

Standard ERP

Release Notes for Standard ERP 2020-06-05

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Standard ERP 2020-06-05 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 between 2019-07-15 and 2020-06-05.

■ SALES LEDGER

Items With No Natural Resources

This report lists all items in the Sales Ledger that do not have natural resources assigned to them. It is useful for countries that need to pay for the packaging used when selling items.

Item Status

On Windows, the Item Status window will now open in the same place where it was previously left.

Electronic Invoices Enabled

Tick the new 'Customers with Enabled E-Invoices' checkbox when running the Contact List report to show all customers that have e-invoicing enabled.

PayLink

Send invoices via email with a 'Pay Now' button that redirects customers to the payment page. The providers we support include PayPal, Paysera (for EU), Paymark (for NZ), and Authorize.net (for US and Canada).

Create Receipt from Invoice

Create a receipt from the invoice 'Create' menu. The receipt will automatically display the invoice details in the receipt matrix.

■ PURCHASE LEDGER

Payment Planning

There is a new tile called 'Payment Planning' on the Purchase Invoice record for added flexibility when planning cashflow. The first field in this tile is 'Payment Note', a text field to add internal comments related to paying the purchase invoice. If this field is filled in on the contact record of the supplier, it will be transferred to the purchase invoice from there.

The second field is 'Planned Payment' where a user can specify the date that they plan to pay the purchase invoice.

Require Supp. Inv. No.

The 'Require Supp. Inv. No.' checkbox in Purchase Invoice Settings will require the "Supp. Inv. No." field on a purchase invoice to be filled in.

Invoices without VAT Code

The 'Disallow OK'ing Invoices Without VAT Code' checkbox in Purchase Invoice Settings disables the ability to save purchase invoices with an empty VAT code field. This helps those in countries where it is mandatory to fill in the VAT Code.

■ SALES ORDER

Create POS Invoice from Sales Order

Creating a POS Invoice from the Sales Order record window is useful when an order is placed and then later paid for at a POS till.

Create POS Invoice from Delivery

Creating a POS Invoice from the Delivery record is useful when an order is placed, delivered, and later paid for at a POS till.

POS Invoices in Order Status

Adding this section to the Order Status report allows you to view counter sales where a customer is paying for their ordered items directly at the till.

■ QUOTATIONS

POS Invoices in Quotation Status

Adding the POS Invoices section to the Quotation Status report shows any POS invoices that are linked to a Quotation.

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

■ STOCK

Goods Receipt

Create a Goods Receipt directly from the item 'Create' menu.

Stocktaking

Create a Stocktaking record directly from the item 'Create' menu.

Goods Receipt Form Fields

The following fields can now be printed: Row Price, Row Sum, and Total price in Base Currency One, Row Transport Sum, and Row Customs Sum.

Base Price

The 'Base Price' field in Goods Receipt has been moved from Flip D to Flip A, making data entry faster.

■ POS

Worldpay Contactless Transaction

The status window will display the received status from the Worldpay terminal after a contactless transaction.

Worldpay Signature Approval

A new POS touchscreen window allows the operator to accept or reject a customers signature.

Worldpay Z Report

Operators can request and store Z Report from the Worldpay IPC software and their supported CC terminals.

Return Payment Mode

Ability to define a default return payment mode and restrict operators from changing it.

■ CRM

Payment Note Field

There is a new text field called 'Payment Note' on the 'Company' tile of the Contact record where users can add internal comments related to paying the purchase invoice. This provides suppliers with added flexibility when planning the cashflow.

If the Payment Note field is filled in on the Contact record of the supplier, it will be transferred to the purchase invoice from there.

Reservation Quotations

The new 'Reservations Quotations' radio button in the Who has Bought/Not Bought report specification window is useful for businesses sending targeted Mail Shots, as they will know which customers accepted and rejected quotations.

Microphone Access

When SIP is configured, this notification alerts the user if microphone access is disabled.

Expected Late Payment

The new 'Expected Late Payment' field found in the Contact 'Terms' tile allows you to add the number of days you expect a customer will pay from the date of the invoice.

The 'Expected Clearing Date' field on invoices will automatically calculate the date that payment is expected based on the number of days entered in the 'Expected Late Payment' field.

■ EMAIL AND CONFERENCES

Email Support in Workflow Overview

We now support Email records in Workflow Overview. A conference that contains emails can now be displayed as a column.

Amazon SES

Sending and receiving emails using Amazon Simple Email Service (SES) is now supported.

HTML Emails

Users can now send HTML emails using our small products.

Max. no. of Recipients and Email Size

These can now be set in the Email SMTP Server setting according to the guidelines of the email provider to prevent sending failure.

