Standard ERP

Release Notes for Standard ERP 8.2

HANSAWORLD

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Standard ERP 8.2 is a modern business management system, built on extensive experience and the latest technologies, with a single original interface and work flow on all popular platforms and devices: Windows, OS X, iOS and Android.

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

This document contains some of the enhancements made to Standard ERP 8.2 compared to Standard ERP 8.1.

■ GENERAL

In many reports in the Sales Ledger, Stock and Job Costing Modules we have now added the option to filter data based on Item Group and Item Classification.

■ SYSTEM

Option to specify translations for currencies

It is now possible to specify the currency names and currency minor unit names for each language in the matrix field on the currency record. This will result in the currency amount in text to be displayed in the local language of the customer.

Access Groups

It is now possible to restrict users from being able to add a hidden line on quotations, sales orders and invoices.

Dial Pad for Outgoing calls

Durning an outgoing call through the communication centre, it is now possible to open a dial pad and follow the prerecorded instructions directing you the specific line.

■ NOMINAL LEDGER

Bank Reconciliation

Import bank statements and automatically reconcile to your transactions at any time during the month. View the reconciliation and create new transactions where required.

Exclude closed accounts and closed objects

A new selection has been added to a report to check all account setups and required objects. It is now possible to exclude closed accounts and/or closed objects from the report.

■ SALES ORDERS

Quotations

When an existing sales order or quotation is copied, blank rows and rows with zero quantity can be automatically deleted when saved.

■ SALES LEDGER

Print before settlement discount value

It is now possible to print the value before settlement discount in the receipt form.

■ EMAIL AND CONFERENCING

Feed Reader

We now have a convenient way for you to read the content from different conferences in one easy step. By selecting your favourite conferences, the emails from them will be accessible in the Feed Reader on the Navigation Centre.

■ HOTEL

Invoice Group reservation

When creating a group reservation, sub reservations will automatically be created for each reservation.

A new maintenance routine was added to make it possible to create a group invoice from the group reservation record for the same account.

Adding guest names on the Invoice

When a company reserves a hotel room for a guest, it is now possible to display the guest's name on the invoice, in addition to the company's name.

■ DROP SHIP

Gross profit when using drop ship

We have added the additional functionality to select the cost price as the invoice is updated, when the items are derived directly from the supplier to the customer. Thereby providing a more accurate gross profit in the system.

■ STOCK

Stock Movement Invoices

When companies give out stock on consignment or as a loan, the situation arrises that the customer would like to know how

much these items will cost should they purchase them. It is now possible to create a stock movement invoice, which is created from the order form, providing the cost of these items without effecting the Sales Ledger or the Nominal Ledger as this invoice displays information only.

PURCHASE LEDGER

Interest cost calculation report

This new report was created in order for interest to be calculated on overdue invoices. The interest is calculated per day, stating from the day it became due until the day that it was paid. This report also adds any penalty fees applicable to overdue invoices.

Booking company expenses paid for by the employee

We now have an easy way to book company expenses which have been paid for by the employee. Start with creating a payment type 'Employee' and when the purchased invoice is booked against this payment type it is mandatory to enter the employee's code. Once this has been booked as type 'cash invoice paid' it will show in the report 'Periodic Personal Payment' which should be paid to the employee.

CRM

Option to delete selected activities

It is now possible to select multiple activities in the task manager and delete them simultaneously using the delete option in the operations menu.

Additional rows added to Workflow Overview Settings

The amount of rows in the workflow overview settings used to define company and user workflow overview has been increased from 50 rows to 200 rows.

Sort function in content of workflow

It is now possible to sort the content of the workflow in the Workflow Overview in either Ascending or Descending order.

The overview can be sorted according to:

• Outstanding activity dates

• Value of the record

• Customer

• Description of the record: combination of salesman and description

• Date of the record

Comments/descriptions on Activities

It is now possible to add comments or descriptions to an activity.

SERVICE ORDERS

Link credit invoice with service order

When a credit note is created from an invoice, which is linked to a service order, the credit note will automatically be linked to that service order providing the full history of the credit note.

POS

Item Pictures on the POS screen

Item pictures are added to the POS screen and will be displayed by default, when:

• the Item is scanned

• the Item's row is selected

"Customer search" by address lines

In POS, it is now possible to search for customer by the address lines. When the option 'any' is selected, the system will search the string in the invoice address line and display any results found in the report.

"Create Gift Voucher"

A new button called 'Create Gift Voucher' has been added to the POS interface. Once this button is selected the user will be able to manually adjust the expiry date, which is otherwise predetermined by the settings. The gift voucher can be ok'ed by the user manually, or it will be automatically ok'ed once the window is closed. These gift vouchers can be created on the go or used as a method of prepayment in the POS environment.

Remaining Amount on Gift Vouchers

The existing Report "Gift Vouchers" in the Sales Ledger module is now available in the POS module as well.

A new column called "Remaining" has been added. This column will display the remaining amount on the gift voucher if the full amount was not used.

Gift Voucher type

Is now possible to create different gift voucher types, that are connected to different payment terms and accounts. This allows a company to have better control over the different voucher types and the accounts used.

Fields for how New Customer will be displayed

A new column has been added which shows how a new customer will be displayed to the user. It provides user friendly information about the new customer.

Paste Quotation and Sales Orders

A new button called 'Paste Quotation and Sales Orders' has been added. This button opens a window where the POS user can enter the quotation or the sales order number. This will result in the customer information and items from the original quotation or sales order to be pasted in the POS invoice automatically.

Pausing the POS flow and resuming it again

Once the POS flow has been paused the current POS invoice is saved and a new one can be created without the loss of data from the previous invoice. This is useful for when a customer wants some additional items. The cashier can proceed with the next customer and return to that sale once the customer is ready to proceed.

"Manager Discount Override"

A new button has been added to the POS interface which allows the manager to set a specific discount in some rows of the POS invoice.

■ HUMAN RESOURCE

Fwd Balance Days + Fwd Balance Date

These two new fields have been added to the employment contracts changes register allowing for easier calculation of leave.

- These 2 fields are the basis for the leave applications/calculations from the date of the Fwd Balance Date

- These 2 fields override the same fields of Employment Contract

- These 2 fields need to show in the report HRM>>Reports>>Leave Balance

These fields must be taken into account in the Leave Applications Register and Leave Balance Report calculations:

If Fwd Balance Date field is blank in the Employee Contracts Changes Inspect window, then the system should calculate balances as it does currently

If Fwd Balance Date field is not blank in the Employee Contracts Changes Inspect window, then the system should override Fwd Balance Days and Fwd Bal. Date Fields in the Employment Contract register inspect window with this date and days (on employment contract changes)

If Set Fwd Balance Days in the contract change, then these days will be added into the column Carried Fwd in the report Leave Balance.

■ NEW MODULE

Productivity Module

Use the new Productivity Module in Standard ERP 8.2 to track and report on the status of project activities in the workflow overview.

■ MOBILE APP

Add/take a picture button

It is now possible to add a picture to an Item and Activity on Android.

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
- Productivity
- 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 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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