

Entersoft Business Suite v5.0.12.0

Entersoft Business Suite®

New features and functionalities

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Brief description of contents

Invoicing and Financial administration

- Invoicing policy
- Retail
- Miscellaneous

CRM

- ✓ Entersoft surveys
 - Branching - Define related property/question based on given answer in the property set form
 - Applied Branching - Define related property/question using the repeater
 - Define new category through the property set form

Horizontal functionality

- MIS Navigator | updated and enhanced
- Collaboration | more [share](#) features (messages, search results, documentation)
- Collaboration | improvements in [message editing](#) (Links & Formatting)
- User | Salespersons & resources [Dashboards](#) associated with the user
- User | Manage [locked users](#)
- Context information | Customer [Scorecard](#) extensions
- Google web services | [Infrastructure](#): Update map [coordinates](#) and [distance](#) from address
- On-line Support | New Team Viewer version

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

1. Invoicing and Financial administration

1.1 Invoicing policy

Happy Hour

The possibility of creating invoicing policy conditions that have effect for a certain period of time **during each day** is now supported.

For example, you may specify that a 50% discount applies to purchases made between 13:00 and 17:00 each day for the whole December of 2021. It is possible to configure such a term by using two new fields added to the invoicing policy line, **From (hh:mm)** and **To (hh:mm)**. When these fields are filled-in, upon applying the invoicing policy, a check is run to decide whether the time of the document creation date (ESDCreated field) exists within the selected term time.



Attention

If, in the term line, fields "From (hh:mm)" and "To (hh:mm)" are also filled-in, they shall be examined independently and in priority, in order to check term validity.

1.2 Retail

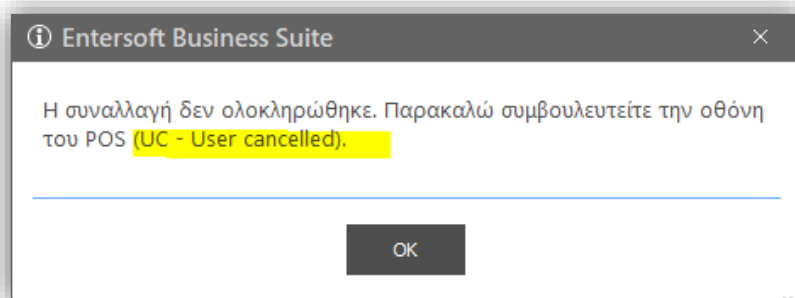
Refund using Cardlink POS

The possibility of making a **refund transaction** through Cardlink's POS is now supported. This is possible using the "**Transaction refund via credit card**" action (GC_DOC_RETAIL_CREDIT_REFUND).

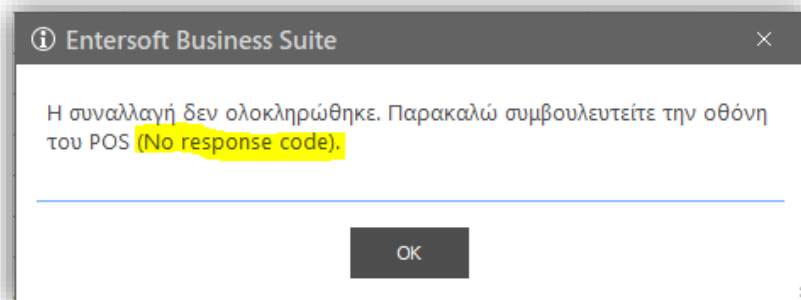
- ✓ Refund for transactions made in installments is supported.
- ✗ Loyalty refund with concurrent points cancellation is not supported

Error Log - Cardlink POS

Improved the messages displayed in case of unsuccessful transaction. The error code and its description are now displayed in detail in the message. The error code is the one returned by the response of communication with Cardlink. The error description is based on the official Cardlink documentation.



Specifically in cases when there is either no connection, or where there is a connection but the host was not found, the following error message appears:



It is also possible to fully record messages when communicating successfully or unsuccessfully with Cardlink (Log), at the terminal. This feature can be enabled by creating a file named **ESPOS.xml** in the terminal's **ESNoSync** folder. The file shall record the results in each case of communication, be it successful or unsuccessful, and any initialization (Init) of communication with Cardlink

EDPS use on a local Area Network (LAN)

Communication with EDPS terminals via LAN is now supported, instead of the standard mode using a serial port. More information can be found in the relevant *Knowledge base* article called

“KB-02098 use of EDPS via LAN”

1.3 Miscellaneous

Max value limit for payment via file

It is now possible to set a **max value limit** for transactions in the created files, for bank payments. These limits are set by the banks and vary per bank. According to the checks performed by the bank, when there's an overflow, the file is rejected

You can set the limit of included file value per bank in the following company parameters under "Online transaction parameters":

- **Alpha Bank - Max limit of transaction value per file**
- **National Bank of Greece - Max limit of transaction value per file**
- **WinBank - Max limit of transaction value per file**
- **Eurobank - Max limit of transaction value per file**

For banks where a **limit = 0** is selected, no check is run.

