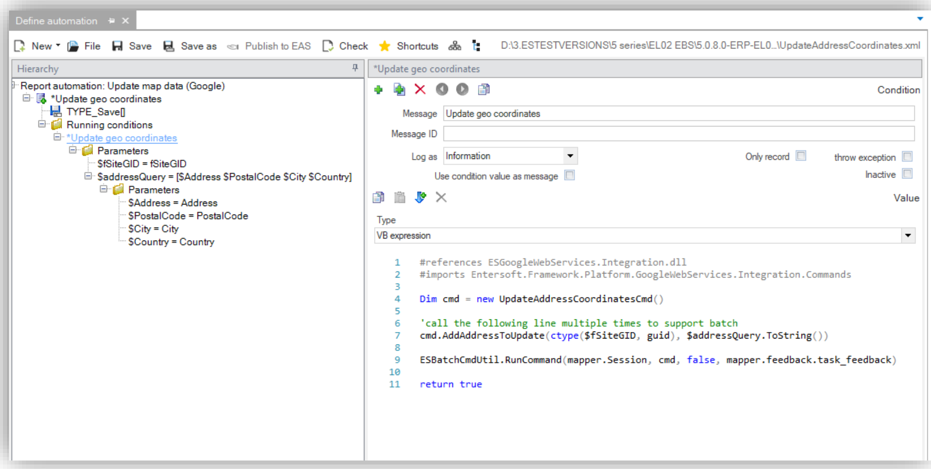
Entersoft.Framework.Platform.GoogleWebServices.Integration.GridCommandHandlers.
BusinessAddressGridCmdeHandler, ESGoogleWebServices.Integration



Using this in a View results in two distinct actions being displayed, below the corresponding menu. More specifically:

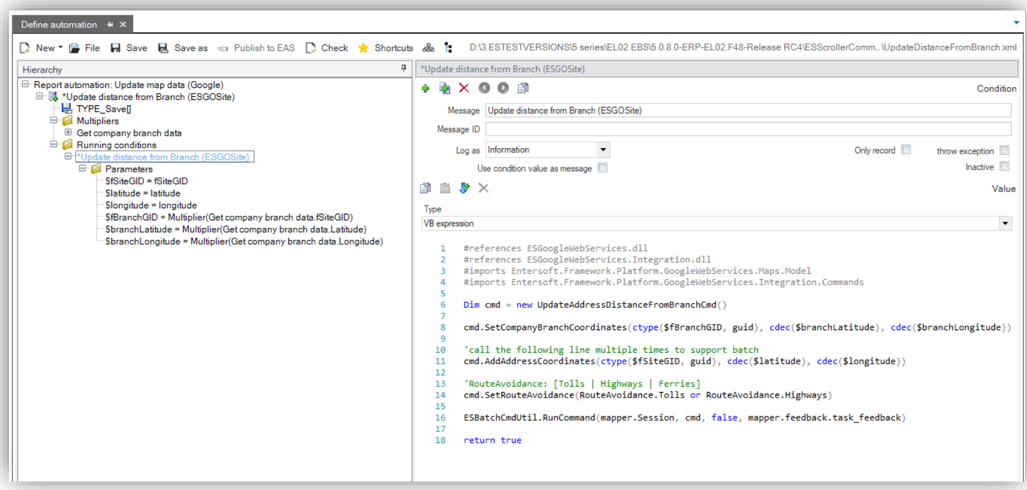
- Update address coordinates (UpdateAddressCoordinates). This requires the following columns existing on the view: fSiteGID, Address, PostalCode, City and Country. A task progress dialog appears during the execution (the process runs on the server, however) and it updates the Latitude and Longitude of the corresponding ESGOSite.

  As an alternative to using the handler, it is possible to create an automation, for example:



- Update address distance from branch (UpdateAddressDistranceFromBranch). This requires the following columns existing on the view: fSiteGID, Latitude, and Longitude, and the parameter: CompanyBranch - Company branch code. Optionally, an Avoid parameter can be set as a string type, multiple choice list (bitwise), with values 1:Tolls, 2:Highways and 3:Ferries. Its purpose is to calculate the distance between the branch and the address. A task progress dialog appears during the execution (the process runs on the server, however) and updates the corresponding ESGOSiteDistance[2].

  As an alternative to using the handler, it is possible to create an automation, for example:



Warning!

