Enterprise
by HansaWorld

Release Notes for Enterprise by HansaWorld 6.4

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The World's Best Integrated Business Platform

Release Notes for Enterprise by HansaWorld 6.4

Enterprise by HansaWorld version 6.4 is released. HansaWorld continues to invest heavily in research and development, to provide customers with the most up-to-date business software on the market - as is evidenced by such major new features as a full client for iPad and for iPhone, and a client for the new Metro interface on Windows 8. This document provides an overview of the most important changes in the new version.

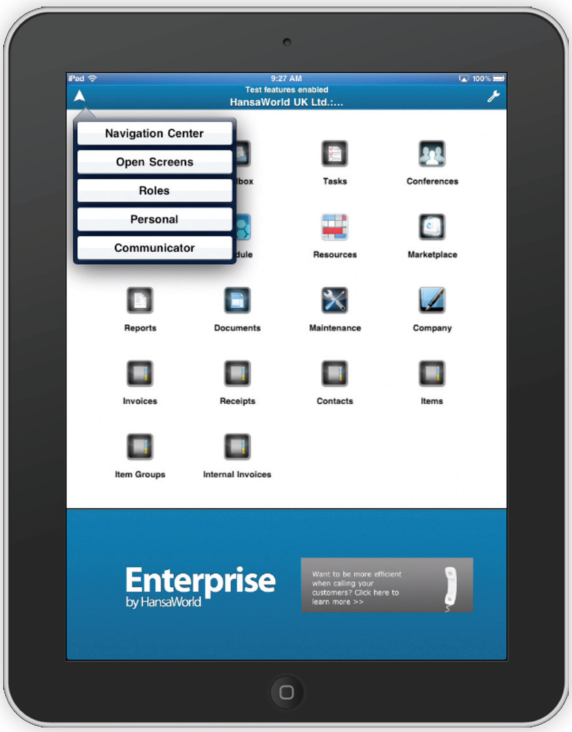
iPAD CLIENT

Enterprise now includes a full (native) client for iPad.

This simple-sounding statement covers a huge amount of potential, as you can now run almost all features of Enterprise from an iPad. The IT industry talks about "Bring Your Own Devices", meaning the movement to encourage staff to use their own equipment for work as well as at home - but for most companies this is theoretical rather than practical, as the only business software available for iPad (or other tablets) is small, role-based apps that talk to the central server. Users are not given full functionality, but rather a small subset of the total tasks they need to perform each day, and as a result remain dependent on using a desktop computer in the office.

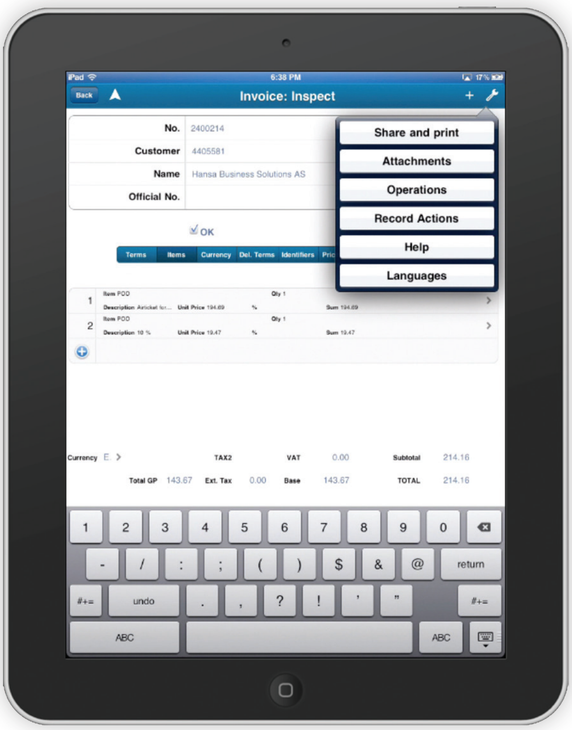
The Enterprise client covers all modules.

There's a new look and feel to Enterprise when running on iPad. Icons have changed, and are redistributed on the screen, the colour scheme is different, and the workflow is slightly different.



