

Zahara Release Notes


20th July 2017

A new release of Zahara is planned for 20th July and this has some major new features as well as some further refinements.

Custom Fields

We have released our first custom fields feature. Currently this is restricted to creating a custom field on the purchase order of a dropdown select list type. You can find custom fields in [Business > Settings > Custom fields](#). From here you can create a field or fields, give them a name and type a list of options for the select box. An example of the current phase would be to create a buying category – like Drink or Food or perhaps Opex / Capex.

The value of this field can then be used as a conditional entry point to an approval workflow.



Add Custom Field [Close]

Label*

Description

List Values* Enter each value in the list separated by a semicolon

Save

Our plans with custom fields are to allow fields to be created on any screen of any type and their values used for reporting and for workflows. There is more to come from future releases but custom fields allows us to provide the level of customisation that new and existing customers require.

Supplier Type

We have created a new field on the supplier form of “Supplier Type” – this value can now be used in workflows as conditional entry points. Example, you have a supplier type of “Drink” and a Supplier type of “Food” – each type has its own approval process.

Product Export

As a halfway house to a full product manager module that will come shortly, we have introduced the ability to export a product set from a given supplier. This means you can export a complete supplier product list, adjust any pricing in Excel and then re-import to update in Zahara. You will find the export icon in the supplier record, at the bottom of the page in the product panel.

User Export

Similar to the above, you can now export your users to an excel spreadsheet to analyse. Find this new Excel icon in the Admin > Settings > user panel. You can select all or individually and then export.

Approvals

There have been a number of improvements to approvals. This is an ongoing process as we attempt to offer world-class workflows. Coming soon will be Absence settings, notification choices timeout and delegation but for now we have:

Extended conditions to include supplier, supplier type, originator, custom fields, product code and invoice / order difference.

Approval Delegate - You can now switch on a feature in Business> Settings> Workflow that says "Originator cannot approve own orders". This means that if an originator is in the workflow as an approver, it will automatically skip that person. If they are the last person to approve – say the CEO, you can set an approval delegate in the User record. What we have designed here is to specify that a CEO cannot sign off on say a £500K order without their delegate also approving.

Currencies

We have now incorporated the full iso list.

Default Division

We have now set it so that when raising an order, the choice of Division will be set to the last one used.

Format Email Approval Line Items Placeholder

We have added some formatting to the {LineItems} placeholder that you can drop into any of your emails.

Create invoice for Multiple Divisions (grouped invoice)

This feature has taken a lot of time but is quite powerful. To date we have been division centric in that you can only raise an order for one division and record an invoice for one division. Now we have the ability to create what we call a grouped invoice. Each line item of the invoice can be attributed to a different division and then the grouped line items are sent off to the respective divisional workflows for approval.

Our scenario here is when you receive a 30-line invoice from your local taxi company. All the journeys need coding and you need to send it out to the respective divisions to do that. You can now do this in Zahara and progress the approvals.

- Notice the new grouped invoice icon in the Invoice page.
- Create an invoice in the normal way and then choose a division on a line by line basis.
- Notice the approval panel and the multi-choice for each division approval

We will no doubt refine this feature in the future when we receive feedback.

Export PDF to Xero

We have extended the functionality of the Xero integration now so that