

2024 Roadmap Themes

SYSPRO 8

Reference Guide

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Roadmap Themes 2024

Improved Control of Internal Operations

NCR and CAPA

NCR and CAPA (Non-conformance reporting and Corrective actions / Preventative actions) is a capability that forms part of the **Quality Management** module and can be used throughout the ERP process. It helps manufacturers and distributors control quality standards within their organization to ensure these are upheld and continually improved.

The corrective and preventative actions (CAPA) component of this feature enables the effective management of an incident that caused a deviation from quality standards. It allows any department to report and effectively manage, correct and prevent non-compliance incidents.

Planned Maintenance

The **Enterprise Asset Management** module includes the **Planned Maintenance** capability that enables manufacturers and distributors to digitize their asset maintenance processes by defining the maintenance requirements and planning this out into the future. This module integrates with the **Requirements Planning** and **Purchase Orders** modules to ensure timely procurement of part requirements for planned and preventative asset maintenance.

Work in Progress Picking and Issuing

The **Work in Progress Picking and Issuing** functionality has been incorporated into SYSPRO to increase stock visibility and optimize stock selection and transfer for production. Stock that has been picked can now be automatically issued to a job once the pick is completed. This provides real time visibility of component stock used in manufacturing and kitting processes and further embraces lean manufacturing, as stock is only moved when it is required.

Last operator tracking for invoice print

Invoices have been enhanced with the addition of a **Last operator to print** field. The last operator to print an invoice or maintain a sales order is recorded and can be added to the invoice to assist with audit logging and to simplify tracking.

SYSPRO Point of Sale

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

Role Access Restriction on Branches

To further support compliance and privacy, as well as increased security between Point of Sale branches, **SYSPRO Point of Sale** has been enhanced to offer even greater control and access to branch-specific information. **SYSPRO Point of Sale** now provides the ability to restrict access to retail branch information to specific roles within the branches using the **Manage Roles** program, thereby ensuring that these roles only see information relevant to their branch or warehouse.

Customer on Hold Payments

SYSPRO Point of Sale has been enhanced to allow you to process account payments for customers who are on hold. Previously, the ability to do so was inhibited by default. However, with the addition of setup options that cater for restricting these options by branch or role, users can now control the use of this function. This enhancement eliminates the need to first remove the customer hold and improves business continuity with customers.

Customer Pricing Query

The new **Customer Pricing Query** program allows **SYSPRO Point of Sale** users to query pricing for specific customers across the entire range of SYSPRO pricing structures and provide the best price. This offers customers the ability to leverage advanced pricing mechanisms in SYSPRO and offers users the ability to query best prices more efficiently.

Embedded Analytics Support

SYSPRO Point of Sale has been enhanced to surface **Embedded Analytics** dashboards, providing relevant roles with instant access to real-time, critical information that can assist them in taking action and making business decisions.

Inventory Custom Fields

SYSPRO Point of Sale users can access and display custom inventory fields that have been set up in SYSPRO. This offers the ability to provide customers with additional custom information and allow easy access to key information regarding stock items.

Offline Transaction Verification

To simplify the administration and data integrity of offline transactions, **SYSPRO Point of Sale** has been enhanced to offer **Offline Transaction Verification**. This feature allows administrators to review data between **SYSPRO Point of Sale** online and offline branches, and assists them in resolving any conflicts for transactions that have not been posted successfully. The **Offline Uncopied Transactions Review** screen will be available both offline and online. When viewed offline, it will display uncopied transactions and give the user the option to reset the copy status for those transactions.

Webviews Customization and Role Restrictions

Administrators can now create and customize webviews by role in **SYSPRO Point of Sale**, creating a focused user interface and streamlined experience for users. In addition, webview design can be restricted to specific **SYSPRO Point of Sale** roles and operators. This, therefore, also increases webview security.

SYSPRO Production and Non-Production Instance Level and Company Level Flags

We've introduced the ability to flag instances and companies as either production or non-production within SYSPRO.

This enhancement enhances visibility of instance and company types and supports the licensing of non-production instances for sandbox environments.

Additionally, the **SYSPRO Production and Non-Production Instance Level and Company Level Flags** improve audit controls, ensure adherence to end-user license agreements (EULA), and provide resistance control for production-use instances and companies.

Affected Programs

- [Company Setup](#)
- [Company Maintenance](#)
- [About SYSPRO](#)

Supporting Multiple Lots Landed Cost Tracking Business Object

We enriched the functionality of the **PO PURCHASE ORDER RECEIPTS**¹ business object by enabling the receipt of multiple lots on a single line for landed cost tracking (LCT) receipts. This is particularly useful for organizations that import goods and require easier integration to LCT when **Lot Traceability** is used.

