INNOVATIVE ERP+ SOLUTIONS FOR MANUFACTURERS & DISTRIBUTORS

NexSys

Powering business growth

A K3 company

SYSPRO

ELITE
Solutions
Partner

ABOUT NEXSYS

NexSys has 40+ years' experience of delivering Innovative ERP+ solutions to manufacturers and distributors throughout the UK and beyond as an elite partner of SYSPRO. NexSys technologies provide organisations maximum visibility over business-critical information, enabling decisions to be made based on accurate, reliable insight. The company's mission is to work collaboratively with customers to provide solutions that enable agility, innovation and competitive edge.

While SYSPRO ERP sits at the heart of the NexSys portfolio, the company offers complementary technologies which deliver complete technology solutions, encompassing modern industry needs. This includes the company's DataSwitch product, a purpose-built systems integration and data manipulation tool that enables companies to become more efficient through automating processes and many other applications.

As a K3 company, NexSys benefits from the strength and security of a global organisation and works closely with its sister businesses to deliver fully integrated solutions, which aid businesses across the supply chain. At the heart of its operations is a dedicated customer support team, project managers, consultants, developers and trainers, who work closely with customers to help them realise maximum ROI from their technology investment. NexSys has a rich heritage of delivering technology transformation projects.

400⁺
UK BASED
CUSTOMERS

40⁺
YEARS POWERING
BUSINESS GROWTH

UK
SUPPORT IS
BASED IN THE UK

K3
PART OF THE
K3 GROUP

" As a K3 company, NexSys benefits from the strength and security of a global organisation and works closely with its sister businesses to deliver fully integrated solutions

CONTENTS

*indicates a partner product

ABOUT SYSPRO

SYSPRO is a leading, global Enterprise Resource Planning (ERP) software provider Specialising in key manufacturing and distribution industries. Our industry-built enterprise solutions and services are designed to make things possible with a team of industry experts committed to addressing unique industry needs and enabling customers to easily adapt and scale.

As trusted advisors, SYSPRO remains focused on the success of partners and customers. With a strong commitment to channel partner growth, SYSPRO customers gain a team of global experts that drive maximum value out of IT systems and business solutions.

SYSPRO's ERP solution empowers customers to take the next step – whether it is expanding into new territories, adding new product lines, transforming business processes, or driving innovation. With SYSPRO ERP software, customers gain access to solutions, processes, and tools to assist in the management of data for key business insights and informed decision making. The solution is scalable and can be deployed in the cloud, on-premise, or both, and accessed via the web on any device to provide customers with choice and flexibility.

Our evolving product roadmap is aligned with industry trends to leverage emerging technology that will enable partners and customers in securing a digital future and to gain a competitive advantage.

1 | **BUSINESS SYSTEM**
Unlimited supply chain solutions

60+ | **COUNTRIES**
Global footprint, local fit

40+ | **YEARS OF GROWTH**
Designed to fit now and into the future

98% | **CUSTOMER RETENTION**
Providing a lifetime of value

6 | **REGIONAL OPERATIONAL CENTRES SERVING 6 CONTINENTS**
Wherever we are we speak your language

15000+ | **LICENSED COMPANIES**

"
SYSPRO's ERP solution empowers customers to take the next step

Industry Expertise

SYSPRO is the only ERP solution purpose-built for manufacturing and distribution. With a mission to build flexible, leading-edge software to meet the specific needs of industry, you won't find a better fit for your business anywhere else in the market.

However, form and functionality are only the starting points – support is also essential. With NexSys as your SYSPRO ERP partner, you can tap into a business that has its roots in manufacturing and distribution. Our unwavering industry knowledge, coupled with our experience of SYSPRO and relationship with fellow global resellers and partners, means we can help you shape, strengthen and solidify SYSPRO into your organisation. We make the solution work for your business, accelerating ROI and making an immediate impact on company-wide productivity and efficiency. Whatever your industry focus, we have the experience and tools to help you grow.

Aerospace	**Automotive**	**Medical Devices**	**Electronics**
Metal Fabrication	**Machinery & Equipment**	**Plastics & Rubber**	**Furniture & Fittings**
Food & Beverage	**Chemicals**	**Packaging**	**Pharmaceutical**

Our People and Experience

The ambition of every individual at NexSys is to help you simplify and grow your business – to make it more efficient, responsive, agile and most importantly profitable.

When you buy a SYSPRO solution from NexSys, you are not just buying the latest technology, you are investing in a long-term relationship – both of which will deliver significant value for years to come.

Services

Effective training, consultancy and ongoing support is as important to the long-term success of your SYSPRO project as it is to the initial stages. That's why, as part of your technology investment, you have access to our experienced Services Team, who are dedicated to helping you at every stage of your journey. Think of them as your integrated ERP team. Every member of our Services Team has been where you are now – they've either purchased SYSPRO, implemented it, or deployed it live within a business – many of them as customers before joining our team.

As a result, they have a talent for making the complex sound simple, they can find a solution to practically every problem, and they have an extensive knowledge of what makes a successful SYSPRO ERP implementation.

The NexSys Services Team has been specially assembled to provide expert guidance to you throughout every stage of your SYSPRO journey. It provides an array of consulting support and training services to help you quickly realise the benefits of SYSPRO and start using it to transform your business.

With hundreds of customers across a wide range of industries, our people are true experts in their field with a sustained enthusiasm to get the job done.

They are rich in manufacturing and implementation experience so you can rely on them to make sure your business gets the most from your SYSPRO solution.

Implementation Methodology

Delivering the Right Solutions to Meet Your Business Goals and Objectives.

A successful ERP implementation is the foundation on which you can expand your business, launch new initiatives and improve existing operations to grow revenue and reduce costs.

To ensure successful implementation, NexSys follows the global standard SYSPRO IDEAL approach. This is a scalable, structured and phased approach to implementing SYSPRO by:

- Using our experience and knowledge of best practices to your benefit
- Providing visibility to and accountability of our activities and services
- Using your resources effectively
- Empowering you and your employees to know and leverage the solution
- Scaling to meet the complexity or simplicity of your implementation needs and your company's capabilities

Supporting the ongoing implementation processes are a number of project control and governance activities to ensure that the project is meeting its defined objectives, remains on its scheduled track and within the defined scope and budget, and assists in ensuring that resources are being managed effectively. SYSPRO IDEAL facilitates a successful implementation and a roadmap to reaping a return on investment on your ERP project for many years to come.

SYSPRO IDEAL Implementation Methodology

💡 Initiate	⚙️ Design	🛠️ Engineer	🔭 Actualize	👥 Leverage
• Handover Meeting • Customer Start-up Meeting • Resource Identification • Scoping • Work Breakdown Structure • Project Planning • Infrastructure Assessment	• Business/Process Review • Solutions Specification and Modeling • Gap Analysis and Resolution • Education Review	• Hardware Infrastructure Readiness • Sample Data Creation • Solution Build • Solution Simulation • Test Script Creation • Data Migration Test • Acceptance Testing	• End-user Training • Readiness Testing • Production Master Data Import • Go/No-Go Review • Balance Take-On • Balancing the System • Cutover to SYSPRO • Go-Live Support • First Month-End Support	• Support Documentation • Support Handover • Account Management Handover • Project Close

Change control
Project Management
Quality control
Risk, actions, issues and decisions
Stakeholder Management

3 | Engineer 🛠️

The project team starts to configure and build the solution based on the agreed design. The first step in this phase is to review the hardware infrastructure to verify that the network resources have sufficient capacity and have been configured correctly to install and run the SYSPRO software and other integrated solutions. Once this is in place the project team can begin building your SYSPRO solution.

1 | Initiate 💡

The project teams from your company and NexSys come together to plan out the project activities, resources and timelines. This phase starts with an internal handover meeting between our sales and service delivery teams to ensure that all parties have an aligned understanding of the business, its requirements and the requirements of the project.

2 | Design 👥

The projects team uses the agreed deliverables (outputs) from Initiate to explore in detail the business objectives and needs. The team begins architecting the solution that will best meet those needs within the project parameters. During this phase of the implementation, the project team will evaluate the current 'as is' business processes of your company and begin outlining the 'to be' business processes. All reporting and documentation requirements are gathered.

4 | Actualise 🔭

With the design and delivery, final preparations are made for go-live. Effective management of this phase is critical to success in ensuring all users of the solution are prepared and ready to use the new software. End-user training is provided while this takes place, a prototype is built, master data is imported, and the complete balancing of the new system values to the legacy system values is performed and accepted.

The NexSys projects team is available to support your first month-end on the SYSPRO solution, to ensure that the business reporting cycles, and fiscal period-end processes are in line with your requirements.

5 | Leverage 👥

Once your SYSPRO solution is in place and is being used for business as usual you can start to derive value from the system.

You will be allocated an account manager who will work with you to ensure you get the most amount of value for your business out of SYSPRO. They will also advise on complementary NexSys solutions that can be integrated into SYSPRO to create further value.

Support

At NexSys, our Customer First strategy puts you at the heart of everything we do, and this is reflected in the high levels of support that our Service Desk delivers. Your relationship with our Service Desk begins during the project implementation phase, when you will be provided with the contact details of our service desk, together with your own login details through which you can access our self-service support portal.

At the helm of our Service Desk is a team of experts, comprising over 240 years of business , ERP and customer support experience.

Everybody in our Service Desk team is dedicated to resolving issues as quickly and effectively as they can, to ensure minimum disruption to your business at all times.

Development Services

No two businesses are alike and we believe you should be able to extend your solution to suit your unique business requirements.

NexSys has a growing portfolio of solutions that give you the ability to extend SYSPRO to best meet your needs. This is backed up by a specialist team which has the knowledge and experience you need to make SYSPRO work for you while identifying global industry trends to anticipate users' aspirations.

Customisation

Your system, your way.

Every business is different so to realise the most effective ROI from your SYSPRO investment, you will want to tailor it to the unique shape of your enterprise.

Your business conforms to certain common practices that are part of the underlying business logic that SYSPRO ERP offers.

Similarly the people you employ to work on the system have requirements of their own and all have different ways of interacting with the software.

We believe in allowing people the ability to configure the software to best suit their needs rather than the system dictating how a business should be run.

With SYSPRO you can change the look and feel of the user interface to be in keeping with your company's brand and you can even incorporate your own data and special ways of processing this data. As your business requirements evolve, you can adapt and change accordingly at little to no cost.

Upgrades need not keep you up at night because the customisation is version agnostic, so will continue to function as expected as you upgrade your software.

SYSPRO's power-tailoring enables you to personalise, tailor and configure the system to better suit your individual user requirements, streamline your business processes and improve user experience.

Customised Panes are one of SYSPRO's powerful tailoring capabilities and enables the creation of user-defined views using various graphical components such as graphs, list views and web applications.

SYSPRO has open API access allowing connectivity with other applications without the need for bespoke code.

Leveraging the power of SYSPROs integration infrastructure, **DataSwitch** is purpose built to simplify system integration and data manipulation.

Future Proofing

Industry stands still for nobody and in the age of digitalisation, your manufacturing or distribution company needs to adapt and pivot quickly, in order to remain competitive, At NexSys, we are committed to making our digitalisation software suite future-proof, so you can maximise agility and take advantage of new technology innovations as they develop. Our product development team constantly keeps your investment top of mind when building new functionality.

> "We're always willing to try new things to take the business forward. We have an ongoing commitment to invest in consultancy and software and see NexSys as a long term partner. They're an extension of our team and we encourage them to both support and challenge what we do.

Mark Cooper, Management Accountant - **Rocket Medical**

> "NexSys have really helped us to imagine the future of the business with SYSPRO and foresee some of the many benefits it will bring to our company. The quality of consultants from NexSys is excellent. They have a lot of knowledge about the product, are flexible in their approach and go above and beyond for us.

Mark Martin, Systems Manager - **Titan Motorsport**

> "It's an ongoing process, and we'll never stand still. There's always more that SYSPRO can do for us. NexSys is a long-term partner, and we'll continue working together to help meet our business goals.

Sonia Freed, Managing Director - **Europa**

MANUFACTURING

SYSPRO's ERP Manufacturing Management Software allows you to plan, execute and control production more effectively based on a wide variety of manufacturing modes. SYSPRO enables you to integrate your manufacturing operations into other business processes, to help you become more streamlined and run more efficiently.

16 | **Manufacturing Operations Management**

20 | **Requirements Planning**

21 | **Bill of Materials**

22 | **Engineering Change Control**

23 | **Work in Progress**

24 | **Projects & Contracts**

25 | ***UniPoint - Quality Management**

MANUFACTURING OPERATIONS MANAGEMENT

SYSPRO's Manufacturing Operations Management (MOM) solution can help you revolutionise your company to remain competitive in today's market. It provides complete manufacturing life-cycle management from planning, scheduling, publishing, collecting, tracking and analysing, to optimise and improve end-to-end manufacturing operations. Together with SYSPRO's ERP this Manufacturing Execution System (MES) offers a unique level of delivery, cost and quality control of manufacturing operations for job shop, batch production, production line and mixed mode environments.

The solution encompasses the following:

- Advanced Planning & Scheduling
- Shop Floor Data Collection and Tracking
- Factory Digitisation and Automation

- Factory Performance & Loss Management
- Lean Manufacturing and Continuous Improvement

The Benefits of Manufacturing Operations Management

Increase productivity, minimise loss and lower production costs.

SYSPRO's Manufacturing Operations Management solution can help you take control of your manufacturing operations and start to:

- Deliver to your customers faster
- Control labour and machine costs
- Reduce downtime and bottlenecks

- Measure and improve product quality
- Increase productivity and output
- Reduce cost to compete

The solution helps manufacturers:

- Measure performance to drive to world class standards of operation for overall equipment effectiveness (OEE), total effective equipment performance (TEEP) and overall labour effectiveness (OLE)
- Increase productivity and lower costs by minimising loss within the business
- Optimise operational efficiencies through better workflow of core manufacturing activities: schedule, publish, collect, track, analyse and improve
- Connect machines and other devices to digitise the factory (Industry 4.0) and gain a competitive advantage

Manufacturing Operations Management Features

A 360° View of Production
M.O.M supports your complete manufacturing life cycle, providing you with a 360˚ view of your production.

- **Schedule** – quickly and accurately schedule to maximise order fulfilment and resource utilisation
- **Collect** – collect data from the shop floor from humans and machines
- **Track** – gain real time visibility of employees, equipment and jobs
- **Analyse** – access out-of-the-box analytics for OLE, OEE and TEEP
- **Improve** – drive continuous improvement with Six Big Loss, online documents and more

Any Device, Anywhere
SYSPRO's Manufacturing Operations Management solution makes use of the latest technologies to provide a modern and intuitive, browser-based user interface, allowing you to gain visibility over any stage of the manufacturing process, from any device.

Smart Factory
Enables you to connect equipment to digitise your factory by collecting data from your machines and other devices automatically. In terms of future-proofing your business by embracing Industry 4.0, the technology offers the foundation to building your Smart Factory. By embedding interactive technology in key machines, manufacturers can look to creating more intelligent manufacturing processes.

Advanced Planning and Scheduling
Incorporates an advanced, finite capacity based, planning and scheduling (APS) system allowing you to quickly and accurately schedule while minimising downtime.

- **Visual Planning Board** – define your resources and their available capacity via the shifts that they operate. Create, optimise and share your production schedules online. Publish job lists to your resources for easy data collection
- **Dashboard** – balance equipment utilisation and order fulfilment to maximise factory output. View your most/ least utilised 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

Shop Floor Data Collection

Incorporates shop floor data collection (SFDC) from your employees and equipment.

- **Workbench** – collect data both on and off the shop floor from your employees or equipment in real-time using a "stopwatch" style of recording for accuracy. Data recorded here is used to support the calculations of overall labour effectiveness (OLE) and overall equipment effectiveness (OEE)
- **Connect Equipment** – digitise 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 employee; what their current status is, 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; what the current status is, 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, scheduled posting of approved transactions to SYSPRO for financial analysis. Manual "sync now" option also available. Export to payroll systems (optional)
- **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
- **Equipment Performance** – detailed analysis of an individual equipment performance with supporting detail including audit trails 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 Digitisation and Auto

Allows you to connect machines, measuring equipment and other devices to read data automatically without the need for 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)

Manufacturing Operations Management Features

Factory Performance and Loss Management

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

Utilises Six Big Loss analysis to identify, classify and quantify your loss enabling you to determine the countermeasures that will help to reduce them.

- **Loss Management** – dashboard realisation 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 improvement 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 analyse performance for a specific group of employees. Further analyse by date or diversion
- **Equipment Analysis** – detailed analysis of your equipment performance. Filter by individual equipment or analyse performance for a specific group of equipment. Further analyse 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 organisational control to restrict information that can be viewed by work group or individual
- **Quality Assured** – the solution has been formed around the globally recognised standard for manufacturing operations management (IEC62264) providing the tools and analytics essential for effective manufacturing operations management to help you compete in today's market

REQUIREMENTS PLANNING

SYSPRO Requirements Planning uses projected and actual demand and supply to assist in planning and creating realistic production, purchasing and supply transfer schedules. It also identifies capacity constraints and maintains optimal stock holdings in a multi-site and multi-warehouse environments.

