2019 Highlights

SYSPRO 8

Reference Guide

SYSPRO™

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User Experience

SYSPRO Scheduler

The **SYSPRO Scheduler** lets you schedule a pre-determined activity at a given time in the future and then send a trigger for that activity at the appropriate time.

A calendar view (similar to **Microsoft Outlook**) is accessible from programs that have been designed to use the **SYSPRO Scheduler**. This lets you view existing tasks that have been scheduled as well as create and maintain schedules using the **Maintain Schedules** program.

Features currently using the **SYSPRO Scheduler**:

- Cycle Count

    This creates a cycle count schedule of stock counting policies.

SYSPRO Avanti

A number of new capabilities have been added to SYSPRO's web-based platform.

SYSPRO Supply Chain Portal

The **SYSPRO Supply Chain Portal** allows users beyond a SYSPRO site to connect, interact and transact using the *SYSPRO Avanti* HTML5 user interface.

Adding Portal users to your SYSPRO configuration provides external user access to specific functionality (using a dedicated user interface and menu system) based on the portal features available.

Features currently available from the **SYSPRO Supply Chain Portal**:

- Request for Quote System:

  This lets you collaborate with your suppliers by automating the quote process and enabling suppliers to action an RFQ.

Translation

All fields in *SYSPRO Avanti* can be translated into a different language (with the exception of the logon screen).

This is applied when the language is configured within the **System Setup** program of the SYSPRO core product.

Support for Large Rich Text Notes

Notepads that have been built into a SYSPRO application (or Customized Panes that use the notepad control) can now be added to a web view to be surfaced in *SYSPRO Avanti*. There are two types of notepads: simple text notepads and Rich Text Format (RTF) notepads.

The rich text notepad displays a special toolbar with all the formatting options. This toolbar does not appear for a notepad that only supports simple text (e.g. the **Additional Notes** in the **Customer Query** program).

Considerations:

- In SYSPRO, all complex notepads are stored in RTF format. Because this format is not supported in a web browser, it needs to be converted to HTML format for rendering in *SYSPRO Avanti*. The converse is also true - when saving notes entered in *SYSPRO Avanti*, the system must convert the HTML format to RTF format.
- If the notepad in SYSPRO includes a **Save** button, then this will also be shown in the notepad toolbar of *SYSPRO Avanti*.
- As in SYSPRO, notes in *SYSPRO Avanti* are automatically saved where appropriate (e.g. there is no **Save** button in SYSPRO's main menu notepad because any notes entered are automatically saved when you exit SYSPRO.

Visual Designer by Role

You can now design web views by role in *SYSPRO Avanti*. From within a *SYSPRO Avanti* program, select **Design Web View by Role** from the **Customize** icon and then specify the role for which you would like to design the web view.

Customized Pane support

Toolbar buttons for **Customized Panes** are now surfaced in the Visual Designer and can be added to a web view.

Gantt, Pie and Funnel chart support

You can now add Gantt, Pie and Funnel charts to visually represent data in *SYSPRO Avanti*.

Global help support

The SYSPRO Online Help can be accessed by pressing `F1` in *SYSPRO Avanti*.

Forgotten password

The **Forgot Password** functionality (which allows operators to reset their SYSPRO passwords without administrator assistance) is now available for *SYSPRO Avanti*.

Workspaces

You can define multiple workspaces in the home menu, when it is not associated with a role.

Additional VBScript Support

Although VBScript provides functions and sub-routines, basic date/time and string manipulation, math functions, user interaction, error handling, and regular expressions, additional functionality can be added using ActiveX technologies.

> VBScript Desktop Alerts are now surfaced as Toast Notifications in *SYSPRO Avanti*.

The following VBScript functions are now supported for grids in *SYSPRO Avanti*:

- OnPopulate
- OnSubmit
- OnRowSelected
- OnDblClick
- OnLinkClicked
- OnAfterChange

Additionally, the `OnDELPressed` and `OnChecked` functions are now supported for customized pane list views.

Sort search by relevance

The order of preference or relevance that is displayed in search results (based on the search term or phrase entered) returns more accurate and relevant results.

The relevance of results and weighting is determined by the order in which the fields are displayed, or ordered in the search. You can now configure whether relevance is applied against a search using the **Espresso Search Configuration** program in the SYSPRO core product.

> If you have previously created your own customize searches, the relevance option is not automatically applied to them. If you want to enable relevance, you will have to do it manually.

