Release Notes - 2023/2024

Standard ERP

Standard ERP is a cutting-edge business management system. Built with extensive experience and the latest technology, it uses an original unified interface and workflow for a consistent user experience across all popular platforms and devices: Windows, macOS, Linux, Android and iOS.

All previous versions of Standard ERP can be updated to the latest released version.

This document highlights some of the new features and enhancements that were added between July 2023 and June 2024.

ANDROID

Small Devices

Several improvements have been made for smaller screens and resolutions, specifically when the device is in portrait/vertical mode.

In Touchscreen windows, row height is reduced and invoice rows resize accordingly based on the number of buttons that have to fit in the screen.

The vertical layout of the following windows have also been improved:

- Touchscreen Windows
    - Pay (One Mode)
    - Cash In and Out
    - Scan Serial No.
    - Add Comment Line
    - Change VAT No.
- Other Windows
    - Login Screen
    - First Screen

Worldline ToM

Integration with Worldline's Tap on Mobile App is available for contactless card payment.

Navigation Centre

To avoid text wrapping under icons, the way icons are drawn in the Navigation Centre has been improved.

Barcode Scanning

The Google API for barcode scanning has been implemented to allow the use of the phone's camera to scan QR codes and Barcodes. In POS, a new button called Scan Barcode can be used.

BUSINESS ALERTS

Approval Rules

- The Approvals engine has been reworked to allow better flexibility in the code, with few changes to the interface.
- It is now possible to set up Approval Rules for Budgets.

Approval Status Report

In one report we give the ability to action approval requests from all parts of the system where approvals can be requested.

Activity Consequence

This has been removed when using multi-level approvals.

CONSOLIDATION

Consolidated Receipt Summary

A new report called Receipt Summary, Consolidated has been added that shows the value of receipts in each daughter company for a given period. It allows drill-down to the Receipts Journal report in each daughter company.

CRM

Activity Types

A Closed checkbox has been added to allow unused/unwanted records to be closed.

Recurring Tasks

Tag/Object has been added to give another filtering option.

Task Manager

Filtering by "Other" symbols is now possible, in addition to the predefined ones.

To Do List Report

Multi-company support has been added to the activity drill-down in the To Do List report.

Change Person on Activities

This new maintenance enables changing the person assigned to tasks.

EXPENSES

CostPocket Import

The following improvements have been made to the integration with CostPocket:

- VAT code is now checked.
- A search for a matching Supplier record is done.
- Currency rate is automatically filled in based on Currency code.
- Document import for single documents versus reports can now be done separately. Single documents can be imported in the Purchase Ledger and reports in Expenses.
- Supplier bank account details are now imported and stored in the Contact record and the Purchase Invoice.

FORMS

Tag/Object Name

New form fields have been added to Order and Delivery Note forms to allow printing of Tag/Object name.

Colour Attribute

The ability to colour text, fields, lines and frames has been added.

Multiple Languages

The same form field can now be printed in multiple languages on the same form.

For example: Item descriptions from Item Texts

Amount in Text

Ability to print Numeric Values as Text in multiple languages on the same form has been implemented.

Conditional Printing

Print conditions can now be defined to control whether individual elements will be printed on a form.

For example: the discount field only prints if the discount value is greater than 0.

It can be used in combination with Multiple Languages and Amount in Text.

Branch Field

Branch Field has been added to the following forms:

- Cash Note
- Invoice
- Order
- Purchase Invoice
- Purchase Order
- Quotation
- Reservation
- Service Order

GENERAL

macOS Sonoma

Support for macOS 14 Sonoma was added.

Report Progress

A green bar is now displayed at the top of reports when they're running to show report progress. The green bar disappears when the process is complete.

QR Codes

A new primitive has been introduced to display QR codes in application windows.

Report Defaults

It is now possible to save, edit and delete default values in all report specification windows.

HRM

Payroll Summary Report

This new report gives an overview of payroll cost information. It supports multi-currency and multi-company.

Checklist Points Report

This new report shows what Checklist Points have/ have not been completed for a given period. It works across multiple companies.

Employment Contract

Improvements in the Employment Contract record now enables more information to be stored:

- Salary Payment Date
- Tax Load
- Different types of Salary (yearly, monthly, hourly)

The list of Benefits can also now be edited even after the contract is OKed.

Training Plans

The Training plans functionality to handle onboarding and employee education has been improved.

- A new setting has been created, automating the creation and closing of training plans.
- A warning will now be given to users when scheduling a training topic; if an open training plan for the same topic already exists.
- The Employee Training Report has new sorting options by date, topic or status.

LEARNING MANAGEMENT

A new module has been developed to facilitate the planning and delivery of digital learning content through an online portal.

Edit Mode Functionality

This enables full editing of Courses, Course Content, Topics, Settings and Enrolled Users directly from the web portal by a user with sufficient access rights.

Self Enrolment

This allows students the ability to apply or self enrol for courses.

New Settings

- Online Learning Support - ability to define how, where and in what visual style content will display on the web.
- Departments
- Course Classifications
- Course Classifications Types
- Competences - setting pathways a student can follow before progressing further.
- Student Courses - where course access can be granted to students.