¹Business object: PORTOR

Improved Organizational Controls

EFT NACHA Conversion

SYSPRO's **Electronic Funds Transfer** module creates an XML file to facilitate the processing of electronic payments for **Accounts Payable** suppliers and user-defined **Cash Book** beneficiaries. The **EFT NACHA Conversion** extends this capability for customers in North America by including a specific payment file format that is required by the National Automated Clearing House Association (NACHA) to execute a mass payment batch.

Electronic Invoicing Support

We are introducing a platform to manage electronic invoicing in compliance with country-specific regulations as paper based and emailed PDF invoices no longer satisfy the compliance requirements of many tax authorities. This enhancement allows you to partner with specialist software providers or build customized integration to e-invoice platforms.

In **SYSPRO 8 2024**, you can enable the **E-INVOICING REQUIRED** setup option against all or selected customers to create an invoice in electronic format that can only be printed when the electronic invoice reaches a status that satisfies the requirements for printing as set by the specific country's mandate, for example only when the e-invoice is set to complete.

Dimension Analysis

We have increased the **Dimension Analysis** capability to include the remaining transaction programs within SYSPRO, which ensures that Dimension Analysis can be triggered from all transaction programs.

Dated Exchange Rates

SYSPRO's **Dated Exchange Rates** feature allows companies operating in global, multi-currency environments to capture buying and selling exchange rates for specific dates or date ranges. They can then use the effective dates from transactions to pick up dated exchange rates in Accounts Payable, Accounts Receivable and Cash Book Revaluations for translation into the local currency. This feature not only simplifies **International Financial Reporting Standards (IFRS)** compliance, but also allows users to easily translate foreign currency transactions with increased accuracy.

Dispatch Whole Order Rule

To increase flexibility and efficiency in the dispatch process, we added the option to dispatch whole orders only, thereby preventing partial dispatches. This option can be enabled per customer or per sales order.

Affected programs

We have updated the following programs in **SYSPRO 8 2024**:

- [Customer Maintenance](#)
- [Customer Query](#)
- [Sales Order Entry](#)
- [Sales Order Entry Express](#)
- [Dispatch Note Maintenance](#)
- [Dispatch Note Review](#)

Affected business objects

We have updated the following business objects **SYSPRO 8 2024**:

- Dispatch note creation from Sales Order
- AR Customer Maintenance
- SO Sales Order Import
- SO Sales Order Import Validation
- SO Sales Order Query
- AR Customer Query

Work In Progress Negative Issue FIFO Support

We have changed the way the cost is determined for negative material issue transactions, where components from jobs are returned into stock. This change ensures that the newest FIFO bucket on file is used to determine the cost, if the user doesn't select a bucket.



This only applies to companies where the **COSTING METHOD** setup option is defined as **FIFO** (*Setup Options > Configuration > Distribution > Inventory*) or where the **COSTING PER WAREHOUSE** setup option is enabled and the **COSTING METHOD** within the warehouse is defined as **FIFO (Warehouse Maintenance)**.

Lot/Serial Expiry Date Control Options

These additional date fields support manufacturers who need better control over raw material expiry dates. This enhancement ensures greater control, especially when issuing raw materials to work in progress.

The **Job Start Date** option This option specifies that the validation of the lot/serial expiry date is based on the job start date. A lot/serial that expires before the job start date can't be issued to the job.

The **Job Delivery Date** option indicates that the lot/serial expiry date is calculated from the job delivery date and if the lot/serial expires before the job delivery date it would be considered expired and can't be issued to the job.

The **Transaction Date** indicates that the date when the lot is issued to the job is used to validate the lot expiry. Therefore, if the expiry date is before the transaction date, the lot/serial is considered expired.

Affected programs

We have updated the following programs in **SYSPRO 8 2024**:

- [Inventory Stock Code Maintenance](#)
- Bins, Lots & Serial Allocation
- [WIP Job Receipts Import](#)
- [WIP Job Issues](#)
- [WIP Reserve lots & Serials Maintenance](#)

Affected business objects

We have updated the following business objects in **SYSPRO 8 2024**:

- Inventory Stock Code Maintenance
- WIP Job Specific Issues
- Reserve Lots and Serials
- Inventory Query
- WIP Build Material Issue

eNet Runtime Operator Linked Licensing

SYSPRO has introduced **eNet Runtime Operator Linked Licensing** to enhance posting auditability, integration control, and prevent misuse.

This architectural change ensures that third-party software providers post as SYSPRO operators flagged for runtime posting. The key benefits of this feature include:

- Full Traceability:
Enforces traceability by operator code, ensuring that specific operator codes are used for all e.net access, including setup, maintenance transactions, and queries.
- Simplified Configuration:
Eases configuration between third-party software provider products and SYSPRO, as the operator code does not require checking the operator password. Additionally, operator password rules, including expiry, can be disregarded.