Simplified Administration

Optimized SRS Document Printing performance

There is a new **Optimize print** option available from within the **Maintain SRS Document Templates** program.

In a server-side environment, this option lets you print documents as soon as the data becomes available as well as archiving the documents at the same time.

Although this dual capability of printing and archiving applies to both single and batch modes, the performance benefit is more visible when printing in batch mode.

Document Batch Printing

When you enable the **Optimize print** option and are batch printing in a server-side environment, the XML file that is generated for each batch is now only generated once, resulting in improved performance (i.e. a document can be sent to the print queue as soon as the data is extracted and the previous document has completed).

Using the Document Printing API architecture, this XML file is now generated from the core program instead of the applicable document printing program (e.g. **Statement Print**) and is then sent to the **SYSPRO 8 Reporting Host Service** to produce the document.

Document Archiving

When you enable the **Optimize print** option and are printing in a server-side environment that requires document archiving, the process is now simplified by combining the process of printing and archiving (i.e. you don't need to split your archiving into multiple batches).

Document types

When you enable the **Optimize print** option, it applies only to the following document types:

- A/R Statement Print
- Purchase Orders – Foreign
- Purchase Orders – Local
- Quotation - Multiple Column
- Quotation - Multiple Line
- Quotation – Single
- Delivery note
- Dispatch note
- Invoice
- Order acknowledgment
- Factory Documentation

> The **Optimize print** option is only applicable when the following grouping options for a document template are disabled:
> - Spool multiple documents as a single job
> - Group by email address
> - Group by contact information

Multi-Factor Authentication

Multi-Factor Authentication is a process that identifies a user by validating two or more authentication methods from independent credential categories. This ensures that a user is only granted access after successfully presenting two or more pieces of evidence to the authentication mechanism.

In SYSPRO, the traditional user name and password has been bolstered by the addition of Email and Google authentication to improve security during the login process.

- **Email authentication** sends an email to MFA-defined operators containing a Time-based One-time Password (TOTP) required as part of login verification.
- **Google authentication** uses an app to generate a QR code for first time user configuration and a Time-based One-time Password (TOTP) is required as part of the verification process for subsequent logins.

Single Sign-on

Single Sign-on in SYSPRO provides a simple to setup and robust method of using **Microsoft Active Directory (AD)** to control SYSPRO users.

Once configured, it enables a complete single sign-on experience as SYSPRO users are authenticated by **Windows** and then simply use a shortcut to run SYSPRO without being prompted for a user name and password at the login screen.

It means that a SYSPRO site can use **Microsoft Active Directory (AD)** to add, change, disable and delete operators virtually seamlessly. Any changes to user attributes automatically reflect against the SYSPRO operator without manual intervention.

Benefits

- Increased security around SYSPRO logins (you can lock-down users and only allow them access to SYSPRO using their specific operator code).

- Convenient administration of SYSPRO operators managed by **Microsoft Active Directory (AD)**.

- Simplified login process for SYSPRO operators.

Maintaining SQL Users

As an administrator, you no longer have to create and configure SQL logins for SYSPRO operators using **Microsoft SQL Server Management Studio** before capturing the SQL login and password details against the operator in SYSPRO.

This is now possible from within SYSPRO, with functionality added to the **System Setup** and **Operator Maintenance** programs. The process creates the following for a SYSPRO operator:

- SQL login

- SQL user

> This is used to access the relevant databases with the required permission access enabled (i.e. `DataReader` and `DataWriter`).

Diagnostic Extract Utility

The **Diagnostic Extract Utility** lets you supply support teams with relevant information about the configuration and usage details of all companies in your SYSPRO environment. The aim is to facilitate the diagnostic process for the speedy and efficient resolution of issues you may encounter.

The extracted information is encrypted and compressed before being emailed to SYSPRO for analysis and troubleshooting by the relevant support team.

> This program is intended for advanced support purposes only and must not be used unless directed by an appropriate SYSPRO support entity.

SYSPRO Installer Application

The following capabilities were added to the **SYSPRO Installer Application** to improve and enhance the deployment functionality:

- Update SQL Server credentials
- Update deployment service credentials
- Run the deployment service as named user
- Rename a server/machine
- Install SYSPRO Additional Services
- Clone machine or deployment group
- Manage hotfix notifications

Notepad

SYSPRO's **Notepad** (rich text and plain text) has been standardized to support larger text files. This is available in the core product as well as *SYSPRO Avanti*.