Material Requirements Planning (MRP) helps reduce inventory, increase manufacturing productivity and ultimately facilitates cash flow.

The Benefits of Requirements Planning

- Effective planning of material and production capacity to satisfy demand
- Identification of critical resources with rough-cut capacity planning
- Detailed pegging information available in queries and reports
- Critical resource queries facilitate effective planning
- 'Bucketless', date-driven planning environment for greater accuracy

Requirements Planning Features

- Create build schedules from Master Production Schedule (MPS) suggestions
- Calculate material and capacity requirements under an infinite or finite capacity assumption
- Create actual purchase orders, work orders or requisitions from suggestions
- Generate supply chain transfers from suggestions for transfers between warehouses
- Accept suggested changes to existing purchase orders and jobs based on changes in demand
- Define a gross requirements rule per item for the calculation of MPS-suggested quantities
- Define planning frequencies, lead times and planning horizons for time fence indicators
- Query MRP calculation results with pegging details to view sources of demand
- View capacity load in a bar chart or report form
- Use time fence indicators to assess the viability of changing an existing materials plan
- View and report planning details in user-defined time periods
- Create and amend purchase orders and jobs based on suggestions, with powerful, on-screen reviews
- Review and update live blanket purchase orders which require corrective action to meet planned demand
- Review excess stock and shortages based on minimum and maximum inventory levels calculated in Inventory Optimisation. Stock is moved from one warehouse to another by creating suggested supply chain transfers
- Test materials plans before updating the live system with 'snapshot' functionality
- Control inventory levels by identifying potential oversupply
- Avoid bottlenecks by reviewing average queue times
- Manage lot traceable items, including tracking expiration dates
- Quickly identify overloaded work centres
- Setup forecast depletion options

BILL OF MATERIALS

The Bill of Material (BOM) is designed to ensure your organisation has complete control over the product structure. This module ensures that engineering, production, purchasing and order processing are utilising the same information. SYSPRO Bill of Materials facilitates accurate expected costs against which actual production costs can be tracked. The complete bill forms the basis for material and capacity planning, shop floor control, and costing. You can create and maintain a model of your manufactured and assembled products calculate manufacturing lead times as well as generate as well as generate what-if costing scenarios.

The Benefits of Bill of Materials

- Supports up to 15 levels
- Multiple recovery rates per cost centre, work centre and employee
- Multiple routes for lead time, cost and contingency modelling
- Calculation of manufacturing and cumulative lead times
- Calculation of dynamic elapsed time and capacity required from elements of operation time
- Capacity unit of measure conversion factor for capacity units other than time
- Unit, rate and block runtime
- Capacity calendar per work centre and productive unit
- Material and operation scrap
- Percentage and planning bills, phantom parts, and sub-contract operations
- Optional components for sales of kits
- Co- and by-products
- Import functions for integration to third-party programs such as CAD
- Validation functions for notification of potential problems

Bill of Materials Features

- Define component relationships as quantity per percentage of parent or specific quantity, regardless of batch
- Define and process parent and component quantities in a unit of measure other than stocking
- Define elements of time, such as set-up, start-up, run and tear down, per operation
- Easily import structure and routings
- Use the replace-where-used functionality to identify and replace components in the structures in which they are used
- Indicate movement time between operations
- Define operation transfer quantities
- Document narrations at component and operation level
- Track effectiveness dates of components
- Define scrap factors for more
- accurate planning
- Define routes per location for accurate costing and planning
- Plan for co- and by-products, and related cost apportionment
- Link multimedia, such as photos and video clips, to components and operations
- Indicate scrap percentage and/or quantity with optional progressive scrap
- Calculate BOM costs per warehouse
- Analyse BOM and what-if costs
- Compare BOM costs to current inventory costs
- Transfer rolled-up costs to unit cost of item
- Update work centre information when associated cost centre information changes
- Identify material shortages with trial kitting

ENGINEERING CHANGE CONTROL

Manufacturers need the ability to bridge the gap between engineering, quality assurance and production to control and speed the process of driving new product revisions to market quickly and cost effectively.

SYSPRO Engineering Change Control (ECC) helps you to improve the management of engineering changes to your products and/or associated data. This is achieved through user-defined workflow, steps and processes. It can augment or replace the paper trail that typically accompanies any changes to product design data. The archiving facility enables retrieval and production of prior revisions/ releases.

The Benefits of Engineering Change Control

- Analyse and monitor engineering change information to gain insights into how material and labour changes will affect production costs and pricing
- User-defined workflow for the streamlined control of product design changes
- Automatic or manual movement between statuses
- Association of triggers and events for automated alerts
- Electronic sign-off for engineering change Orders (ECO's) for ease of tracking
- Archiving of versions for tracking and retrieval

Engineering Change Control Features

- Enforce security and controls in the ECC process
- Govern revision/release sensitivity at stock code level
- Keep track of product-related data such as drawings, circuit diagrams and CNC programs
- Record all notes by the ECO reviewer, providing a complete chronology of all comments for future reference
- Assign product design tasks to specific users/groups of users
- Transfer tasks between users/groups of users
- Define new task notifications, outstanding task reminders and electronic sign-off
- Control structure and/or routings maintenance with mandatory ECO's
- Define any number of user-defined statuses with associated routings

- Trigger an associated event when an ECO is moved into a status
- Identify existing jobs, purchase orders and sales orders relating to the affected products on the ECO with where-used queries
- Identify affected products against an ECO
- Optionally prevent creation or maintenance of purchase orders, jobs and sales orders for products on an ECO
- Optionally prevent stock code maintenance for ECC affected items
- Optionally allow cosmetic changes to a BOM without increasing the revision/release
- Optionally allow the tracking of release when ECC stock control is at Revision level
- Retrieve previous revisions of structures, routings and jobs from archives for production as planned or as built
- Optionally allow non-sequential revision or release numbering

WORK IN PROGRESS

Work in Progress allows you to issue work orders, develop schedules, and track costs associated with the manufacturing process. This solution provides you with complete control of the manufacturing process and the ability to see up-to-the-minute, work-in-progress information.

The Work in Progress module allows the material required to produce a product to be automatically merged from the corresponding Bill of Materials. All of the required paperwork to move the job through the shop can then be generated from each work order.

The Benefits of Work in Progress

- Management of production activities in a variety of manufacturing environments
- Monitor and control material, operational costs, production overheads, resources and scrap per job
- Monitoring of job variances between actual and standard
- Analysis of efficiency and utilisation of shop floor elements
- Scheduling of jobs according to production calendars
- Identification of overloaded work centres
- Automatic creation of jobs from sales orders, quotations and MRP
- Management of co- and by-products
- Trial kitting for checking availability of materials/parts, including different versions of change-controlled parts
- Milestone and subcontract operations
- Multi-level job queries
- Factory documentation and job archiving
- Allocating Work In Progress (WIP) to a branch code to facilitate the planning, management, analysis and accounting of production.

Work in Progress Features

- Define work centre and productive unit capacity
- Create jobs for standard or custom products
- Issue materials and labour to jobs in kits or by item and optionally allow material substitution
- Post labour at standard or actual employee rate
- Optionally capture real-time job receipt data with **TransLution**
- Add nest multiple jobs using the same raw material to minimise waste
- Record costs incurred on sub-contracted operations
- Create rework jobs as required
- Receive completed items into inspection or directly into inventory
- Link purchase orders to jobs to expedite receiving

- Determine standards for machines and employees
- Optionally include non-productive time in job costs
- Optionally receive manufactured product into an alternate warehouse, or as a different item
- Create sub-jobs with automatic transfer of values to the master
- Calculate due dates on a forward, backward, finite or manual basis
- Place jobs on hold to suspend processing
- Reserve stock for allocations at the time of confirming a job.
- Reserve and track lot and serialised items for jobs
- Recalculate expected costs
- Archive completed jobs as XML documents

PROJECTS & CONTRACTS

SYSPRO Projects and Contracts facilitates accurate profit reporting for long-term projects which require analysis of costs and revenues for multiple sections and levels.

The Benefits of Projects and Contracts

- Real-time actual and committed costs, as well as realised and projected profits
- Analyse at project job or contract level
- Deposits, retentions and billing schedules
- Recall of standard costing hierarchies for similar items to reduce processing time
- Revenue recognition through sales orders, based on the defined costing hierarchy
- Calculation of profits taken and projected
- Profitable areas highlighted
- Comprehensive reporting for jobs and contracts

Projects and Contracts Features

- Designate up to five user-defined costing levels within a contract
- Describe the costing hierarchy at the time of creating the job or estimate
- Assign unlimited numbers of heads to a contract
- Assign unlimited numbers of sections and subsections to a head
- Assign multiple jobs to a contract for tracking purposes
- Estimate cost and revenue by levels or sections within a contract
- Attach purchase order lines to the relevant hierarchy level
- Associate material labour transactions with the relevant hierarchy level
- Adjust billing values between heads and sections
- Base billing on contract or job hierarchy
- Apply deposit against first or last payment, or progress payments
- Raise retention invoice after specified term
- Reduce final invoice by retention value
- Query jobs in terms of sales, billings, cost of sales and future expected costs
- Query the total cost of a hierarchical job, including head and section cost details
- Drill down to transaction detail

UNIPOINT - ADVANCED QUALITY MANAGEMENT

uniPoint is a configure-to-order, SYSPRO-integrated quality solution designed to help companies automate their journey toward excellence. With over 25 integrated software modules for quality and compliance management, uniPoint has transformed the quality management systems of 2,000+ companies into a collaborative and paperless environment for continual improvement, while tracking the total administrative cost of quality at every stage. uniPoint uses the latest technology and offers a powerful feature set with unmatched simplicity and ease-of use.

uniPoint offers a mobile-first design option, allowing our mobile/web modules to run on any internet-enabled mobile phone, tablet or desktop with full functionality, SSL Security and optimised speed. Our advanced Inspection module offers bubble drawing capability and advanced technology, such as the auto-transfer of actual Inspection results from your CMM machine, and a Mobile/Web Portal for vendors and customers.

Quality for SYSPRO by uniPoint Benefits

- Accurate and real-time information for precise reporting
- Easy to install, learn and use for quick adoption
- Evolve toward a paperless quality system
- Quick visibility to your overall quality health with Key Indicators dash board
- Complete integration for reduction of regulatory risks
- Diminish redundant data entry and dispose of the non-integrated spreadsheets and databases
- Encourage employee collaboration & accountability to encourage a quality culture

Quality for SYSPRO by uniPoint Features:

- Integrates with your SYSPRO with over 110 shared data points
- Twenty-five module, configure-to-order and scalable system
- Complete out-of-the box quality solution
- Broadcast/specific email reminders
- User workflow/To-Do Lists
- Over 100 standard quality management reports included
- Over 600 quality metrics included within Key Indicators dashboard
- Over 50 standard quality Trend Analysis graphs included
- Standard training and implementation process provided along with our video library: https://www.unipointsoftware.com/resources/videos/training-syspro/

SALES & DISTRIBUTION

SYSPRO Sales solutions enable you to manage all elements of the sale cycle, from managing your customer and supplier details to identifying key sales trends.

SYSPRO Distribution solutions provide the technology to manage a supply chain from end to end. Our highly developed solutions enable maximum control and flexibility over operations and inventory and are ideally suited to single or multi-site, domestic and international operations, where operational efficiency is fundamental to success.

QUOTATIONS AND ESTIMATES

Quotations and Estimates facilitates the creation of professional and comprehensive quotations with multiple offers on stocked and/or customised items for existing or prospective customers. The highly flexible interface provides all the information required to produce timely quotes or estimates which include material, labour, and any outside services. SYSPRO's Quotations and Estimates capability provides the ability to incorporate external vendor related service costs which can be marked up as a part of the cost estimate. Accurately capturing these costs in your quoting process is key as more and more companies are outsourcing services to gain manufacturing and cost efficiencies. When customised items must be specially made, supporting estimates can be created. And if one or more special parts are required for the customised items, they also can be supported by estimates.

This process can be extended to fourteen levels, which are then rolled up to complete the quotation's top-level costing.

The Benefits of Quotations

- Quotations for existing and/or custom items
- Product Configurator for streamlined quote generation
- Accurate time and materials estimates for manufacturing
- Accurate estimates of expected labour, material and overhead costs
- Bill of Materials retention for custom manufactured items
- Supplier contract maintenance for non-stocked purchased items
- Built-in margins to safeguard profits
- Lost-quote analysis to improve sales
- Optional inclusion of quotations in material requirements planning for forward planning based on acceptance probabilities
- Job chaining for multi-level custom bills of material
- Manual or automatic quotation numbering, optionally by branch and with prefix
- Quotation versioning for tracking quote changes
- Streamlined importing of details from third-party products such as CAD and Excel

Quotations Features

- Determine price and lead time with online cost roll-up
- Define multiple formats for generating quote documents for printing, faxing and emailing
- Control quoted costs with expiration dates
- Create up to five offers per quotation with default quantity breaks
- Copy and modify previous quotations
- Recall non-stocked item information for use in multiple quotations
- Re-value quotes based on current inventory or bill of material costs
- Import estimates and quotes from external files such as CAD-generated data
- Recall configurations previously defined using the Product Configurator
- Automatically create work orders, purchase orders, sales orders, retentions, deposits and billing schedules on acceptance of a quote
- Add and print notes, comments and instructions on reports and quotation formats
- Create inventory items and generate a bill of material from an estimate
- Optionally include progressive scrap in the calculation of material and capacity requirements
- Optionally prefix automatically generated non-stock codes

PRODUCT CONFIGURATOR

SYSPRO Product Configurator provides a rules-based system, which enables on-the-fly configuration of highly customisable and dimensional products via a straightforward question and answer evaluation.

Through the standardisation of this process the configurator can be utilised by multiple people across the organisation. For manufacturers who want to enhance customer service and operational efficiency, the Product Configurator can be accessed via a web-based interface, enabling the efficient and accurate configuration of products. This allows companies to work smarter and eliminate the wasted effort when tracking orders, quotes, jobs, and more.

Pre-defined user configurations are set up to control the configuration process and eliminate invalid product options and options relationships. The configuration can be set up to create a stocked parent part, non-stocked parent or both. Once the parent has been defined, non-technical people can use a Wizard to create a viable customised product for a bill of material, job, sales order, estimate, quote or a combination of these.

The Benefits of Product Configurator

- Ideal for engineer-to-order and configure-to-order environments
- On-the-fly configuration of complex products for estimates, quotations, orders, bill of materials, and jobs
- Uncluttered web-based interface for external configuration activities by customers or internal configuration activities by staff
- Rules-based for viable configurations of products
- Mandatory and optional selections, as well as selection-dependency
- Library of common configurations for rapid processing of repeat orders
- Configuration of standard inventory items
- Calculation of configurations can be based on item dimensions
- Multimedia links provide clarity for selections

Product Configurator Features

- Define selection criteria to determine the number of options presented for configuration
- Develop component dependencies based on options
- Link options to stock codes and operations
- Store and recall commonly used configurations
- Optionally create a new inventory part and bill of material from a configured selection
- Optionally generate a custom work order and linked sales order
- Optionally reuse existing parent when
- generated from selections
- Generate non-stocked items or kit types
- Generate intelligent part numbers based on selections
- Base costs on bill of materials or inventory cost
- Generate labour requirements based on configuration options
- Drive demand through production by generating sales orders for standard parts
- Prevent premature use with 'under development' indicator
- Print selections on order documents

SALES ORDERS

SYSPRO Sales Orders enhances customer service through fast, efficient order processing and accurate, timely order fulfilment while maximising sales through instant access to information on stock availability, prices and product substitutions.

The Benefits of Sales Orders

- Suitable for a variety of order processing environments
- Flexible entry methods, copy facilities and pricing methods for efficient customer service
- Express entry for on-the-fly quotations and conversion to firm orders
- Real-time access to availability, prices, substitutes and available-to-promise information
- Margin checking and powerful pricing tools for safeguarding profitability targets
- Multi-currency for global orders
- Sales kits with optional components
- Customer-based rules for tailored ordering
- for improved customer service and order accuracy
- Optional tax and invoice rounding to cater for small coins
- Allocate specific products by Lot and Serial numbers
- Manual or automatic depletion of bins/lots
- Multiple units of measure, including cases, units and dimensions
- Delivery promising, scheduling and picking, as well as load planning features, for stream-lined dispatch
- Support for global sales tax systems such as VAT and USA AVP

Sales Orders Features

- Process stocked and non-stocked items, as well as freight and miscellaneous charges
- Copy and modify previous orders
- Query best price for customer, stock code and quantity combination
- Configure order discounts based on a variety of criteria
- Create job/SCT/purchase orders/requisitions on the fly for shortages
- Apply a handling fee and deposit on selected items.
- Apply tax based on a variety of criteria, including order-line shipping addresses
- Place orders using the customer's, supplier's, or approved manufacturer's part number
- Print order and sales documents online or in batch, and reprint as required
- Configure real-time credit checking with
- email notification
- Use the express features such as recent purchase, order template, and Excel copy functionality to facilitate rapid processing of orders
- Manage promotional pricing with contracts for customers and buying groups
- Separately record labour associated with repair/ service work orders
- Consolidate invoices across multiple orders and/or deliveries
- Archive completed sales orders as XML documents for retrieval as required
- Define multiple formats for generating delivery, dispatch, acknowledgment and invoice documents for printing, faxing and emailing

COUNTER SALES

SYSPRO Counter Sales facilitates over-the-counter sales transactions by enabling the receipt of payments and deposits at the point of transaction.

