Standard ERP

Release Notes for Standard ERP 8.4

HANSAWORLD

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Standard ERP 8.4 is a modern business management system, built with extensive experience and the latest technology, using a single original interface and workflow for all popular platforms and devices: Windows, macOS, Linux, Android and iOS.

All previous HansaWorld products can be upgraded to Standard ERP.

This document highlights some of the enhancements made in Standard ERP 8.4 in relation to Standard ERP 8.3.

■ CRM

Activity Tags

Tag/Object fields have now been added to Activity records, providing users with another way to organize their data. Tagged activities can also be filtered in the Workflow Overview.

Activity Priorities

Activity prioritization can now be configured to reflect not only quantitative value, but qualitative value as well. This means the numeric values used to prioritize activities can be defined with a textual description, such as "Top Priority", "Medium Priority", *etc.*, allowing users to personalize their own prioritization structure.

Customer Letters

Users can now send a customer letter to multiple receiving groups. For example, *Customer Main Email + All Contact Persons + Primary Contact Person*.

Task Deadlines

A new field has been added for all task types to designate a deadline. The start date and time fields are intended for when the task begins, the end fields are for when the task is complete, and the deadline fields indicate by when the task is assigned to be complete.

■ HOTEL

Room Availability

Users are now able to sort by date in the room browser window to see which rooms are available during a given time frame.

■ OFFLINE RESTAURANT

Live Sync

The Live Sync functionality allows users to continue performing tasks normally when the client is disconnected from the server. All functionality available in Restaurant module is now available in Live Sync mode.

■ POS

Customize POS Appearance

The POS windows can now be configured to the specific needs of the user and their displays, offering a new level of flexibility to the POS invoice window. Options include defining the Panel Size (where invoice rows and content display) with a new "Medium" setting. Button Label, Panel and Header Field font sizes for both the POS Invoice window and Customer Display window can all be adjusted as well.

With Standard ERP 8.4's new flat button design, users will experience a smoother process in displaying an image within POS buttons. A green button stating "Pay", for example, can instead display a custom image or currency icon.

POS Invoice and Customer Display Windows

- "Hide Item Code on POS Invoice" removes the "Code" column. This data is normally not needed during normal cashier routines, and often disregarded by staff only needing to see the description. This affects what is seen on the customer display window as well.

- To optimize appearance, the LiveSync status indicator now displays on top of the window in the top bar where users find the Create / Cancel / Save buttons.

Automatically Open the Number Pad

The number pad can now be opened automatically for numeric entries in any POS related window. This improves the user experience in the Pay (One Mode) window, Cash In and Out process, and the overall POS system.

New Number Pad Buttons

New buttons have been added to the number pad for improved workflow and productivity.

- **Proceed**: Functioning similarly to "Finish", the "Proceed" button is now available. This button is useful in cases when the payment window does not close automatically, or if it's opened again and the amount due is 0,00. Once the user selects "Proceed", the invoice is complete, receipt printed, the completed activity window closes and the next invoice is started.

- **Full Payment**: When "Full Payment" is selected, it will not open a new window, but will add a full payment in defined mode.

- **Clear Selected Field**: To clear a selected field without having to use the keyboard, the "Clr" button has also beed added to the number pad.

- **Quantities and Discounts**: "Quantity" and "Discount" buttons now act as a command to open the number pad window, making it much easier for the user to enter specific quantity and discount amounts without using the keyboard. This is helpful for those using touchscreen devices and don't have a physical keyboard attached.

- **New Login NumPad Buttons**: New buttons have been added to the number pad on the login window as well. "Del" removes the last character in the selected field and "Clr" removes every character in the selected field.

Include Page

An new option, "Include Page", is now available for POS buttons. This button can be used to get buttons from one page and include them on another; useful in the event that a specific set of footer buttons are needed in every page.

Selected Row Page

A new field has been added to the "Selected Row Page" in the local machine settings, defining the page that should automatically open when an invoice row has been selected. This gives the user a quick access to row-specific buttons with the original buttons remaining on top for easy navigation.

■ SYSTEM

Editing Record Fields

Record fields can now be configured for specified access groups. This new capability includes changing field labels, hiding a field based on whether it contains data, and hiding a field altogether. Additionally, entering data into a field can now be set as required before saving.

Register Observations

Notifications can now be triggered when fields within records belonging to a specified register are changed. Users are alerted if, for example, the value of the field falls into defined parameters, or if any change is made at all within the respective field.

"Disable Browse" Access

A new level of access, "Disable Browse", has been added for Registers. Users granted this level of access cannot see the respective register in the Registers list, and cannot open it with hotkeys. Users with this access level are still able to create and save new records, as well as duplicate existing records, which will still be available in the respective registers.

Records accessed through other channels outside the Register can still be viewed and deleted. Users with this access are still able to see records in reports and navigate between them using the previous/next arrow buttons.

Change Supervisor

For Activity and Project activity records, changing the Supervisor can now be restricted, ensuring the assigned supervisor remains unless management decides otherwise.

Cloud Security

In the Settings of System module, users will find a new option, under Cloud Security, to prevent users with access to MyStandard from downloading backups and any other file.

"Print" from Print Preview

Once a record is saved, users can print directly from the "Print Preview" window with the new "Print" button.

■ WEB SHOP AND CMS

GZIP

GZIP is now, by default, a part of the Web Shop and CMS module.

■ REST API V2

The second version of Standard ERP Rest API is used to read data from the Standard ERP database via HTTP requests. This allows values from any register or block in the database, including customized registers and blocks, to be read. Other updates include:

- Expanded options to filter and sort records.
- The ability to retrieve changes made since a previous API call.
- Improved security features.
- The ability to fetch only specified fields, decreasing the response time.