The Navigation Menu icon at upper left allows you to get back to the Navigation menu (iPad's name for the Master Control Panel) at any time, and also to:

- navigate between all open windows
- switch between any open screens (for example get back to an Invoice Browse window from the Invoice Inspect
- operate only using one of the pre-defined roles that were previously available on iTunes: Mobile Reports, Mobile Sales and Mobile Stock
- view the Personal Desktop.



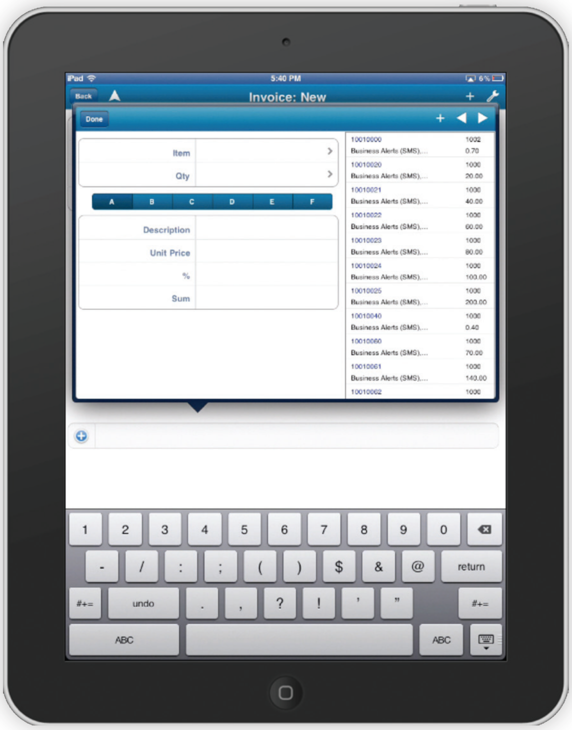
The Operations Menu icon at upper right handles features that are relevant to a specific record, rather than the whole system:

- printing and previewing
- saving, deleting or invalidating the record, or viewing its history
- emailing
- faxing
- attaching the record on the Personal Desktop or on another record
- launching context-sensitive tutorials, or the manuals site
- switching languages, if you have a multi-language version..

Most of the functionality of the iPad client is self-explanatory to a previous desktop/laptop Enterprise user. The main differences in data entry come in the handling of:

creating new records - click on + on the main window bar
creating new matrix rows - click on + in the matrix
entering/editing matrix data - each row is viewed separately, opening a separate window.
Paste Special - dropdown options are viewed by clicking on the > icon at the right of the relevant field.

Sales-facing records have a new routine for rapid items entry.



The list of possible Items remains open at the right of the screen, and scrolling and selecting one puts that Item on the Quotation, Sales Order or Invoice, with a quantity of 1. This quick entry screen also remains open.

iPad also supports signature capture. Transactional records allow you to attach a signature to them, and launching this feature opens a screen where your customer can sign using their finger.

Reporting supports gesture control - meaning that you can pinch to zoom in on any interesting aspect of a report.

iPHONE CLIENT

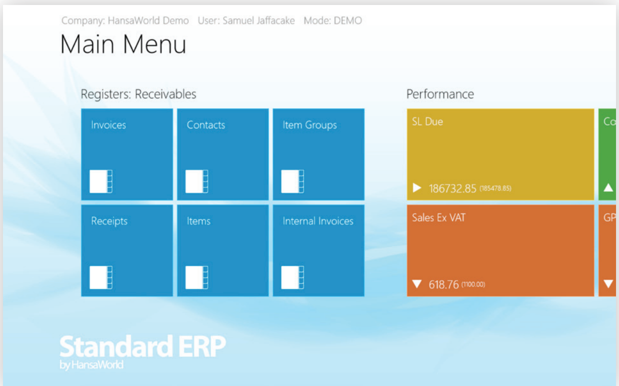
Enterprise now includes a full (native) iPhone client. The iPhone client works in the same way as the iPad client.

METRO ON WINDOWS 8 CLIENT

Enterprise now includes a full (native) client for Windows 8, using the Metro interface. Since Windows 8 is not yet a generally available product, Enterprise on Windows 8 is available by request only. Metro is designed for use on all Windows devices, including computers, slates and phones, and so is Enterprise on Metro.