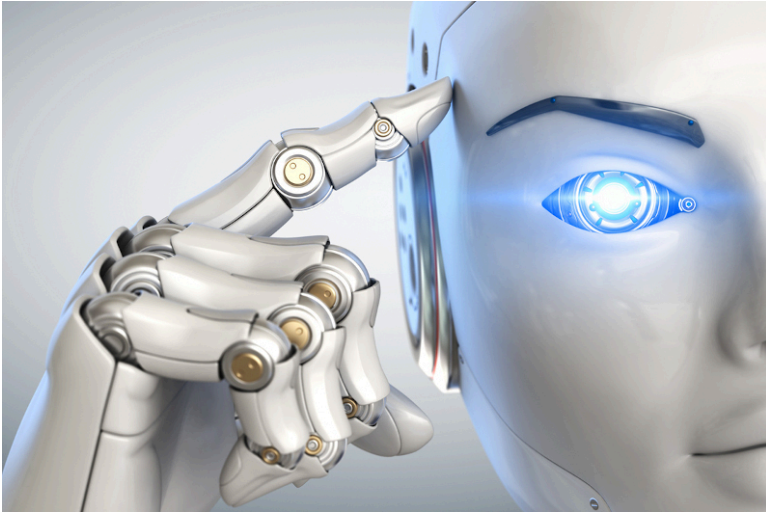> The **Admin Notepad Editor (Rich Text)** is still limited to 32,000 bytes of data, but this will be changed in a future version.

Use System-wide SMTP

This feature solves the issue of a SYSPRO administrator having to capture the same SMTP email options for each company in the system.

Digital Technologies

SYSPRO Rules Engine

The **SYSPRO Rules Engine** helps you streamline your business processes by acting as a sophisticated *if/then* statement interpreter (i.e. rule translator).

A set of services monitor your SYSPRO transactions in real time and (once a specific set of rules is defined) they analyze and determine when something you're interested in happens. Your configured actions required by each rule are then processed accordingly.

Rules are applicable to all SYSPRO transactions, regardless of where they originate (e.g. SYSPRO core product, **SYSPRO Avanti**, **SYSPRO Espresso**, etc.).

Benefits:

Incorporating rules that monitor your SYSPRO database log enable the following capabilities:

- **Stay informed**

  Always be aware of what's happening in your business by configuring rules that inform you when specific transactions take place.

  > **FOR EXAMPLE:**
  >
  > When a customer reaches their credit limit, SYSPRO can push a notification to **SYSPRO Avanti**, begin a conversation using the **SYSPRO Bot** and surface a **SYSPRO Harmony** beat.

- **Automate processes**

  Automate actions that are required when particular events occur.

  > **FOR EXAMPLE:**
  >
  > Track the history of a specific database column.

- **Predict outcomes**

  Use predictions supplied by the **SYSPRO 8 Machine Learning** service within any part of a rule.

  The **SYSPRO Rules Engine** automatically picks up any active AI Models focused on the same table as your target table, making these outputs available within your list of variables.

  This lets you add conditions to a rule, as well as use prediction outcomes in your actions.

  > **FOR EXAMPLE:**
  >
  > If the probability of a purchase order being late is higher than 80%, then push a **SYSPRO Harmony** beat that states 'There is an 87% change that order 000164 will be late'.

Rules Administrator

The **Rules Administrator** lets you create and maintain rules within **SYSPRO Avanti**.

You can define the following parts for rules:

Part	Description
Target	This indicates the table (and operation on the table) that should initiate a rule.
Variables	These are used to define or manipulate any values required in the **Conditions** or **Actions**. They include fixed values (e.g. strings, integers, dates) C# snippets and SQL retrieval.
Conditions	This is a set of conditional expressions that must be met before any actions are performed. To execute a specific action, conditions act as triggers that are initiated according to how the condition was configured.
Actions	Actions are executed when the rule conditions are met.

AI Integration

You can now use predictions supplied by the **SYSPRO 8 Machine Learning** service within any part of a rule.

> **FOR EXAMPLE:**

The **SYSPRO 8 Rules Engine Service** automatically picks up any active machine learning models focused on the same table as your target table, making these outputs available within your list of variables.

This lets you add conditions to a rule (e.g. if the probability of a purchase order being late is higher than 80%, then continue to the actions) as well as use conditions in your actions (e.g. a Harmony message could state: 'There is an 87% chance that order 000164 will be late').

