

Release Notes for Standard ERP 8.0

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Standard ERP 8.0 is a modern business management system, built on extensive experience and latest technologies, with a single original interface and workflow on all popular platforms: Windows, OS X, iOS and Android.

All of the previous products by HansaWorld can be seamlessly upgraded to Standard ERP.

This document contains some of the enhancements made to Standard ERP 8.0 compared to Enterprise by HansaWorld.

■ GENERAL

Dashboard

A new Dashboard icon is added to the Navigation Center (in older products called Master Control) window.

The Dashboard provides an overview of different key performance indicators with detailed analysis available as drill-down.

BI

A new Business Intelligence (BI) icon on Navigation Center opens a window that displays Sales or General Ledger statistics from a specified period in a graph format, with Column, Pie Chart, Line and Area graph options.

The sales statistics show sales per Month, per Object, per Customer Category or per Item Group, with sales being measured by Revenue, Quantities Sold, Cost of Sales or Gross Profit.

The General Ledger statistics displays postings to a specified General Ledger Account and/or Object in a similar manner as Sales.

Workflow Overview

Multiple Workflow views are now supported in the Workflow Overview window.

Workflow views now include Sales Orders and Restaurant Kitchen Orders as well as Quotations and Activities.

Now the amounts shown in Workflow Overview window can be setup to include or exclude Sales Tax (VAT).

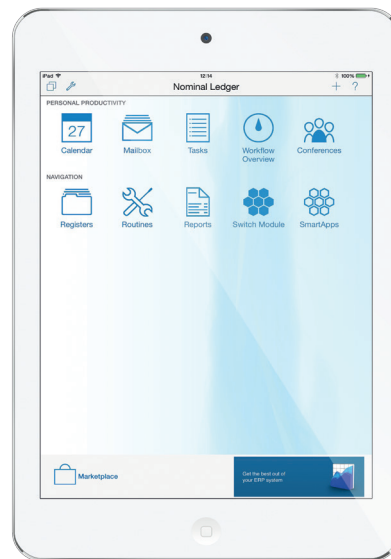
The Workflow Overview allows to configure user specific view.

A new Task Type "Other" has been added to the Activity window allowing to enter Leads, Prospects or other Activities to the Workflow Overview window.

Now it is possible to specify estimated value of the entered leads in the Activity.

Create Menu

A new menu "Create", containing the functions to create new records directly from the record open (previously these



iPad Interface

functions were under the Operations menu), added to all Inspect and Browse windows.

The "New" and "Duplicate" commands (previously separate buttons) are now moved to the "Create" menu.

Create Workflow Activity

The Create menu in every register now includes a Create Workflow Activity function that allows to add Activities connected with the record open. The Workflow Manager window opened from any record, can be used to create Workflow Activities connected with that record.

Link Manager

Now navigation links to all records except Activities can be found in the Link Manager.

Links to Activities are shown in the Workflow Manager.

Document Manager

Paperclip icon in any record opens the Document Manager, containing all the files, notes and reports that have been attached to the record.

Documents can be grouped with archives. (Workflow Manager, and links to all other records).

Row menu

Operations and actions connected with matrix rows are now contained in the Row menu, that can be accessed with right-click (Windows) or ctrl-click (Mac OS X) on the relevant row.

Examples of operations and actions that can be found in Row menus are:

- Opening the Item Status window from most sales and inventory records

- Add Header Line, Add Subtotal Line, Add Hidden Line
- Previous Sales and Purchase Prices Reports from Sales and Purchase Orders

Paste Special

The Paste Special window now opens as a drop-down menu below the field where data is being entered. It also opens automatically once typing is started.

With Browse Filtering the system filters results to match what has been typed.

Calendar

The Calendar has received a complete makeover, with Activities now displaying their text in the Monthly and Weekly views as well as in the Daily View. Resizing any of the Calendar screens now increases space for the Activities, allowing more text to be displayed.

Task Manager

The Task Manager now opens automatically after log in if there are any outstanding tasks. The Task Manager icon in the Navigation Center now features a badge displaying the number of outstanding tasks in the Task Manager.

Reports

Reports can be recalculated to Excel directly from the reports printed to the screen.

Registers in the Navigation Centre

Individual Register Icons have now been removed from the Navigation Center, replaced by a single new Registers icon, that opens a window listing all Registers in specific Module.