When performing the “**create file to send**” action, in process **Create payments file to Bank** (menu: *Accounting/ Cash & Bank accounts*) and if the total amount of the selected transactions exceeds the selected limit, a relevant prohibitive message appears.

In addition, in the same **Create payments file to Bank** process, after the file has been created, the transaction list results are automatically updated.

Horizontal dimensions

In document lines, in any type of document, horizontal dimensions descriptions have been added as fields available to insert to the grid.

Display transitions

It is possible to select the max number of levels to be displayed, when using the **"Show transitions"** action, which is available through documents. The max number of levels is set in the new company parameter **Max transition chart level**, which is available in the "Document management" category.

Stock valuation

The possibility of simultaneously executing valuation by different clients for **different companies** in the same database is now supported. To date, this feature was not supported, even though it was not prohibited. In case you wish to use this feature, in the **\CSConfig** area, you must create the **StockValuation.xml** file that will include the **ConcurrentRunsEnabled** key, as shown below:

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <settings>
    <add key="ConcurrentRunsEnabled" value="1" />
  </settings>
</configuration>
```

Document configuration

- The possibility of creating **Voucher entries** (ESFIVoucherentry) from voucher lines, in cash transaction documents, has now been enabled. This is not currently used in a product scenario.
- It was possible to disable **Auto delete item lines** in documents, for example, in the case of null quantity lines. You can enable it by adding the "flag" to the document type flags: **NO_AUTO_DEL_LI**

2. CRM

2.1 Branching - Related property/question based on given answer

In some cases, the answer to a question may raise another question. For this reason, the feature of relating one question to another based on the answer given is supported. To relate a question to another, you need to select the question you wish from the drop down list in the **Related line** field. By selecting one question from the list, the **Related line** field is filled in with the code of the selected question. Also, you need to fill in the **List value - relevant line** field with the value of list of the related question that the respondent

needs to select, so the related question to be shown. To do so, you need to click in the **List value - relevant line** field and press . The list with the values of the selected question is shown. You can select as many values as you wish.

Generate question based on answer		New category																		
	SEQ.NO	Code	Description	Alternative description	Type	Additional elements	Category	Category description	Default value	Mandatory	Representation	Categories	Photo	Weight	Style	Maximum number of values	Related line	List value - relevant line	Not applicable	Inactive
1	1	TestBran...	Select sex		Option list	ES.Sex	Category01	Category01		☐	No		☐	1.0000		0			☐	☐
2	2	TestBran...	Which of o...		Multi-sele...	HomeAppl...	Category01	Category01		☐	No		☐	1.0000	checkbox	2			☐	☐
3	3	TestBran...	Smart Frid...		Option list	HA_MainF...	Category02	Category02		☐	No		☐	1.0000		0	TestBran... 1		☐	☐
4	4	TestBran...	LED Sho...		Option list	HA_MainF...	Category02	Category02		☐	No		☐	1.0000		0	TestBran... 2		☐	☐
5	5	TestBran...	Robot Vac...		Option list	HA_MainF...	Category02	Category02		☐	No		☐	1.0000		0	TestBran... 3		☐	☐
6	6	TestBran...	answer		Text		Category03	Category03		☐	No		☐	0.0000		0			☐	☐
7	7	TestBran...	How woul...		Option list	ES.Poorly...	Category04	Category04		☐	No		☐	1.0000	stars	0			☐	☐
8	8	TestBran...	How woul...		Option list	ES.Poorly...	Category05	Category05		☐	No		☐	1.0000		0			☐	☐