Notifications and Actions

A number of new actions can now be executed by the **SYSPRO 8 Rules Engine Service**:

Action	Description
Avanti Notifications	These are messages sent to an operator in *SYSPRO Avanti*.
Espresso Notifications	These are messages sent to an operator in *SYSPRO Espresso*.
SYSPRO Bot Messages	These are messages sent to an operator on the **SYSPRO Bot** (using the proactive messaging feature).
Delete Rule	This deletes a rule after all its actions have executed (useful for once-off rules).
Disable Rule	This disables a rule after all its actions have executed.

Sample Rules

A number of sample rules have been added to the **Rules Administrator**:

LCT shipment might arrive late

Description	Notifies an operator that a shipment might arrive more than 10 days late.
Actions	▪ Sends an Avanti notification ▪ Posts a Harmony beat
Uses	Sample Machine Learning model `LctDaysLate`.

Job status rule

Description	Notifies an operator if a new job will be Late or On time.
Actions	▪ Sends an Avanti Notification.
Uses	Sample Machine Learning model `JobStatus`.

New stock code added

Description	Notifies an operator when a new stock code is added to the inventory list.
Actions	- Posts a Harmony beat - Sends the SYSPRO Bot a proactive message - Sends an Avanti notification

WIP Material Cost

Description	Notifies an operator when the actual material cost exceeds the expected material cost.
Actions	- Posts a Harmony beat - Sends the SYSPRO Bot a proactive message - Sends an Espresso notification - Sends an Avanti notification

AR Invoice Late Payment Predicted

Description	Notifies an operator when a late invoice payment is predicted for a customer.
Actions	- Posts a Harmony beat - Sends an Avanti notification
Uses	Sample Machine Learning model `CustomerInvoicePayDays`

Sales order return reason

Description	Notifies an operator why sales orders over a certain value might be returned.
Actions	Sends an Avanti notification.
Uses	Sample Machine Learning model `LostSaleReason`

Predict supplier payment

Description	Predict supplier payments.
Actions	Sends an Avanti notification
Uses	Sample Machine Learning model `ApInvoicePayment`.

Artificial Intelligence and Machine Learning

Versioning and Status Support

The **Administration UI** program within *SYSPRO Avanti* has been enhanced to allow you to :

- Activate a selected project that you require to be used for all predictions.
- De-activate active projects when they are not required.
- Delete a de-activated project that is no longer required.

Download and Import projects

The **Administration UI** program within *SYSPRO Avanti* has been enhanced to allow you to download and import projects (i.e. you can now download a selected project in the project tree list using the browser and import it at another site).

This is particularly helpful when a SYSPRO partner builds a project off-site as they can now easily import it to the customer's machine.

Gauges Infrastructure (KPI Integration)

For regression models, AI tiles can now use gauges to display a predicted value, indicating whether it is positive or negative (tile type: **MLGauge**).

You can use the **Insight Tile KPI Definition** program (core SYSPRO) to define a KPI for your tile. *SYSPRO Avanti* will use this KPI to render the AI tiles.

Anomaly Detection

The following anomaly project samples have been added to the **Administration UI** program in *SYSPRO Avanti*:

- Purchase Order Line Anomaly
- Sales Order Line Anomaly

Business Scenario Expansion

Additional sample business scenarios are now available using predictive and exception machine learning and artificial intelligence:

- PO receipting process and scrap
- Predicted supplier performance
- LCT expected delivery
- Chance of a machine producing a fault
- Sales of stock codes by location
- Payment of invoices by customer
- Lost sales reason predicted

SYSPRO Bot

Bot Skill Development Platform

You now have access to a development platform that enables the development, testing and deployment of Bot skills, customized to situational requirements.

Proactive Messaging

You can now create rules via the Bot or within the Rules Administrator that activates any of the trained skills and which can trigger the Bot to initiate a conversation.

> **FOR EXAMPLE:**
>
> If you set a price alert on a stock code via the Bot, this creates a rule in the Rules Engine, which in turn initiates a Bot conversation when the alert is triggered.