The Navigation Center window has a new + icon that can be used to create new records in any of the registers in the current module.

For example while in Quotations module clicking the + icon at the top of the Navigation Center and selecting "Create Quotation" from the drop-down menu will create a new Quotation record.

Report filtering

Customer Category, Classification and Item Group selections have been added to the report specification windows.

■ BUSINESS ALERTS

Approval Activities

Approval Activities now have their own Task Type: Approval.

Approval tab under Approval Activities now contains buttons "approve", "reject", "forward" etc., making the approval process easier.

The Filter tab of the Task Manager window now features a separate option to list Approval Activities only. Several Approval Activities can be selected in the Task Manager and approved in one go.

Approval Status

Each record that can be subject to an approval process now contains an Approval Status field displaying the current status, instead of the previous Radio Button set.

Browse windows include a new column showing the approval status of each record.

■ CASH BOOK

De-activating Expense Accounts

A "Closed" checkbox has been added to Expense Account records, preventing users from using particular Expense Accounts in Cash In and Cash Out records.

A Closed column has been added to the Expense Accounts browse window, to indicate the Expense Accounts that have been de-activated.

Limited Access in Cash Book

Limited Access Buttons have been added to the Cash In and Cash Out browse windows, allowing to filter out and display only those records that were created by user or by members of his Sales Group, and to revert back to displaying all records.

Access rights can be now setup so that user's access will start from their Sales Group or their User Level. This user will not be able to filter to a higher level than is set in their Person record.

■ CRM

CRM for Vendors

New options have been added to Activity Types, Subsystems setting and to Purchase Order Classes allowing to specify the default Activity Types that will be used when Workflow Activities from Purchase Orders are created.

Require Activity text entry

The system can now remind users to record notes in certain Activities.

In each Activity Class it can be specified whether users should be required to enter comments in the Activity matrix in any Activity that has an Activity Type belonging to the Activity Class.

Objects on Customers and Vendors

New commands "Automatically Create Sales Objects on Contacts" and "Automatically Create Purchase Objects on Contacts" allow easier Objects set up when entering new Customers and Vendors in order to break General ledger reports down to Customer or Vendor level.

Every time a new Customer or Vendor Contact record is saved, the respective Sales or Purchase Objects will be created and entered in the Contact record automatically. The Object will be created with the same Code as the Contact Number, and it will be given the Prefix from the Object Type as well.

Alternatively new Create Object menu option can be used, to create and add Objects to selected Contacts only.

Favorite Activity Types

The Favorite Activity Types feature sets up a list of most commonly used Activity Types and displaying only favorites in the Paste Activity Type window.

An Activity Type from the list of favorites can be easily removed.

■ EMAIL AND CONFERENCES

Mail Tags

Company-wide list of Mail Tags can now be defined and manually assigned to mails with Tags drop-down menu.

The Mailbox can now be filtered by mails with selected tags.

The Mail Tag filter has been added to the Mail Search report specification window, so it is possible to search for Mails in mailbox with a specified Mail Tag.

HTML E-mail

HTML formatting can now be used in Automatic Reply.

The Android Client now supports creating and editing HTML format e-mails.

E-mail System Log

There are new options enabling additional logging about e-mails:

- E-mail send & receive processing
- Save sent e-mails

■ EXPENSES

Multi Currency Expense Claim

Now a single Expense claim record can be used for all expense receipts regardless of Currency.

A new flip F has been added to the matrix, where Currency and rates can be specified in each row.

E-mail from Personnel Payment

New function on the Create menu on the Personnel Payment record allows to send an e-mail to the staff member to notify about the Expense claim payment made.

The new feature will also create separate e-mails for each staff member even if single Personnel Payment record was used to register payments to multiple staff members.

Comment for Personnel Payment

A Comment field has been added to the Personnel Payment record header.

■ GENERAL LEDGER

Financial Report Writer

User-defined financial reports where values for different periods are displayed in separate rows can now be created.

For example a report comparing the following figures:

- Sales in the Current Month
- Sales in the 3 Months to the Current Month
- Sales in the 12 Months to the Current Month
- Sales Last Year

New columns have been added to the Key Financial Ratios report definition to define the period for each row, thus adding separate columns for each Salesperson or for each Department in the report.