9	9	TestBran...	hello worl...		Text		Category06	Category06		☐	No		☐	0.0000		0	TestBran... 1,2,3		☐	☐
10	10	TestBran...	hi there.....		Text		Category06	Category06		☐	No		☐	0.0000		0	TestBran... 8,9,10		☐	☐
11	11	TestBran...	And how ...		Option list	ES.Poorly...	Category05	Category05		☐	No		☐	1.0000		0			☐	☐
12	12	TestBran...	Overall, h...		Option list	ES.Poorly...	Category05	Category05		☐	No		☐	1.0000		0			☐	☐
13	13	TestBran...	dddddrffe...		Text		Category07	Category07		☐	No		☐	0.0000		0			☐	☐



Example

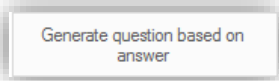
In the picture above the property/question with the code Q3 is related to the property/question with code Q2 and the property/question with code Q3 will be shown ONLY when the respondent selects the value 1 in the property/question with code Q2.

Respectively, the property/question with the code Q9 is related to the property/question with code Q8 and the property/question with code Q9 will be shown ONLY when the respondent selects the value 1 or 2 or 3 in the property/question with code Q8.

2.2 Applied branching - Repeater

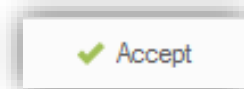
Occasionally, you want to get in-depth information about the values of a question when one of them is selected. In this case, you need to create the related question. For this reason, the **Generate question based on answer** action is supported. This feature is supported only for option & multi-select list types of questions. Firstly, you need to select the question that contains the

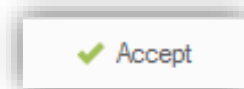
Generate question based on answer

answers/options based on which the related values will be created. Then, by clicking on the  button, a dialog box is shown in which you need to fill in the following:

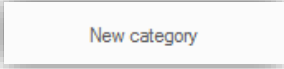
button,

<i>Field name</i>	<i>Description</i>												
<i>Type</i>	Mandatory - The type of the questions that will be created. The default value is text. <table> <tr> <th colspan="2">Values</th></tr> <tr> <td>Text</td><td>A field where the respondent can write free text</td></tr> <tr> <td>Option list</td><td>A field where the respondent can choose one value between several options.</td></tr> <tr> <td>Value in base currency</td><td>A field where the respondent can enter a decimal number</td></tr> <tr> <td>Multi-select list</td><td>A field where the respondent can choose multiple values between several options.</td></tr> <tr> <td>Percentage</td><td>A field where the respondent can set a percentage</td></tr> </table>	Values		Text	A field where the respondent can write free text	Option list	A field where the respondent can choose one value between several options.	Value in base currency	A field where the respondent can enter a decimal number	Multi-select list	A field where the respondent can choose multiple values between several options.	Percentage	A field where the respondent can set a percentage
Values													
Text	A field where the respondent can write free text												
Option list	A field where the respondent can choose one value between several options.												
Value in base currency	A field where the respondent can enter a decimal number												
Multi-select list	A field where the respondent can choose multiple values between several options.												
Percentage	A field where the respondent can set a percentage												
<i>Additional elements</i>	Optional – This field need to be filled in when the selected type is Option list or Multi-select list.												
<i>Category</i>	Mandatory - The category of the question.												



Afterwards, you need to click the  button and then, a number of questions/properties of the selected type and category are inserted. This number is equal to the number of answers/options of the source question/property and the description of each generated question/property is the description of each answer/option of the source question/property.

