

# The Supply Chain and Connected World

SYSPRO 8

Reference Guide

Published: November 2022



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# The Supply Chain and Connected World

The following provides a summary of the features and functionality available in **SYSPRO 8**.



## 2022

### Admin Management Capabilities within the Supply Chain Portal

The **SYSPRO Supply Chain Portal** has been enhanced to provide management capabilities to account managers enabling them to maintain which employees at their suppliers and customers have access to the portal. This includes the ability to define the dynamic landing page to determine the features and functionality available to each employee.

The ability to manage your own portal provides administrators and account managers (both Sales and Procurement alike) with an improved user experience, increased configuration flexibility, improved integration and effective portal access security. This leads to increased collaboration and visibility throughout the supply chain and portal users gain access only to those portions of the portal that they require.

In a multi-company environment, the supplier/customer no longer needs to have the same key in all companies from which they transact. SYSPRO Administrators can now link SYSPRO operators to a portal supplier or portal customer (per company) so that they can manage the specific customer and supplier accounts for access to the portal. In addition, account managers can now customize the individual applications availability within the dynamic landing page.

## Sales Orders Picking Allocation Override

This feature increases the flexibility of sales order picking by letting you override allocations when items can't be located and to use alternate stock in the warehouse if available. This helps to eliminate bottlenecks and simplifies the picking process.

This typically targets situations where the picker is unable to locate the allocated stock (or stock with earlier expiry dates is found). Instead of having to return to the office, cancel the pick and reallocate, stock can be reallocated on the pick using either the **SYSPRO Desktop** or **SYSPRO Espresso** versions.

### Program notes

You activate the feature by switching on the **PICK ALLOCATION OVERRIDE** option against the warehouse. Stock can be reallocated on the pick using either the **Pick Maintenance<sup>1</sup>** program (**SYSPRO Desktop**) or the **Order Picking** and **Missions & Tasks** applications (**SYSPRO Espresso**).

## Sales Pricing Engine

Building on the simplified pricing structures implemented in previous releases, SYSPRO's **Sales Pricing Engine** feature is bolstered by a flexible pricing hierarchy that now lets you define priorities and contracts against price rules. Price rules with the highest priority take precedence over other price rules and override the *best price*. When a contract is linked to a price group, it becomes a price rule that is included in the pricing hierarchy.

In addition, a status (e.g. active, in review, on hold) can now be defined against a price list and further control is provided over price selection when stock is sold in different units of measure.

To ensure a smooth transition to the revised **Sales Pricing Engine**, the **Price List Conversion<sup>2</sup>** program lets you convert existing price code configurations (e.g. existing stock code and price code combinations) into price lists.

<sup>1</sup>Program: SORPPM

<sup>2</sup>Program name: SORPLC

## 2021-R2

### Customer and Supplier Account Management

Online web portals have become the connection point for organizations, and self-service that maximizes the efficiency of interactions is key to empowering users, having connected interactions across channels, and enabling successful organizations.

In keeping with this self-service trend, the **SYSPRO Supply Chain Portal** has evolved to provide SYSPRO sites with enhanced account management capabilities for end-customers and suppliers.

The following functional roles are currently available when using the portal:

- Request for quote (RFQ)
- Supplier Account Management (SAM)
- Customer Account Management (CAM)



These functional roles will be extended as the capabilities of the feature grows.

A SYSPRO company can provide its customers and suppliers with access to information relevant to their relationship and the transactions between them. This forms the basis of self-service access and reduces the administrative burden of sending and requesting specific information through other communication channels.

#### Benefits

- End-customers and suppliers have direct access to information relating to their account, including transaction details.
- End-customers and suppliers can download invoices, statements (Customer Account Management) and remittance advices (Supplier Account Management) in PDF format, as required.
- Self-service access improves the administrative response time to communicate customer or supplier-specific information.
- The average accounts receivable turnaround time is reduced for the SYSPRO company because of the immediate availability of information to the end-customer.
- The immediate availability of information to the supplier can reduce supplier lead times and increase opportunities to take advantage of any early settlement discounts offered by the supplier.

#### Security

The portal's security ensures that the correct access is given to each portal user and that your end-supplier or customer can't access any unauthorized information.