The Benefits of Counter Sales

- Multiple deposit receipts and cash receipts against accounts
- Various payment types and multiple cash drawers
- Fast, accurate information to customers and sales
- staff at the customer counter
- Prevention of sales to customers in excess of their credit terms
- Access to current information on customer sales, inventory movement and cash receipts during order entry

- Ability to sell serialised or lot traceable items
- Tracking of cash sales, deposit history and payment transactions
- Provision for complex pricing structures such as contract pricing and discounts
- Optional auto-depletion of lots and bins
- Daily cash receipts and sales reports
- Multi-currency sales and receipts
- Application of sales commissions for reporting

Counter Sales Features

- Control operator access
- Sell non-stocked or stocked items
- Process sales using a customer's or supplier's stock code
- Apply freight and miscellaneous charges
- Sell kits with optional or mandatory components
- Process back orders
- Process split payments, credit cards or cheques, and calculate the change due

- Apply deposits in full or partially as payments
- Process a payment against an existing customer as required
- Accept deposits and payments against regular orders

TRADE PROMOTIONS

SYSPRO's comprehensive Trade Promotions functionality provides increased control and efficient management of your promotions, thereby reducing time-consuming reconciliation's and improving accuracy and profitability. With its clear visibility of Pareto, forecasting, inventory and sales data, SYSPRO enables quick identification of suitable items for promotion such as new, re-branded and seasonal items, slow movers, or those nearing expiry date.

The Benefits of Trade Promotions

- Streamlined promotion and deduction processing for industries selling through retail outlets, and the consumer packaged goods industry
- Improved visibility and invoice accuracy mitigates costly errors and write-offs
- Efficient reconciliation of accounts
- Single and multi-level credit checking, with selective inclusion of outstanding deductions
- Deduction review and reconciliation
    - Resolution, write-off and matching of deductions to available accrued promotions for improved control
    - Automatic adjustments of accounts receivable invoices for streamlined processing
    - Automatic write-off of small amounts

- Pricing
    - Bracket pricing and discounts based on quantity, volume or weight
    - Automatic application of bracket pricing for incoming EDI orders
    - Pricing for product groups and delivery methods
- Flexible promotions
    - Promotion qualification by weight, volume or quantity
    - Promotion reviews for applying paybacks by cash or credit
    - Off-invoice allowances, accruals and free-goods promotions
    - Price changes, line promotions or line discounts for off-invoice promotions
    - Tracking of accrued promotions

Trade Promotions Features

- Configure promotions for either order date or requested delivery date ranges
- Recalculate line item pricing in order entry at any time to obtain group pricing
- Select to apply promotions to individual lines or entire orders
- Match accrued promotions with specific deduction codes
- Configure free goods promotions to supply ordered or specific stock, free or at a reduced price
- Capture deductions at the time of accounts receivable payment processing
- Review, change and split deduction amounts among customers, and change deduction codes on a single screen

- Reinstate unauthorised deductions as accounts receivable debit memos
- Enter notes and maintain follow-up dates

BLANKET SALES ORDERS & RELEASES

SYSPRO Blanket Sales Orders provides an effective method of setting up contracts between original equipment manufacturers (OEM's) and their suppliers by providing blanket sales orders with multiple release dates, multiple call-offs and cumulative tracking.

The Benefits of Blanket Sales Orders and Releases

- Easy reconciliation according to discrete or cumulative quantities
- Simple manual or EDI receipt of releases and call-offs
- Automated balancing and correction of opening balances
- Extensive visual decision-support, comparing existing plans and contractual arrangements before accepting changes
- Detailed query provides access to sales order lines, customer information and release history
- Online release history query by month and year
- Sales can define the parameters and contractual arrangements negotiated with the OEM

- Entry clerks and/or EDI methods can be used to quickly record a new release
- Management can review the new request; compare it with base data, contractual arrangements and production practicality; manipulate it to suit their needs and capability; and accept the results
- Control the parameters as well as the negotiated contractual arrangements
- Reduce the amount of cash tied up in raw materials and components, while allowing you to schedule the resources needed to manufacture the product

Blanket Sales Orders and Releases Features

- Record new releases manually or through EDI
- Review and manipulate requests according to current capacity prior to acceptance
- Quickly filter changes in orders to schedule purchasing, manufacturing and dispatching to meet a customer's request
- Advise customers of the practicality of changes and communicate these changes to internal supplying department
- Provide quick access to quantities delivered and outstanding per contract
- View in-transit figures
- Record notes against a release during confirmation

- Cross-reference customer and supplier stock codes
- Control the parameters as well as the negotiated contractual arrangements
- Define the number of days before a ship date to allocate inventory

SALES ANALYSIS

SYSPRO Sales Analysis provides insight into sales activities to improve sales profitability and provide information for sales forecasting and planning on a number of levels.

SYSPRO Sales Analysis also assists in determining the extent to which a sales force has met its sales objectives through the provision of analysis on how well Sales people and product groups are performing compared to budgets available. The Sales Analysis system is the focal point for the accumulation of sales data generated from other modules.

Sales history is accumulated in a wide variety of user-defined formats such as: salesperson, product class, customer, warehouse, geographic area, customer class, stock code, order type and branch. Information can be displayed in bar charts or reports. Various budgets and targets can be entered based on user-defined groupings. In addition Tax and Commission reporting can be performed.

The Benefits of Sales Analysis

- Identification of the most profitable products, customers and divisions
- Measurements of actual performance against quantity or revenue forecasts
- Customer, product budgets and salesperson targets

- Analysis of market trends and geographic buying patterns
- Analysis of sales staff performance and actuals to budgets
- Improved sales forecasting
- Analysis of tax collections

Sales Analysis Features

- Create budgets for sales people, customers and product lines using user-defined time periods for analysis
- Choose the data to analyse with user-defined sales history options
- Correct sales transactions without interrupting invoicing
- Produce periodic sales, profitability and tax reports
- Retain up to 24 months of sales history online

RETURN MERCHANDISE AUTHORISATION

Return Merchandise Authorization (RMA) facilitates the processing, management and analysis of product returns, replacements, credits, and repairs. With RMA, the process of inspecting, diagnosing and correcting product defects can be managed effectively, and trends can be analysed to gain insight that can inform procurement and production decisions.

The information delivered through RMA empowers customer service personnel to respond effectively to customer requests to return products, driving satisfactory customer engagement.

The Benefits of Return Merchandise

- Instant on-screen access to all return merchandise authorisation (RMA) information for improved customer service and continuous improvement initiatives
- Retention of unlimited history of RMA's for tracking
- Automatic calculation of associated return charges to prevent costly mistakes
- Complete visibility of returned inventory
- Verification of warranty date, price and

- quantity purchased for improved accuracy
- Immediate replacement of cross-shipments for returned goods facilitates improved customer service
- Alerts for invalid RMA's
- Track reasons for returns and quickly identify issues
- Providing discounts to sales orders for replacement stock enhances customer satisfaction in the return process

Return Merchandise Features

- Create unique user-defined return codes
- Enter multiple line items per RMA
- Process stocked and non-stocked items
- Check against return period for RMAs issued
- Select from various actions when receipting RMA items such as repair, scrap, return to supplier, restock or take no action
- Apply automated restocking charge fees
- Check validation of sold items
- Control transfers from to repair warehouses after inspection
- Create repair work orders for items within or out of warranty
- Initiate inter-branch transactions

- Integration with Return to Supplier allows for the creation of an RMA voucher to be issued to the supplier detailing the collection of the defective product
- Apply the same discounts on replacement sales orders that were applied on the original sales order

CONTACT MANAGEMENT

SYSPRO Contact Management allows you to define and manage a rich set of information about the people with whom you do business, as well as the individuals within your organisation. It helps manage information, not only traditional SYSPRO customers and suppliers, but also other business relationships such as potential customers (prospects), consultants and competitors.

The Benefits of Contact Management

- Recording, planning and tracking activities against contacts in a centralised environment
- Improved customer and supplier service through instant on-screen access to all relevant information, including touch-points with your company
- Powerful customisable search and query capabilities
- Integration with Microsoft Outlook for sending and receiving email

- Integration with Microsoft Office for enterprise-wide use of SYSPRO Contact Management information
- Structured addresses for enhanced location support
- Optional licensed model per 'Contact Management user'

Contact Management Features

- Create contact categories
- Create extensive contact information
- Configure user fields to enable capturing of additional data when posting an activity
- Post and track contact activities

- Create SYSPRO suppliers and customers from a contact account
- Define dynamic organisation lists
- Optionally synchronise contacts to Microsoft Outlook

CUSTOMER COMPLAINTS

The Customer Complaints capability allows for the capturing, management and effective resolution of customer complaints. It enables the business to easily review and escalate critical product defects and service issues to prevent their reoccurrence, and is a requirement for all businesses wanting to achieve a formal quality accreditation. This improves customer-centric behaviour, driving customer retention.

Customer Complaints integrates easily into SYSPRO, and all customer complaints are kept together in one system.

The Benefits of Customer Complaints

- **Increases Customer Retention -** Customer Complaints provides visibility of customer grievances to ensure these are addressed in order to retain customers. It allows for maintenance of customer relations and provides insight into their dissatisfaction.
- **Drives Continuous Improvement -** Insight into customer dissatisfaction with products can provide valuable feedback to enact changes in production plans, Bill of Materials, raw material allocations, tool allocation, changes in product specifications and development efforts. It may also lead to product withdrawals and highlight machine

and maintenance issues.
- **Helps Improve Product Quality -** Customer Complaints provides visibility into product defects, which may be non-compliant. It also highlights any areas requiring swift intervention and also pinpoints the cost of quality measures.
- **Provides Insight into Supply Chain Shortcomings -** Provides visibility into possible defects in the supply chain enabling intervention, preventative actions, process or procedure changes, and equipment redesigns.

Customer Complaints Features

- **Add and Manage Users -** Provides the ability to add users, assign specific roles and permissions to users, and allocate incidents to users according to those assigned roles.
- **Record the Complaint -** Any person receiving a complaint (whether verbal, phone calls, e-mails, etc.) can capture the complaint in the system. These complaints are then recorded in the Customer Complaint System as an incoming complaint. The captured complaint will include:
- **Reports**
  - Complainant name and contact details
  - Addressee name and email
  - Date of complaint (calendar)
  - Date of quality incident (calendar)
  - Nature of complaint (text box)
  - Unique customer complaint number

- **Complaint Allocation, Analysis and Resolution -** Complaints are allocated to appropriate staff, who receive an email notifying them of the allocated complaint, and the required investigation of the complaint. The system requires information like scope of defect, root cause analysis, corrective and preventative action and estimated resolution time to be captured.
- **Communication with Customer -** Emails are automatically triggered from the Customer Complaints system to customers, acknowledging receipt of their complaint, providing resolution lead time and further information.

INVENTORY MANAGEMENT

Manufacturers and distributors must respond quickly to customer demands and make intelligent, cost-effective decisions to remain competitive. SYSPRO Inventory Management gives you more control over your inventory by providing greater accuracy and visibility to inventory information throughout the organisation. This enables effective customer service and improved profits through optimised stock levels.

The Benefits of Inventory Management

- Effective control of supply and demand
- Costing methods per warehouse: average, standard, last, LIFO, or FIFO
- Actual cost tracking for lot traceable or batch serialised items
- Multiple pricing options, including quantity-based, discounted, and contract
- Powerful queries into movements and all inventory touch-points in the system, such as related jobs, purchase orders, sales orders, where-used and available-to-promise
- Multiple units of measure, including a separate cost unit of measure, per item
- Replenishment rules by item to prevent stockouts
- Min/Max levels, safety stock and re-order quantities per warehouse
- Multiple bin locations per SKU
- Linking of key suppliers and approved manufacturers to purchased items
- Extensive serial tracking and lot traceability with expiration dates & bin tracking
- Goods-in-transit control
- Lead times and dock-to-stock for accurate replenishment planning
- Two-phased receipting of items to be inspected
- Extensive security options for processing inventory and accessing transaction, cost and pricing information
- Fully integrated into forecasting, sales orders, purchase orders, work in progress, materials requirements planning and general ledger

Inventory Management Features

- Process inventory receipts, job and expense issues, warehouse transfers, cost adjustments and modifications, and physical adjustments
- Back flush items with short manufacturing cycles
- Track goods in transit between warehouses
- Globally change cost and selling prices
- Record notes per item for purchasing, sales and manufacturing, including technical specs and dangerous goods handling
- Place stock codes on full or partial hold to prevent processing
- Cross-reference supplier and customer stock codes
- Optionally assign the same serial number to multiple items
- Browse stock items using multimedia images
- Group inventory items into sales kits
- Calculate minimum quantity based on usage
- Reserve stock
- Stock take and cycle counting supported

LOT TRACEABILITY, SERIALISATION & PRODUCT RECALLS

SYSPRO Traceability enables you to maximise quality control by tracking products, materials and processes, as well as by facilitating effective recalls. It caters for the tracking of materials through receipt, manufacture, assembly, inspection, stocking and final distribution, while maintaining quality assurance certification and tracking expiration dates.

The Benefits of Traceability

- Traceability of semi-finished or finished products from the supplier of raw materials through to the customer
- History of traceable-item transactions for accountability and customer service follow-up
- Lot or serial numbering by single products or batch
- Optional auto-depletion of lots in issue and sale transactions
- Shelf life and expiry date tracking
- Optional full or sample inspection of

- lots during purchase order and work order receipts
- Optional tracking of lots or serial from component to parent
- Expiry dates included in materials requirements planning calculations
- Bi-directional lot and serial queries and reporting
- Reject control and documentation
- Archiving of lot information
- Easy product recall management

Traceability Features

- Automatically or manually assign lot numbers as goods are received
- Default lot number to work order number for ease of receipt
- Document all rejects and scrap
- Reserve lot or serial numbers for products being manufactured
- Keep detailed notes on inspections
- Reserve component lots or serials for issue to specific jobs
- Query by item use (which customer, invoice, job) or by item supplied (which supplier, purchase order, stock item)
- Trace serialised and non-serialised inventory items
- Record up to five user defined dates, such as Manufactured Date, Deliver Before Date, Best Before Date, Use By Date, etc. against each lot traceable item

- Place any warehouse, stock code, bin, lot or serial on hold during a Product Recall
- Identify where any component has been used
- Easily identify any traceable parent item (lot or serial) that has been receipted into stock by any means.
- Facilitates full product recalls
- Provides the ability to perform mock recalls
- Assists in the process of identifying, tracking and isolating suspect items.
- You are able to interrogate the system for affected products using any combination of data available.
- Additional traceability for lots can be added for easy identification
- Once located internally, the item is quarantined and issuing of that item is blocked
- Assists in identifying the scope of the product recall.

INVENTORY FORECASTING

SYSPRO Inventory Forecasting enables you to produce accurate and credible forecasts based on sales history, and provides the tools to measure the quality of your forecasts. It uses a set of mathematical algorithms to predict future sales based on historic demand, and enables you to easily identify those products that contribute the most to your business in terms of sales value, gross profit, cost of sales, quantity sold and hits.