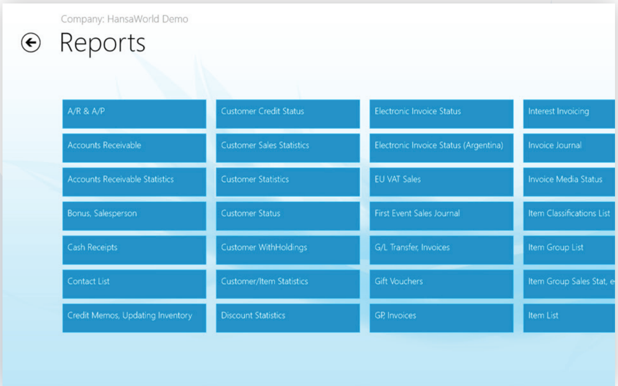
The application is launched from the Windows 8 Live Tiles environment:

Inside Enterprise, simply viewing the Navigation Centre shows just how different this interface is:

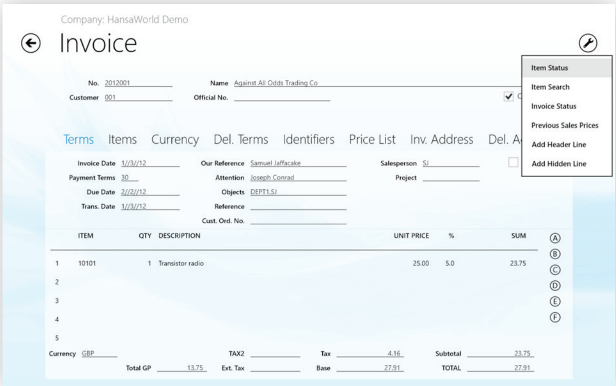


Elements that are icons in other operating systems are each Live Tiles in the Metro interface version of Enterprise. Each can be selected by finger or mouse. Each tile is sensitive to its function, meaning that some will open data entry windows, some will give options such as listing all modules from which to make your selection, some will run reports, and others (such as the coloured KPI tiles) will drilldown to specific reports. The colours on the KPI tiles reflect the trend of a given measure.

Here is the list of reports that can be run from the Sales Ledger:



Data entry windows look somewhat different from Enterprise on other operating systems:



Paste Specials are launched by a similar > icon as on iOS devices. Operations menu selections are launched from the Operations menu icon at the upper right of the screen.

ADDITIONAL FEATURES IN ENTERPRISE, ALL VERSIONS

Accounts (Nominal Ledger)

There's a new field on the matrix of the Transaction to allow a second description to be defined, which can then be printed out on the Transactions Journal and Summary reports, and Transaction and Simulation documents.

It's also possible to force the entry of a specific VAT Code for a given Account or range ofAccounts.

Consolidation

It's now possible to store consolidation exchange rates, separate from the transactional exchange rates used by the system. A new setting in the Consolidation module allows users to specify separate daily rates for Profit & Loss accounts versus Balance Sheet accounts, and then the Consolidated Trial Balance report can now be run using these rates or using transaction rates from all companies.

KPIs

Most of the KPIs that can be displayed on the Master Control Panel now support drill down to detailed reports.

Pricing

Support "happy hour" and similar promotions by specifying the hours that a Price List is applicable for.

Quotations

There's a new setting that prevents Invoices being raised for a quantity greater than that quoted, and another that permits Pro Forma Invoices to be printed from Quotations (and an associated report that shows Pro Forma Invoices raised from Quotations). The Quotation Salesman Statistics now has a detailed version, which also lists the Quotations for each salesperson, with the ability to drill down to each Quotation.

Sales Orders

New settings have been added that ensure Enterprise will create an Invoice on OK'ing a Delivery, and a Credit Note on OK'ing a Returned Goods record. Further settings can ensure that a Delivery Address and/or a customer order number must be entered in order to save a Sales Order.

Point of Sales

For Apple hardware resellers, Enterprise now supports an integration with Apple's GSX system for selling Apple Care - also known as Auto Enrolment. For new customers, you can scan hardware items and related Apple Care items, and Enterprise will send a Concurrent Sales registration to GSX. For customers that are buying Apple Care for an item previously purchased, scanning the Apple Care item and the original serial numbered item will validate with GSX whether such an item is eligible for such an extended warranty, and if so will then register it. If for any reason the GSX system is down, Enterprise creates a record in a special Apple GSX Queue, which it keeps trying to send from there until the GSX system is back online.

