Improved Control of Internal Operations

SYSPRO 8

Reference Guide

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SYSPRO™

CONTENTS

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

2022

Inventory Transactional Custom Form Fields

This feature increases the flexibility of the **Inventory Control** module by catering for transactional custom form fields. This lets you store additional details against transactions such as movements and receipts and is useful when recording additional information like visible condition, quality and auditing information.

Warehouse Order Policies

This feature extends the **O - COVER SHORTAGES LESS THAN MIN OVERAGES UP TO MAX** order policy to cater for *concurrent* co-products manufactured from a notional part. The policy must be applied to the notional part (i.e. not the co-product) which effectively means that the minimum and maximum levels of the co-product are ignored and replaced by the minimum and maximum levels of the notional part.

The (**O - COVER SHORTAGES LESS THAN MIN OVERAGES UP TO MAX**) order policy was introduced in **SYSPRO 8 2021 R2** to allow processing of supplies up to the warehouse maximum level, even though the quantity on hand was above the minimum level. This ensured that stock levels could be increased prior to promotions or anticipated demand.

SRS API - Dispatch Invoices

The SRS API has been updated to cater for automating the invoicing process when using dispatch notes by letting you generate dispatch note invoices.

Program notes:

- The **Sales Order Document Printing** Espresso application lets you generate dispatch notes and dispatch note invoices using the SRS API.
- The SO DOCUMENT DETAILS QUERY[1] and SO DOCUMENT PRINT QUERY[2] business objects have been updated to cater for this.

Web Based UI: Product Configurator

The *Product Configurator* module is available in *SYSPRO Web UI (Avanti)*.

The **Configuration Maintenance**[3] program lets you build different configurations for a product, where each variation comprises a set of selection criteria, options, components and operations. The configuration can be saved in the library for subsequent re-use.

Program notes

Once the configuration is built and deployed, the *SYSPRO Web UI (Avanti)* **Product Configurator Wizard**[4] application can be accessed from the **Configurator** field or button from within the following programs:

- Sales Order Entry
- Quotations
- Job Entry
- Estimates
- Structures and Routings

Kanban Replenishment

Kanban refers to an inventory control system used in just-in-time manufacturing to track production and ensure timely replenishment of stocked parts and materials.

In SYSPRO, the **Kanban Replenishment** feature extends the Warehouse Management System, providing a stock replenishment solution for sales order picking and manufacturing production lines. When the minimum bin level is reached, stock replenishment movements are created automatically, replacing the stock that has been picked, consumed, counted or moved.

This is achieved by creating bin-stock relationships and associating bins with specific warehouse areas. When the stock level within a bin is below minimum, the system looks for available stock across configured warehouses, and determines which stock is most suitable using first in first out

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[1]Business object: SORQD2
[2]Business object: SORQDP
[3]Program: CFGPDZ
[4]Program: CFGPC1

(FIFO) and first expired first out (FEFO) principles. Stock movements are then generated using the **Missions and Tasks** feature. You can configure dispatch and receiving bins to allow for staged movements between the warehouses.

Factory Documentation Printing via SQL driver

SYSPRO's document printing architecture has been enhanced to enable the printing of Factory documentation using the SQL driver. Previously, this was only available using the XML driver, regardless of the configuration defined against the document template.

Once you have configured your system to use the SQL driver, you then assign a SQL template to the document format.

SYSPRO Point of Sale

SYSPRO Point of Sale has been enhanced in various ways to improve the following aspects:

Changeable Quantities for Service Charges

The *SYSPRO Point of Sale* capabilities have been enhanced to allow operators to specify a quantity when adding service charge lines. When capturing a transaction, you can now define the quantity required for a *Miscellaneous charge type* service charge with a calculation type of *User defined*.

This not only provides store clerks with the ability to capture a *User defined* service charge with a quantity of more than 1 in a single step, but it also saves them time when adding multiple service charges.

Improved Synchronization Performance

The performance of the **SYSPRO 8 Point of Sale Synchronize Service** has been improved by eliminating unnecessary data synchronization between the main server and offline branches.

Updated Offline Database Scripts

SYSPRO Point of Sale now manages the creation and update of databases required for offline usage, without reliance on **Silverlight**.

SYSPRO Point of Sale API

The **SYSPRO Point of Sale API** service (i.e. **SysproPosApiService** - previously named **POS Engine**) has been updated to support HTTPS communication and to align with industry naming standards.

Multiple UoM Calculations

SYSPRO Point of Sale now includes functionality to manage unit of measure conversions using the QUANTITY CONVERSION FOR MULTIPLE UOM[1] business object.

This ensures consistent available quantity calculations for lots, bins and serials when selling stock items with multiple unit of measures and that the subsequent sales order allocation and inventory depletion in SYSPRO is handled correctly when posting the sales order to SYSPRO.

This capability allows *SYSPRO Point of Sale* to easily manage the conversion across different unit of measures, eliminating errors typically introduced by manual calculations when working with multiple unit of measures.

Third Party Biometric Scanning

The *SYSPRO Point of Sale* architecture has been enhanced to enable supervisor authorization using biometric scanning.

From the **Branch Settings** program, administrators can select to apply a third party provider's biometric solution for a specific *SYSPRO Point of Sale* branch. Then, during the **Supervisor Authorization** process, the entering of a password is replaced by the request to perform a biometric scan

This capability provides better security and lets you develop your own biometric validation. It also lets third party developers easily integrate with *SYSPRO Point of Sale* at different supervisor authorization points.

Standardized Naming Convention - Contact Numbers

The naming convention within *SYSPRO Point of Sale* has been standardized to eliminate possible confusion relating to the search fields previously referred to as **Contact Number**, **Cell number**, **Telephone** and **Additional Telephone**.

Within all searches in *SYSPRO Point of Sale*, the **Telephone** search field has been standardized as **Contact number**, and the **Add Telephone** search field has been standardized as **Cell number**.

Invoice Terms Available on Stationary Format Designs

The **Printing Designer** within *SYSPRO Point of Sale* lets you add customer **Invoice Terms** to all customer-related stationery format designs This aligns with standard business practice to indicate payment terms on your commercial documents (i.e. Invoices, Sales Orders, Credit Notes and Quotes).

The **TermsCode** and **TermsDescription** fields are now available for selection from the **Printing Designer** dictionary under the **Headers** section.

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[1]Business object: SORQUM

Flexibility for placing items in back order

The **Manage Orders** program in *SYSPRO Point of Sale* now lets you configure your branch or user to automatically place the full quantity of a sales order into back order (matching the *SYSPRO Desktop* version).

Previously, when changing the order quantity for a sales order within the **Manage Orders** program, *SYSPRO Point of Sale* would automatically calculate the ship and back order quantities accordingly. However, now you can use the **Automatically put order qty in b/order** option to automatically put the whole order quantity into back order (or the available quantity into ship and the remainder into back order).

This capability aligns *SYSPRO Point of Sale* with the user preference currently available in the **Sales Order Entry** program, allowing you to manage the back order preference at a line level.