The Benefits of Inventory Forecasting

- Variety of forecast algorithms, including a competition method which automatically selects the best algorithm for the collection
- Analysis of product performance at stock code, warehouse, product class, supplier, planner or buyer level
- Enhanced data selection sets which carry through the entire process through into Inventory Optimisation
- Application of seasonality factors
- Powerful Pareto analysis
- Forecast generated at stock-keeping unit (SKU) level

- Batch updating of forecast parameters
- Automatic updating of forecast history from sales in real time
- Identification of unpredictable items with a powerful review of forecast accuracy achieved
- Use of proxies to forecast items with no history
- Create forecasts for SKU's either manually or in a batch mode

Inventory Forecasting Features

- Define multiple calendars
- Set forecast horizon up to 24 months
- Utilise monthly or weekly time buckets
- Identify the items that contribute most to the business through Pareto analysis
- Set default algorithms at company, SKU group or individual SKU level
- Remove outliers and anomalies either manually or automatically
- Manually forecast items which typically require market intelligence, or are of critical importance to the business
- Edit history to exclude specific invoices and outliers or make manual adjustments
- Edit draft forecast to reflect market intelligence
- Store three or more years of history and purge unwanted history
- Compare manual forecast with computer-recommended forecast

- Control and validate the forecast before making it active
- Convert approved forecast to current forecast in requirements planning
- Review forecast accuracy to measure and improve the quality of forecast
- Improve visibility with configurable graphical output
- Edit and optionally freeze draft forecast to reflect market intelligence

INVENTORY FAMILIES AND GROUPINGS

Families and Groupings is an essential tool for any organisation in a demand-driven environment allowing for the aggregated view, and manipulation, of both sales and forecasts and providing input to material requirements planning. SYSPRO Inventory Families and Groupings provides the tools to arrange 'collections' of stock-keeping units (SKU's) into families and groupings of similar items. These collections provide a high-level view of items from which sales forecasts can be produced and the quality of the forecast measured.

The Benefits of Inventory Families and Groupings

- Forecasts at various levels in the family hierarchy (grandfather, father, child)
- Multi-level analysis of family performance over time
- Variety of forecasting algorithms, including a competition method which automatically selects the best algorithm for the collection
- Default algorithms at company or collection level

- Pareto (ABC) analysis for ranking items within each collection
- Analysis of sales value, gross profit, cost of sales, quantity sold or hits (invoice line occurrences) using Pareto capability
- Automatic real-time updates of collection history
- Configurable graphical output for improved visibility

Inventory Families and Groupings Features

- Establish families or groupings of SKU's using SYSPRO's unique collections capability with hierarchical structures for brand - or product type views
- Group warehouses for purposes of forecasting at a regional or territory level for logistical or supply chain purposes
- Generate forecasts at a brand level to facilitate a more targeted marketing strategy
- Consolidate SKU's with different pack sizes using an alternate, common unit of measure
- Forecast using sales value, cost value, quantity or gross profit as the basis
- Detect seasonality and apply forecasts to seasonal data if present

- Manually or automatically remove outliers and anomalies
- Compare manual forecasts with computer-recommended forecasts
- Aggregate sales history of the collection members to enable a forecast at collection level and then disaggregate the collection forecast back to SKU level
- Validate forecasts before activating
- Optionally edit history at collection level
- Use SKU history of three or more years
- Utilise monthly or weekly time buckets
- Set forecast horizon up to 24 months
- Edit and optionally freeze draft forecast to reflect market intelligence

INVENTORY OPTIMISATION

Inventory Optimisation is about having the right inventory to meet your target service levels while tying up a minimum amount of capital in inventory.

SYSPRO Inventory Optimization provides the tools and processes to optimize stock levels, ensuring stock is in the right place at the right time, and reduces obsolescence.

The Benefits of Inventory Optimisation

- Modelling of different what-if policy scenarios for the best mix of service and inventory investment
- Improved stock turns and service levels
- Reduction of waste in the supply chain
- Risk policies use Poisson or normal distribution for target service levels
- Consolidation of warehouses at regional or territory level for logistical and supply chain purposes

- Highlighting of problems, such as over- or under-stocking, and stock-outs
- Improved ability to manage demand
- Clear and objective measures of the balance between supply and demand
- Optimisation at the stock-keeping-unit (SKU) level with aggregation up to higher levels
- Selection sets in common with inventory forecasting allowing for consistency in processing

Inventory Optimisation Features

- Utilise monthly or weekly time buckets
- Define either fixed or risk based policies per SKU
- Copy policies across multiple SKU's
- Calculate and create Min/Max stock levels per time bucket based on defined policies Edit draft Min/Max levels to reflect market intelligence
- Control and validate the Min/Max levels before making them active
- Approve draft Min/Max stock levels for use in Requirements Planning

- Review excess stock as defined by company policy, and create supply chain transfers to re-distribute the surplus
- View and edit all inputs to target stock (set-up, policies, forecast, historic demand, forecast accuracy) in one interface
- Review the Actual Service Level vs. expected service level for each SKU

ORCHARD - WAREHOUSE MANAGEMENT

The Warehouse Management Solution (WMS) ensures that material is located correctly, delivered to the shop floor just-in-time, stored and then accurately picked for dispatch to the customer. WMS is not solely concerned with stock location and movement - powerful rules can be embedded to aid organisations that deliver to their customers on a just-in-time basis and/or have sequencing rules imposed upon the content of any given dispatch.

The Benefits of Orchard - Warehouse Management

- Through structural modelling of the warehouse environment, the Warehouse Management System recommends actions based on a number of factors, including the capacity and zone of bin locations, the accessibility, volume and weight constraints of forklifts, and the physical warehouse environments and activity. For example, WMS can be set up to perform very simple 'chaos binning' or sophisticated priority based zone binning with all levels in between
- There are a number of options for processing transactions within WMS. As well as via desktop computers with or without touch screens, data can also be entered and queried using Android devices such as handheld or forklift truck mounted devices with barcode readers. Using handheld scanning, data is updated instantly and is validated online ensuring the correct stock and containers are selected from the instructions

- Barcoding allows for the accurate labelling of stock items and records inventory transactions utilising validation at source, thereby removing the need for duplication of data capture. Barcodes can be captured using Windows desktop and Android devices for all transaction types
- By capturing transactions at source, accuracy of stock information is ensured. Operators can pick against a pick list, in conjunction with barcode scanning, removing the problems typically associated with dispatch errors
- Periodic cycle counting alongside real time control over raw materials, usage and the associated costs, eliminates the need for annual stock checks

Orchard - Warehouse Management Features

- Work in Progress - KANBAN pull rules can be applied to ensure stock is always available for production at the line side work cells. Movements are automatically invoked to replenish stocks to WIP from storage, as raw materials are being consumed during the production cycle
- Pallet Control provides the ability to manage stock at container, pallet or stillage level. It simplifies the capturing of transactional details and provides higher traceability. It also provides the ability to scan the unique container barcode which describes both the stock code and the quantity and any relevant lot or batch information
- WMS's Two Stage Put Away caters for examples where "shunter" forklift trucks are used to move pallets to and from main storage, where the goods are then placed in racking by high reach forklift trucks. In this scenario the receipt of stock to end of aisle is classified as one movement, and from the end of the aisle to the main storage bin is classified as a second movement
- Two Stage Picking/Narrow Aisles - with the introduction of narrow aisle management, Two Stage Bulk Picking has been made available in WMS providing a more efficient way of managing bulk movement resource in the warehouse

- Wave KANBAN provides wave replenishment of storage and picking areas of the warehouse, allowing the configuration of the storage areas to incorporate the fastest moving products as well as efficient replenishment of the pick face
- WMS allows for Forecasting of Stock for future potential orders by Customer or customer group, ring fencing stock even before the product has been made or bought in
- WMS now allows for batch picking by Carton. The Cartons can get created at the same time as the Pick is produced, assigning multiple pick lines to each Carton. It is then the Cartons which determine and validate the pick sequence
- WMS Server Side functionality can be integrated with message queues to allow for the auto allocation and release of orders as they are entered into SYSPRO
- WMS can provide barcodes in various formats including EAN 128 GS-1, and 2D Matrix. WMS comes with a wide range of standard reports and enquiries. In addition, using SYSPRO Reporting Services (a separate module which includes Crystal Report Writer) or SQL stored procedures, customised reports and enquiries can be created

REQUEST FOR QUOTE

SYSPRO's Request for Quote (RFQ) provides you the ability to extend a formal invitation to suppliers to tender on the supply of goods or services. As a vital part of Procurement, this capability streamlines the process by automating the creation of the RFQ from a Requisition and allowing servicing of the RFQ directly by suppliers online.

Request for Quote provides transparency of the tender process, improving governance. It also assists buyers in making informed procurement decisions quickly and easily as they can compare offerings from different suppliers.

The Benefits of Request for Quote

- Streamlines procurement process with single entry point for multiple quote submissions
- Easily convert from a requisition
- Include all request and product details – specifications, quantity, product drawings, lead time and quality requests.
- Easily release to tender by printing or e-mailing all suppliers simultaneously
- Collaborate with Suppliers via web enabled Supply Chain Portal
- Obtain best price and delivery options
- Easy bid review and approval process
- Full query function with drill down to detail lines, bids and submitted suppliers
- Easily convert winning bid to a purchase order

Request for Quote Features

- Converted from a Requisition
- Multiple Suppliers Per Request for Quote
- Automatic allocation of preferred suppliers or manual selection
- Distribute RFQs by printing or emailing to suppliers. If emailed, the email will include a link that will direct the supplier to the Supply Chain Portal where they can view all the
- Requests for quotes that they have been invited to quote on.
- Approval, Rejection and Expiry Date
- Multiple quote statuses to provide visibility of progress
- Make informed decisions for new purchasing sources
- Retain bid history for future analysis

PURCHASE ORDERS

SYSPRO Purchase Orders is an integral part of the organisation's distribution and manufacturing functions. Purchase Order provides you with the functionality to simplify your purchasing and receiving processes while ensuring greater order accuracy. It enables the monitoring of the quality, accuracy, lead times and cost of purchases, while providing comprehensive supplier performance analysis.

The Benefits of Purchase Orders

- Purchase approval workflow via the Requisition system for improved expenditure control
- Requisition groups for approval levels and budgets
- Fast conversion of approved requisitions to purchase orders
- Multi-line purchase orders with the option of a different warehouse and due date per order line
- Order line comments, as well as a notepad facility to record purchase requisition and purchase order notes
- Multi-currency with fixed or current exchange rate per order
- Copy facility for rapid processing of repeat orders
- Blanket purchase orders with call-off
- Original and revised dates retained for supplier performance tracking
- Follow-up codes and dates to expedite purchases
- Supplier stock code cross-referencing with pricing for streamlined processing
- User-defined stationery formats for company specific order documents
- Detailed queries with graphical purchase order commitment
- Receipt into inventory, directly into jobs and sales orders
- Two-stage receipting for inspection items
- Non-merchandise apportionment across all purchase order receipt lines
- Goods Received Notes (GRN) facility for supplier invoice-to-order matching and variance reporting
- XML export utility for electronic upload by suppliers
- Assign and purchase from preferred suppliers to retain strategic relationships
- Capture and maintained predetermined sourcing policies by supplier or stock code to align with your strategic stock management goals

Purchase Orders Features

- Manage the purchases of stocked and non-stocked items
- Purchase in multiple units with user-defined conversion rates
- Automatically include comments for each line item from inventory or manually enter comment lines
- Place orders using current cost, last price paid or contract pricing
- Analyse vendor performance for delivery, pricing and quality
- Streamline purchasing with requisitions and authorisation procedures
- Generate requisitions from customer back orders
- Fax or email purchase order documents
- Link purchase orders to sales order lines or work orders
- Create customised purchase order and GRN stationery

LANDED COST TRACKING

SYSPRO's Landed Cost Tracking (LCT) provides visibility of imported goods through shipment tracking and enables greater control of all associated costs, resulting in accurate landed costs. It enables you to track shipments of imported goods, monitor the progress and estimated arrival times of shipments, and establish a reliable estimate of the overall cost of imported goods. Furthermore, it aids the calculation of a more accurate actual cost at which to receive the goods and provides an actual cost comparison to the various estimates made during the procurement cycle.

The Benefits of Landed Cost Tracking

- Identification of all cost elements associated with imported goods for better estimates of landed costs
- Estimated landed cost for each product through accurate cost apportionment based on volume, value, quantity, etc.
- Tracking of shipment arrival dates
- Pre-costing of shipments for streamlined receipting

- Goods Received Note (GRN) system to trace element costs for accurate invoice matching
- Multiple tariff codes
- Automatic update of expected arrival date when shipping date is revised
- Archiving of completed shipments and associated costs

Landed Cost Tracking Features

- Define a bill of costs for each inventory item per route
- Define multiple alternate shipping routes for each stock item
- Designate the currency rates for customs exchange calculations
- Combine multiple purchase orders into a single shipment
- Identify differences between landed costs and current inventory costs with the automatic cost rollup feature
- Compare actual invoice cost with estimated costs for all cost elements
- Select suppliers based on shipping routes and associated costs

- Receive traceable stock items through inspection with lot and/or serial numbers
- Register supplier invoices against the shipment registration system
- Revise shipment quantities if different to the original purchase order
- Use the Landed Cost Tracking query to view shipment and element details
- Archive the shipment once all the actual costs have been accumulated

RETURN TO SUPPLIER

Return to Supplier 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, ensuring visibility and tracking of the item until the process is concluded.

The Benefits of Return to Supplier

- Provide complete visibility of returned inventory
- Track returned items that are outstanding
- Allow for credit notes and replacement items from vendor
- Tracks costs of items not replaced by vendor
- Retain unlimited history of RTS transactions

- Triggered when an item fails incoming or in-process inspection
- Linked to purchase order for full traceability and product history
- Quarantine defective material to be returned

Matching Return to Supplier

- Ensures that items to be returned to the vendor are removed from the available stock and held in a review area while the terms for return are negotiated
- Handle stocked and non-stocked items
- Track variances between cost of item and credit received
- Manage items to return through the RTS review process
- Add non-stocked items on the fly during the review process

- Issue items directly to the RTS review area, while processing a return from a customer (RMA)
- Transfer stocked items immediately to the RTS area during the receiving process
- Create GRN which can be matched against supplier's credit note
- Create Purchase Order for expected replacement items

SUPPLY CHAIN PORTAL

The Supply Chain Portal is an interactive web platform that facilitates online transactions between an enterprise and its suppliers and customers. The Supply Chain Portal streamlines collaboration between buyers and suppliers and minimises document handling – reducing potential fraud. It automates business processes and ensures transparency of supplier and customer transactions. Ultimately, the Supply Chain Portal will help to increase operational efficiency and improve governance.

The Benefits of Supply Chain Portal

- **Digitalisation of Business Processes** The Supply Chain Portal minimises document handling and other manual activities and facilitates cross functional collaboration by enabling an online process for engaging with customers and suppliers. With Request for Quote being the first capability in the Supply Chain Portal, this streamlines the tender process and further drives the business towards digital transformation.
- **Centralisation of Platforms** The Supply Chain Portal offers a central access point and repository for supplier and customer documentation and engagement.
- **Seamlessly Integrates with SYSPRO** The Supply Chain Portal is seamlessly integrated with and pulls data from SYSPRO.
- **Improves Governance** The Supply Chain Portal governs business processes and interactions by assisting in standardizing policies for engaging with customers and suppliers. This is supported by the ability to upload documentation and rich text notes.

- **Collaboration and Transparency** With unlimited user passes available, relevant operators from different departments, and from customer and supplier companies, can interact on one platform, easing the flow and availability of information. This will also provide greater transparency of transactions – limiting the risk of fraud.
- **Increased Business Efficiencies** Tasks typically facilitated manually by employees are transferred to suppliers and customers who enjoy online self-service whilst staff are freed up to perform more valuable tasks.

Supply Chain Portal Features

- **Request for Quote** Request for Quote capability enables the formal invitation of suppliers to tender for the supply of goods and services. Suppliers are invited to submit quotations for the goods and services in a closed bid tender process. The customer uploads the Request and the supporting documents (like specifications and product drawings). The potential supplier responds, and a dashboard displays the RFQ status – whether it's new, submitted, successful or unsuccessful for suppliers.
- **Customer Account Management** End-customers are provided with access to information relating to their account which includes account contact person and their contact details and their credit standing – how much they owe, how much credit they have available and the terms of their account. In addition, they can view their account status – average days to pay, receivable days outstanding and their outstanding balance as well as a graphical presentation of their account ageing. They can also view details of their transactions, particularly a list of invoices which they can also download, whether payments and sales orders have been processed, and they can view and download their statements in PDF.
- **Supplier Account Management** Suppliers are able to view their account status, invoice terms for the account and the details around their commitments to their customer i.e. value of goods ordered and not received,

value of goods received and not invoiced and their outstanding balance on this account. They are also able to see a list of invoices and details of payments made to them by their customer. In addition, suppliers have visibility of active purchase orders, return to supplier transactions, including their status and quantity as well as registered invoices, credit and debit notes and their statuses. Suppliers will also be able to download remittance advices for payments processed on their accounts in PDF format.

- **User Management** Portal User Management functionality enables the definition of portal users with different functional roles for them to access and transact in the portal. Also, once users are logged into their profile, they will be surfaced only with information that is relevant to their status within their company account.
- **Document Printing** Document printing has been added that relies on the definition of default document parameters predefined for portal printing. It also takes into account stationery format definitions already available in SYSPRO ERP, for example a Customer is already linked to a Statement format as part of their Masterfile definition.

ACCOUNTS RECEIVABLE

SYSPRO Accounts Receivable improves receivables management by facilitating accurate invoice processing and ageing, timely statement delivery and revenue collection as well as efficient credit management. This in turn leads to improved cash flow and customer relationships.