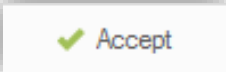
2.3 New category



New category

To create a new category, you need to click the button and fill in the following fields in the dialog box shown:

Field name	Description
<i>Code</i>	Mandatory - The category code.
<i>Description</i>	Mandatory - The category description.
<i>Style</i>	Mandatory - The display method of the questions that belong to this category.
<i>Order by</i>	The order of the category.



✓ Accept

Then, by clicking the button of the dialog box, the new category is inserted.

3. Horizontal functionality

3.1 Login screen

Starting from this version, the default background image is a photograph of a snowy mountain with climbers.



3.2 View designer

Added the possibility to select multiple scroller parameters, when integrating them to a category. In previous versions, they had to be selected manually, one by one (the selection mode is visible in the 1st image, and the result in the 2nd image).

Επεξεργασία παραμέτρων κατηγορίας

Εισάγετε Κείμενο προς Αναζήτηση... Εύρεση

▼ AA ▲	Κωδικός	Τίτλος
▼ Επιλεγμένη		
☒	1 Code	Κωδικός Είδους
☒	2 Description	Περιγραφή
☒	3 ItemType	Τύπος Ειδών
☒	4 Inactive	Ανενεργό
▼ Μη επιλεγμένη		
☐	fItemFamilyCode	Οικογένεια
☐	fItemGroupCode	Ομάδα
☐	fItemCategoryCode	Κατηγορία
☐	fItemSubcategoryCode	Υποκατηγορία
☐	fBusinessUnitCode	Εμπορικός Τομέας

Αποδοχή Ακύρωση

***Είδη Αποθήκης**

Παράμετροι

Γενικές Ομαδοποίηση Ειδικές Όλες

Κωδικός Είδους: ... Περιγραφή: ...

Τύπος Ειδών: ... Ανενεργό Όχι

	Κωδ. Είδους	Περιγραφή	ΜΜ	Απόθεμα	Τιμή χονδρι...	Τιμή λιανικ...	Βασικός Προμηθευτής	Χώρα Προέλε...	Bar code
Εμπόρευμα									
1	w1	whiskey φθινό	ΦΙΑ	-25,000	20,000...	0,00000			
2	w2	whiskey μεσαίο	ΦΙΑ	-25,000	30,000...	0,00000			
3	w3	whiskey ακριβό	ΦΙΑ	-25,000	50,000...	0,00000			
4	w4	whiskey 1	ΦΙΑ	-4,000	25,000...	0,00000			
5	w5	whiskey 2	ΦΙΑ	-2,000	35,000...	0,00000			
6	w6	whiskey 3	ΦΙΑ	-2,000	55,000...	0,00000			
				-83,000					
Σ				-83,000					

Πλήθος εγγραφών: 6 (Επιλεγμένες: 1)

3.3 Calendar

A different color shade was added for the current day and time in the Calendar. A different color shade was also applied to the hour lines of the plan.

11 ⁰⁰	
12 ⁰⁰	
13 ⁰⁰	
14 ⁰⁰	
15 ⁰⁰	entersoft Παρουσίαση νέου προϊόντος 2022 ΑΝΟΙΧΤΟ ΠΡΣ-00001
16 ⁰⁰	

3.4 Retail

Upon logging in to ESRetail and ESKiosk applications, the latest login information is now suggested, as in the ESMMainApp. This information is as follows:

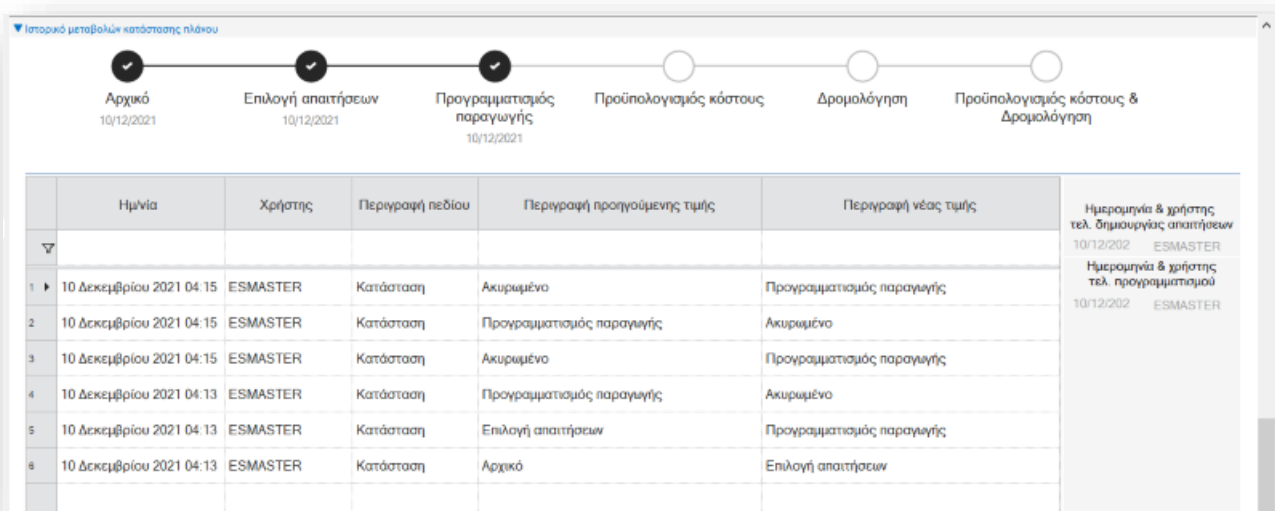
- Database
- User name
- Company

- Branch
- Language

3.5 Step progress bar

The new Step Progress Bar control has been added to the screen configuration, to reflect changes in single-run steps. For example, in a Commission request, where the workflow step accepts different values until it is completed (Initial > To approve > Approved > In progress > Completed), it is possible to check the Request status with an overview.

An example of the new control can be found in the History Log page in the Production Scheduling Plan (Production > Production scheduling)



To implement a Step progress bar, the user should:

- create the relevant scroller that will provide the different values to appear on the progress bar
- add the new control to the form. This can be done in Special fields > Context progress indicator.

The detailed control values are as follows:

- In AreaID and the FilterID, the scroller name and area are indicated
- HideIndicatorIcon to show node icons
- HideItemsIcons to show the icons above the node
- InverseProgressDirection to start nodes from left to right or vice-versa
- LayoutMode with Fixed/Compact values, so that nodes are spread out and a scroll bar is displayed, or so that the nodes are squeezed in to fit and no scroll bar is displayed.
- Orientation to display the progress bar horizontally or vertically
- ContentAlignment for the desired progress bar alignment