Improved Lead time Calculations

The custom lead time calculation logic within *SYSPRO Point of Sale* now lets you also take into consideration the lead-time days (i.e. `LMWDaysLeadtime`) from the `RegionsWarehouse` table and to cater for Kit-type items.

This offers improved lead time calculations considering the data provided within your custom form fields and ensures that lead-time calculations on kit-type items are performed at component level, with the longest lead-time then applied to the parent item.

2021-R2

SQL Health Dashboard improvements

The **SQL Health Dashboard** program was improved to provide quicker performance when analyzing the health of tables, columns and foreign keys on a company database.

The dashboard now also includes the following information:

Instance Information

- Connection driver

  This indicates the ODBC driver used when connecting to **Microsoft SQL Server**.

- Connection encryption

  This indicates whether the connection to **Microsoft SQL Server** is encrypted.

- Connection protocol

  This indicates the protocol used when connecting to **Microsoft SQL Server** (i.e. TCP, Named pipes or Shared memory).

Database Information:

- TDE encryption status

  This indicates if **Transparent Data Encryption** (TDE) is in use and the current status of the encryption.

Recall Management

The parent item of contaminated or defective products can optionally be included in the **Product Recall Selections Review** to ensure that all potentially spoiled items are identified.

Although this initially increases the list of items included, filtering options are available to refine the results (typically useful for companies that retain traceability data and don't archive lots). This list can then be used by companies to identify the affected products.

Warehouse Order Policies

A new batching rule (**O - COVER SHORTAGES LESS THAN MIN OVERAGES UP TO MAX**) allows processing of supplies up to the warehouse maximum level, even though the quantity on hand is above the minimum level. This ensures that stock levels can be increased prior to promotions or anticipated demand.

This caters for raising a suggestion when the minimum stock level in the warehouse is greater than the demand. Further supplies can be raised outside of MRP until the maximum is reached, at which time a *cancel* action is raised (i.e. when the supply quantity exceeds the warehouse maximum for that stock code).

This feature is relevant to sites that are not licensed for the ***Inventory Optimization*** modules, but which are using warehouse order policies in MRP.

> 📝 This rule can only be used if the SCHEDULE JOBS AND PURCHASE ORDERS setup option is enabled (*Setup Options > Configuration > Manufacturing > Requirements Planning*) and when running the **Requirements Calculation** in legacy mode.

SYSPRO Point of Sale

Administration: Managing inactive users

The management of users in ***SYSPRO Point of Sale*** has been enhanced so that administrators can disable operators no longer in use and exclude them from the **Manage Users** program.

Previously, the **Manage Users** program was unable to distinguish between these users, which compromised system speed when dealing with a large number of operators. Being able to remove inactive users from the **Manage Users** program improves the efficiency when configuring and maintaining operators in ***SYSPRO Point of Sale***.

Administrators can define a user as **Active** within the **Add/Edit User** screen of the **Manage Users** program. A new **Show all users** option (disabled by default) enables administrators to either include or exclude the inactive operators from the list view.

The **Active** option is enabled by default for all existing users. If you then disable this option against a user, the operator won't be able to log into ***SYSPRO Point of Sale***.

> 📝 This only applies to ***SYSPRO Point of Sale*** when running in ***SYSPRO Web UI (Avanti)*** and doesn't apply when running in **Silverlight**.

Quoting: Generating quotes for customers on hold

The existing access control in ***SYSPRO Point of Sale*** has been extended within the **Store > Manage Quotes** and **Store Management > Order Maintenance** programs so that you can control operator access to creating and maintaining quotes for customers on hold.

The new **Allow Quotes against Customers that has been placed 'On Hold'** access control setting has been added to the **Functionality** column of the **Access Control Setup** program and is set as `Deny` by default. This enables administrators to define one of the following options:

- **Deny** - Prevents quote generation for customers on hold.
- **Allow** - Allows a customer to be selected for quote creation, regardless of their hold status and without user intervention.
- **Allow (auth req)** - Quotations for customers on hold only allowed when supervisor

- authorization is provided.
- **Inherit all** - The system checks higher up in the access control hierarchy to determine the function's access.

Once you've configured access control, the system allows quote generation, but blocks the quote from being converted to a sales order until the hold against the customer is released.

> This only applies to *SYSPRO Point of Sale* when running in *SYSPRO Web UI (Avanti)* and doesn't apply when running in **Silverlight**.

Security and compliance enhancements

HTTPS and HSTS security

SYSPRO Point of Sale compliance and security features when running in *SYSPRO Web UI (Avanti)* has been strengthened by being able to run the application using HTTPS, a more secure form of communication.

During the installation, maintenance or upgrading of *SYSPRO Point of Sale* via the **SYSPRO Installer Application**, you can now specify the communication method you want to use.

Owing to its inherent security benefits, HTTPS has become the default and preferred method for running *SYSPRO Point of Sale*.

Single Sign-on

SYSPRO Point of Sale now supports **Single Sign-on** capabilities when running in *SYSPRO Web UI (Avanti)*.

Single Sign-on provides a simple to setup and robust method of using **Microsoft Active Directory (AD)** to control your users. Once configured, it enables a complete single sign-on experience as users are authenticated by **Microsoft Windows** and then simply use their email address to log into *SYSPRO Web UI (Avanti)*.

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

Benefits

- Increased login security.
- Simplified login process for *SYSPRO Point of Sale* users.
- Convenient administration of users managed by **Microsoft Active Directory (AD)**.

Requirements

- A registered certificate for the *SYSPRO Point of Sale* server is required to run **Single Sign-on**.
- A customer account must be registered with **Azure B2C** and configured with the correct redirect URL back to the specific *SYSPRO Point of Sale* instance.
- *SYSPRO Point of Sale* users must be configured with an email address for the system to identify the correct operator.

Setup

To enable **Single Sign-on** functionality in *SYSPRO Point of Sale* (when running in *SYSPRO Web UI (Avanti)*) add the following tags within the `Web.config` file located in the `\inetpub\wwwroot\SYSPRO8POS_xxxx\SYSPROPOSAVANTI` folder (where `xxxx` is your company code):

```
<add key="ida:IsB2Cauth" value="true" /><add key="ida:Tenant" value="yourcloud.onmicrosoft.com" />
<add key="ida:TenantId" value="yourUniqueTenantId" />
<add key="ida:ClientId" value=" yourUniqueClientId " />
<add key="ida:ClientSecret" value="YourClientSecret" />
<add key="ida:AadInstance" value="https://yourcloud.b2clogin.com/tfp/{0}/{1}" />
<add key="ida:RedirectUri" value="https://yourCompany.com/SYSPRO8POSAVANTI_EDU1/" />
<add key="ida:SignUpSignInPolicyId" value="b2c_1_susi" />
<add key="ida:EditProfilePolicyId" value="b2c_1_edit_profile" />
<add key="ida:ResetPasswordPolicyId" value="b2c_1_reset" />
```

This functionality doesn't apply when running **SYSPRO Point of Sale** in **Silverlight**.

User experience: Performance improvements

The performance and responsiveness of **SYSPRO Point of Sale** when running in **SYSPRO Web UI (Avanti)** has been improved by speeding up the data binding process and subsequent display of modals and screens.