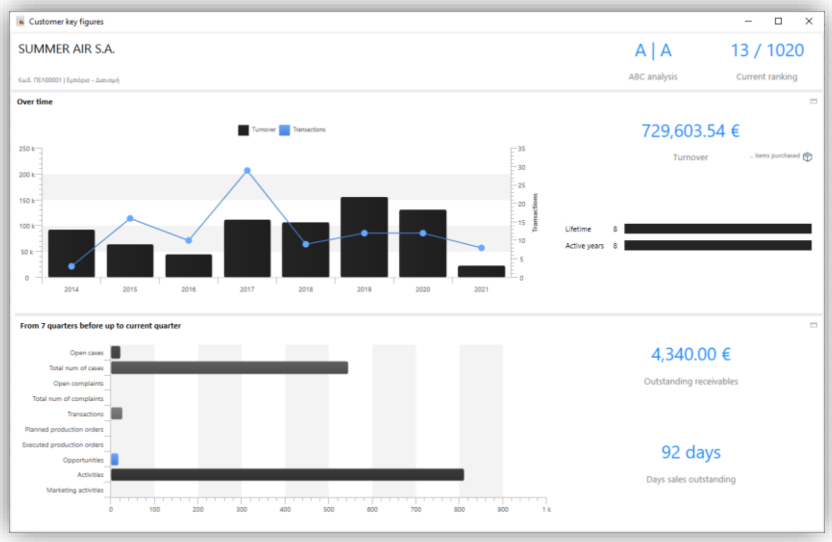
This requires an appropriate update of the Company Parameter: Google Map Service Key (Googlekey, Category: Map services). For more information on downloading Google services API keys, visit the Entersoft wiki, here: https://wiki.entersoft.eu/wiki/Entersoft-Business-Suite-Google-APIs

3.7 Scorecards

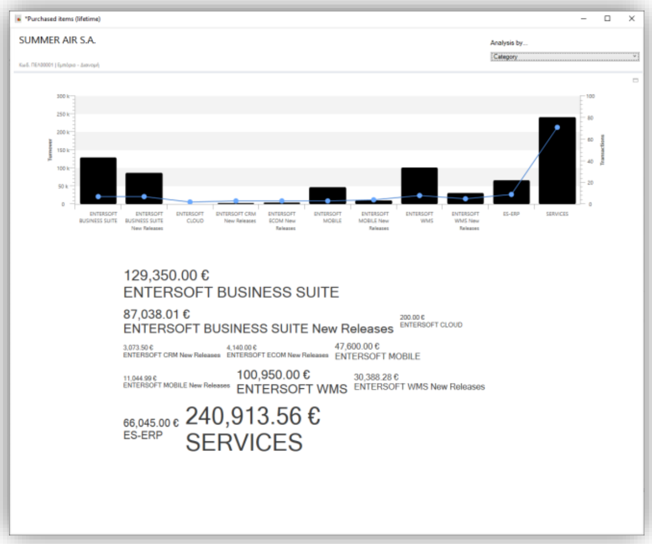
The Customer Scorecard has been expanded to include:

- The current position of the customer based on ABC Analysis

[2] This new table has 1-n relation to ESGOSites and aims to save distances in km between branches and business addresses.

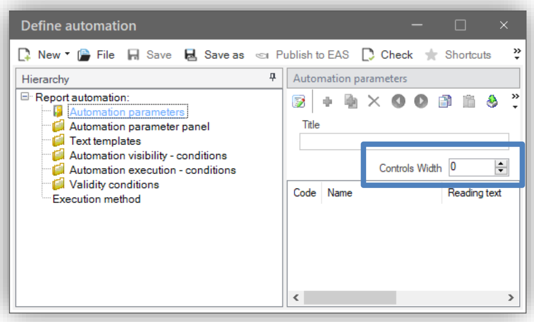


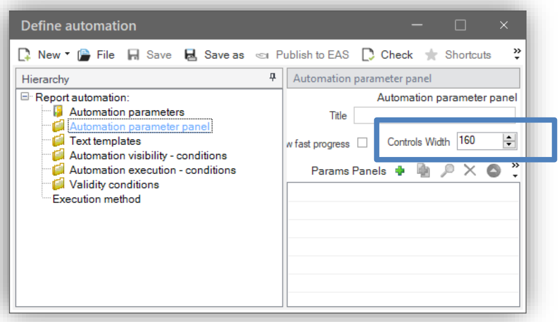
- Link to Next dashboard for a Lifetime analysis of Turnover and of the transactions number by item categorization of items purchased by the customer. Additional turnover representation is provided by selected level of classification in the form of cloud tags.



3.8 Automations...

- The ability to set the parameter width of an automation is now available in standard automation parameters, exactly the same way as the parameters already existing in the wizard:





3.9 Online support

For the Online support purposes (Horizontal menu > Help > On-line support) the newer Team Viewer version 13.2.36.224 QSC is provided. Note that the new version automatically uses the Windows language.