The Benefits of Accounts Receivable

- Multi-branch and multi-currency
- Multi-period for timely period-end rollovers
- Master/sub-account relationships for large enterprises
- Flexible ageing, terms and discount options for improved customer relations
- Multiple user-defined statement formats for different customer categories
- Bulk emailing and faxing of customer statements for rapid processing and delivery
- Instant access to all customer information, including outstanding invoices, sales orders and work in progress, for improved receivables management
- Credit management tools for improved cash flow, debt management and early detection of bad debts
- Configuration of recurring invoices for streamlined processing of repeat charges
- Optional, automatically calculated finance charges for penalties on overdue accounts
- Seamlessly deal with foreign customers, and receive settlement values in multiple currencies for local or foreign customers
- Reduce the risk of errors typically associated with manual currency translation calculations
- Gain better control over exchange variances during your sales cycle.

Accounts Receivable Features

- Choose from a variety of customer account numbering methods
- Set customer credit limit and terms
- Drill down from invoice to detailed sales order information
- Attach scanned delivery proofs to customer invoices for improved reconciliation
- Match payments with outstanding invoices manually or automatically, by invoice or aged date
- Query balance-ageing and average days-to-pay information
- Configure alerts for overdue accounts
- Attach notes and detailed credit management information to customer accounts and invoices
- Contra invoices between supplier and customer for the same organisation
- Automate balance functions and month end procedures
- Automate recurring monthly invoices, such as maintenance contract charges
- Post unapplied payments, then contra against the relevant invoice when identified
- Revalue foreign invoices in report-only or update mode
- Manage communication with your customers and record when letters and reminders have been issued
- Receive payments from customers, including in a currency that is different to that recorded against the customer
- Manage adjustments associated with exchange rates in the sales cycle.

FINANCIAL

SYSPRO's powerful financial solutions provide comprehensive financial and cost accounting functionality and controls. Financial data is always current thanks to real-time integration between SYSPRO financial, distribution and manufacturing solutions. Financial processes can be extended to the web or integrated to other applications using SYSPRO e.net solutions.

ACCOUNTS PAYABLE

SYSPRO Accounts Payable facilitates improved cash flow and relationships with suppliers by providing timely, accurate and efficient control over invoice processing, bill payments, analysis of available discounts and tracking of purchases.

The Benefits of Accounts Payable

- Multi-branch and multi-currency
- Multi-period accounting for timely period-end rollovers
- Forecast of current and future cash requirements for improved cash flow
- Support for diverse tax systems, such as TAX/VAT/ GST, for global processing
- Invoice registration system for payment authorisation control
- Secure authorisation of registered supplier invoices
- Quickly process recurring invoices
- Goods received note system for tracking accruals, matching invoices and controlling price variances
- Flexible payment methods, concurrent payment cycles, and automatic calculation

- of settlement discounts for efficient invoice settlement
- EFT, manual and automatic cheques processing, and bulk emailing of remittances for streamlined payment runs
- Void check processing for rapid reversal of payments processed in error or returned
- User-defined stationery formats for company specific checks and remittances
- Full purchase order receipt and invoice history, as well as purchase analysis for supplier planning and general ledger transaction audit trail
- Seamlessly deal with foreign suppliers in terms of account settlement
- Gain better control over exchange variances during your purchasing cycle

Accounts Payable Features

- Choose from a variety of supplier account numbering methods
- Process invoices and payments in multiple currencies
- Link suppliers to default expense ledger accounts
- Expense invoices over single or multiple general ledger accounts
- Post transactions to up to two prior periods
- Record invoices for approval prior to raising liability values
- Manage permanent and temporary suppliers
- Contra invoices between supplier and customer if part of the same organisation
- Automate postings of recurring monthly entries, such as leases, rentals and maintenance contracts

- Automate balance functions and month end procedures
- Place an invoice on hold and restrict payment
- Select invoices for payment manually or automatically based on chosen criteria
- Automatically void payments or reverse incorrect payment runs, security permitting
- Define company-suitable cheque, remittance and label formats
- Revalue foreign invoices in report-only or update mode
- Manage adjustments associated with purchase price variances and exchange rates
- Manage variances between the cost of an item and credit note received for supplier returns

ASSETS REGISTER

The SYSPRO Assets Register solution provides up-to-date real-time information pertaining to the value of all assets within the organisation by keeping a record of depreciation and current asset values. It also contains a facility which evaluates the remaining worth by tracking income and expenditure derived from assets. It is also possible to capture Shop Floor Data with Equator Employee Portal

The Benefits of Assets Register

- Register of all assets, their details and values
- Multi-period accounting
- User-defined retention of history
- Asset budget approval and requisitioning against Capex
- Asset quantities and additions
- Full or partial disposal of assets
- Book and tax values, as well as alternative user defined valuations
- Separate book and tax value depreciation codes
- Financial revaluation of assets

- Periodic and accumulated depreciation values
- Provision for initial and investment allowances
- Tracking of asset-related transactions
- Transfer of assets between companies, branches, cost centres and locations
- Asset counts, with an option for bar–coded labels
- Support for IAS 16 regulations
- Support for MACRS methods used by the IRS in USA

Assets Register Features

- Optionally calculate depreciation and tax allowances to date when initially adding assets
- Assign assets to individual branches and/or user-defined groups and types
- Attach sub-assets to master assets
- Group assets for reporting purposes
- Manage capital expenditure items
- Temporarily suspend depreciation if asset is out of commission
- Obtain estimates of the remaining useful life of an asset
- Record revenue and expense transactions for assets
- Document and track maintenance or repair time against assets
- Report on acquisitions, disposals and revaluations
- Streamline the set-up process using intuitive standard templates and import capability for existing assets.

- Calculate book depreciation and tax allowances using:
  - Straight line - fixed and varying percentage per year; varying percentage per month
  - Reducing fixed or varying percentage per year
  - Estimated useful life - fixed or statistical
  - Sum of years in digits
  - Remaining value over remaining life
  - Declining balance, switch to straight line when optimal or no switch to straight line
- Automatically post periodic depreciation to the general ledger according to a user-defined integration hierarchy
- Post depreciation adjustments
- Determine profit or loss on sale/disposal

CASH BOOK

SYSPRO Cash Book allows optimal cash management by providing system-wide bank reconciliation, as well as tracking information on cash inflows and outflows. Cash Book is part of the set of financial analysis solutions provided by SYSPRO to enable managers to forecast and perform what-if analysis on financial data.

The Benefits of Cash Book

- Fast, accurate bank reconciliations
- Visibility of current cash book and bank balances, as well as reconciled and unreconciled transactions
- Integration of account-based payments from Accounts Payable and Accounts Receivable, with online drill-down to source transactions
- Multi-period accounting for Accounts Payable and Accounts Receivable entries
- Manual and automatic check payments, as well as electronic fund transfers (EFT), for non-account bill settlements
- Interbank transfers

- Inter-company postings
- Cash flow forecasting and projections
- Full transaction history, as well as cash book and reconciliation reports
- Import Bank data for automatic reconciliation of matching transactions.
- Cash Book Tax GL Integration by Tax Code drastically improve s tracking and allocation of tax receipts and payments as they are allocated to a dedicated account in the General Ledger, collecting all of the similar tax transactions together for analysis

Cash Book Features

- Manage multiple local and foreign currency bank accounts
- Post foreign currency transactions through local currency bank accounts
- Record bank deposits and withdrawals, and distribute across single or multiple general ledger accounts
- Adjust previously entered deposit and withdrawal amounts, and distribute the values to the relevant general ledger accounts
- Post inter-company entries with automatic distribution to inter-company loan accounts
- Process inter-bank transfers with automatic distribution to inter-bank offset accounts
- Update exchange rates for foreign currencies on the fly during transaction entry, security permitting

- Process recurring entries automatically
- Use the stationery format design tools to define non-account check and remittance formats
- Pay non-account bills using manual or automatic check payments, or EFT
- Process bank reconciliations manually or electronically by bank

ACTIVITY BASED COSTING

SYSPRO Activity Based Costing (ABC) allows for the accumulation and recovery of costs associated with the purchasing, manufacturing and selling of items, thereby improving accuracy in calculating product profitability. Overhead costs are accumulated against items by attaching elements of cost to the transition points of purchasing, manufacturing or selling.

The Benefits of Activity Based Costing

- User-defined elements of costs attached to transition points in the purchase, production and sale of products
- Pre-production costs are apportioned as stock is received from Purchasing
- Manufacturing costs are apportioned as stock is received from Work in Progress

- Post-production costs are distributed through cost of sales as the final item is invoiced
- Calculation of single batch or item-based activities
- Phased implementation supported

Activity Based Costing Features

- Define the cost elements to be allocated to stock
- Assign the drive quantities for each element
- Run Activity Based Costing parallel to traditional costing during implementation
- Estimate appropriate recovery rates using system generated estimates

GENERAL LEDGER

SYSPRO General Ledger facilitates the management of corporate performance and the monitoring of return on investment by providing complete enterprise-wide financial recording, analysis and reporting from all aspects of the business. It also integrates seamlessly with all finance modules within SYSPRO.

The Benefits of General Ledger

- Unlimited detail and summary histories for comparison reports, queries and graphs
- Unlimited structured or free-format account codes for evolving requirements
- Multi-currency, with currency exchange-rate history, for global organisation requirements
- Sub-module integration in real-time or batch mode Sub-ledger drill-down for rapid identification of source transaction details
- Multiple general ledger journal types, including recurring journals
- Automatic balance transfer based on associated statistical account weighting
- Cost analysis to allow for detailed allocation to be recorded within an account

- Balancing reports for rapid identification of sub-ledger imbalances and their causes
- Standard financial-ratio queries, such as liquidity and profitability, for snapshots of company performance
- Consolidated financial reporting for multi-company requirements
- Option for authorisation of journal functions for centralised control
- Multiple security options at account code level
- Granular security in structured general ledger for organisational divisions such as branches, cost centres and departments
- Financial year redefinition for evolving enterprises

General Ledger Features

- Define a 4-, 6-, 12- or 13-period financial year Maintain an open ledger for up to two years with multi-period accounting
- Choose between structured or unstructured general ledger account formats
- Define ledger code groupings and report codes Specify integration from sub-ledgers as detail or summary, by module or ledger account
- Retain foreign currency rates of exchange at transaction level
- Maintain standard and recurring journal entries, and optionally automate their periodic posting
- Utilise predefined templates for rapid posting of repetitive entries
- Import budgets and journal entries from third-party products such as payroll

- Cut and paste journals from Excel
- Use the general ledger balancing function to streamline periodic reconciliations
- Password protect sensitive accounts
- Place accounts on hold to prevent postings
- Restrict access to structured ledger codes for queries and posting by role, group or operator
- Restrict access to journal creation, authorisation, printing and posting
- Produce consolidated financial reports for multiple companies
- Maintain up to 10 budgets for each ledger code
- Use statistical accounts for non-financial values such as headcount for inclusion in weighted transfers and report calculations

CASHFLOW FORECASTING

SYSPRO Cashflow Forecasting facilitates the effective projection of currency-based cash flow requirements by providing the capability to create multiple online cash flow models from a variety of forward-looking inflow and outflow data such as future receivables, payables, sales, purchases, demand forecasts, material requirements, budgeted expenses and user-defined projections.

The Benefits of Cashflow Forecasting

- Forewarning of potential cash flow problems and impacts example: early supplier payment discounts
- Personalised models by currency (local and foreign), based on selected inflow and outflow data – ability to convert the foreign currency to local currency

- Different views by Cash Book, General Ledger, Purchase Orders, Accounts Payable and Accounts Receivable, based on inclusion criteria defined against a model
- User-defined date ranges for projection periods

Cashflow Forecasting Features

- View projected cash positions based on multiple models
- Define collectors for each model to accumulate the relevant values
- Define opening-balance collectors as bank balances or general ledger balances; alternatively, define at run time
- Choose from movement collectors such as cash book permanent entries, cash requirements from accounts payable, outstanding purchase orders, accounts receivable payment projections or movements from general ledger
- Model the impact of early-supplier payment discounts

GENERAL LEDGER COST ANALYSIS

General Ledger (GL) Cost Analysis provides detailed analysis of the values distributed to certain categories of expenses, such as travelling, repairs and maintenance, general expenses and donations within a single ledger account. Detailed distribution to analysis categories is enforced throughout the system.

The Benefits of General Ledger Cost Analysis

- User-defined analysis categories for company specific requirements
- Automatic categorisation in reports and queries for reduced manual analysis of expense-type accounts
- Multiple categories tracked in a single account, therefore fewer account codes required

General Ledger Cost Analysis Features

- Create your own analysis categories
- Define up to five analysis types per category with unlimited sub-categories per analysis type
- Easily track expense details within one G/L account
- View analysis details in the G/L Query
- Eliminate unnecessary accounts in your General Ledger
- Analyse expenses using Graphs with supporting details in SYSPRO Reporting Services reports
- Post to analysis categories where the expense transaction is recorded

ELECTRONIC FUNDS TRANSFER

The SYSPRO Electronic Funds Transfer (EFT) system improves multi-currency payment efficiency and provides an accurate, current picture of your cash flow. Furthermore, it reduces the risk of fraud and transactional costs associated with beneficiary payments.

The Benefits of Electronic Funds Transfer

- Lower transactional costs of beneficiary payments
- Reduced fraud risk
- Reduced risk of late payment penalties
- Reduced resource requirements
- More accurate cash flow control
- Paperless payment audit trails

Electronic Funds Transfer Features

- Indicate per bank whether EFT transactions are required
- Indicate per supplier whether EFT payments are required
- Capture banking details for Cash Book beneficiaries
- Define security at activity and field level
- Define company-specific EFT remittance advice formats
- Customise EFT output files for bank-specific formats
- Define EFT narration at company or supplier level
- Combine EFT payments for both Accounts Payable suppliers and Cash Book beneficiaries into one bank batch file
- Post Accounts Payable EFT payments to the Cash Book in detail or in summary

GENERAL LEDGER FINANCIAL REPORTING

SYSPRO General Ledger Financial Reporting enables the generation of any number of financial statements in multiple output formats to meet the requirements of your organisation.

The Benefits of General Ledger Financial Reporting

- Comparative analysis between financial years, actual to budget, companies or branches
- Specifically structured for financial reporting, with sample templates for getting started
- Flexible design capabilities for reporting from multiple companies, periods and years, in local and foreign currency
- Flexible account selection options, including

the ability to use wildcards or select by a user defined group code
- Options for printing, viewing online, and extracting to file formats, such as comma delimited and XML
- Run-time prompts for flexibility when running reports
- In-line editing from output previews for convenience

General Ledger Financial Reporting Features

- Create an unlimited number of user-defined financial reports to suit your business requirements
- Optionally publish reports in Extensible Markup Language (XML) or to the Extensible Business Reporting Language (XBRL) standard
- View XML output using the SYSPRO browser, which enables you to drill down to source transaction, security permitting
- Conveniently view XML reports outside of SYSPRO on the internet or company intranet using a standard internet browser

BUDGETS & TARGETS

SYSPRO Budgeting and Targets outlines an organisation's planned sales and expenditures for a given time period based on their expected performance.

This enables you to streamline your business planning, improve your accountability and enhance your expense management.

The Benefits of Budgeting & Targets

- Budgets against ledger accounts for comparative analysis and reporting
- General ledger budgets for current year, next year and eight alternate budgets
- Projected targets against customers, product classes or user-defined sales history targets for projection of future sales from multiple perspectives
- Projection of forecasts based on past sales and integrated algorithms for more accurate sales targets
- Performance and achievement reports for comparisons between actual and projected targets
- Commitment accounting establishes expenditure thresholds across defined ledger accounts managing spending limits

Budgeting & Targets Features

- Create general ledger budgets for individual periods, based on manually entered amounts, or a fixed amount spread evenly across all periods or based on a user-defined budget spread
- Import budgets from external budgeting systems
- Copy from one budget to another and optionally apply a percentage increase
- Establish sales targets per company-specific sales criteria

NEXSYS MAKING TAX DIGITAL

HMRC's introduction of Making Tax Digital (MTD) has added administrative overhead to already taxed finance teams. SYSPRO simplifies VAT filing by correctly capturing tax on source transactions

- With standardised tax rates assigned to customer to automatically bill the correct amounts
- With standardised supplier tax rates to correctly capture all input VAT
- With configurable and repeatable business rules for cross border trading

This reduces the admin overhead to address HMRC's requirement of keeping digital records of your tax transactions.

NexSys has further extended SYSPRO tax functionality to facilitate UK VAT filing by integrating SYSPRO to HMRC's MTD API with the NexSys MTD solution. It helps companies:

- Capture transactions traditionally recorded outside of the ERP (such as cycle-to-work schemes) directly within SYSPRO
- Record Postponed VAT on imports
- Meet HMRC's requirements to file VAT returns using software

Created to be configurable the NexSys MTD solution will cater for your SYSPRO setup and flex as your business grows.