This is achieved by each portal user being linked to a specific supplier or customer account from the SYSPRO company and then linked to a functional portal role. When logging in, portal users are presented with a landing page determined by their functional role(s) and includes insights into the relevant information.

**FOR EXAMPLE:**

**Customer Account Management** functional roles includes insights such as credit standing, average days to pay, receivable days outstanding, outstanding balances, etc.

**Supplier Account Management** functional roles includes insights such as agreed invoice terms, value of goods ordered but not yet received, value of goods received but not yet invoiced, outstanding balances, etc.

Administrators can easily configure security access for each portal user by defining an operator as a portal user; configuring each portal role with the appropriate access; and assigning the correct functional roles to the portal operators.

# 2021-R1

## SMTP email using Office 365

In a server-side reporting environment, the SYSPRO Reporting Services infrastructure caters for using the operator's Office 365 account when sending emails. This provides visibility to the recipients of distributed reports by displaying the address of the operator who emailed the report.

This only applies if a valid Office 365 account is configured and enabled within the **Personal Settings** program (*SYSPRO Ribbon bar > Home > Personal Settings*) and the appropriate Email/SMTP settings for emailing via Office 365 are configured at company or system-wide level (depending on your setup options).



If the **USE SYSTEM-WIDE SMTP DETAILS** company setup option is enabled (*Setup Options > Company > General*) then ensure that the correct Email/SMTP settings are configured against the system setup options (*Setup Options > System Setup > Connectivity*).

## 2020-R2

### **SYSPRO Bot**

#### Skills Expansion

The **SYSPRO Bot** set of skills now lets you query purchase order balances, GRN details and ledger balances.

These new skills include:

- PO Balance Query  
This skill lets you view purchase order balance details.
- PO GRN Query  
This skill lets you view *summary* purchase order details and GRN information.
- PO GRN Detail Query  
This skill lets you view *detailed* purchase order details and GRN information.
- GRN Query  
This skill lets you view GRN details.
- General Ledger  
This skill provides the new General Ledger menu within the **SYSPRO Bot**.
- GL Query  
This skill lets you view ledger details.
- GL Balance Summary Query  
This skill lets you view the module, ledger control and recalculated difference information.

#### Custom Search Expansion

New custom searches are available to the `Skill.GLBalanceSummaryQuery` skill that lets you query the ledger for a specific module and period without having to enter this information manually.

- GLModule
- GLModulePeriod



# 2020-R1

## SYSPRO Supply Chain Portal improvements

SYSPRO's portal architecture now caters for dedicated **PORTAL SUPPLIER** and **PORTAL CUSTOMER** fields against each operator.

Previously, when a portal user logged into the **SYSPRO Supply Chain Portal**, the system used the **DEFAULT SUPPLIER** code entered in the **E.net** pane of the **Operator Maintenance** program as the supplier code.

The new **PORTAL USER** fields are maintainable within the **Options** pane of the **Operator Maintenance** program.



The **PORTAL CUSTOMER** field is currently not in use and will only become relevant with a later release of SYSPRO.



If you configured RFQ portal users prior to this change, the supplier codes are seamlessly migrated as part of the upgrade to the **SYSPRO 8 2020 R1** release. No additional configuration is required.

## SYSPRO Bot

### SYSPRO Bot Customization

The new **SYSPRO Bot Customization** program in **SYSPRO Web UI (Avanti)** lets you modify various permission aspects of the **SYSPRO Bot**.

Things you can do in this program include:

- Configure the SYSPRO Bot skills available at role or operator level
- Customize the action buttons associated with each SYSPRO Bot skill
- Customize the skills available on the SYSPRO Bot main menu for specific roles or operators

### Document Format Customization

The following **SYSPRO Bot** format settings can be defined system-wide, by company, by role or by operator (in the **Custom Configuration** program against the

`SYSPROBotDocumentFormatOptionsParameter` entry located under the **XML Parameters** folder):

- Order Acknowledgments
- Delivery notes
- Invoices
- Quotes
- Purchase Orders

## Skills Expansion

The following new skills are available with the **SYSPRO Bot** to let you create quotes that are not customer-specific:

- Add Quote Line Menu
- Add Quote Comment Line
- Change Quote Line
- Confirm Quote
- Delete Quote Line

## Custom Search Expansion

The following new custom search is available with the **SYSPRO Bot**:

- QuoteChangeLineItem

## SYSPRO Bot Software Development Kit

This feature extends the **SYSPRO Bot** functionality beyond the standard skills provided by SYSPRO. You can now easily create the functions (i.e. skills) that your organization requires without having to host a completely new bot.