The **SYSPRO Web UI (Avanti)** framework has been enhanced to allow the file contents to be passed directly to **SYSPRO Web UI (Avanti)**. Previously, when displaying data in a grid, screen or modal in **SYSPRO Web UI (Avanti)**, the system speed was compromised by unnecessary disk usage.

WMS: Missions and Tasks

The **Missions and Tasks** feature lets you create a work-to-list for queuing and moving inventory within a warehouse. This gives warehouse managers greater work allocation control and visibility.

A mission can be created for inventory putaway, sales order pick or cycle count transactions. Once missions and tasks are assigned to the employee or team they can be serviced using the **Missions & Tasks** application in **SYSPRO Espresso** (where operators can then view their tasks from a mobile device) or the **WHM Review Mission Tasks** program.

The system is updated in real time as the stock is allocated, physically moved and the task completed. Once all tasks are done, the mission can be completed.

Tariff code application evolution

Tariff codes can be selected at all sales order lines, regardless of the tax configuration defined at company level. Previously, this could only be done if the **EC VAT** SYSTEM REQUIRED setup option was enabled.

Sales Pricing Engine

Pricing structures within SYSPRO have been simplified so that pricing methods can be created and maintained in one place.

Price groups can be linked to a customer, branch, customer class, geographic area or custom form. Pricing rules or lists are then set up per price group and governed by effective dates.

Inventory Bin Query Optimization

The enhanced **Warehouse Bin Query** program provides an easy way to create bin and warehouse transfers.

The bins within the warehouse can be selected from a tree structure. The bin content is displayed in a list view where you can select the ellipses at the **Action** column to create bin and warehouse transfers.

From there the **Inventory Movements** program is displayed where all relevant fields are pre-populated for ease of use. If the **ENABLE FOR PUT-AWAYS** setup option is enabled, you can also create bin or warehouse put-aways.

Flexible consolidated dispatch invoice pricing

Because the price of an item can change after a dispatch is created, a new setup option (**USE SALES ORDER PRICE ON INVOICE**) lets you choose to use the sales order price when consolidating dispatch notes for invoicing instead of defaulting to the original dispatch invoice price.

2021-R1

SYSPRO Installer Application

The **Utilities** panel lets you download all product files (including hotfixes) to your local SYSPRO Deployment folder.

The download process occurs in the background so you can continue using the **SYSPRO Installer Application**, or close the app and leave the download to continue overnight.

> 💡 This is useful as it ensures that you have all the required installation files before proceeding with an install.
>
> SYSPRO partners can also use this feature to download and copy product files to a storage device to save time when installing off-site (typically at a customer site with unstable internet connectivity).

The **Utilities** panel also lets you delete downloaded media files, such as product and hotfix files.

Order Picking in Espresso

The **Order Picking** application has been added to *SYSPRO Espresso*. It lets operators remain on the shop floor to conduct order picking in a quicker and more efficient manner.

The *SYSPRO Espresso* application is equivalent to the **Pick Maintenance**[1] program in the core SYSPRO product and lets you maintain order picks with the following functionality:

- Start, stop, complete and cancel a pick.
- Start, complete and cancel a pick line.
- Complete selected pick lines.

> ℹ️ The **Order Picking** application uses the SO PICK QUERY[2] business object to output pick line information and the SO PICK STATUS CHANGE[3] business object to post the updated pick details.

SYSPRO Point of Sale

Improved Access Control

The existing access control in *SYSPRO Point of Sale* has been extended in the **Manage Orders** program so that you can control an operator's access to the **Invoice** function, regardless of the order's type or status.

[1]Program: SORPPM
[2]Business object: SORQPN
[3]Business object: SORTPS

Previously, this function was accessible except when working with deposit or suspended orders. You can now hide or disable the **Invoice** button by configuring your requirements within the **Access Control Setup** program (available from the **Setup** menu).

> If you previously defined the `<InvoiceOnlyButtonManageOrdersAlwaysDisabled>` element in the `SystemConfig.xml` file to be TRUE, then you need to reconfigure the access to this button using the **Access Control Setup** program after updating to *SYSPRO 8 2021 R1*.

Enhanced searchability

The search capability in *SYSPRO Point of Sale* has been extended to barcodes when searching for stock items.

In addition, when you use the **Add/Edit Line** screen of the **Manage Orders** program, you can now add stock items using a stock code, serial number or barcode (normal or integrated). Previously, this was only possible using stock codes.

You can also define your preferences as follows:

- Default filter options for the **Manage Orders** program can now be defined by barcode or serial number within the **Search Defaults** screens of the **Branch Settings** program.

- Default filter options for the **Search** program can now be defined by barcode within the **Search Defaults** screen of the **Manage Users** program.

> - You can't use serial numbers when adding stock items to a quote.
> - You can only use normal barcodes when searching for stock items, as integrated barcodes are not supported within the search.

Centralized logging for debugging purposes

To simplify the debugging process and reduce the persistence of files to the file system, SQL logging within *SYSPRO Point of Sale* is now recorded within the SQL database.

Previously, each query logged was output to a unique file on disk. From *SYSPRO 8 2021 R1*, it is now logged to the `SQLQueryLogging` database table to ensure that all information relevant to debugging is centralized and located at a single point for reference.

SQL query logging exclusions

To simplify the fault-finding process when SQL Query Logging is enabled, *SYSPRO Point of Sale* and its `SystemConfig.exe` file have been altered to limit the logging of SQL queries executed, to functional queries only.

Previously, when SQL logging was enabled, multiple *miscellaneous* queries were logged which increased the size of the log file and made it difficult to identify queries.

From **SYSPRO 8 2021 R1**, a standard exclusions list is now included in the `SystemConfig.exe` file and allows for the exclusion of certain SQL queries by name. A new XML node `<SQLQueryLoggingExclusions>` has been implemented at parent level and the ChildNodes are named `<QueryNameToExclude>`.

Although you can add further queries to the list if required, the following SQL queries are now excluded by default:

- BranchSqlConnectionForBranchSelect
- OfflineService
- PoSTransactionListToProcessSelect
- SystemSettingsSelect
- UserSessionsCurrentUserStatusSelect

Each query included in the new exclusions list of the `SystemConfig.exe` file is not logged when the `<OutputSqlQueries>` element is set to TRUE.

Improved transaction tracking

The assigning of receipt numbers within the **Account Payments** program has been extended to the **Account Payment Reallocations** program.

From **SYSPRO 8 2021 R1**, receipt numbers are assigned (using the same numbering method as account payments) to both the reversal payment and new payment when you process an account payment reallocation in **SYSPRO Point of Sale**.

In addition, the receipts related to these transactions are now available to view, print or reprint within the **Account Payment Query** program.

Improved governance

To improve governance around account payment re-allocations, you can now enable supervisor authorization for these transactions by configuring the **Allow Account Payment Reallocation** option within the **Branch Settings** program.

Improved performance

The **SYSPRO Web UI (Avanti)** framework for **SYSPRO Point of Sale** has been enhanced to cater for providing data directly to **SYSPRO Web UI (Avanti)**.