■ NOMINAL LEDGER

Account Reconciliation

In the Account Reconciliation report, transactions created prior to the report period but reconciled within the report period do not get added to the 'Reconciled Before Period' value.

If a transaction has been reconciled during the period specified, then it will be reflected in the 'Reconciled During This Period' section of the this report, regardless of its original transaction date.

Profit and Loss

It is now possible to add the Budget Period in the report specification widow when running the Profit and Loss report.

Correction List

There is a new column that shows the date and time a user invalidated, or corrected an invoice in the Correction List report.

■ CHEQUES

Batch Deposit

The batch deposit record window now displays the amount of each cheque pasted into the matrix in the Amount column.

■ HUMAN RESOURCES

Leave Application

Leave Applications must be OKed before a Calendar Activity can be made. If you try to create a Calendar Activity from an un-OKed Leave Application, you will receive the message 'The Leave Application must be OKed before you can create Activities.'

Automatically Create Activities

Select the 'Automatically Create Activities' option in Leave Settings to automatically create a Calendar Activity once a Leave Application is approved.

Leave Balance Report

The Leave Balance report now only displays companies which have Employment Contract records.

By default, the Leave Balance report excludes terminated contracts. Select 'Show Terminated' in the report specification window to include terminated contracts.

■ HOTEL

Nightly Audit

The night audit report will display prepayments made to reservations in Section 5 (Receipts Analysis).

Guest Tile

The country field has been added to indicate the Country the guest came from.

Resource Planner/Reservation Manager

The colour of the room number will indicate the status of the the room (ie. Is the room ready or not).

The logic is as follows:

- Green = ready for checking in
- Yellow = Only cleaning needed, then after room is ready

■ RESTAURANT

Restaurant Settings

There is a checkbox named "Force Sequence".

When you select this checkbox, Standard ERP will guide you through the preliminary sequence of steps for starting a new bar tab:

1. Select Waiter
2. Select Table
3. Select Covers

After it prompts you for the above, you can enter items and continue workflow as normal.

■ MYSTANDARD

Wanted Status and Substatus

It is now possible for Cloud Admins to see the Wanted Status and Substatus of servers in the Server Management section.

Server UUID

A new read-only UUID field available for Cloud Admins has been added to the Change Server Data window. This field shows the UUID of the Remote Cloud Server.

■ CASHBOOK

Official Serial Number

If specified, the new 'Official Serial Number' field in the Cash Out form will print the Official Serial Number from the record.

Legal Record Numbers

An 'Official No.' field was added to Cash Out and Cash In, in the Cash Book Module. This field will be automatically filled in with specifications from Legal Record Numbers.

■ SYSTEM

Access to Servers

This report lists all the users in secondary servers listed in the Secondary Servers setting in Technics.

Get Exchange Rates

Users now have the ability to pull exchange rates into Standard ERP using the fixer.io service. This is applicable in South Africa, Australia, New Zealand, the United States, and Canada.

Access Groups

Access Groups now has the option to sort lines. If the first line contains a module, this is the default module that opens after the user launches the client. The following lines will be sorted by type, then alphabetically. Lines that grant access come before lines that restrict access. If there are duplicate lines, the last line counts and the user will get less access, not more.

If an access group has the same function several times, the first duplicate line will be highlighted after sorting. Fix it and sort again to find the next duplicate function.

■ TECHNICS

Global User List

This report lists global users in the database with the option to view those that are open, closed, or all.

■ DATA SECURITY

S3 Bucket Upload

Within one minute of a backup being created, the backup is uploaded to an S3 bucket. The minimum size of this file is 15 KB and the max size is 250 000 MB.

■ ANDROID

Target API Level

The Target API Level has been updated to level 28 to allow support for Android 9.0 and higher.

■ WEBSHOP

Guest Checkout

Customers now have the ability to checkout as a guest in Webshop with no account or login needed.

Web Pages

A new field called 'Script' added to Web Pages allows users to add JavaScript to the header.

You can also add more than one stylesheet to Webpages by separating them with comma.

Web Elements

A new field called 'Style' was added to Web Elements and enables users to add inline style directly to the element.

Web Payment Methods

Web payment types are now stored in one setting. The setting originally found in Webshop Company settings has been moved to Web Payment Methods.

Invoice List

Pay invoices directly from the invoice list. A 'Pay' button now appears next to the invoice line and redirects users to the appropriate payment page depending on the payment gateway that has been set up.

■ WEBCLIENT

Web Port For All Requests

There is a new checkbox in Web Client Settings which allows all requests to go through the normal web port.

This prevents situations where the webclient is not accessible because the automatically allocated port is closed, and customer is not able to change it or select a different one

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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