An optional NexSys MTD Currency Extender is available for companies trading in non-Sterling currencies. The extender converts applicable UK vatable transactions into Sterling for UK VAT filing through to HMRC whilst allowing companies to continue trading in their currency of choice for group trading and reporting needs.

With NexSys MTD and SYSPRO, NexSys provides you a complete UK HMRC certified MTD solution.

PROPHIX - CORPORATE PERFORMANCE MANAGEMENT

Specialising in the Manufacturing and Distribution sectors, SYSPRO ERP provides the solutions, processes and tools to assist you to manage your data and gain insights into your business. However, in today's dynamic markets, efficient financial planning and analysis (FP&A) is critical to a company's success. This is where Prophix can help. Prophix empowers finance professionals with our innovative software that automates critical financial processes delivering greater visibility into their company's financial health, improving a company's profitability and minimising their risks. Therefore, combining the manufacturing and distribution capabilities of SYSPRO with the FP&A capabilities of Prophix will empower organisations to transform the way they budget, plan and report.

Seamless Integration with SYSPRO

Prophix software is built to integrate easily with a variety of databases, flat files, external data sources, or other formats including SYSPRO ERP. Prophix's data integration features a simple interface, which any business user can master without relying on IT assistance, this allows SYSPRO users to easily move data into pre-built models effortlessly.

The Benefits of Prophix

Prophix combines all of your SYSPRO and other business systems financial data into a single, unified, financial platform purpose-built to streamline FP&A processes like budgeting, forecasting, scenario modelling, consolidation and reporting.

- Reporting - Automate the production and distribution of your balance sheet, income statement, cash flow statement and more – ensuring that no one sees information which they should not access.
- Rich visuals and Dashboards - Leverage stunning visuals of key KPIs (dashboards and scorecards) to offer quick views of the company's performance, provide insights faster and accelerate decision making
- Budgeting – Leveraging centralized data and automation, budget faster with greater accuracy
- Forecasting - Prophix enables you to forecast, faster, more frequently and with greater accuracy
- Scenario planning – Quickly model and be prepared for sudden market and economic shifts

- Financial Consolidation - Simplify financial consolidation and close with automation to speed up your most time-consuming processes
- Analysis - Facilitate business analysis from multiple perspectives. Gain a holistic view of your organisation's performance, while satisfying specific requirements for financial and operational analysis to make informed decisions
- Cash Flow Planning - Understanding financial performance along with your cash position will provide your executive team with the ability to properly time investments, ensure purchases are in alignment with organisational objectives and improve communications with your bank

NEXSYS SOLUTIONS FOR PEOPLE MANAGEMENT

The NexSys Human Resource (HR) application, Equator, is fully integrated with SYSPRO financial and manufacturing modules and available either as a built-in software suite or as discrete modules. It allows data to be captured electronically using devices including barcode, proximity tag and biometric readers.

EQUATOR EMPLOYEE PORTAL

Equator Employee Portal allows employees to access their personal information directly from a Web Browser. Typically, this will allow your employees to view or modify their specific personal information. This can reduce the burden on your HR professionals to respond to routine employee requests and enquiries, and free them from many routine administration tasks maintaining the database.

The Benefits of Equator Employee Portal

- The system allows employees to post requests for holidays, absence and overtime and to monitor the progress of such requests through to approval. Standard enquiries are provided covering time recording, scheduled work patterns and pay information, depending on which Equator modules are used, including historical data
- By adding links to your Company policy and procedural documentation the Equator Employee Portal can become the main tool used by employees to satisfy their HR needs

- Innovative processing with real time information and a simple user interface which is configurable to individual user preferences
- If your company has the Equator Real-time Data Collection or Time and Attendance modules, the Equator Employee Portal provides for real time entry and validation of employee arrival/departure. If your company has the Equator Shop Floor Data Capture module, this additionally allows jobs to be started, part-completed, completed etc.

Equator Employee Portal Features

- Holiday requests with approval monitoring Absence requests
- Absence notification
- Overtime requests with approval monitoring
- Time clocking enquiries
- Scheduled work pattern
- Payslip queries and printing, including history
- Real time shop floor data capture, including dynamic 'scheduled jobs list'
- Real time attendance recording
- If your company has the Equator Shop Floor Data Capture module, this allows jobs to be started, part-completed, completed, etc
- By using a standard Web Browser, deployment of the Equator system at remote sites is greatly simplified.
- Manage personal details

- Holiday Absence Schedule
- Employee Benefits
- View P11D and P60
- Staff Roster
- Emergency Presence List
- Absence Authorisation
- User Interface
  - Intuitive online help
  - Scalable user interface that adapts itself for desktops, mobile devices and tablets
- Security
  - User access controls and encryption
  - Shared access definition with desktop application
  - Strong password support for access to personal data
  - Audit trails
  - Open ID connect based authorisation

EQUATOR PAYROLL

For large and small organisations needing an effective solution to the complex task of payroll administration. The Payroll module, which is comprehensively checked and assessed on an annual basis with HMRC to ensure that we satisfy all current and future legislative requirements, is designed to provide maximum flexibility, combined with ease of use.

The Benefits of Payroll

- Payroll eliminates the need to retain detailed knowledge of the ever changing rules associated with PAYE, SSP, ShPP, SAP, SPP, SMP, SPBP, NIC, Student Loans, Attachment of Earnings and Pension Auto Enrolment. It incorporates electronic filing capabilities by the internet for all mandatory returns
- Ability to allocate and move employees between companies/departments
- The ability to retain Payroll history for an unlimited period and all retained history may be viewed or reported directly in the system

- Individual employees can be processed separately and modified as many times as required. The prelist report enables you to check employees' build-up prior to processing. When there are 'across-the-board' changes such as tax code updates, pension details, percentage pay increases and alterations to pay/bonus rates, the Global Update feature makes it easy.
- Payroll data is checked and assessed on an annual basis with HMRC

Payroll Features

- All RTI submission types via the internet
- Support for auto enrolment under Workplace Pensions Reform
- Unlimited pensions
- User defined analysis
- Unlimited allowances and deductions
- Unlimited premium factors
- Average pay retention
- Attachment of earnings
- Student loans
- P11D's, including wizards for benefit calculation
- Internet return for Expense and Benefits
- Weekly, fortnightly, 4-weekly and monthly pay rolls
- Company vehicles
- Tax/P45 checking
- HMRC audit compliance data extract

- Report generator for flexible data analysis
- Data provisioning service for tax code notifications
- eDoc deposit service
- Holiday accruals
- Payslip reprint via the Web Portal

EQUATOR TIME & ATTENDANCE

The Time and Attendance solution allows the electronic capture of Time and Attendance details for any number of employees, via industrial and low-cost time clocks or PC based time clock emulator software, using bar-code, magnetic proximity, biometric fingerprint or touch screen technology. The system also allows data to be captured from standard PDA's using Bluetooth wireless.

The Benefits of Time & Attendance

- Adapt the system to your rules, rather than changing your company policies to fit the system. The information is gathered real time or at pre-set intervals giving an accurate attendance picture who is in, out, on holiday, absent or off-site
- The information may also be used to calculate a comprehensive build to gross for payroll and reconciliation with activity on the shop floor.
- A fully integrated roster allows an instant view of available resource, optionally based on required skills, for any future period based on scheduled work patterns and taking into account holiday, absence or overtime booked

- Allows for any number or type of work patterns, including standard, rotational, flexi, continental and night shifts
- Flexible pay methods are supported including annualised hours and a time banking option, in addition to traditional flexi time
- With more and more staff now viewing company information via an intranet or an internet using a web browser, the web portal facility enables staff to access real time T&A data, including clocked times, scheduled work pattern and holiday information, both on and off-site

Time & Attendance Features

- Reports and Enquiries include: Employee details, Attendance statistics, Lateness and overtime, Holiday and absence including Bradford factor, Work pattern and resource planner, Clocking and employee enquiries, Employee transfers, Flexi accruals and balances and Stand down time
- Unlimited user defined work patterns
- Employee departmental transfers
- Calendar facility
- Annualised and banked hours facility
- Use of existing access control ID cards
- Multiple pay and premium rates
- Instant pay makeup
- Temporary and contract personnel
- Real time information and validations
- Real time book out/in for absence including time out for smoke breaks, medical appointments and company business
- Fire alarm activation for on/off site list
- Auto calculation of holiday entitlements and long service benefits
- Absence thresholds

- Under resource commitment warnings
- Overtime recording and authorisation
- Comprehensive build to gross for payroll
- Shift premiums and minimum required hours
- European Working Time recording, monitoring and reporting
- User defined automatic assumptions
- Holiday and absence planning schedule
- Holiday requests and authorisation via the web portal
- Resource planning
- PC based time clock emulator software
- In/out picture board
- Event management
- Exception correction wizard
- Roster for resource availability
- Period/year end:
  - Holiday entitlements
  - Long service holiday accumulators
  - Absence threshold levels
  - Attendance lateness and overtime

EQUATOR PERSONNEL

Equator's Personnel solution provides an effective solution to an organisation's human resource requirements. Decision making is made credible and harnesses employee management and set objectives. Employee details, recruitment, induction, job objectives, reviews, training, skills, health and safety, career paths, holidays and absences, medical details and accident recording are all catered for, enabling comprehensive personnel administration.

The Benefits of Personnel

- A diary facility books and tracks employee movements both on and off site
- A user-defined 'question and-answer' function, which can be linked to other personnel details such as medical particulars, qualifications and reviews
- A memo pad feature allows extensive and virtually unlimited data entry

- Additional flexibility in accessing, inputting or amending employee records on-site via an intranet, or off-site through internet connectivity is achievable with a Web Portal facility
- Management reporting including graphical analysis with a comprehensive selection criteria and date range for flexible period analysis

Personnel Features

- Reports and enquiries
- Employee details and induction schedules including job descriptions and inductions, next of kin contacts, training records and requirements, reviews and self-appraisals, qualifications, career and salary history
- Equipment issued for personal protection and company use as well as company tools
- Safety reports on dangerous occurrences, Hazards and Risk Assessments and health and safety audit
- Training and skills analysis, matching and certificate printing

- General staff administrative reports such as job details, vacancy and recruitment analysis, reminders, languages, holidays and absence analysis (including Bradford factor), headcounts, birthdays, length of service, staff turnover,
- Disciplinary and Grievance actions and redundancy
- Automatic letter generator using mail merge
- Employee performance monitoring
- Employee induction procedures

EQUATOR SHOP FLOOR DATA COLLECTION

The Shop Floor Data Collection module enables information from the factory floor to be collected and collated electronically. As each operation or activity is performed, the information is captured by the employee 'swiping' or 'wanding', using bar-code pens, scanners or through direct entry into a data capture time clock. It is also possible to capture Shop Floor Data with Equator Employee Portal.

The Benefits of Shop Floor Data Collection

- The system allows data to be captured from standard PDA's using Bluetooth wireless technology, or from a PC based application designed for 'touch screen' use, and integrated with real time components
- Real time or at pre-set intervals the entries are 'collected' from the time clocks and updated to the main system which means the information can then be used for a variety of purposes, including automatic posting to Time and Attendance, Work-in-Progress and instant productive and non-productive analysis

- The information collected from the time clocks is user defined and can include employee number, job number, operation number, quantity produced, start and finish times, quantity scrapped and so on
- Advanced functionality and flexibility including unlimited user defined work patterns and work terms, continental work patterns, including flexitime and rotations, and multiple job /operations per employee, including single or multiple machine minding

Shop Floor Data Collection Features

- Team and cell processing
- Automatic defaults – cost / work centre / department
- Alternative work pattern management
- Calendar facility
- Temporary and contract personnel
- Estimated times for jobs and operations
- Quantity tolerances
- Real-time 'Work To' list, material requirements and document display
- Labour and Quantity Costing
- Automatic job receipt
- Automatic material issue, including Lot and Serial number entry

- Real time information and validations against the SYSPRO database
- User defined auto calculation shop floor transactions
- User defined data entry
- Time & Attendance reconciliation
- Independent data capture time clock functionality
- User defined auto calculation shop floor transactions
- User defined data entry
- Auto assume and transaction generation
- Automatically monitors and creates non-productive activities

WEBEXPENSES - EXPENSE MANAGEMENT

We work with Webexpenses to provide a powerful feature set designed to help companies fully manage employee expenses in one integrated solution for greater efficiency. At webexpenses, we view the development of our software as a collaborative process, working closely with our clients and users to make sure they have the tools required for effective expenses management. On average we release around 100 updates each year, with new features added and existing ones improves. Our expertise and track record of innovation means you can be confident that you're getting the best solution.

Webexpenses Features

- Manage, track and monitor expenses from wherever you are with seamless control across tablet and smartphone devices
- Go paperless with a fast, automated digital receipts process
- The road to smarter expenses starts with our powerful business mileage control feature
- Automatically update expenses details of multiple credit card holders in a single click
- Take full control of petty cash payments with a digital and trackable tool
- Protect your organisation from risk through making compliance an active part of the expenses workflow

- Customisable reports provide a simple way to report and track all expenses spend in any way you want
- Easily integrate with your existing finance or accounting software
- Configured to meet the specific needs of your company set-up
- Keep all your information safe with a system designed to meet all the most stringent industry data security standards
- Carbon Emissions Tracking - help to improve your carbon footprint by tracking carbon emissions on travel via air, car and train
- Credit card reconciliation - automatic import of credit card feeds

REPORTING, ANALYTICS & SOCIAL

Our reporting solutions allow you to produce simple ad hoc reports in a format that you require. You can custom design reports to virtually any level of complexity complete with tailoring reporting options, preferences and layout features such as graphics. It also allows reports to be shared between users while protecting access to information.

REPORTING SERVICES / CRYSTAL REPORTING

SYSPRO Reporting Services (SRS) provides high-quality financial and operational reports and documents, together with visual analysis capabilities. The flexibility of SRS means that reports can be designed for almost any requirement. In addition, as the reports are version-independent, they are unaffected during system upgrades.

The Benefits of Reporting Services

- Rapid, secure access to enterprise information
- The power of Crystal Report functionality for standard and user-defined reports
- Boardroom-quality reporting through the flexibility to design reports to almost any requirement
- Dynamic chart and analysis capabilities
- Report scheduling for convenience

- Reporting with interactive hyperlinks to details, other applications or reports
- Tailoring any standard SRS report to match your requirements
- Dynamic filtering of report content
- Efficient retrieval of report history and archives
- Option of server-side processing of reports to reduce processing time and overheads

Reporting Services Features

- Configure forms for report options and preferences
- Customise report fields, layout and themes
- Document and Report archiving facility
- Automatic translation of report headings into any language
- Run multiple reports simultaneously in the background
- Print a document to more than one device Delete existing unused document templates
- On-screen alerts provide visual notification of predefined conditions

- Publish multi-format documents
- Offers alternative to Microsoft Word printing Access data from external sources
- Import and export documents, including data from external sources
- Email documents in PDF format Archive reports as run
- Open reporting API to allow developers and external applications to add and distribute SYSPRO documents

BUSINESS INSIGHT TILES

Business Insights is an individual performance management tool for all levels of engagement. It provides real-time insight into key performance information and the means to act quickly and proactively.

By surfacing relevant information pertinent to specific individuals and roles, Business Insights empowers these individuals within an organization to meet goals, targets and deadlines, collaborate with others, and perform to their full potential. All while measuring their own KPI's and managing their own work-lists.

The Benefits of Business Insight Tiles

- **Improve business performance** - Drive business behaviour by empowering your users with business-critical insights for quicker analysis, decision making and execution.
- **Accelerate Turnaround Time** - Accelerates turnaround time by streamlining the actions and activities that occur between one task and the next in a business process. By promoting that information, that is most pertinent to that person in their role within the process, users are empowered to take action – driving throughput.
- **Increase Decision-Making Capability** - Make proactive business decisions with increased visibility into operational performance of the company by individual

and department across the entire operation and determine where you are successful and where you need to improve.
- **Improve Business Performance** - Improve performance by defining and assigning operational goals, targets and deadlines at an individual, role or organizational level as key performance indicators and metrics designed with the ability to immediately action work-to-lists – converting KPI's into meaningful improvement.
- **Empower the Workforce** - Empower users to perform to their full potential and to meet goals and targets by assigning insights in an intuitive, self-explanatory, easy-to-use interface, aligned with critical business drivers and work- lists to be actioned.

Business Insight Tiles Features

- **Single Real-Time View** - Provides a single real-time view into key business drivers of the company by individual and department across the entire operation.
- **Surfaces Relevant Key Performance Information** - An easy to use, self-explanatory and intuitive interface that surfaces key performance information that is relevant to the individual, department or organization.
- **Drill-Down Capability** - Drill down into insights and the detail behind each metric by individual role or department.