New Registers

- Items
- Contacts - with checkboxes to differentiate “Student" and “Teacher"
- Courses
- Course Content
- Topics - allows for course content to be structured within' different 'Topics'
- Course Tests

NOMINAL LEDGER

Bank Work-Window

Improvements in the visual representation of data as well as navigation in the window.

Nominal Ledger Report

The report can now be run from the Account record operations menu.

Sub-Ledger Intermediary Account

Transactions from sub-ledgers can now be automatically balanced using an intermediary account. This helps keep the Trial Balance balanced when viewed at Tag/Object level.

Simulations

Creating a Nominal Ledger Transaction directly from a Simulation record is now possible.

POINT OF SALE

Gift Voucher

It is now possible to enable vouchers to print directly after the POS receipt.

Additional form fields have been added to allow printing of more gift voucher information on relevant forms.

Cash Up Maintenance

The resulting transaction now includes local machine and drawer for clarity.

Auto-Finish

The existing functionality has been extended to work across more buttons/payment methods and it is now possible to enable or disable this feature separately for each POS Button.

It now works with the following POS Buttons:

- Cash
- Cheque
- Credit Card
- Debit Card
- Full Payment
- Gift Voucher
- Loyalty Points Payment
- On Hotel Guest Account
- Pay
- Pay (Buttons Layout)
- Pay (One Mode)

Extra Tax

Support for an additional tax has been added to both POS Touchscreen and POS Invoices.

Credit Card Terminal

It is now possible to set up Local Credit Card Terminal information centrally, rather than having to set it on each device.

PRICING

Update Cost Prices Import

The existing import now allows import of Item Group, Unit and Price. The logic of adding a new item or updating an existing one has also been improved.

PRODUCTION

Production Order

The Production Order and Production record are now properly linked and it is possible to drill down into the Production Order record from the Prod. Ord field.

Deficiency List Report

An option to exclude closed items has been added.

Production WIP

It is now possible to automatically create transactions posting to a WIP account for better tracking of costs before production is completed.

PURCHASE LEDGER

Supplier Status Report

It is now possible to drill down into a Payment record directly from the report.

Withholding Tax

The Paste Special window now includes more details from the setting.

The setting has been improved with the following:

- Comment field has been widened to display more information.
- Code column now allows for three digits.
- Now allows for 199 rows.

RENTAL

Item Serial Number Balance

This support register is now available in the Database Maintenance module to help rental customers troubleshoot serial number related issues.

Batched Items

Rental workflows have been improved to better handle rental items with batch serial numbers.

Rental Item Status Report

This is a new report run from the Rental Item operations menu. Through the corresponding setting, the following information can be included:

- Rental Reservations
- Rental Summary
- Stock Transfers
- Internal Stock Movements
- Service Orders

RESOURCE PLANNER

Occupation %

A bar chart showing Occupation % has been added to the Resource Planner window and can be enabled/disabled in the Resource Planner setting

REST API

Filtering

Users are now able to filter by a single value in a field containing multiple values and get back all records containing that value, instead of records containing only that value.

RESTAURANT

Tags/Objects

Support for Tags/Objects has been added, in the same way as they are handled in POS.

Extra Tax

Support for an additional tax has been added to both Bar Tab Touchscreen and Tabs Old View.

Auto-Finish

The existing POS functionality is now also available in the Restaurant module.

It works with the following POS Buttons:

- Cash
- Cheque
- Credit Card
- Debit Card
- Gift Voucher
- Loyalty Points Payment
- On Hotel Guest Account
- Pay

SALES LEDGER

Atradius

Integration with the Atradius debt collection system has been implemented. When enabled, an option becomes available in the Sales Ledger Invoice operations menu to send the invoice details to Atradius for collection.

Customer Status Report

This now features a drill-down function for easy access to Receipts.

Receipts

Receipts will now be linked automatically to their Invoices.

Payment Term Codes

Three-character Payment Term codes are now supported.

SALES ORDER

Outstanding Orders Report

Users can now run a report based on Order Date.

Sales Order Setting

A new setting has been added to tell the system to always create new Purchase Orders from Sales Orders.

STOCK

Chronology Per Item

It is now possible to set chronology to work per item rather than at the record level. This has no direct effect on item cost, but stops saving of records if chronology rules are not followed.

Batch Specification

Best Before Date has been added to the browse window of the setting.

SYSTEM

ISO Alpha-2 and Alpha-3

We now store Country Codes in both ISO formats (Alpha-2 and Alpha-3) to make integrations easier. New form fields have also been added to support the printing of either value as needed.

Company Info

New address fields have been added for correspondence.

Attachment Access Rights

It is now possible to define access levels for attachments in Registers and Settings.

Remote Backups

Companies can now disable uploading of backups to the cloud.

Global Locking

This option allows users to enforce the same locking rule across all companies.

TECHNICS

Logging Control

Record History has been enabled for blocks. This was primarily done for GDPR to track changes to the Logging Control setting itself.

Test Report

This is a report to help with testing scenarios where part of the test is running a report in parallel with other processes.

WINDOWS OS

Browse Window Colouring

Status colours in browse windows have been improved to softer shades.