Security

Standard ERP Rest API uses specified access rights for the individual user. Each user must be able to navigate to, and open the register in a normal client, therefore, must have access to both the respective module and register. For those registers that do not appear in a module, a customization is required to make them do so in a specified module.

■ INTEGRATIONS

Avalara

Avalara AvaTax is a web integration, for users in the United States of America and Canada, that automates VAT and sales tax management and is now seamlessly integrated with Standard ERP. While delivering billions of tax decisions for over 12,000 jurisdictions, AvaTax ensures accuracy and compliance as it automatically applies the appropriate rate and calculates each transaction in real-time.

Accounting for thousands of sales tax rules, AvaTax cuts out the headache of interpreting a complex tax code. Users have the tools to manage requirements for their entire catalog of products and services, handle global indirect taxes, account for exemptions and consumer use tax, ensure reports have accurate addresses with automatic validation, and ease the filing process. Using the Avatar integration with Standard ERP significantly reduces the risk of unpaid taxes, penalties, and consequential audits.

Always up to date with the latest rates and tax rules, Avalara generates both summarized and detailed reports on-demand. Once AvaTax is set up, it operates in the background with data imported directly into Standard ERP.

SiteMinder

SiteMinder is a cloud channel management service facilitating online distribution and direct booking for the hospitality industry. Expedia, Booking.com, Orbitz, for example, are among the hundreds of reservation sites users can manage through SiteMinder. When a room is reserved on one site,

availability is updated in Standard ERP and across all online channels. With Standard ERP's tools for resource, room distribution, and property management, users can reduce the cost of operations and customer acquisition.

SiteMinder's dashboard offers real-time information to analyze the performance of the user's establishment, breaking down the data for each channel and each room.

Yodlee

Bank account and reconciliation can be managed through Standard ERP's integration with Yodlee, a leading service working with thousands of financial institutions and fintech companies. Pay bills and track expenses while linking accounts of all types with any device. Receipts and payments are then recorded in their relevant ledger, from the bank statement, in Standard ERP.

Standard ERP's integration with Yodlee automates the reconciliation process and reduces the amount of time dedicated to these tasks when compared to traditional, manual entry methods.

■ MYSTANDARD

Non-Blocking Update

Users are now able to update their systems with virtually no downtime using the non-blocking version update. During the update process, a new update system is created, importing backup data from the live system and applying journal entries to the update system. When the new update system is complete and ready, it becomes the new live system. This ensures the user's system is live during the entire process while updating to the new version.

Two Factor Password Recovery

Users can now specify a secondary email address and phone number for password recovery purposes. The "Two Factory Password Reset" allows users to enter their phone number and receive a verification code used to reset their password with a mobile device.

Uploading Files

Large files can now be uploaded to MyStandard. Additionally, users are able to upload files simultaneously.

Server Settings

Server time zone is now adjustable and server ports can be changed.

Test System

Updating the server to Test version is now possible via MyStandard portal.

Server Parameters

Server parameters can be added and removed through the MyStandard Portal. After specifying the parameter, users have the option to enable or disable it.

Modules

- Accounts Payable
- Accounts Receivable
- Business Alerts
- Cash Book
- Checks
- Conferences
- Consolidation
- Contracts
- Course Booking
- Credit Management
- CRM
- Customs
- EDI
- Email
- Expenses
- Fax
- Fixed Assets
- General Ledger
- Group Calendar
- Hotel
- Human Resources Management
- Internal Inventory
- Inventory
- Jewellery
- Job Costing
- MRP
- Point of Sales
- POS Offline
- Pricing
- Production
- Productivity
- Purchase Orders
- Quotations
- Rental
- Report Generator
- Resource Planning
- Restaurant
- Sales Orders
- Service Orders
- Share Trading
- SmartView (Business Intelligence)
- Task Manager
- Telephone Log
- Timekeeper
- Warehouse Management
- Webshop and CMS

Technologies

- Business Communicator (Asterisk, Skype and TAPI)
- Limited Access
- Massive Cache
- Print Server
- Real Time Interfacing Toolkit
- Forms Designer
- HAL Customisation language
- Relational Database
- Wide Area Networking
- Database Accelerator

Company Profile

HansaWorld is a leading software house providing a full suite of Enterprise Resource Planning and Customer Relationship Management products that delivers the flexibility required by today's businesses.

The group employs more than 300 staff with a strong network of subsidiary companies and distribution partners on all continents. This network enables us to offer international implementation in over 30 languages with country specific localizations. The products are easy to use and available on all smartphones, tablets and desktops including Mac, iPhone and iPad.

HansaWorld continually invests in Research and Development to provide innovative and future proof products to our customers.

As recognized innovators for over 25 years, HansaWorld shows continued technological leadership in the international business software industry.

More than 550,000 companies trust us with their business critical information.

Product Strategy

Standard ERP's advanced and successful user interface was first developed for Apple Macintosh in 1988. In 1994, when the program was ported to Windows, it had already been proved by thousands of users. HansaWorld's experience with international sales and modern technology puts it in the perfect position to meet the challenges of the next decade.

HansaWorld provides a wide range of technologies for e-business including internal and external email, several webshop solutions and full clients for all major tablets. In addition, HansaWorld can help to build a corporate portal. Standard ERP is developed using C++ as its programming language, and proprietary technology for database design and for network communication. This allows HansaWorld to have the same products available for several different operating systems, each version optimised for maximum performance.

Currently Standard ERP is available for Windows including Windows CE devices up to Windows 8 tablets, Mac OS X, all iOS devices (iPod Touch through to iPad), Linux and AIX, all browsers, and Google Android.

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