This removes the need to first save data to disk - improving the grid layout and data binding speed when running **SYSPRO Point of Sale** in **SYSPRO Web UI (Avanti)**.

Enhanced Flexibility when Maintaining Sales Orders

A new operator preference has been added to the **Sales Order Entry** and **Sales Order Entry Express** programs that lets you indicate that the back order quantity must be updated before the ship quantity when maintaining orders. Previously, the ship quantity was impacted first when you

adjusted the order quantity of an existing order line.

The **Adjust b/order when order qty changed** preference is available from the **Options** tab of the **Preferences** pane and requires that the **Automatically put order qty in b/order** operator preference is also enabled.

When you decrease the order quantity, the back order quantity is decreased first, followed by the ship (or reserved) quantity, if there is not enough stock on back order to satisfy the change. Similarly, when you increase the order quantity for an existing line, the additional quantity goes into back order.

Intrastat Reporting

Intrastat reporting now includes freight and miscellaneous charges for dispatches as well as service charges on non-stocked lines for arrivals. This addresses the need for European countries to record and report on Intrastat transactions that occur when goods are purchased from or delivered to other countries within the EU.

Other enhancements include:

- Supplier invoice values can now be used to report on Intrastat arrival transactions (no longer Goods Received Notes).

- The supplementary unit factor and method can be captured for sales orders and purchase orders to ensure recording of the actual quantity invoiced.

- Goods for demonstration purposes and goods on consignment that are transported to a warehouse outside the supplier's country are included.

> Quick Sales, Counter Sales, Point of Sale and Credit Notes are not included in this enhancement.

2020-R2

SYSPRO Point of Sale

Crediting Kit Receipts

SYSPRO Point of Sale capabilities have been extended so that customers can now process credits against all kit type items directly in *SYSPRO Point of Sale* (previously this would have to be performed manually in the core SYSPRO product).

Kit types can now be credited either from the original invoice, or manually in the **Credit Note** program (available from the **Store** menu) or **Manage Credit Notes** program (available from the **Store Management** menu).

Requirements:

- Default bins must be defined in SYSPRO for parent and component lines for the warehouse.
- The `ShowKitComponentLines` element in the `SystemConfig.xml` file must be enabled (i.e. its value must be defined as *true*).

Limitations:

- This doesn't apply to the **Point of Sale**, **Manage Quotes** and **Exchanges** programs (available from the **Store** menu).
- Lot, bin and serialized items in kits are not supported. Therefore, this does not apply if the **MULTIPLE BINS** option is enabled.
- Kit type **F** is not supported, so you cannot enable the **Ship from default bin** option in *SYSPRO Point of Sale*.

> Kit optional components are always added in *SYSPRO Point of Sale*.

Template Design with SYSPRO Reporting Services

The print template design process in *SYSPRO Point of Sale* has been simplified to use *SYSPRO Reporting Services* to support custom documents. This replaces the previous printing designer (**Stimulsoft**).

Petty Cash Transaction Governance

SYSPRO Point of Sale lets you monitor, control and report on all petty cash transactions to improve governance at branch level.

Petty Cash Query

The new **Petty Cash Query** program (accessible from the **Query** menu) lets you query, review and reprint petty cash transactions. You can search petty cash transactions by branch, document number, or date range.

Petty Cash Transactions

The existing **Petty Cash** transaction screen improves traceability for petty cash transactions by including petty cash document numbers for all petty cash transaction types.

Petty Cash Report

The existing **Petty Cash Report** caters for petty cash document numbers, as well as a reprint capability.

To enable the printing of the new receipt numbers, you need to update the petty cash template with the latest default template or dictionary and add the field onto the existing report.

Branch Settings

New options were added to the **Petty Cash** tab of the **Branch Settings** program that let you define transaction limits for petty cash expenditure and receipts, as well as configure whether supervisor authorization is required when limits are exceeded. The options are disabled by default:

- Enforce Petty Cash Expenditure
- Petty Cash Expenditure Limit
- Enforce Petty Cash Receipt Limit
- Petty Cash Receipt Limit

SCT Access Control

The existing access control within *SYSPRO Point of Sale* lets administrators more closely control various aspects of supply chain transfer functionality to improve governance at store level.

The following functions within the **Manage SCT's** program can now be controlled at Branch, Role, User and Device level:

- Add Item
- Edit Item
- Add Other
- Delete Item
- Allocate B/O
- Release B/O

- Invoice SCT
- Cancel SCT
- Update Header

Access Control

The new **Access Control** program (available from the **Setup** menu) serves as the interface for all newly added or existing access control items that have been enhanced. It lets administrators define the following types of visibility and/or functionality where relevant:

- **Visibility**

  These options let administrators define what functions (i.e. controls) are visible to operators, by selecting one of the following permission levels:

  - Collapsed: The function is hidden from the operator.
  - Visible: The function is visible to the operator.
  - Inherit: The system must check higher up in the access control hierarchy to determine the function's visibility.

  > All current controls default to `Visible`, but any new controls added in future will default to `Collapsed`.

- **Functionality**

  These options let administrators define the functionality available to operators, by selecting one of the following permission types:

  - Deny: The function is disabled.
  - Allow: The function is enabled and requires no supervisor authorization to proceed.
  - Allow (Auth req): The function is enabled but requires supervisor authorization to proceed.
  - Inherit: The system must check higher up in the access control hierarchy to determine the function's accessibility.

  > All current controls default to `Allow`, but any new controls added in future will default to `Deny`.

Increased stock & bin visibility when adding orders and quotes

The following programs in *SYSPRO Point of Sale* have been enhanced to assist operators to quickly identify stock availability and bin locations when adding a sales order or quote:

- **Manage Orders** (available from the **Store Management** menu)
- **Point of Sale** (available from the **Store** menu)
- **Manage Quotes** (available from the **Store** menu)
- **Exchanges** (available from the **Store** menu)

Administrators can now define an operator's visibility access (within the **Access Control** program) for the following display fields when adding sales orders or quotes:

- Quantity on hand
- Default bin

The **Visibility** permission for these functions defaults to `Collapsed`.

This increased visibility provides operators with vital information when they need it.

If you installed `hotfix KB8050234` in the *SYSPRO 8 2020 R1* release (which let you view these fields by defining the `<QtyOnHandAndDefaultBinIsVisible>` setting in the `SystemConfig.xml` file) then you will need to reconfigure the access to these fields using the new **Access Control** program.

Transaction Audit Trails

Improved transaction tracking and governance has been included in *SYSPRO Point of Sale* by providing an audit trail of all data changes relating to transaction processing and printing. You can now monitor, control, and report on key functions (e.g. granting of discounts).

You can configure which audit trails you require in the new **Audit Trail Setup** tab of the **System Settings** program. The new audit trail reports (available from the new **Audit Trails** menu tab in *SYSPRO Point of Sale*) include:

Supervisor authorizations

Two new programs (**Header Authorization Audit Trail** and **Detail Authorization Audit Trail**) detail all occurrences where a supervisor authorization has been applied to a sales order or quote header change (e.g. tax override, credit notes, price margin, etc.).