Lock Stock Take Screen during processing

Stock take times have been optimized by locking the **Stock Take Update** screen, thereby preventing updates to criteria during processing. This enhancement eliminates recursive loops and expedites the stock take process.

Document Services - Credit Top Up

Users can now view their current balance and access the **OneView Portal Credit Management** page directly within the **Consumption Based Licensing Log** program to purchase more document credits with ease.

The following functionality has been added to the **Consumption Based Licensing Log** program:

- **Current Balance** field: View the number of credits currently available.
- **Refresh the Current Credit Balance** button: Refresh the **Current Balance** field.
- **Top Up** button: Open the **OneView Portal Credit Management** page to buy Document Services credits.

Multimedia Upload Constraints

SYSPRO 2024 allows you to specify constraints on both the size and types of files that can be uploaded using the **Multimedia Upload** utility. The maximum size and allowed file types can be defined in **Setup Options** to prevent overloading the server and communication bandwidth, as well as prohibit uploading harmful file types.

Accounts Payable Control Record Split

Accounts Payable control records within the SYSPRO database architecture have been redesigned for greater scalability. This addresses the need to cater for the locking and, by extension, queuing of processes of the current control tables while a process retrieves and uses the next keys held in these tables.

TPM Control Record Split

Trade promotion control records within the SYSPRO database architecture have been redesigned for greater scalability. This addresses the need to cater for the locking and, by extension, queuing of processes of the current control tables while a process retrieves and uses the next keys held in these tables.

AR Withholding Tax At Point of Capture

The introduction of the **Ease of Paying Taxes (EoPT) Act** in the Philippines mandates a shift in the timing of withholding tax obligations. Now, withholding tax must be recorded when income becomes payable - at the point of invoice creation. Previously in SYSPRO, withholding tax could only be processed when payments were made.



To address this regulatory change, SYSPRO now automates the calculation and recording of withholding tax directly at the point of sales invoice creation. This eliminates the need for manual processes, ensuring compliance with local tax regulations while streamlining efficiency and accuracy in tax reporting.

By embedding withholding tax directly into the sales invoice process, SYSPRO enables businesses to stay ahead of regulatory demands while optimizing operational workflows.

Supply Chain and Connected World

Pricing Engine - Gross Or Nett Indicator

We have expanded the **Sales Pricing Engine** capability by adding a Gross / Nett indicator that allows you to specify whether the price in the price list, invoice or quotation includes or excludes the discount.

Supply Chain Portal Administration Management

SYSPRO's **Supply Chain Portal Administration Management** feature provides a self-service model to enhance flexibility and usability by offering administrators access to the portal for configuring third-party user accounts, access and passwords.

This enhancement also allows you to configure customer and supplier-specific landing pages, determining what can be set against those operators.

Extending the Precision for TPM Calculations

The percentage discount on trade promotion calculations has been extended to accommodate five decimal places. This enhances sales management by providing greater flexibility and improved precision when you configure and calculate trade promotions using the **Percentage** calculation type in the **Promotion Code** program.

Allow Over Dispatch for TPM Orders Business Object

We have enhanced the **DISPATCH NOTE CREATION FROM SALES ORDER**¹ business object to allow over dispatching of orders that are associated with trade promotions. This increases the flexibility of integrated dispatch processes and third-party systems and reduces the need to amend or generate new sales orders to dispatch remainders of stock.

Custom Form Field Inclusion in Sales Order Query Business Object

We have updated the **SO LIST OF SALES ORDERS**² and the **SO BACK ORDER RELEASE**³ business objects to return all custom form fields held against the sales order header, thereby ensuring that third party integrators can easily gain access to the data from the **SO SALES ORDER QUERY**⁴ business object.

¹Business object: SORTDN

²Business object: SORQSO

³Business object: SORRBO

⁴Business object: SORQRY

Information and Intelligence

Master Data Take On Management

The quantum architecture capabilities have been enhanced to optimize the take-on and management of SYSPRO data. SYSPRO **Master Data Take On Management** capabilities simplify implementations and data population using the data sequence rules, intelligent data import templates and bulk update capabilities. These capabilities allow you to migrate and cleanse your data easily and efficiently in SYSPRO.

Embedded Analytics

Embedded Analytics 2024 Update

We include an updated **Embedded Analytics** engine that improves performance and responsiveness, enhances drill down capabilities and improves the rendering capabilities of dashboards hosted within SYSPRO web views.