There is also a feature for cancelling an Auto Enrolment order, which after running will allow the normal invoice deletion or invalidation.

Sales Ledger Touchscreen

Previous versions of Enterprise allowed a button-driven interface to be superimposed on Sales Ledger Invoices, but this interface was different from the Point of Sales interface, and supported much less functionality. Version 6.4 introduces a "new" interface to the Sales Ledger - the same interface as is already available for Point of Sales. This is, in fact, a dramatic and far-reaching change, as the two interfaces actually do completely different things in the background:

Point of Sales Invoices - allow sales to be captured at branch level, with Live Sync functionality to ensure users can continue to process sales even if the connection to the central server is lost. Individual sales do not update stock; there is a batch routine that updates the server quantities, which can be run as regularly as you like.

Sales Ledger Touchscreen Invoices - each invoice updates stock in real-time, based on normal routines that would apply even without the touchscreen component (an invoice without a Sales Order and associated Delivery will automatically post a stock reduction entry). Users are completely dependent on logging on to the central server, and so you need to plan fail-over functionality in case of network loss. Users can access the real-time stock position across multiple locations.

Applying the new interface is fundamental, as it involves switching on a string of functionality in the Sales Ledger that was only previously available in Point of Sales. This includes all the loyalty scheme features, dynamic barcodes, and most particularly the button definitions - which cover such features as reprinting receipts, running reports on server, opening and closing sessions, changing terms, returns, and changing addresses.

The POS Buttons feature now allows you to set which interface to use for each button set - and this includes a third interface, for Bar Tabs in Restaurants.

Sales Ledger

Just as for some time you have been able to create a Payments Suggestion in the Purchase Ledger, that creates a Payment record with payments for open purchase invoices that meet specified criteria, there is now a Receipts Suggestion feature on the Receipts browse that allows you to create a Receipt for any open invoices that meet the filtering criteria.

You can set a number of credit days on the Contact record. If there are Invoices outstanding for this customer for more than this number of days, then the customer is treated as over their credit limit and so cannot buy anything further until those invoices are settled.

Purchase Orders

New settings have been added that ensure Enterprise will create a Purchase Invoice on OK'ing a Goods Receipt, and a Purchase Credit Note on OKing a Returned Goods to Supplier record.

Stock

Businesses that buy and sell large numbers of sequentially serial-numbered items can now use bulk serial number functionality. Based on a controlling setting, Goods Receipts don't split serial-numbered items into separate matrix rows. Users just enter the first number of the serial number range, and Enterprise automatically saves the end number of the range based on the quantity received. Similar functionality exists on Sales Invoices, whereby you only need to enter the first serial number in the range, and Enterprise does the rest.

Previously, if you costed Freight, Customs, or Extra Costs against a Goods Receipt, the amounts were allocated to each row based on the proportion of the total value of the Goods Receipt represented by each row. There is now a setting that allows this allocation to be based on weight rather than value.

There's a new accrual possibility on Deliveries, whereby the Delivery can post to an accrual account which is then reversed by the Invoice, against the actual cost of sales account.

Objects can be set per Location, and then automatically used on all cost accounting entries.

Returned Goods records can be raised independently of Sales Orders, for example to allow returns against multiple sales orders.

The Aged Stock Analysis report now allows ageing based on values rather than just quantities, and there is a detailed variant that prints the last Goods Receipt and last sales dates, as well as the unit price and total value of the item in stock.

Purchase Ledger

New features have been added to make the Purchase Ledger easier to use. On the Purchase Invoice record, if it has been created from an e-Invoice, there's a new operations menu command to open the PDF that will be attached to the originating e-Invoice. Also on Payments, you can now see the date by which you need to pay in order to qualify for an early settlement discount.

Approval rules (Business Alerts module)

Enterprise has functionality for creating multiple levels of authorisation for most types of transaction. The feature allows users to configure which staff members will authorise transactions, based on value, with the ability to create chains of authorisation and process through emails, pop-up messages or even SMS messages. This functionality has beenextended so that:

- the necessary approver can be selected manually by the user, rather than using the preconfigured rules automatically to select the approver
- approvals can be copied for information purposes only to "FYI" staff
- approvals can be forwarded to other staff
- transactions that have been rejected for approval can be edited and resubmitted, rather than requiring a completely fresh approval process
- a setting is now available so that the transaction record is automatically finalised (OK'd) once the final approval has been made, rather than requiring the separate step
- the user requesting transaction approval can effectively recall the transaction, by cancelling the approval request, editing the transaction as required, and then resubmitting for approval.