Low Memory

An error message is now displayed when the machine Standard ERP is running on is low on memory.

WORKFLOW OVERVIEW

Project Filter

It is now possible to filter by Project in views displaying Quotations, Sales Orders and Activities.

Leads Value

The Leads column now shows the sum of all Lead records displayed.

ARGENTINA

Credit Notes

The Supp. Inv. No. field in Purchase Invoices now allows more characters to support the 17-character legal structure required by tax authorities.

BRAZIL

Service Profiles

New fields have been added to the Company Info setting and the Contact record to record sender and receiver profiles.

SYSTAX Tax Integration

Requesting tax calculations from SYSTAX is now possible for Sales Invoices and Purchase Invoices containing Service items. Responses are stored in a Tax Matrix.

CROATIA

Legal Entity Number

Changes to SEPA message formats have meant the creation of a new global identifier for companies. Country VAT Reg no. is now used for LEI no. - Legal Entity Number.

FINLAND

Prepayment Registration

A check has been added to validate supplier prepayment registration from YTJ.

E-Invoice Status

The Invoices browse window now displays the E-Invoice status of each invoice.

Bank Payment File

Support for Pain 001.001.003, based on ISSO20022 has been added.

MOZAMBIQUE

Tax Use Authorisation Number

A new field has been added to the Company Info setting to hold the company's tax authority registration/authorisation number.

The following forms have been modified to enable printing of the new field:

- Invoices and Proforma Invoices
- Sales Orders
- Receipts
- Purchase Invoices
- Quotations
- Deliveries
- Good Receipts
- Credit Notes

Official Number

A new field called Official No. has been added to the following:

- Invoices
- Sales Orders
- Receipts
- Quotations
- Deliveries

NORWAY

LOGIQ E-Invoicing

Integration with Logiq has been developed, providing users with an alternative e-invoicing solution.

E-invoice PDF files are automatically embedded into the XML request.

PARAGUAY

DPY E-Invoicing

Integration with DPY has been developed to allow electronic sending of invoices to the tax authorities. This is a paid solution from DPY and is more suited to larger customers. An account with DPY is required.

Several new supporting fields have been added to several records to support the workflow.

The E-Invoice is sent in JSON format and a QR code URL is generated.

SIFEN E-Invoicing And E-Delivery

Integration with the free solution offered by the tax authorities has been added. This is the more common solution for smaller businesses who do not wish to use a third party paid solution.

The E-Invoice and/or E-Delivery is sent in XML format and authentication is done through a certificate.

A QR code is generated and can be printed.

Credit Reason

A reason is mandatory for issuing debit and credit notes. We now block saving records without entering a reason.

Legal Record Numbers

It is now possible to define a separate set of legal record numbers for invoices sent electronically and those that are manually issued.

Manual Interest Invoice

A new payment term has been created and is automatically assigned to Debit Notes.

POLAND

Bank Statement Import

Added support for importing bank statements in MT940 format from following banks: Pekao S.A, Alior Bank and ING Bank Śląski.

Exports

The following exports have been optimised and are available as separate exports:

- Unified Export JPK_FA
- Unified Export JPK_KR

A new export was added:

- Unified Export JPK_KPiR

Tax Exemptions

It is required by law to specify the basis of Exempt VAT. This is now possible using the Tax Exemptions setting and corresponding column in the VAT Codes setting.

VAT Declaration

It is now possible to print the VAT declaration directly from the setting.

WKF Virtual Fiscal Printer

Support for a virtual fiscal solution has been added. It sends receipt information to the tax authorities and gets back a QR code with a URL containing the official UUID.

EORI Number

A field has been added to Company Info and Contacts to record EORI numbers.

Exchange Rates

Users can now choose whether exchange rates on SL and PL invoices should be based on transaction or invoice date.

PORTUGAL

Taxonomy and Tax Accounts

The Taxonomy setting has been increased to 999 rows and a column for Tax Accounts has been added. This allows for all possible Taxonomies in Portugal and to be able to associate each account in the Chart of Accounts to a Taxonomy code.

A checkbox has been added to display Tax Accounts in the following reports: Balance Sheet, Profit and Loss, Trial Balance, and Analytical Balance.

Creditors/Debtors Accounts Report

New information has been added to Creditors Account and Debtors Account Reports to comply with Auditing regulations.

SAUDI ARABIA

ZATCA E-Invoicing

Integration with ZATCA for e-invoicing has been implemented, with multi-company support.

- Invoice information is sent and validated when the invoice is OKed.
- Simplified tax invoices are supported.

TURKEY

SOVOS E-Invoicing

Integration with SOVOS for E-Invoicing has started by adding relevant supporting fields to the following:

- Cloud Service Settings
- Units
- Sales Invoice
- Invoice Type
- Contracts

UAE

VAT Audit

The existing VAT Audit export has been adjusted to comply with FTA requirements FAF v1.0.0.

VAT Return Report

A new VAT Return report has been added to enable users to check data before running the VAT Return export.

PlanetTax

Implemented passport scanning to fill in traveller data.

Validation to allow only ISO Alpha-3 Country Codes has been added.