These skills can then connect to SYSPRO business objects, external data sources and external applications.

### FOR EXAMPLE:

You can create a custom skill for employees to process their leave applications, which connects to your internal leave application system.



Resources will be made available on the **SYSPRO Learning Channel**.

## 2019-R2

### **SYSPRO Supply Chain Portal**

The **SYSPRO Supply Chain Portal** allows users beyond a SYSPRO site to connect, interact and transact using the **SYSPRO Web UI (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.

### **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

# 2019-R1

## **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

## 2018-R2

### **SYSPRO Bot**

Artificial Intelligence means customers deal with an intelligent and human-like chatbot that answers queries quickly.

Chatbots which answer and even predict customer queries automate customer service to free up resources in the business.

The (AI) web robot resides within the SYPRO ERP ecosystem and streamlines business functions through natural conversations with the BOT.

# 2018-R1

## **SYSPRO Harmony (Social ERP)**

**SYSPRO Harmony** is a collaborative, user-friendly social platform at the core of ERP that gives users a familiar interface through which to interact with the SYSPRO ecosystem and conduct their daily business.

The platform is embedded in the SYSPRO product and combines a number of technologies (e.g. Social Media, Collaboration, Machine Learning, Cognitive Services and Data Analytics) into one application:

### *Benefits:*

- View your company's operating status 24/7
- Drive user collaboration with social ERP conversations
- Harness the power of machine learning on your data to achieve sentiment analysis on your transactions
- Simplify complex technologies and business processes
- Enable faster decision making
- Follow relevant information and have this surface automatically
- Enable integration of SYSPRO data onto a messaging platform
- Enable trend analysis in conversations
- Improve user experience with a familiar, easy-to-use social media-type user interface
- Encourage system usage across the entire organization

## **Follow information**

As with social media, Harmony users can follow, post and collaborate within the organization network using real-time information from the SYSPRO database. Using the data generated from these interactions, the system intelligently pushes pertinent information to the user using familiar interfaces.

This provides a more personalized working platform for users, allowing them to create their own profile, follow and track key data, take action and provide and share insights relevant to both internal and external stakeholders, all from a single view.





## **Social ERP conversations**

Harmony is a collaborative, user-friendly social platform at the core of ERP that gives users a familiar interface through which to interact with the SYSPRO ecosystem and conduct their daily business.

## Sentiment integration

Data Sentiment enables a complete spectrum picture of customer opinion about your services or products for informed and strategic decision making. Visual cues (the equivalent of emoticons) help alert users by attaching sentiment to specific items.

Key notes attached to these items are detected to reveal the tone in terms of the state of an event, customer or component which tracks potential future issues regarding customer service and happiness before they arise.

Emoji	Sentiment
	Very happy
	Happy
	Neutral
	Unhappy
	Very unhappy

## Trend Surfacing (Auto-Aggregation)

Most social media applications (like [Twitter](#) or [LinkedIn](#)) use intelligent machine learning algorithms to detect trends from the messages posted and then surfaces that information to the user according to relevance.

Similarly, Harmony uses predictive analytics to reveal trends that provide actionable insight. The difference is that not only does Harmony process machine learning and trend detection on conversations, it also processes these on the core SYSPRO database.

Harmony identifies transactions on the SYSPRO database, the key fields against which these transactions are being processed and then performs trend detection and aggregation on the data. It presents this information in chart form to reflect what is currently trending in the SYSPRO database.

### FOR EXAMPLE:

A stock code could be used in a large number of sales orders, as well as some purchase orders and RMAs. In this case, that stock code would be trending.

This highlights critical information without you having to request it or consolidate reports across the different modules.





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