Skills Expansion

The following new skills are now available with the SYSPRO BOT:

- Delete Alert Rule
- Disable Alert Rule
- Enable Alert Rule
- Statement Print
- Print Purchase Order
- Print Quote
- Reprint Quote
- Reprint Purchase Order
- Pricing
- Standard Price Query
- Set Price Alert
- Query Purchase Order
- Purchase Order Menu
- Quotes
- Add Non-stocked Code
- Add Non-Stocked Quote Line
- Add Quote Line
- Cancel Quote
- Confirm Quote
- Create Non-Stocked Quote
- Requisitions

- My Alerts
- Bank Query
- Create purchase order
- Customer Quotes
- Inventory Query
- Add Purchase Order Line
- Predictions
- Create RMA
- Create Requisition
- Add Requisition line
- Requisition Query
- Requisition routing
- RMA Query
- Update Purchase Order Header
- Supplier Invoices
- Supplier Query
- Supplier receipts
- Requisition Approval

Mobility

SYSPRO Espresso

The following new capabilities have been added to SYSPRO's mobile platform:

Espresso Xpress Cart

You can add columns to customize the grid view of the **Espresso Xpress Cart** (e.g. to display the information you deem important). You can use the **Espresso Application Builder** program in the core SYSPRO product and the **Espresso Xpress Cart** in *SYSPRO Espresso* to customize the search to display these columns.

AI Integration

SYSPRO Espresso supports client certificates installed on devices to assist with validation at the time of logging in.

This adds additional security and prevents unauthorized devices from accessing *SYSPRO Espresso*.

Forgot Password

The **Forgot Password** functionality (that lets operators reset their SYSPRO passwords without administrator assistance) is now available in *SYSPRO Espresso*.

Manufacturing

Recall Management

Archive Maintenance

The **Include** function has a new **Product recall** selection option that lets you include product recalls when archiving files.

Purge and Archive

A **Product Recall Archive Details** section has been added that lets you specify criteria according to which you want to archive product recall details. Options include:

Field	Description
Product recall archive	Select this to include product recall data when archiving.
Product recall archive number	This indicates the archive file name that is generated.
Product recall completed	This indicates the cut-off date according to which you want completed product recall records to be archived.
Product recall comment	This lets you add a comment for archived product recalls.

Lot Product Recall Detail Report

This is a new program that lets you print a detailed report of product recall information.

Lot Product Recall Summary Report

This is a new program that lets you print a summary report of the most essential product recall data.

Recorded Dates

The **Recorded Dates** feature lets you better manage the life-cycle of your products by enabling you to record several industry-specific dates against items.

The dates are captured and saved against specific lots, allowing you to manage the shelf life and expiration dates of your products. Dates include: use by date, sell by date, internal expiry date, manufacturing date, dispatch date and best before date.

Distribution

Dispatch Note business objects
SO Change Dispatch Status

The new SO CHANGE DISPATCH STATUS[1] business object lets you change the status of dispatch notes.

Current status	Can be changed to:
Entered	- Suspense - Hold
Dispatch note printed	- Released to invoice - Suspense - Hold
Released to invoice	- Suspense - Hold
Suspense	The last status of the dispatch note before it was put in suspense.
Hold	The last status of the dispatch note before it was put on hold.

[1]Business object: SORTDS

SO Consolidate Dispatch Invoice Calculation

The new SO CONSOLIDATE DISPATCH INVOICE CALCULATION[1] business object lets you post invoices against consolidated dispatch notes.

The **Dispatch Note Consolidation** program creates the consolidation records against the invoice. When the invoice is posted, all required transactions and calculations are processed and saved to the SYSPRO database.

A copy of the invoice information is stored and can be printed/reprinted using the SO CONSOLIDATED DISPATCH INV DOC QUERY[2] business object or the **Document Print** program.

SO Dispatch Note Maintenance

The new SO DISPATCH NOTE MAINTENANCE[3] business object lets you reduce the dispatch quantity for a stocked or non-stocked sales order line.

When the dispatch quantity is reduced, the back order quantity against the sales order line is automatically increased.

Allocations for traceable or serialized stock items must be de-allocated in the stocking unit of measure. Stock allocations against the dispatch line can be reduced or deleted, but can't be changed to a different lot, bin or serial.

Request for Quote System

The **Request for Quote System** feature forms part of the procurement process and extends collaboration to your suppliers by automating the quote process and servicing of the RFQ by the supplier.

Suppliers are invited to bid or quote for stocked and non-stocked products. Once the potential supplier's quotation is received, it is either accepted (a purchase order can be created and submitted to the supplier) or rejected.

This feature is designed to be used with the **SYSPRO Supply Chain Portal**, which allows suppliers to submit their quotations online.