The new columns are: Period (this defaults to taking the Period rule specified in the Columns definition, but can specify Month, Year, Fiscal Year to Date or Fiscal Year instead), Offset and Length.

Now it is possible to define whether report columns should display values in Base Currency 1 or Base Currency 2.

Object Entry

A second version of the Paste Object window has been added, based on Object Types and similar to the Paste Item window based on Classifications. On opening the new Paste Object window, Object Types will be listed in a column on the left. When you double-click an Object Type, the Objects belonging to that Type will be listed on the right.

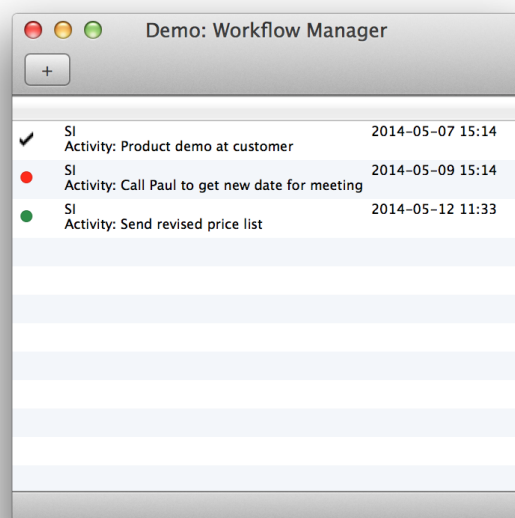
Budget Classes

Class in each of Budget and Revised Budget records can now be specified. This allows to run Balance Sheet and Profit & Loss reports in which it is possible to compare actuals with a specified Class of Budget values.

The Budget Class selection has been added to the following report specification windows:

- Balance Sheet
- Profit & Loss
- Revised Budget Journal
- Budget Journal

A new maintenance routine has also been added to generate Revised Budget records from Budget records in bulk.



G/L Accrual Transactions Report

This report can now be run per Object.

Simulation Journal

The Simulation Journal report has been added to the General Ledger module reports list.

■ HUMAN RESOURCES MANAGEMENT

Employment Contract

New fields added: Fwd. Bal. Days and Fwd. Bal. Date.

New Operations menu function added: Employment Contract Data that provides overview of the contract.

■ JOB COSTING

Project Info Report

The Project Info report provides with a full overview of a Project.

An Info in Project Info Report setting has now been added to the Job Costing module, allowing to specify the information that will be shown in this report when it is produced by different users (in a similar manner to what has long been possible with the Customer and Vendor Status reports).

It can be specified whether Quotations, Activities, Invoices, Retention and Downpayments will be included in the report, and it is also possible to save complex sets of options regarding the display of Project Invoicing and Project Status information.

Invoicing for Time

When invoicing for services logged to a Project using Activities, it is now possible to select options when running the "Create Project Invoices" maintenance routine to include Item Descriptions, Activity Texts or both on Invoices. The same option is available when creating invoices from Project Budgets using the Create menu.

■ POINT OF SALES

Z-Reading

It is now possible to set up a button for POS Invoice screen that will produce a Z-Reading report.

■ PRICING

Quantity Dependent Discounts Reporting

It is now possible to include Price Lists with Quantity Dependent Discounts in the Price List report in the Pricing module.

■ ACCOUNTS PAYABLE

E-mailing Remittance Advices

Now it is possible to create e-mails from a Payment record that contains payments to multiple Vendors.

It is now possible to specify by Category or Classifications the Vendors to whom Remittance Advices are to be send.