- **Pre-configured To Standard Business Metrics** - Pre-configured, standard insights, built according to industry specific KPI's and metrics.
- **Flexible and Customisable Metrics** - Flexible and customizable to allow organizations to consolidate information from multiple sources, script their own views and establish their own monitoring and goal.

SYSPRO EMBEDDED ANALYTICS

Embedded analytics is a business intelligence solution built into SYSPRO; a holistic visualisation solution that enables data-driven decision making and a resulting improvement of operations. Engaging dashboards with charts, gauges and other widgets provide a visual view broader than business insight tiles. Embedded Analytics helps to bridge the gap between data and action by providing users with easy access to insights and analytics within the same environment where they perform their work. This eliminates the need for them to switch between different systems and applications to access data, which can be time-consuming and tedious. By connecting insights and actions in the same place, Embedded Analytics enables users to make data-driven decisions faster and more easily, leading to increased adoption and improved organisational outcomes. Additionally, it will help your company to better adapt to customer needs and improve customer satisfaction.

The Benefits of Embedded Analytics

- Enables Data-driven decisions faster with visual analytics embedded within business workflows and processes
- Self-service and customisation capabilities allow you to see your data how you want
- Customisable analytics with the ability to merge and connect data across all your business systems
- Supports a digital transformation strategy
- Optimise business performance using data-driven insights and optimise customer service

- Minimise system risk and complexity with a centralised data analytics solution
- Reduce expense by dispensing with required investment in and management of 3rd-party BI solutions
- Reduce development time with easy-to-use technology and pre-built widgets

Embedded Analytics Features

- Data connection manager allowing you to define and connect to an array of different systems and data sources
- Data source manager to blend and join data from multiple systems and files that is the foundation for your visual dashboards
- Visualisation manager to allow you to create auto-populated visuals for use on your dashboards. Includes over 20 responsive visualisation widgets

- Dashboard library manager where you can maintain your standard and customised visualisations to import, export and test prior to deployment.
- Embedded analytics web card to integrate into SYSPRO
- Data interrogation to filter, drill and zoom into the data and dynamically update your dashboard visuals for quick analysis

NEXSYS REPORTS

NexSys Reports allows businesses to generate consistent documentation through its rich API, utilising the power of Crystal Reports. From customs documentation to quotations, NexSys Reports gives businesses the automation required to gain efficiencies within the organisation.

Reports can be written for complex reporting and documentation needs that are not typically satisfied using the formats that come from the core ERP system, or as a supplement to the already existing documents.

The Benefits of NexSys Reports

- Allows report printing and sending to be performed in the background, saving time and clicks
- Various ways to connect different data sources to generate reports and documents
- Server-side so no installations are required on the client computers
- Barcode API, allowing QR codes and Code128 to be generated and embedded into reports

NexSys Reports Features

- Feature rich API for automatic report generation
- Email integration via SMTP, allowing reports and documents to be sent as attachments
- Send to print functionality allowing reports to be printed in the background
- Utilises a web report viewer, so reports can be viewed via a web browser and even printed and emailed from the same browser window
- Printer filters, allowing printers to be hidden from the utility
- Live logging for fault finding and improved supportability
- Supports Crystal Parameters for dynamic report generation
- Multi-company compliant, allowing different reports and documents on a per company basis
- PDF Print functionality for printing ready-made PDF's

AUTOMAIL - DOCUMENT MANAGEMENT

AutoMail for SYSPRO is an email automation system that uses a source PDF or simple text script to send complex emails with PDF attachments. AutoMail enables rapid deployment of email facilities for existing applications such as SYSPRO, or any application that can produce a PDF report or output a custom text file.

AutoMail runs as a Windows Service that monitors a specific directory for PDF or script files that provide instructions for the creation and sending of emails. The source application generates a report (e.g. Crystal or SQL) which is outputted as a PDF file containing content pages separated by header pages. When the PDF file is dropped in the AutoMail folder, AutoMail will parse the header pages in the file and create emails using the commands in the header pages, with the specific content pages attached.

The Benefits of Automail

- Full control of email content and delivery
- AutoMail provides robust, scripted email automation
- On-the-fly PDF attachment generation
- Automates previously labour intensive invoicing and sales processes
- Simply drop text files into a designated folder and let AutoMail create and attach complex PDF files
- Generates fully HTML emails with attachments

Automail Features

- Default settings can be overridden in the PDF header or script on a job by job basis (e.g. from SMTP server or template name)
- Comprehensive PDF support including reports created by Crystal Reports and Word
- Encryption and password protection of PDF attachments
- Full HTML email template system with master templates and embedded images
- Full retry functionality with comprehensive and clear error messages in the event of a problem
- AutoMail Monitor GUI application that shows sent, failed and retrying items

AI & MACHINE LEARNING

With the introduction of digital transformation and embracing new message streams from digitalization, a new approach to making sense of all this data is needed. Artificial Intelligence and Machine Learning (the engine behind AI) gives computers the ability to make sense of and learn from data to perform specific tasks without manual interference. It provides analysis and insights to users, addressing the large amounts of structured and unstructured business and industry data that companies increasingly need to consider as part of their decision-making process.

From AI to UI

SYSPRO's practical application of ML and AI provides an improved user experience and enables organizations to take advantage of these new technologies to become more efficient. SYSPRO understands that the use and benefits of these disruptive technologies must be introduced in a manner that companies can make use of them out-of-the-box.

- AI models can be attached anywhere in SYSPPRO's web based interface, Avanti, using our flexible cards infrastructure, binding a user UI and data context to an AI model. These cards become the 'mouthpieces' of ML/ AI, surfacing insights, predictions or detecting anomalies directly to the users processing transactions, drawing their attention to aspects they may not have been aware of.

- The underlying machine learning and artificial intelligence engine is available for both cloud or onpremise deployments.
- A ML designer is made available so that non-technical users can design their own AI models simply.

How SYSPRO utilizes AI

Predictions - Use historical data to predict the future. Examples of these are from a seasonal perspective where we can predict when a customer might purchase a particular product or use historical data to predict when a customer might default on payments based on past behaviour.

Anomaly Detection - This is where our AI engine listens to operator activity. This is typically used to capture fraudulent transactions or even incorrect key strokes. As an example, Joe Blogs ordinarily captures 10 sales orders with an average value of £7000. On one day Joe Blogs captures a sales order for £100,000. The AI engine will flag this transaction as an anomaly for someone in the organization who can determine whether this is valid or fraudulent.

Computer Vision - Used currently by the Autonomous car to detect objects. With SYSPRO ERP, this capability can assist with health and safety regulations on the factory floor, for quality assurance. For example, using facial recognition to detect who is authorized to use machines or forklifts; or taking pictures of products as they come off the production line to provide real-time quality checks.

HARMONY & SOCIAL

Harmony is a next-generation, user-friendly social media-type platform at the core of SYSPRO enterprise resource planning (ERP).

It helps promote a more collaborative way of working by harmonizing data with people – providing users a familiar, easy and effective away to connect, communicate, and conduct their daily business. By accessing, and relating real-time information, insights, and trends through Social ERP, users can act instantly and decisively – helping increase responsiveness, lead times and overall productivity.

Harmony Benefits

Increase User Engagement - Harmony answers the needs of the contemporary user by incorporating a familiar and personalized social media-type interface on which to do business.

Foster Collaboration - By bringing the social media aspect into the core of ERP, Harmony allows posting and collaboration within the network of the organization using real-time information from the SYSPRO database that surfaces as you are composing your 'Beat' (Conversation Post within Harmony Portal).

Stay in Touch - SYSPRO Harmony provides direct, 24/7 access to the people and the information that's relevant and critical to your role and tasks with the ability to communicate instantly with your network of associates.

Increase Responsiveness - Share and relate critical business insights, data and intelligence with your coworkers to solve problems faster.

Spot Significant Trends - Take proactive steps with an instant and ever expanding view into customer sentiments, relevant emerging data trends, and significant business movements.

Harmony Features

As with social media, Harmony users can follow, post, and collaborate within the organization network using real-time information from the SYSPRO database.

- Follow and track key information
- Action and communicate relevant information to internal stakeholders
- Integrate SYSPRO data into the chat
- Archive and trend analysis in conversations and data
- Surface sentiments detected
- Spot Trends

BOTS

The SYSPRO Bot is a digital ERP assistant which resides within SYSPRO ERP to provide self-service facilities on specific business functions by conversing with internal and external stakeholders on any platform and device. The bot can securely provide employees, customers and/or suppliers with information and alerts, or perform tasks such as price queries, stock or order status lookups from any platform, including your company website, Facebook Messenger, Microsoft Teams, Skype and more.

The Benefits of Bots

- Provides an always-on, consistent and efficient customer experience, 24/7, across the globe
- Enables Interactive Self-service to get basic information, fill out an application, source a quote, confirm a purchase or check product availability and more, via text, chat or messaging
- Make service delivery convenient by offering your staff, customers and suppliers with the choice of how they would like to engage with your organisation from any chat space, on any device, at any time.
- Improves User Engagement and Experience of the contemporary customer and workforce for an immediate, always available, intuitive, multi-platform and multi-

- device user experience when engaging with and within your business
- The identity of the SYSPRO BOT can match your organization to assume a digital 'persona' and become the 'face' of the company.
- Provides time-saving mobile access to business information on the fly helping you to make better decisions faster.
- Prompts You to Take Action Before Problems Occur with personalised notifications and prompting action on relevant business events and predictions
- Frees up Resources to Spend Time on More Valuable Tasks
- Automates and simplifies business tasks and minimises the likelihood of errors

Bots Features

- Request Information, Process Transactions and Input Data at Anytime
- The SYSPRO Bot can be used to prompt or guide viewers through a self-service process quickly, efficiently and accurately.
- Businesses can evaluate which of their repetitive processes they can 'train' a BOT to perform as proficiently as anyone else would, and automate that process using this digital citizen. 80 out-of-the-box skillsets are currently available which can be streamlined to perform a complete process. A Skills Development Platform allows you to build your own skillsets.
- The identity of the BOT can match your Organisation to assume a digital 'persona' and become the 'face' of the company.

- The SYSPRO Bot works together with an AI Engine to mine through and analyse large data sets – delivering insights, reports, alerts, predictions, trends and more directly to your preferred platform.
- Converse with the SYSPRO Bot on Any Platform from Any Device
- The SYSPRO Bot makes use of machine learning, natural language parameters, and Microsoft's Language Understanding Intelligence Service to interpret human language and emulate a natural conversation
- Meets and adheres to predetermined security and authentication protocols.
- The Bot is hosted in Azure and makes use of the Microsoft BOT Framework allowing 24/7 availability across the globe.

INTEGRATION & PRODUCTIVITY TOOLS

SYSPRO provides a complete integration framework through to client interface, allowing you, for example, to email or place orders over the internet, or perform stock takes with a mobile device. SYSPRO's Integration Framework enables you to extend your SYSPRO ERP solution to work with other systems within the enterprise and to extended beyond it.

DATASWITCH - INTEGRATION & AUTOMATION

DataSwitch is a purpose built system integration and data manipulation tool, capable of processing data from files or databases that are external to your SYSPRO ERP system. It offers a user friendly interface that allows you to automate tricky repetitive data import and export tasks. It is ideally suited for generating multiple transactions from a single input and can be configured to alert operators in the event of any transaction failure.

The Benefits of DataSwitch

- **Time to Value** - Whatever values and benefits you perceive from automating systems and process, realise them faster with DataSwitch's quick implementation and ease of use
- **Increased Accuracy** - Automating your processes through system integration removes the risk of errors in business critical transactions. Processes can be completed not only faster, but more accurately too, meaning business decisions can be made based on real-time data – all resulting in a leaner business
- **Reduced Costs** - Transactions between your ERP system and those of your suppliers, customers and business partners can be automated to reduce administration and rework costs

- **Increased Flexibility** - Respond more quickly to the changing needs of your business by having instant access to your systems integration allowing you to adapt and meet the needs of your customers and suppliers in an efficient and effective manor
- **Faster Time to Market** - By automating processes you can decrease the time to manufacture, supply and invoice. This allows you to shorten the supply chain process, strengthening your relationship with your customer whilst also improving cash flow
- **Efficient Processes** - Removing human interactions means time to complete each process can be significantly reduced, enabling you to re-deploy staff where they are most needed and most effective

DataSwitch Features

- **Dataflow Builder** - Visualise your integrations via visual process flows
- **File Processing** - Interact, translate and process network based files in multiple data formats ranging from CSV to TXT to XML and JSON
- **Integration Object Suite** - Build your integrations with one of the many standard objects which support translation and mapping of your data between systems, while supporting connection methods such as REST, SOAP or WEB API's methods and SQL database access

- **XSLT & JavaScript Translation** - A choice of common translation languages to simplify the development tasks of converting and mapping data between endpoints
- **Integrated Security** - Support for Active Directory integration providing single sign on for designated integration administrators, or internal role based security to centralise administration
- **FTP / SFTP Scheduling** - Fully integrated file transfer support for uploading and downloaded scheduled data from multiple sources via standard FTP or encrypted SFTP

- **Real-time Diagnostics** - Have complete control over your system integration diagnostics with real-time reporting on the status of DataSwitch
- **Dashboard Reporting** - Visual real-time reporting, completely configurable to each of your system integration data flows
- **EDI Translation Pack** - Available as an additional module is the EDI parser pack which enables you to automatically parse to and from EDIFACT, EANCOM, TRADACOMS and X12 EDI standards, putting you in control of your EDI partnerships direct with customers and suppliers.

- **Common Data Model** - Available as part of the SwitchSync module, the Centralised Data optimisation feature, ensures duplicate data is removed from the transport layer providing optimal and efficient integration
- **Request / Response API** - Available as part of the SwitchSync module, the Request/Response API enables you to provide near-real-time communications between systems coupled with the Common Data Model to enhance performance and data synchronisation

Examples of Using DataSwitch

- Importing of Sales Orders. Users can receive files in various formats from their customers which DataSwitch can archive and convert into XML before creating sales orders directly in SYSPRO. DataSwitch can also be used to pre-process these files and post a series of different transactions based on the content of the files
- Automatically emailing invoices to customers. When invoices are raised in SYSPRO, transactions can be generated in DataSwitch so customer specific XML files can be saved in specific directories for exporting as EDI invoices
- Importing orders from Web sites. Sales orders created on web sites can be emailed or copied to DataSwitch which in turn can create a customer, import the sales order and email a response to the customer
- Posting transactions from SQL triggers. When transactions are posted into an SQL database DataSwitch transactions can be inserted via SQL triggers to invoke specific actions e.g.
- When invoices are generated in SYSPRO. SQL triggers are fired to insert transactions into DataSwitch so stock can be booked in and A/P invoices can be posted to remote SYSPRO sites
- SYSPRO Report Writer reports are being run to identify WIP jobs with an outstanding value. This data is then passed to DataSwitch so the jobs can be closed with the value being distributed to the nominal codes identified within this report

- Importing of Sales Orders. When stock in a distribution warehouse falls below a minimum level and there is stock available in the main store an SCT (Supply Chain Transfer) can be raised in SYSPRO to request replenishment stock
- Importing stock codes, BOM's, prices etc. Stock codes and BOM's can be created or up dated based on extract files from sources including 3rd party CAD applications
- Synchronising warehouses with another warehousing suite. Companies that choose to outsource their warehousing can import remote transactions into DataSwitch so stock levels and transactions can be synchronised within SYSPRO

OFFICE INTEGRATION

SYSPRO Office Integration (SOI) enables anyone in the enterprise to access information directly and securely from the SYSPRO database using a Microsoft Office product such as Word or Excel, regardless of whether SYSPRO is installed on their client machine. Furthermore, once the information has been displayed it can be inserted directly into the current document as simple text or tables.

The Benefits of Office Integration

- Remote access to SYSPRO information without the requirement for a local SYSPRO installation
- Secure access to SYSPRO information using Microsoft Office applications
- Microsoft Outlook is the standard integrated email and calendar application

- Stationery formats such as invoices, order documents and statements can be formatted using a variety of tools, including Microsoft Word

Office Integration Features

- Define to-do lists to remind users of task steps to complete; e.g. sequential month-end tasks
- Insert task reminders into Microsoft Outlook's to-do list
- Output data to an Excel spreadsheet from any SYSPRO list view
- Invoke Microsoft MapPoint from within list view SmartLinks

- Use Microsoft Outlook as an email client for scheduling appointments and meetings, and for storing basic contact information in SYSPRO's Contact Management system (CMS)
- Send emails and simultaneously record activities in the SYSPRO CMS

E.NET: SYSPRO'S INTEGRATION INTERFACE

SYSPRO e.net Solutions enable you to extend beyond your enterprise using SYSPRO's open interface. It encourages integration with best-of-breed third-party products while facilitating collaboration with business partners - the essential links in your supply chain.

SYSPRO e.net Solutions provide:

- A simplified development environment in which developers can customize SYSPRO's business functionality to suit end-user requirements
- An infrastructure that helps users integrate third-party applications to SYSPRO
- Direct access to SYSPRO data using external devices.