Return to Supplier

The **Return to Supplier** feature facilitates the return of goods or services to suppliers as a result of defects or other reasons for dissatisfaction.

It simplifies the process of returns and provides an efficient method of controlling items leaving site for returns or repairs. This ensures visibility and tracking of the item until the process is concluded.

Benefits:

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[1]Business object: SORTCC
[2]Business object: SORQCD
[3]Business object: SORTDM

- Enables Quality Management

  Enables quality management of raw materials or finished goods by facilitating seamless returns to suppliers when defects are identified.

- Streamlines Workflows and Business Processes

  Provides complete visibility of returned inventory throughout the returns process and improves the associated record keeping or document management. It provides the ability to return defective goods immediately - isolating and removing them from any process.

- Helps Manage Inventory

  Ensures that items to be returned to the supplier are removed from the available stock and held in a review area while the terms for return are negotiated. Non-stocked items can be added on-the-fly during the review process.

- Facilitates Financial Control

  Tracks variances between cost of item and credit received. Allows for the creation of a GRN which can be matched against a supplier's credit note, and a purchase order for expected replacement items.

SYSPRO Supply Chain Portal

The **SYSPRO Supply Chain Portal** allows users beyond a SYSPRO site to connect, interact and transact using the *SYSPRO Avanti* HTML5 user interface.

Adding Portal users to your SYSPRO configuration provides external user access to specific functionality (using a dedicated user interface and menu system) based on the portal features available.

Features currently available from the **SYSPRO Supply Chain Portal**:

- Request for Quote System:

  This lets you collaborate with your suppliers by automating the quote process and enabling suppliers to action an RFQ.

Cycle Count

The **Cycle Count** feature lets you perform partial stock counts at specific intervals without disrupting daily operations.

This feature is designed to be used with the **SYSPRO Scheduler** to allow for the planning and scheduling of specific cycle-counts for particular areas in the warehouse.

The *Benefits:*

- Increased stock accuracy by continuously assessing your inventory.
- Limit the amount of disruption in your warehouse by shortening the time between your counting processes.

- Fewer stock write-offs by reducing inventory variances.
- Ongoing insight into inventory accuracy, resulting in better governance and timely adjustments.
- Convenient scheduling ahead of time.

Consolidated credit notes

You can now use the **RMA Issues and Receipts** program to consolidate credit notes when receiving returned stocked and non-stocked items.

Sales order lines from different invoices can be consolidated into a single credit note as long as the sales order headers have the same branch, area, salesperson and currency. Once created, the credit note can be allocated to a single invoice.

> 💡 If you want to link each credit note to the corresponding invoice, you should rather create one per invoice instead of consolidating them.

You can also create a single consolidated credit note for returned merchandise without specifying invoice numbers. If you choose to consolidate them, all RMA lines without invoice numbers are grouped together.

The **SO Consolidate RMA lines** eSignature has been added to control access to the credit note consolidation functionality.

SYSPRO Point of Sale

Conversion of POS to Avanti

The **SYSPRO Point of Sale** software suite is being converted to the **SYSPRO Avanti** platform.

Benefits:

- Cloud-related functionality (e.g. web interface).
- Screen customization and full use of SYSPRO custom form fields.
- The availability of Point of Sale on Cloud type devices (e.g. tablets).

Point of Sale Dashboard - Sales at Store Level

A new dashboard provides key information regarding the sales and performance of a Point of Sale branch.

Benefits:

- Key statistics regarding the intensity of a Point of Sale branch's performance are highlighted.
- Point of Sale branches can set their own targets (over-and-above corporate budgets) to monitor their performance.
- Trends are highlighted for sales values, footfall and average purchase values.

Kit Type K in Manage Orders

SYSPRO Point of Sale now caters for kit type K in the **Manage Orders** program, demonstrating the products' awareness of grouped components that are typically purchased together.

Generally used for special offers, you can now process kits where the kit grouping or parent part is notational only and the components of the kit are separately detailed (pricing is at parent level).

The ability to remove optional items from a kit is also provided.

Partial Credits of Kit Sales

SYSPRO Point of Sale now caters for the partial crediting of a kit and you can process a credit for an item that was sold as part of a special offer, via a kit.

Financial

Digital Tax Tool

The **Digital Tax System** feature lets you generate tax returns for electronic and/or manual submissions. This is in response to tax authorities around the world increasingly requiring businesses to submit VAT and GST returns in an electronic format.