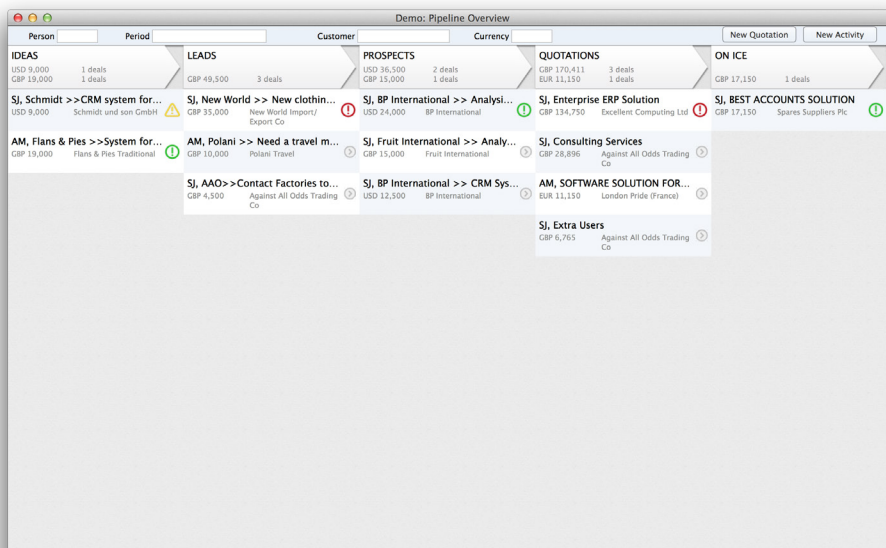
Downpayment

A new option has been added to the Create menu in Payment records: Downpayment.

Disabling Payment Terms

It is now possible to mark Payment Term as Closed, to prevent users from using it.

A Closed column has also been added to the Payment Terms browse window, to indicate the Payment Terms that have been disabled.



Workflow Overview

■ PURCHASE ORDERS

Downpayment Payable

It is now possible to create a Downpayment Payable from the Purchase Order and issue a Payment against that Downpayment Payable. After receiving the goods or services and entering the final Payable to the system, the Downpayment will be applied to the Payable automatically.

OKed Purchase Order Status

It is now possible to select whether to include OKed or unOKed Purchase Orders in the following reports:

- Deficiency List
- Purchase Order Journal

When running the "Create Purchase Orders" maintenance routine, unOKed Purchase Orders can be excluded from the calculations.

■ RESTAURANT

Kitchen Order Screen

A new window now allows you to view current outstanding Kitchen Orders. This window will display Kitchen Orders in different colors depending on how long they have been waiting in the queue, so critical orders can be spotted easily. The colors are user-definable.

Prices Including/Excluding Sales Tax

Now it is possible to use prices that exclude Sales Tax in Restaurant Tabs.

Bar Tabs in Sales Reporting

Now it is possible to include Bar Tabs in various sales reports in the Accounts Receivables module:

- In the Item Group Sales Tax Report - new checkbox added: Bar Tabs
- In the Sales Tax per Customer Report - POS Invoices and Bar Tabs checkboxes added in report specification window
- In the A/R Sales Tax Code Statistics Report - POS Invoices and Bar Tabs checkboxes added in report specification window
- In the Item Price List statistics - Status button frame with OKed and Not OKed checkboxes, Bar Tabs in Registers button frame added to report specification window
- In the Sales Per Hour Report - Status button frame with OKed and Not OKed checkboxes, Bar Tabs in Registers button frame added to report specification window

■ ACCOUNTS RECEIVABLE

Item Status Bar changes

It can be now specified per user whether the Item Status window should open by default. An option for each user can be selected.

Customer Status

It is now possible to run the Customer Status report from the Operations menu when viewing a Sales Invoice.

Credit Limits

Different credit limits for Customers for different periods can now be set up, and history of the credit limit rules that have been set for each Customer can be kept.

E-mailing Invoices

The "Create Mails from Invoices" maintenance routine now offers the option of creating a single e-mail for each Customer. Such an e-mail may have several PDF Invoices attached.

Also unOKed invoices can now be sent by e-mail.

■ INVENTORY

Create Invoice from Delivery

Now Invoices can be created directly from Deliveries.

There is also a new Access Group action that can be used to prevent unauthorized users from performing this action.

Reason for Inventory Adjustments

A new option has been added to force the entry of Reason Codes in Inventory Adjustment records and in Returns from Customers and to Vendors.

■ WEB SHOP

PayPal Integration

It is now possible for Customers to make payments with PayPal. Exceptions in display for particular customers can also be created.

Web Orders

Depending on the payment method used by the customer, PayPal or Credit Cards, it is possible to configure whether the system will record each transaction as a Sales Order and Prepayment Receipt, a Sales Order and Invoice, or a Sales Invoice only that updates inventory.

The system can OK Sales Orders after payment.

It is also possible to define a default Inventory Location and a default Salesperson for all web orders.

Product Catalogue

The look of product catalog page on the website can now be customized.

The Catalog Sort Order can be by Product Comment or Product Code, and it is possible to choose one of the Catalog Pages options: None, On Top, At Bottom or Both.