Detail line deletions

A new **Line Delete Audit Trail** program details all occurrences where a line has been deleted from a quote or sales order.

Special Discounts

A new **Price And Discount Audit Trail** program details any change made to a price or discount on sales order or quote lines in the **Point of Sale** or **Manage Quotes** programs (available from the **Store** menu).

The report also indicates whether a supervisor authorization was applied, including the details that were applied.

Document Printing

A new **Print Audit Trail** program provides an audit trail of any printing or reprinting of sales invoices and quotes performed in *SYSPRO Point of Sale*.

Changes to Ship methods

A new **Ship Method Audit Trail** report provides an audit trail of any changes made to the ship method on quotes and sales orders in the **Point of Sale** or **Manage Quotes** programs (available from the **Store** menu).

The report also indicates whether a supervisor authorization was applied, including the details that were applied.

Tax Code Changes

A new **Tax Code Audit Trail** report details any changes made to tax codes on quotes and sales orders in the **Point of Sale** or **Manage Quotes** programs (available from the **Store** menu).

Considerations:

- The `EnableAuditTrailLogging` element in the `SystemConfig.xml` file can be enabled or disabled per site.
- The new audit trail database (`SysproComp_POS_AuditTrails`) contains the following new tables:
  - `_SystemAuditTrailPrinting`

    This stores an audit trail of any prints performed.
  - `_SystemAuditTrail`

    This stores audit trail-specific information.

Limitations:

- Supply Chain Transfers are not included in the audit trail reports as *SYSPRO Point of Sale* posts SCT-related information directly to SYSPRO in real time. However, you can access SCT information directly from the SorAdditions, SorChanges and SorCancelled tables.
- Transactional data is not replicated in the SYSPRO company database to offline branches.

Intrastat Triangulation

Intrastat Triangulation occurs when three EU states are involved in a transaction, where one orders goods from a second while goods are sourced from a third.

- The state receiving goods records an Intrastat arrival.
- The state dispatching goods records an Intrastat dispatch (declaring the ordering state as a recipient).
- The intermediary or agent state records nothing for Intrastat purposes.

When a requisition, purchase order or sales order is created, the triangulation role of agent, supplier or customer is selected, as well as the dispatch and destination states. These details are specified at order line level for stocked and non-stocked goods, so they are used when creating dispatch notes, credit notes or reprint files, and when receipting in stock from inspection.

You can view and change tariffs on the Intrastat triangulation transactions using the **Maintain Intrastat Dispatches** and **Maintain Intrastat Arrivals** programs. Intrastat transaction values are reported in the **EC Triangulation Transactions - Dispatch** and **EC Triangulation Transactions – Arrivals** reports.

Return Merchandise

Sales order discounts on RMAs

You can now automatically apply the discounts given on the original sales order when processing an exchange or cross shipment of an RMA.

When adding RMA cross shipment details, the discounts from the original invoice are displayed by default at header or line level, as per the original sales order. If the RMA is not linked to an invoice, the discounts set up against the customer are displayed by default. These can then be accepted or updated when generating the sales order for replacement goods.

When an item was returned, and the sales order is created for the replacement goods, the discounts from the original invoice are applied to sales order by default. The discounts can then be accepted or changed.

Securing transactions

New eSignatures can be applied to RMA transactions to improve governance and control. These let you manage and secure the RMA process and cover adding and changing RMA's as well as adding, changing, receipting and crediting RMA lines.

2020-R1

MFA Operator History Query

This program lets you view the history of successful MFA authentications for the company.

SYSPRO automatically tracks each time an operator successfully authenticates themselves to SYSPRO through **Multi-Factor Authentication** and logs which authentication method is used. Its purpose is to assist system administrators in effectively managing system security.

Recall Management

The product recall process includes any traceable parent item that has been received into stock, ensuring it can be quickly and easily located in the supply chain. It means that lot and serial traceable items received through jobs, inventory movements, backflushing or purchase orders are included when selecting items you want to recall using the **Product Recall Selections Review** program.

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.

Job Nesting

The **Job Nesting** feature has been extended to include manufacturing units of measure (MUM). This means you can use the stocking, alternate, manufacturing or other units of measure when issuing stock to the nested job.

Affected programs

- WIP Nest Processing

  The **Unit of measure** field was added to the **Issue Materials** pane. This lets you select the unit of measure when issuing materials to the job nest.

Recorded Dates

You can now capture and save dates against specific lots to manage the shelf life and expiration dates of traceable items. These dates include: **Use by date**, **Sell by date**, **Internal expiry date**, **Manufacturing date**, **Dispatch date** and **Best before date**.

In most cases, the additional lot date fields are hidden by default and must be selected using the **Show Captions** option from the context-sensitive menu.

Affected programs

- Purchase Order Receipts
- Purchase Order Inspection
- Shipment Receipt

- Bins, Lots & Serial Capture
- WIP Inspection Document Print
- Job Receipts
- WIP Inspection
- WIP Inspection Accept into Stock
- Job Receipts
- Factory Documentation Format

eSignatures

Access and maintenance of recorded dates are included in and controlled by the following eSignatures:

- WIP Stocked job receipts
- WIP Stocked job receipts e.net
- PO Apportion quantity receipt
- WIP Inspection (accept)
- WIP Inspection (accept) e.net
- Inv Receipt
- Inv Receipt e.net

SYSPRO Point of Sale

Custom Integration - Hook-On-Line-Level

The **Hook-On-Line-Level Assembly** custom integration for third party developers within *SYSPRO Point of Sale* has been enhanced to allow for operator input.

Third party developers now have access to an external assembly that enables a prompt for operator input while processing a sale, credit, exchange or quote in *SYSPRO Point of Sale*.

The following options are now available:

- **Notify operator of order changes**

  This sends a message to operators each time they perform an action that intercepted by the external assembly, notifying them that the transaction has been modified by the custom integration.

- **Allow operator override with authorization**

  This allows an operator to bypass the interception with supervisor authority, so that the transaction behaves as it normally would (i.e. the external assembly is not used).

This external assembly is stored within the `C:\inetpub\wwwroot\SYSPRO8POS_ EDU1\SYSPROPOS\ExternalAssemblies` folder.

You can configure this within the **Hook on Line Level Assembly** tab of the **General Settings** program (available from the **Setup > System Settings** menu in *SYSPRO Point of Sale*).

The name of the external assembly (`SysproPointOfSaleHookAtLineLevel.dll`) is inserted and you can select the test option to confirm that *SYSPRO Point of Sale* can read the assembly.

Conversion to SYSPRO Web UI (Avanti)

The *SYSPRO Point of Sale* software suite is now completely available on the *SYSPRO Web UI (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).

Sales Dashboard

The *SYSPRO Point of Sale* architecture has been enhanced to enable you to create your own custom dashboards, based on your specific business needs.

These dashboards make use of SYSPRO's Business Insights technology and can provide key information regarding the sales and performance of a Point of Sale branch.

To create a dashboard, simply use the **Visual Designer** when designing your home screen in *SYSPRO Web UI (Avanti)*. SYSPRO provides 2 samples which you can use to get you started.