A new Approval Status Report shows, by employee, all approvals issued to them, and their statuses (approved, rejected and pending). Existing transactional status reports (for Internal Orders, Purchase Orders, Purchase Invoices, Quotations, Orders and Invoices) now display the approval status, as do new status reports for Expenses, Goods Receipts, Leave Applications, Leave Transfers, Payments, Project Budgets and Stock Depreciations.

Service Orders

Postings on Work Sheets can automatically update different cost of sales accounts depending on the service order is being carried out under warranty or under an existing maintenance contract (based on fields on the Item), just as invoices can post to different revenue accounts using similar fields.

Data Integrity module

This is a new module that collects together all reports for reviewing the integrity of data in the system, and for assisting in finding errors.

Transaction Checking can be run for any date range, and for any selection of registers - and checks whether a Nominal Ledger Transaction record exists for each sub-system transaction, whereas the Sub System Checking report runs through all Nominal Ledger Transactions for the selected date range and checks whether the sub-system record still exists. Sub System checking uses the reverse logic, checking whether there is a Nominal Ledger transaction for any selected sub system.

New reports have been added to compare the Sales and Purchase Ledgers against balances in the Nominal Ledger. Sales Ledger Checking and Purchase Ledger checking offers daily balances for each ledger, and drill down to the Sales Ledger and Purchase Ledger Roll Forward reports that list all invoices for a given day and their effect in the sub system and in the Nominal Ledger, with any differences.

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 Resource Management
- Internal Stock
- Jewellery
- Job Costing
- MRP
- Nominal Ledger
- Point of Sales
- POS Offline
- Pricing
- Production
- Purchase Ledger
- Purchase Orders
- Quotations
- Rental
- Report Generator
- Resort
- 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)
- Forms Designer
- HAL Customisation language
- Intelligent Routing
- Interfacing Toolkit
- Massive Cacheing
- SQL Shadowing
- SmartApps Designer
- Wide-area Networking

Cloud Based Services

- Address Lookup
- Credit Card Payment
- Credit History
- E-invoicing
- Electronic Bank Services
- Electronic VAT Return
- Exchange Rate Lookup
- Postcode Lookup

Company profile

HansaWorld is a major international software company specialising in business optimisation solutions. The group employs around 300 staff in a strong network of daughter companies and distribution partners worldwide. There are offices in 19 countries spanning all the major continents, allowing HansaWorld to offer international implementations with a single point of contact across many countries.

The group was founded in Sweden in 1988, by Managing Director Karl Bohlin, and is currently headquartered in Ireland. The products are available in 27 languages and work with almost all computers and operating systems. There have been more than 75,000 HansaWorld installations at a wide range of organisations, from small and medium-sized businesses to entrepreneurial divisions of larger companies.

HansaWorld is one of the leading drivers to bring a new perspective to corporate software business needs. Traditional software companies continue to push a silo approach involving developing an Enterprise Resource Planning application that is difficult to integrate with other components such as Customer Relationship Management, Email, Document Management, Workflow and vertical market solutions. HansaWorld has pioneered the approach of developing solutions that cover almost all the company's main business needs in a single, integrated solution, and by underpinning these with constant technological innovation. As a result, this Integrated Business Platform unifies processes across all departments, through advanced software-based best practices which thereby improve the flow and value of business transactions to deliver time and cost savings at every level without compromise.

HansaWorld provides local product management for each market where it actively sells Enterprise. This process covers not just translations (if required), but also localisation for statutory and commercial practices, and ongoing quality control.

Product Strategy

Enterprise'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 PDA support. In addition, HansaWorld can help to build a corporate portal. Enterprise 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.

Enterprise by HansaWorld is currently available for Windows 2000 and later, Mac OSX, Linux, Chrome OS, AIX and mobile platforms including Android, iOS and Windows CE.

Certified HansaWorld Business Partner

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