

Excellent Portal New Features and Improvements

Version 7.4

Reports Enhancements

◆ Reports Update

Profit & Loss, Balance Sheet, Purchase Ledger, and Sales Ledger reports have been reworked with **new layouts and expanded filtering options**. All four reports are now also available on mobile. It is possible to **download reports as PDF** directly from Excellent Portal.

◆ Items — Stock List

The Items register now includes a **Stock List tab** showing current stock levels per warehouse location, including balance, unit cost, and total value.

Personnel Management Enhancements

◆ Multi-Level Approval Process

Approval Rules for Personnel Management registers (Documents, Planned Absences, Shift Sheets) now **support multi-level hierarchical approval**. It is now possible to set up a next-level approver who receives their task only after all first-level approvals are completed. Setting for that needs to be done in Excellent Books/Standard ERP.

◆ Employee Filtering when Creating Documents

When creating Documents, the employee list is now **filtered based on the user's role**. Employees see only themselves, managers see their department members, and admins see everyone.

◆ Documents — Create Record & Refresh Text

Two new actions are available in Documents. **“Create Record”** creates an Absence record directly from a Vacation document. **“Refresh Text”** updates the document text box based on changes in linked records such as employee or absence.

◆ Personnel Management — Create Task

It is now possible to **create a task** directly from any Personnel Management register record.

Bug Fixes

◆ **Payment — Wrong Number Series**

Changing the Payment Mode on a new payment no longer causes a number series conflict that prevents saving.

◆ **Department Manager — Subordinates' Vacation Balance**

Department managers can now view **remaining vacation days for their subordinates** in the Absences view.

◆ **Documents Print**

Fixed an issue where the text box content was missing when printing **standard document forms**.

◆ **EST — Employee Department in Absences**

Fixed an inconsistency where employee department data was read from the wrong source, causing incorrect behaviour in the Absences view.