The feature also assists with tax queries and reconciling VAT entries from the transactions in the company's general ledger.

Customer Complaint System

The **Customer Complaint System** feature forms part of the Quality Management System. It provides a platform for customers to raise complaints and for the organization to investigate and take the necessary action to address these complaints.

Once a complaint is received and categorized, possible corrective and/or preventative action can be developed and implemented to ensure customer satisfaction is maintained.

Detail Posting to Control Accounts

The **Detail Posting to Control Accounts** feature lets you configure control account integration to General Ledger in detail. Previously, transactions to control accounts were consolidated and written to the ledger in summary, regardless of your integration level. The detail lines are now printed on distribution reports and can be viewed using the **GL Query** program as well as from within the relevant ledger journal maintenance program.

The detail integration to control accounts facility has been added to the following modules:

- Inventory Control
- GRN
- Trade Promotions

- Work in Progress
  - Part Billings
  - Labor Posting

Tax on Settlement Discount

The **Tax on Settlement Discount** enhancement enables all programs in the **Accounts Receivable** and **Accounts Payable** modules to handle withholding tax and tax on settlement discount at the same time.

The user interfaces of the programs weren't changed, only the calculation for tax on settlement discounts was adjusted and is now calculated according to the selected tax codes. The same tax codes (and therefore percentages) that were applied to the invoice lines are applied to the settlement discount.

Setup Options

The following setup options must be enabled to apply this feature:

CALCULATION FOR TERMS DISCOUNT

(*Setup Options > Preferences > Financials > Accounts Receivable*)

- Determine tax based on invoice paid
- Include tax
- Credit and/or debit notes

Affected Programs

- AR Payments and Adjustments
- AR Period End
- Cash Posting Worksheet
- AR Post Permanent Entries
- AR Finance Charge Calculation
- AR Initial Invoice Capture
- AR Currency Conversion
- AR Customer Code Conversion
- AR Collector Run Maintenance
- AR Post Dated Check Status
- AR Payment Run
- AR Credit Checking
- Master Sub-accounts
- AR Initial Invoice Capture

- AR Master/Sub Account Maintenance
- AR Invoice Posting
- AR Payment Run
- AR Payments Import
- Customers
- Cash Posting Worksheet
- Tax Return
- Document Print
- SO Counter Sales
- Customer-Supplier Contra
- Interface Import
- AR Payments and Adjustments business object
- Post Accounts Receivable Setup Options
- Query Accounts Receivable Setup Options

> The AP payment cycle process is not affected by this change.

Highlights: SYSPRO 8 2019 R1

User Experience

Avanti Change Password

SYSPRO Avanti lets users change their own password when logging in, reducing workload on system administrators.

This facility is available from the login screen, similarly to conventional SYSPRO.

Simplified Administration

Security Settings Dashboard

Configuring security and ensuring consistency across various operators is a complex process that typically involves a number of programs.

SYSPRO's **Security Settings Dashboard** program lets SYSPRO administrators query operator security settings within a single program.

Benefits:

- Query and view security information.
- Verify which operators have access (and how the access is configured) to various securable entities.
- View possible program conflicts.
- Amend security configuration in related programs via smart links.

SQL Managed Instances

SYSPRO running on Azure provides you with a choice of running **SQL Managed Instance** or SQL Server running on a Virtual Machine (VM).

With **SQL Managed Instance** – a cloud-based managed database - you provision the SQL environment based on CPUs, Memory and Disk usage, and SQL Server is automatically configured and enabled for you. There is, therefore, no need for you to provision a separate Windows Server VM and then install and configure SQL Server.

Benefits:

- Simplified SQL environment setup.
- PaaS environment - Automated patching and version updates, automated backups and high availability.
- Reduced management overhead and TCO – Improved IT flexibility and responsiveness.
- Flexibility to scale-up (and down) as required.
- Ability to exchange existing SQL Server licenses for discounted rates on SQL Managed Instance.

Hotfix Notification Maintenance

The new **Hotfix Notification Maintenance** program gives you more control over your site deployments.

Benefits:

- View who has conducted deployments on your site.
- Maintain who receives hotfix notifications.

Roaming Users

Roaming Users is the technology that provides a consistent personalized experience to each SYSPRO user, regardless of the client PC they use.

In our aim to make SYSPRO simpler, a new system-wide personalization has been added making it easy to configure SYSPRO to support Roaming Users.