> Point of Sale branches can now set their own targets, over and above corporate budgets, to monitor their performance.

An example of what can be done using this new functionality, would be a sales dashboard:

Statistics regarding the intensity of a Point of Sale branch's performance can be highlighted, down to hourly trading, enabling you to actively monitor and manage your sales.

Trends that can be highlighted include the following:

- **Sales Value**

  This indicates the net value of sales, after all discounts, and excluding any sales tax.

- **Footfall**

  This indicates the number of transactions (i.e. sales invoices generated).

  SCT's and other non-revenue related inventory movements are excluded.

- **Average Purchase Value**

  This indicates the average value of sales to customers.

  This is determined by dividing the **Sales Value** by the **Footfall** for a specified time period.

Negative Stock Processing by Warehouse

You can now define negative stock capacity at warehouse level for **_SYSPRO Point of Sale_** transactions.

Allowing negative stock for a specified warehouse utilized by a branch solves the problem of having a customer at the till with goods in hand, but the till operator not being able to process the sale due to the system showing no stock on hand.

This configuration is available on the **Warehouse 2** tab of the **Branch Settings** program within **_SYSPRO Point of Sale_**. From here you can also indicate if a warning must be displayed when a transaction will cause a negative stock situation.

Password Standardization

SYSPRO Point of Sale now supports the same level of password control as SYSPRO and provides the following capabilities:

- Automatically expire user passwords after a defined period of time.
- Enforce rules regarding the construction of a password to ensure greater security.

Therefore, when a user changes their password in **_SYSPRO Point of Sale_** for any reason, it will be validated against these setup options to ensure the password meets the minimum requirements.

This configuration is available on the **Password Settings** tab of the **System Settings** program in **_SYSPRO Point of Sale_**.

Deposit Management

The management and governance of deposits at branch level has been improved with new trial balance and audit trail capabilities.

The **Deposits Trial Balance** produces a deposit payment trial balance of all unapplied deposit liabilities recorded in **_SYSPRO Point of Sale_** for improved governance:

- All deposit values are listed by customer.
- Information is derived from the ArInvoicePay table, and is subtotaled by customer.
- The report is branch specific.
- Zero value balances are excluded by default, with an option for inclusion.
- The report defaults to the current system date, with an option to change the date to an earlier date. If you select an earlier date then the report excludes all entries subsequent to the selected date.

The **Deposits Audit Trail** provides an audit trail of deposits taken for sales orders in **_SYSPRO Point of Sale_**:

- New deposits, deposit applications against sales and deposit refunds are identified separately.
- All deposit transactions processed in **SYSPRO Point of Sale** are included, as recorded in the ArInvoicePay table.
- The report is branch specific and provides for financial period and date range selections.

These new programs are both available from the **Query** program in **SYSPRO Point of Sale**.

Online and Offline Receipt Numbers

SYSPRO Point of Sale governance regarding the management and control of account payments has been enhanced.

The system now retains a list of receipt numbers and allocates a unique document number for all account payments received and processed at a Point of Sale store.

This occurs for both online and offline processing to prevent duplicate receipt numbers when the system is back online.

> 💡 This is particularly useful in an offline situation, as it enables you to instantly provide a customer with their proof of a payment.

In addition, the new **Account Payments** program (available from the **Query** menu) provides Point of Sale administrators a view of all account payment processing for their store. By default, access to this program is only assigned to the `Admin` role.

Things you can do in this program include:

- View an audit trail report of all account payments.
- Query account payments by your preferred selection criteria.
- Reprint an account payment.

This significantly improves the management of and governance over account payment transactions processed through **SYSPRO Point of Sale**.

> 📝 This functionality does *not* apply to customer account payment re-allocations.

Supply Chain Transfer Security

SYSPRO Point of Sale administrators can now control various aspects of supply chain transfer functionality at a more granular level, improving the governance and security over SCTs.

The new **Access Control** program (available from the **Setup** menu) includes the following capabilities at branch, role, user or device level:

- **Visibility**

  This pane enables you to define whether or not the option is available to the operator.

- **Functionality**

  This pane enables you to define an operator's access to various functions as follows:

  - Denied
  - Allowed without supervisor authorization
  - Allowed with supervisor authorization
  - Inherit access control according to hierarchy

You can therefore use this program to define the following abilities of a user for SCT transactions:

- Add item
- Edit item
- Add other
- Delete item
- Allocate back order
- Release back order
- Invoice SCT
- Cancel SCT
- Update header

Shipping Method Security

Governance regarding the delivery of goods to customers has been improved, with new security in terms of a user's ability to change shipping methods in the **Manage Orders** and **Manage Quotes** programs of *SYSPRO Point of Sale*.

The new **Access Control** program (available from the **Setup** menu) enables you to define an operator's access to various functions (at branch, role, user or device level) as follows:

- Denied
- Allowed without supervisor authorization
- Allowed with supervisor authorization
- Inherit access control according to hierarchy

You can therefore use this program to define a users access rights for changing shipping methods on new or existing orders in *SYSPRO Point of Sale*.

Request for Quote System

The **Request for Quote System** feature has been enhanced:

- Improvements to the governance of the RFQ process ensures that an RFQ can be sent directly to suppliers using the **SYSPRO Supply Chain Portal**. Once you end the RFQ, you can email it to suppliers, inviting them to submit a quote via the portal.

- You can use the **Send Email** program to configure the RFQ invitation email template that is sent to suppliers.

User interface changes

- The **Expiry date** wording was changed to **Closing date**. The supplier can submit a quote on or before the closing date of the RFQ and a quote can only be accepted after the closing date.

- The supplier cannot change the pricing unit of measure (i.e. the supplier must quote in the unit of measure provided).

- Only requisitions of type **Normal** can be accepted for RFQs using the **Requisition Entry** program.

  The **Accept for RFQ** tool is disabled if the requisition type is **Issue** or **Transfer**, as these are used for stock and/or warehouse management.

Quick Quotes

The **Quick Quotes** functionality has been enhanced to allow you to add the quick quote number field to the **Quick Sales Order Entry** program. This lets you search for quick quotes, as well as view the quick quote number on various sales order and printing programs once the quote has been converted.

The quote reference number is auto-generated according to the defined **QUICK QUOTES** setup options (*Setup Options > Keys > Distribution - Sales Management*).

Affected programs

- SO Quotes
- Document Print
- Sales Order Entry
- Sales Order Query
- AR Branch Maintenance
- SO Document Formats

💡 The **Quick quote number** field is hidden by default. You can reinstate it using the **Field Selector** option from the context-sensitive menu (displayed by right-clicking any field in the pane). Simply select the field from the **Sales Order Quote Header** and drag it onto the pane.

Order Picking - L&F Account

The **Order Picking** feature has been extended to let you configure how you want to account for stock shortages in the warehouse. Stock shortfalls can be processed as stock adjustments using inventory journals, or missing stock can be transferred to a separate lost and found warehouse. When using a lost and found warehouse, you can offset shortages when stock is found during stock takes or cycle counts.