Items Per Page and Max. Pages can now be specified.

■ TELEPHONY AND BUSINESS COMMUNICATOR

Asterisk VoIP Server configuration

It is now possible to fully configure a local or remote Voice over IP (VoIP) Asterisk server. Servers can be handled by creating one or more PBX Connections from the Telephony module.

PBX Connections

It is now possible to specify the External Line Prefix used in an Asterisk server.

Inter-Asterisk eXchange (IAX) configuration also now makes it possible to connect together multiple PBX Connections running on separate Asterisk servers.

In the case of a remote server, settings have been added to configure the Linux Remote User needed to connect to the server as well as the Remote Configuration Directory where the Asterisk configuration files are located.

The Host IP address for the server can now also be defined, not just the Domain as previously.

Queues - Report

Now it is possible to see a list of agents logged in to a queue and run Asterisk Queue Status report, that will show the status of the agents logged in to a queue i.e. Disconnected, Busy, Ringing and Available.

Queues - Fallback

Asterisk Users can be excluded from being part of the queue fallback mechanism by ticking the No Queue Fallback checkbox in their records. Such users will not be called whenever a telephony queue with no agents logged in receives a call.

Queues and Menus - Sound messages

On-hold music and sounds can be setup to greet callers.

Users

Asterisk accounts can be created for Global Users and Persons from their respective records.

Activities

Activity Types for the activities are now can be automatically created upon incoming and outgoing Skype and Asterisk calls.

A queue can be set from the Asterisk tile in an Activity.

Click-to-call

Fields containing phone numbers have been given a Call button that allows to initiate phone calls with a single click. The Preferred Calling method can be Asterisk, Skype, or not selected. In the case none preferred calling method is selected, clicking on the Call button will open the Business Communicator with the correct Contact selected.

■ TECHNICAL

Reconnecting

New setting Local Optional Features in User Settings module has been added for enabling automatic reconnection of the client.

Email Validation

All users are required to validate their email addresses in order to be able to log into the system. Status of the validation can be checked in Persons register under Operations menu functions Validation E-mail and Check E-mail Address:

- A new operations menu Validation E-mail is added in the Person register.
- A new operations menu Check E-mail Address is added in the Person register.
- A new operations menu Validation E-mail is added in the Persons Browse register.
- A new operations menu Check E-mail Address is added in the Persons Browse register.

Reserve Systems

In System module Backup Settings new fields have been added for enabling online cloning for reserve systems.

In order to allow automatic connections to additional or reserve HansaWorld servers with easy password control Secondary Servers and Password Server settings were added in Technics module.

Single Function Users

Two new single functions have been introduced: Calendar and Task Manager

Technics module

Added Client Integration setting for enabling integration with OSX Address Book, Skype and Bria soft phone application.

Report Record Count has a new checkbox to Include All Companies allowing to receive information in one place.

Modules

- Business Alerts
- Cash Book
- Cheques
- Conferences
- Consolidation
- Contracts
- Course Booking
- Credit Management
- CRM
- Customs
- EDI
- Email
- Expenses
- Fax
- Fixed Assets
- Group Calendar
- Hotel
- Human Resources Management
- Internal Stock
- Jewellery
- Job Costing
- MRP
- Nominal Ledger
- Point of Sales
- POS Offline
- Pricing
- Production
- Purchase Ledger
- Purchase Orders
- Quotations
- Rental
- Report Generator
- Resource Planning
- Restaurant
- Sales Ledger
- Sales Orders
- Service Orders
- Share Trading

- SmartView
(Business Intelligence)
- Stock
- 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 the first major software house to provide a full suite of Enterprise Resource Planning, Financials and Customer Relationship Management as well as a wide selection of industry-specific solutions on tablets and smartphones. HansaWorld shows continued technological leadership in the international business software industry.

The group employs around 300 staff in a strong network of daughter companies and distribution partners covering over 100 countries on all continents, allowing HansaWorld to offer international implementations with a single point of contact across many countries. The solutions are available in more languages than anyone else, run on all major platforms and support mobility via laptops, the latest tablets and smartphones. More than 78,000

installations world-wide reinforce us as a global leader.

HansaWorld continuously invest in R&D to provide innovative and future proof solutions to help businesses run efficiently and smoothly, combining 25 years of experience with global knowledge and local representation.

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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