The concept of Roaming Users, configuring your server environment and the new system-wide personalization option has been explained in the new technical guide: **SYSPRO – Roaming Users**, available from the **Resources** section.

Load Balancer process recycling

The **SYSPRO 8 e.net Communications Load Balancer** efficiently distributes network traffic to servers.

The resource usage of this service can grow beyond reasonable limits, which affects performance. To combat this, it now supports several settings that control when worker processes are recycled.

Benefits:

- Periodic recycling of worker processes.
- Detection and termination of hanging processes.
- Improved performance.

Manufacturing

Recall Management

The **Recall Management** feature caters for a request from a manufacturer to return a product after the discovery of safety issues or product defects that might endanger the consumer or put the organization at risk of legal action.

A product recall can be applied at warehouse, bin, stock code, lot or serial level (effectively placing them on hold) and may affect sales orders, jobs, parent parts and kits.

The product recall process includes stock items that were manufactured, sold and delivered to the customer, as well as items that were receipted into stock and are still residing in the warehouse.

LCT Bill of Landed Costs - Copy function

The **Bill of Landed Costs** program lets you copy a bill of landed costs from a specific stock code to a single, a range or a defined selection of stock codes.

Quality Management System - Recorded Dates

Phase 1 of this feature has been released and is focused towards the Food and Beverage industry (as well as similar industries like pharmaceuticals) where expiry dates are regulatory.

In order to properly manage the life-cycle of a product, there is often the requirement for a unique range of recorded dates that need to be attached to any product.

New functionality in the **Lot Number Maintenance** program enables industries to record a further range of dates, where previously **Expiry Date** was the critical date recorded.

Distribution

Order Picking

The **Order Picking** feature provides picking routines to improve order book fulfillment and the management of the pick processes.

It is an extension of the multi-bin functionality that is currently available in SYSPRO.

Benefits:

- Better stock visibility by tracking items and locations.
- Improved fulfillment times for sales functions.
- Picking tailored to suit your business based on your requirements for batch, wave, or order picks.
- Standardized receiving, put-away, and picking processes.
- Batch transactions based on locality for improved efficiency of location visits.
- Reduced cycle times for larger orders using coordinated team picking.
- Work-to-lists provide clear visibility into resource demands by discipline, locality and date/time-based requirements.

Purchase Order Bulk Emailing

The new Purchase Order Bulk Email functionality lets you email multiple purchase orders to corresponding suppliers in a single process.

Benefits:

- Improved purchasing efficiencies
- Quicker processing time

Custom Forms for Warehouse Inventory Control

The **Warehouse Maintenance** program lets you add and save custom forms for a warehouse.

Point Of Sale

New capabilities

- **Sales Orders** now allow for tax codes to be applied by line item.
- The **Quotes** search now includes the originating operator.
- The **Customer Query** now displays Contacts as recorded in Contact Management.
- The **Take Payments** program now allows operators to review payments before finalizing a transaction.
- A security option has been added to request operator validation before taking payment.
- The **Inventory Query** program now displays defined custom form fields against stock items.

Numbering

Invoice numbers and Quotation numbers can now be recorded separately as Point of Sale transactions.

Benefits:

- Supports governance requirements for Sales Tax Reporting
- Ensures sequential POS invoice numbering

Financial

GL Balancing Tool

This program lets you balance SYSPRO sub modules to General Ledger, allowing you to detect discrepancies between them. These discrepancies can occur because of data corruption (e.g. power outage during posting) unposted journal entries or journals being edited before posting to General Ledger. It is important that you resolve discrepancies, as inaccurate financials will have a detrimental effect on your financial reporting and planning.

Multi-currency Payments

The **Multi-currency Payments** facility lets you make payments to a supplier and receive payments from a customer in a different currency. It lets you manage funds across various currencies and countries, reducing the risk of errors arising from manual calculations. It eliminates the need to process receipts and payments in alternate currencies and provides a complete audit trail of the transactions.

Detail Posting to Control Accounts

The **Detail Posting to Control Accounts** feature lets you configure control account integration to General Ledger in detail. Previously, transactions to control accounts were consolidated and written to the ledger in summary, regardless of your integration level. The detail lines are now printed on distribution reports and can be viewed using the **GL Query** program as well as from within the relevant ledger journal maintenance program.

The detail integration to control accounts facility has been added to the following modules:

- Accounts Receivable
- Accounts Payable
- Assets
- Cash Book

SYSPRO