A sales order and order line that is in status R - RELEASED TO PICKING or P - IN PICKING can't be invoiced, as the picking cycle hasn't been completed. Once picking is completed, the sales order status returns to 1 - OPEN ORDER LINE for invoicing.

Affected programs

- Warehouse Maintenance

  The ACCOUNTING FOR SHORTAGES option lets you select whether you want to process stock shortfalls as an adjustment against the warehouse or place the missing stock items in a separate warehouse.

- Sales Order Entry

  When stock can't be picked because of shortages, the quantity on the sales order is not adjusted, as the stock quantity is placed in back order.

- Pick Maintenance

- Pick Review

- Lost and Found Warehouse Review

  This program lets you view and manage the stock items placed in a lost-and-found warehouse during order picking and cycle counting.

Cycle Counting - L&F Account

The **Cycle Count** feature has been extended to let you manage stock surpluses discovered during cycle counting. You can also capture cycle count information from within the **Browse on Cycle Counts** program.

Affected programs

- Cycle Count Review and Confirm

  You can review and transfer surplus stock by selecting the **Review** link in the **Lost and Found warehouse/Increasing** column. The selected stock will be transferred from the lost and found warehouse to the bin that was counted during cycle counting using the **Lost and Found Warehouse Review** program.

  The Review link is only displayed if *surplus* stock was captured for the cycle count.

- Browse on Cycle Counts

  You can capture counted quantities by selecting the **Action** link at the **Functions** column and choosing **Capture a cycle count**. The **Cycle Count Capture** program is displayed.

- Inventory Lost and Found Warehouse Query

  This new business object lets you view all items in the lost and found warehouse.

GIT Amendment Journals

This enhancement lets you view goods in transit information.

When the **GOODS IN TRANSIT AMENDMENT JOURNAL** setup option is enabled, amendment journals are created when GIT detail records are added or updated (*Setup Options > Preferences > Distribution > Inventory*). This occurs in a variety circumstances (e.g. processing a transfer in, creating or printing a transfer out, updating a transfer due date, etc).

The **GTR Detail Amendment Journals** program displays a list of amendment journals and the corresponding before and after values.

2019-R2

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`).

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

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**.

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.

SYSPRO Point of Sale

Conversion of POS to Avanti

The **SYSPRO Point of Sale** software suite is being converted to the **SYSPRO Web UI (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.

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:

- 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.

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.

A mission can be generated from a cycle count to assign counting tasks to the warehouse operation, which can then be completed using the Espresso **Missions & Tasks** application. The system is updated real time as the stock is counted and the task completed.

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**[1] 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.

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.

[1]Program: RMAP20

2019-R1

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.

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.

SYSPRO 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

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.

A mission can be generated from a sales order pick in order to assign picking tasks to the warehouse operation. The picking tasks can be completed using the Espresso **Order Picking** or **Missions & Tasks** application. The system is updated real time as the stock is picked and the task completed.

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.

2018-R2

Forgotten Password

This lets you reset your SYSPRO passwords without requiring the assistance of a system administrator (you're typically locked out of the system after exceeding a pre-defined number of login attempts allowed).

You can request a password reset from the SYSPRO login screen (select **Forgot Password**) and are then notified via email that a request for a password reset has been received and that the password has been reset. The email includes a temporary password which is valid for a specified time period. When next you log into SYSPRO using the temporary password, you'll need to enter a new password.

Benefits:

- Password change email notification
- Login exceeded email notification
- Operator self-service reducing requirements for administrative resources
- Notification and logging for traceability
- Forgot password using new system-wide email settings

Espresso Barcoding

A new function in ***SYSPRO Espresso*** lets you use any camera-enabled device (e.g. smart phone) to scan barcodes on all fields where the scanning icon (📷) is displayed.

Espresso Change Password

SYSPRO Espresso 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.

2018-R1

Espresso Xpress Cart

The **Espresso Xpress Cart** provides manufacturers and distributors with an efficient, fast and simple-to-use mobile sales ordering app, extending the sales order experience directly to customers.

This is achieved using flexibility, efficiency, ease and speed of capturing orders online, mobility on the road and improved customer ordering experience.

Espresso Script Editor

The **Espresso Application Builder** program includes a script editor that lets you add scripting to an Espresso component. This allows you to build additional business logic into Espresso.

Espresso Customer Workbench

The **Espresso Customer Workbench** includes various customer components that lets you view customer data and add or update transactions within one application without having to leave the current application.

Espresso Printing Reports & Documents

When maintaining a sales order in **SYSPRO Espresso**, the **SYSPRO Espresso Sales Order Document Printing** application lets you generate invoices, delivery notes and order acknowledgments.

When generating a document, the current status of the document and built-in business rules determine the type of document that can be generated and the document formats that can be selected. You can also reprint documents that have already been printed.

Espresso SFDC

The **Espresso SFDC (Shop Floor Data Collection)** Workbench provides a mobile solution for capturing all production-related transactions directly from the shop floor.

It enables access to all job-related transactions and work-to-lists available to the shop floor via mobile devices.

Operators are directed to their work-to-lists, have insight into job specifications and are presented with a single point-of-entry for recording all their production progress.

Benefits:

- Reduce errors caused by manual data capture
- Eliminate shop floor paper
- Improve material accuracy and tracking
- Provide current production visibility for better decision-making support

Job Nesting

The **Job Nesting** feature lets you combine several small jobs into one larger nested job process. This lets you view and select combinations of work orders that can be batched together into larger processes (e.g. you can nest multiple jobs using the same raw material or components).

The result is a reduction of waste and operational costs, optimized use of raw material and resources, and improved efficiencies.

Benefits:

- Group jobs requiring the same raw material (such as sheets) to a nested job. Optimize the raw material and labor usage against the nested job.
- Record actual raw material and labor usage against the nested job as well as results of the nest.
- Disburse material, labor and scrap against the original jobs on completion.

Manufacturing Operations Management (MOM)
Manufacturing Operations Management

SYSPRO's Manufacturing Operations Management solution helps manufacturers measure performance in a drive towards world-class standard of operations for overall equipment effectiveness (OEE), total effective equipment performance (TEEP) and overall labor effectiveness (OLE).

It increases productivity and lowers costs by minimizing loss within the business. Operational efficiencies are optimized through better workflow of core manufacturing activities (e.g. schedule, publish, collect, track, analyze and improve).

It facilitates the connection of machines and other devices to digitize the factory (Industry 4.0) and gain competitive advantage.

Benefits:

- Deliver to customers faster.
- Control labor and machine costs.
- Reduce downtime and bottlenecks.
- Measure and improve product quality.
- Increase productivity and output.
- Reduce cost to compete.

Any Device, Anywhere

Makes use of the latest technologies to provide intuitive mobile and browser-based UIs via Smartphones, PDAs, Tablets, Bar code scanners and PCs. Extensive online views make it easy for you and your team to gain visibility over any stage of the process, from any device.

Advanced Planning and Scheduling

Incorporates an advanced, finite capacity-based planning and scheduling (APS) system, allowing you to quickly and accurately schedule while minimizing downtime.