Embedded Analytics 2024 Release Connectors

We have further enhanced our **Embedded Analytics** offering to enable the deployment of new data connectors, and now provide support for additional databases. This ensures that SYSPRO businesses can create visuals, by linking data between SYSPRO and disparate systems databases, to provide a single analytical viewpoint.

- MemSQL
- Snowflake
- MySQL
- Oracle

Web UI

Stock Code Interchange

The **Stock Code Interchange** feature has been made available in **SYSPRO Web UI (Avanti)** to provide increased flexibility when accessing stock codes by allowing you to select relevant stock codes based on cross references.

Stock code entry fields on gridviews and forms have been enhanced to include a **Click for alternate keys** button. Selecting this button displays a context-sensitive menu with the following options:

- **Alternate Key**
- **Customer Interchange**
- **Supplier Interchange**

- **Matching Stock Codes**
- **Approved Manufacturers**
- **Remove This Selection**

The **Stock Code Interchange** feature therefore offers you the ability to search against defined supplier, customer, alternate and approved manufacturing codes, and matching stock definitions. It provides increased efficiency when selecting and accessing stock codes.

Drilldown for open Purchase Orders in Supplier Query in the Web UI

We are adding a hyperlink within the **Supplier Query** program in the **SYSPRO Web UI (Avanti)** to let you view outstanding purchase orders for the selected supplier. To view these, you can select the **Show** hyperlink at the **Outstanding Purchase Orders** field, which launches the **PO Browse on Purchase Orders** program.

Web UI Enhanced Browsing

Operators can browse more efficiently with the **Web UI Enhanced Browsing** functionality. This enhancement includes filters, a **Start At** function, which allows operators to jump to specific key values, and introduces paging, which offers users the ability to skip through pages on returned results. The **Web UI Enhanced Browsing** functionality reduces the time taken to render listviews and spent scrolling to find the results you are looking for.

Additional Charts for Web UI

All charts displayed and accessible in the **Desktop UI** have been made available in the **SYSPRO Web UI (Avanti)**. This addition allows users to view data visualizations within all **SYSPRO Web UI (Avanti)** applications.

Business Object COMFND - Order By Clause

We have added an **ORDER BY** parameter to the data sorting functionality within the **COM GENERIC FIND¹** business object so that the query can display the returned data in the relevant order (ascending or descending), rather than sorting the returned data manually.

You can also select the ascending or descending search order at the **Order by** column, which is displayed when selecting the hyperlink at the **Order by fields** option within the **Search Configuration** program.

This change ensures greater efficiency in searches and adhoc queries.

¹Business object: COMFND

Digital Business Platform

Application Designer

Application Designer Custom Form Fields

We have incorporated the ability to add custom forms and custom panes into an application that was designed and developed using the **Application Designer** program. This adds flexibility when developing programs and supports our no code strategy.

Application Designer Posting Business Objects

We have enhanced the **Application Designer** program by providing developers with multiple methods to interact with SYSPRO. Developers can now process transactions via business objects or web services and use business objects for master data.

This promises a significant reduction in the amount of script code required to perform transaction processing tasks.

Data Model

The SYSPRO Data Dictionary has been enhanced to support custom data. The new **Merge User Defined Objects into Data Dictionary** utility allows you to include custom data objects (i.e., forms, tables, columns and indexes) and register them in the SYSPRO Data Dictionary.

These new data dictionary definitions are supported by the Business Activity Query (BAQ) builder, which now also caters for longer custom object names and aliases (up to 30 characters).

In addition, the **Data Model** feature offers the following:

- All custom forms and user object definitions are included in newly created company databases, thereby keeping them in sync across companies and simplifying the company creation process.
- All generic data capabilities or business objects have equal access to both standard SYSPRO data and custom data.

Extended Customer Data Object Names

To allow for increased flexibility when naming custom data objects and fields, as well as alias names within Business Activity Queries, the character limit has been increased to allow for 30-character names.

Multimedia Categories Business Object

We are introducing two new multimedia business objects. The **SETUP MULTIMEDIA CATEGORIES**¹ business object allows third party integrators to create and maintain multimedia categories using SYSPRO'S API, while the **QUERY MULTIMEDIA CATEGORIES**² business object can be used to query multimedia categories. Both business objects ensure a seamless integration to SYSPRO using multimedia.

eSignatures Configuration Business Object

We have added two new configurable business objects for Electronic Signatures that are designed for seamless third-party integration with SYSPRO. The **ESIGNATURE TRANSACTION SETUP**³ was developed to set up and maintain eSignatures whereas the **ESIGNATURE TRANSACTION QUERY**⁴ queries eSignature transactions.

¹Business object: COMSMC

²Business object: COMQMC

³Business object: COMSSG

⁴Business object: COMQSG



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