- Visual Planning Board - define your resources and their available capacity via the shifts that they operate. Create, optimize and share your production schedules online. Publish job lists to your resources for easy data collection.

- Dashboard - balance equipment utilization and order fulfillment to maximize factory output. View your most/least utilized resources, top orders by value and popular products by volume.

- Production Plan - view the agreed production plan. List and/or print shop packets. Review progress, including hours reported, quantities produced and issues logged to expedite and/or provide delivery information.

- Equipment Plan - review the impact of the production plan on your equipment. Drill down into each equipment card to view loading detail and expected daily output.

- Production Status - review open jobs to check their status. Use progress bars to gain visibility of hours booked, materials issued and overall progress at a glance. Drill down to view specific job details, including attached documents and production issues.

- Job Lists - view job and material lists by resource groups for today or this week designed for use with mobile and/or tablet devices.

- Production History - view activity history in relation to both open and closed jobs.

Shop Floor Data Collection and Tracking

Incorporates shop floor data collection (SFDC) from your employees and equipment with options to automatically connect your machines in order to read data without manual inputs.

- Workbench - collect data in real time both on and off the shop floor from your employees or equipment using a stopwatch style of recording for accuracy. Data recorded here is used to support the calculations of overall labor effectiveness (OLE) and overall equipment effectiveness (OEE).

- Connect equipment - digitize your factory by collecting data from your machines and other devices automatically.

- Dashboard - high-level view of your orders, products, employees and equipment. Select specific employees and equipment to view status and performance for a selected time period.

- Employee status - at-a-glance live view of your employees... their current status, what they are working on, and how they are performing during their shift. Drill down into each employee card for a detailed view. Use status indicators to access their workbench to help with clocking and other management issues.

- Equipment status - at-a-glance live view of your equipment... the current status, what jobs they are running, and how they are performing during the shift. Drill down into each equipment card for a detailed view. Use status indicators to access the equipment workbench for management purposes.

- Job status - review open jobs to check their status. Use progress bars to gain visibility of hours booked, materials issued and overall progress at a glance. Drill down to view specific job details, including attached documents and productions issues.

- Transaction review - review (edit, delete, add) and/or approve all transactions generated via the workbench or entered from timesheets. Automate the scheduled posting of approved transactions to SYSPRO for financial analysis. Manual 'sync now' option also available. Export to payroll systems (optional).

- Equipment performance - detailed analysis of an individual equipment performance with supporting detail, including audit trails and a record of the issues encountered.

- Employee performance - detailed analysis of an individual employee performance with supporting detail, including audit trails, daily clocked-hours reconciliation and a record of the issues encountered.

- Management reports - analytics associated with employee availability (uptime/downtime) for management purposes. Includes daily clock-hours reconciliation and option to create custom management reports using pivot tables.

Factory Digitization

Allows you to connect machines measuring equipment and other devices. You can automatically connect with machines to read data without manual inputs.

Gain real time visibility of:

- Start/stop and downtime.
- Job assignment.
- Operation status (e.g. operation completed).
- Machine status (e.g. warming up; idle; running; down).
- Parts count (total, good and bad).

- Component count (total, good and bad).
- Performance issues (e.g. slow running; equipment wear; component jam).
- Custom values (e.g. temperature; pressure; spindle speed).

Factory Performance and Loss Management

Provides out-of-the-box factory performance and loss analytics to allow your organization to drive to world-class standards for overall labor effectiveness (OLE), overall equipment effectiveness (OEE) and total effective equipment performance (TEEP).

Utilizes Six Big Loss analysis to identify, classify and quantify your loss, enabling you to determine counter measures to reduce them.

- Loss Management - dashboard realization of loss across your manufacturing operations with every loss identified, classified (Six Big Loss) and quantified to allow for countermeasures to be applied and continuous improvements to be made.
- Dashboard - factory-level analytics of your equipment showing both OEE and TEEP key performance indicators. Drill down to supporting metrics and measurement of Loading, Availability, Performance and Quality.
- Employee Analysis - detailed analysis of your employee performance. Filter by individual employees or analyze performance for a specific group of employees. Further analyze by date or diversion.
- Equipment Analysis - detailed analysis of your equipment performance. Filter by individual equipment or analyze performance for a specific group of equipment. Further analyze by date or diversion.
- Product Analysis - output and quality analysis for your products by employee and/or equipment.
- Loading - detailed analysis of the loading position of your resources with comparisons to last month and/or quarter to understand trends.
- Availability - detailed analysis of the availability of your employees or equipment with comparisons to last month and/or quarter to understand trends.
- Performance - detailed analysis of the performance of your employees or equipment with comparisons to last month and/or quarter to understand trends.
- Quality - detailed analysis of the quality output from your employees or equipment with comparisons to last month and/or quarter to understand trends.

Lean Manufacturing and Continuous Improvement

Helps to drive Lean Six Sigma continuous improvement initiatives with management alerts, issue logging and workflow, online documents and more.

- Management Alerts - receive performance management alerts to improve efficiencies and prevent issues becoming problems.

- Messaging - send and view messages to and from the shop floor.

- Issue Workflow - view, assign and resolve custom and/or performance-related production issues.

- Paperless Shop - manage and maintain static attachments or online forms related to jobs, operations, employees, equipment. Add hyperlinks to videos and/or document management systems where audit trail or document versioning control is required.

- Anytime, Anywhere - access mission-critical information whenever and wherever you need it via tablet and/or mobile devices.

- Safe and Secure - sign-in authentication with full organizational control to restrict information that can be viewed by workgroup or individual.

- Quality Assured - the solution has been formed around IEC62264, the globally recognized standard for manufacturing operations management - providing the tools and analytics essential for effective manufacturing operations management to help you compete in today's market.

Preferred Supplier

The **Preferred Supplier** feature lets you configure and manage sourcing policies for your stock codes.

A sourcing policy determines who is the preferred supplier of a stock item and helps a company stay competitive by ensuring that purchasing agreements and policies are upheld when creating requisitions and purchase orders.

A purchasing strategy benefits buyers and suppliers - suppliers have guaranteed sales, while buyers can negotiate favorable terms.

Benefits:

- Improved value-to-price relationship (i.e. achieve cost reductions while maintaining or improving quality and service).

- Understanding of category buying and management processes to identify improvement opportunities.

- Examination of supplier relationships across the entire organization.

- Leveraging the entire spend of the organization.

- Developing and implementing multi-year contracts with standardized terms and conditions across the organization.

- Sharing best practices across the organization.

Bin to Serial Linkage

The **Bin to Serial Linkage** feature lets you accurately determine where (from a bin perspective) serialized items reside in a warehouse.

This provides efficient traceability of stock serial tracking across warehousing functions. You can now find and use serials in a more timely manner, as any stock movement can be traced at bin level for serialized stock codes. You can also view the specific bin location of the serial when receipting, issuing or selling serialized items.

Benefits:

- Improve Traceability:

  An improved method of tracking serials linked to bins provides for better visibility into serialized stock items in specific warehouses.

Bulk sales order release

The **Sales Order Release** function lets you release large quantities of sales orders from suspense.

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