The Benefits of E.Net

- Lowered total cost of ownership – custom programs do not have to be rewritten when upgrading to a new release of SYSPRO
- Simplified application development environment – developers do not need to understand SYSPRO's database and can focus on delivering new applications
- Reduced development maintenance costs – developers do not directly access the database and are therefore shielded from any changes to the database
- Secure interface to SYSPRO database – the security rules inherent in SYSPRO are built into the component framework and the business objects

- Version independence – the component interface can evolve while maintaining backwards compatibility because it uses XML to pass parameters and data between SYSPRO and the calling application
- Proven technologies – the component framework is built to the COM specification and makes extensive use of XML
- Customer-focused applications – it allows the creation of applications that meet your specific needs
- Reduced network traffic – the component framework reduces the amount of network traffic required to retrieve data from the business objects.

E.Net Features

- Compatible with any COM-aware development environment
- XML is the communication standard
- Utilization of SYSPRO business logic, validation and data structure
- Single set of security settings for both business objects and the core product
- The Web applications are constructed based on the Microsoft .NET Framework

- Caters for applications that support localized user interfaces e.g. error messages can be returned in multiple languages
- Sample code is provided to help developers become more productive in the minimum amount of time.

O DATA

OData is for customers, third party software providers and systems integrators who want a secure and consistent method of accessing SYSPRO data. It provides improved data access particularly in the cloud by connecting to the SQL database structure and data, in a secure and auditable manner.

OData, short for Open Data Protocol, is an open-source protocol that allows data to be queried making use of the RESTful API. It is an industry standard integration method that uses communications technology to access and connect to SYSPRO's system database through a secure HTTPS restful internet endpoint.

The Benefits of OData

- Seamless integration with SYSPRO ERP
- Connects 3rd parties to SYSPRO Data
- A secure solution with an easy-to-use interface

OData Solution Capabilities

- Perform easier and faster integrations between other systems and SYSPRO data using the HTTP protocol stack
- Access and interact with SYSPRO company and system-wide databases in a consistent manner using RESTful web services
- Access a simple and uniform way to share data in a discoverable manner
- Extend SYSPRO's use for third-party data analysis tools (e.g. Excel, PowerBI, Tableau and other external analytical solutions)
- Simplify the data access mechanism
- Lower the risk of inappropriate data access
- Prevent the requirement for direct SQL Access in future

NEXSYS UTILITIES & PRODUCTIVITY TOOLS

NexSys provide a rich set of utility programs to simplify common problems that are prevalent across businesses. Built and maintained by the NexSys development team, these tools have been created to address frequent customer requests. They focus on automating repetitive tasks and simplifying infrequent business maintenance requirements, allowing your staff to focus on the important value-add duties.

NexSys Reports is used to automate and complex reporting requirements beyond standard ERP reporting tools. Leveraged by companies from meeting complex post-Brexit customs document requirements through to internal procurement and shipping needs, this robust tool automates documents creation and management.

Company Copy simplifies and de-risks the task of cloning your SYSPRO company. Quickly copy your production data to test new business processes or validate system changes. Train new employees on a copied company without affecting live business data.

EFT Interface takes the XML output from the SYSPRO EFT module and translates it into one of a user-definable range of output formats suitable for a given bank or other financial institution. With over 40 pre-defined bank formats, speed up your bank payment integration and if necessary, easily switch financial institutions that better meets your business needs.

Stock Code Replace is a utility built for companies looking to rationalise their inventory holdings. Companies where multiple departments are responsible for managing their own material often end up with duplicate or redundant master stock data over time. This can lead to expensive purchasing expenditure, costly warehouse storage or write-offs due to spoilage or obsolescence. Easily standardise your stock codes by renaming or replacing similar items to establish a more realistic picture of your stock on hand with this utility.
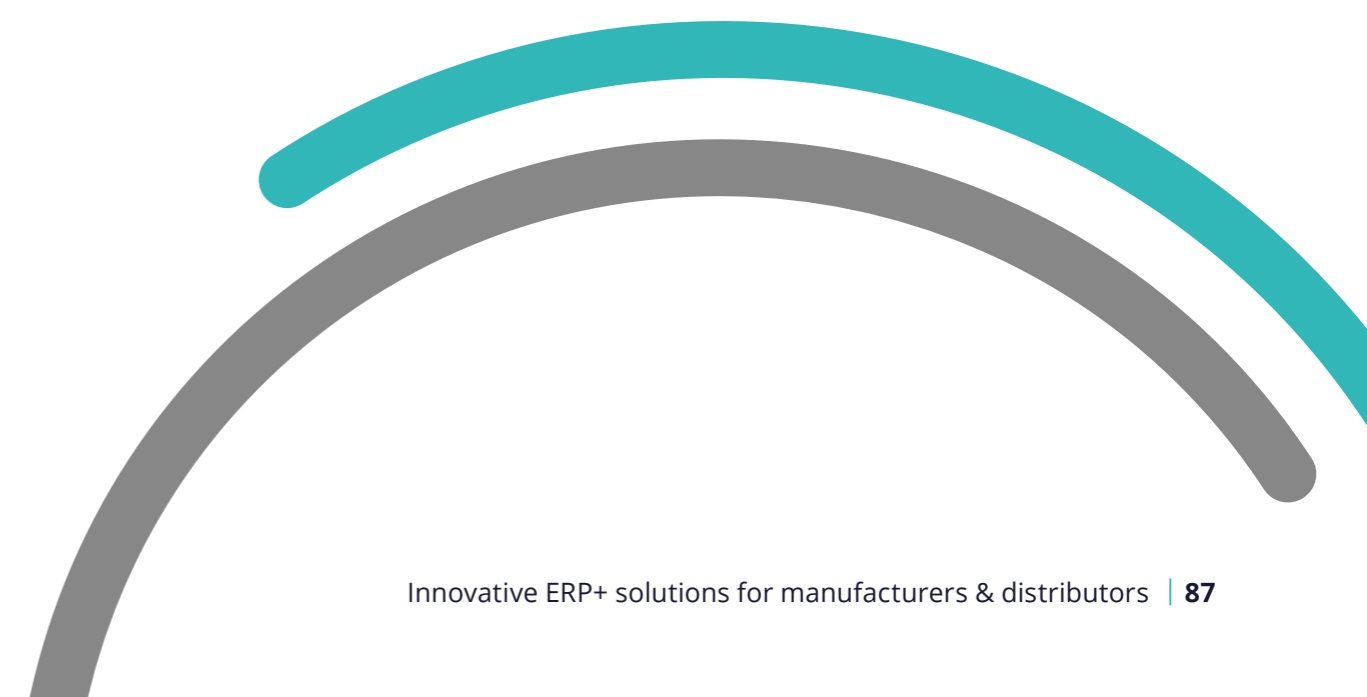
WORKFLOW SERVICES

SYSPRO Workflow Services (SWS) provides the capability to design and enable the streamlined flow of business processes through a fluid and user-friendly interface. The application facilitates greater visibility, clarity, transparency and integration throughout the organisation's business processes.

The Benefits of Workflow Services

- Streamlined business processes
- Promotion of inter-departmental collaboration
- Comprehensive test environment in which to test workflows prior to deployment
- Role-based security
- Notification services

- Accessible from third-party applications
- Central host engine for all workflows
- SOAP and HTTP-communication enabled
- Workflow monitoring and tracking to centralised database
- WYSIWYG workflow and activity designer

Workflow Services Features

- Design, build, test, deploy, manage and integrate any number of business workflows
- Initiate workflow processes, both from within SYSPRO and externally

- Process workflow transactions remotely and without necessarily having SYSPRO installed on the desktop
- Apply rules-based interaction and control

CADTALK - CAD INTEGRATION

CADTalk is an ERP-CAD Integrated Solution offering real-time integration between CAD Software and SYSPRO, allowing perfect synchronisation of both data sets and completely eliminating redundant data entry.

Unique in its solution CADTalk is a complete integration of SYSPRO and virtually any CAD software, not relying on batch XML or other export files. All fields are fully mapped to ensure perfect data integrity with on-screen validation.

CADTalk works with multiple levels of BOM's simultaneously in a fully indented BOM view allowing adding/updating of Routes, Structures, and Stock Codes at any level. CADTalk can also be used to directly update Routes, Structures and Stock Code data currently within SYSPRO. This solution can be an embedded application within you CAD software or a standalone viewer; this gives companies robust possibilities depending on their internal engineering processes.

The Benefits of CADTalk

- Eliminate duplicate data entry and ensuing errors
- Reduce Engineering to Production lead-time
- Keep CAD Drawings and SYSPRO data in sync and up to date Keep people using the tools they know

- Import/export live data to and from SYSPRO - no file export and uploads required

CADTalk Features

- Fully integrated real-time solution
- Manage multiple levels of BOM's simultaneously
- Map any CAD file property to SYSPRO field
- Create and update items, routings and structures within SYSPRO
- Drag/drop and quick data entry all with graphical interface

- View model and drawings from within the application Import and merge from CAD and/or from SYSPRO data

DOCUMENT MANAGEMENT – DOCUWARE AND MORE

SYSPRO can seamlessly integrate with a number of Document Management solutions, giving you the opportunity to source and implement the right solution for your strategy. Document Management software provides the management of electronic documents (check-out, check-in) and can also provide workflow, Document Routing, Electronic Forms, Scanning, Storage, Archiving, Indexing and Records Management.

The Benefits of Docuware Document Management

- Cloud-based Web-browser interface.
- Free mobile (iOS/Android) app for mobile phone/tablet.
- Convenient centralised management, searching for and retrieval of all stored organisational content.
- Seamless integration with SYSPRO, simplifying processes and ensuring data quality for all departments and reducing task duplication.
- Automation of repetitive data input tasks empowering team members to add value across the organisation in new ways.
- Alleviate environmental impact across paper consumption, water use and CO2 and reduce operational costs through efficiency and accuracy savings.
- Fully detailed audit trails of actions on any document across storage, workflow, stamps, download and viewing.
- Versatile search capability on all stored documents using multiple search criteria tools including full text and meta data.

Docuware Document Management Features

- Integrates seamlessly with SYSPRO via the Vertosuite tool and via built-in OCR to extract data from incoming scanned paper based and electronic documents and allowing the population of SYSPRO via the API resulting in reduction in data entry across your business and adherence to your configured business logic.
- Document imaging and archiving solution allows automatic archiving for documents, scanning and structured storage for easy retrieval and access and can be tailored to the specific requirement of an individual organisation.
- Bespoke workflow solutions including daily triggers, emails, approval matrices and user-level permissions.
- The cloud-based solution includes the DocuWare modules as standard.
- The Forms module allows for the creation and use of digital forms (both internal and public) to capture information into the DMS for use e.g., Visitors, enquiries, sales orders, expenses, purchase order requests, accident record, QC audits, worksheets etc.
- Automation of Accounts Payable invoice creation from incoming documents, provision of authorisation and GRN matching facilities.
- POD/POC (Proof of Delivery/Collection) Scanning & Retrieval.
- Authorisation enables the entire document approval process to be streamlined and unified across an organisation no matter where personnel are located.
- Integrated digital signatures with Validated ID to provide full legally covered eSignatures.
- Automatic retrieval of emails and/or attachments from selected mailboxes for processing.

MOBILITY & LABELLING

The adequate identification of stock and the ability to manage stock at the point of transaction is one of the most crucial requirements for a modern manufacturing or distribution business. SYSPRO and our partner products extend the ERP solution out onto the shop floor to empower workers and enable mobile workers to interact with SYSPRO while they are on the go.

92 | **Espresso**

93 | ***TransLution**

94 | ***Bartender - Barcode Labelling**

ESPRESSO

SYSPRO Espresso is a mobile solution that lets you use your SYSPRO business software on any smartphone or tablet. It allows you to access business processes and data as easily as if you were in the office. SYSPRO Espresso mobile apps can work any time, any place, and on any device, providing instant and secure access to information about your customers, suppliers, orders, inventory items and other key business information.

Mobile users can tailor the user interface of SYSPRO Espresso applications themselves, without the need for development skills.

Mobile device management, user access, and software deployment are all handled by the SYSPRO Espresso management hub.

For the developer, the SYSPRO Espresso lowers the time and cost of developing and deploying mobile applications by providing a development environment that is device independent. SYSPRO Espresso allows developers to make use of device capabilities, such as push notifications, signatures, camera and geolocation.

The Benefits of Espresso

- **Device and mobile platform independent:** Designed to work on any monitor, from a mobile phone to a desktop PC (and anything in between)
- **Real-time information, at your fingertips:** Search and retrieve up-to-date information whenever you need – on sales, customers, suppliers, orders, inventory and other business information
- **Tailored experience:** Easily customise the look and experience of SYSPRO Espresso mobile applications by simply dragging and dropping different screen components
- **Integrated mobile management:** SYSPRO system administrators can control user and device access, and configure menus and applications by company and roles

- **Library of applications available:** SYSPRO Espresso applications are available via the trusted community platform of the SYSPRO App Store
- **One app for all applications:** Once a mobile user logs in their menu system gives them access to any applications they are allowed to use. As new apps become available they can be pushed to the user's device, removing the need to download another app

TRANSLUTION

Our mobile solutions allow you to streamline your inventory physical counts, purchase order receiving, job issues, inventory movements, sales order picking and much more, using handheld devices or a desktop PC. The information you enter is validated in real-time, saving errors, increasing stock accuracy and production efficiency and adding value to your company.

The Benefits of TransLution

- Simple, easy to read screens
- Real-time data validation
- Less data duplication
- Barcode scanning functionality for improved accuracy
- Fast, logical entry
- Flexible and Scalable

- Instant availability of process information resulting in maximum control, increased information accuracy, traceability, reporting and improved decision making
- Integrates to SYSPRO ERP, reducing manual entry and inaccuracy
- Quick set up

TransLution Features

- Pre-configured scanner prompts
- Easy touch screens are configured to include only those operations relevant to each process including buttons to print labels, view picking orders, stock count data or reveal production instructions
- Easily configured to post specialised information captured on the scanner to SYSPRO, including lot numbers, serial numbers, general ledger codes and much more
- Custom applications can be created upon request to allow you to scale your solution to fit your business processes. Examples include Material Allocations, Single Scan movements & Proof of Delivery.

- Label Printing capabilities via integration to BarTender™
- Supports multiple devices including scanners, touch screens, pc's and tablet pc's
- Purchase Order Receiving: Receipts into Inspection & into Stock.
- Inventory Movements: Receipts, Bin Transfers, Warehouse Transfers, Goods in Transit, Stock Adjustments & Expense Issues.
- Work In Progress Transactions: Receipts, Issues, Back Flush & Labour Posting.
- Sales Order Picking: Back Order Release & Dispatch Note Creation.
- Stock Take: Create Stock Takes, Count Stock & Complete Stock Takes.

BARTENDER - BARCODE LABELLING

BarTender barcode provides design and print software for labels, barcodes, cards and RFID tags. Running stand-alone or integrated with just about any other program, BarTender is the perfect solution for almost any on-demand printing or marking application, including: label printing, print and apply, direct marking on parts and packaging, encoding smart cards, sign production, and much more. Powerful companion applications even manage system security, network print functions, document publishing, print job logging, and more.

The Benefits of BarTender

BarTender enables organizations to grow their business with:
- Decreased costs of operation
- Improved quality
- Reduced downtime

- Improved efficiency
- Enhanced compliance
- Optimized for anywhere, anytime label printing.

BarTender Features

Take your labelling to the next level with BarTender:
- Automated label printing direct from your ERP
- Ad hoc labelling for rack, shelf and bin labels
- RFID tags and card printing
- Sophisticated product serialization

- Scale integration to capture variable weight to print on a label
- Traceability, compliance and security
- Relabelling via automated scan and print
- GS-1 support including GS-1 Digital Link
- Remote printing from any location, operating system, device or browser

> 66
> After two years of using SYSPRO I wonder how we ever managed without it. We know that the system has more than paid for itself.

> 66
> With SYSPRO, we have been able to produce reports that have been invaluable in measuring our financial performance, job performance, quote accuracy, market performance and sales activity. This is saving us up to 40% of our time and has enabled us to make a cost saving of around £200,000 year-on- year.

> 66
> We are very pleased with NexSys and SYSPRO. The service and support from NexSys is excellent. The company also invests considerably in software development and each year there are important enhancements to the product to help customers get more from their systems. We need to be at the leading edge of our own market and NexSys continuous development of SYSPRO will help keep us out in front by making us more competitive

NOTES

INDEX

ABOUT NEXSYS

NexSys delivers best-of-breed Innovative ERP+ solutions to manufacturers and distributors throughout the UK. Through its previous brand, K3 Syspro, the business has more than 40 years' experience delivering successful ERP implementations and technology projects. NexSys is an elite partner of SYSPRO, with a dedicated and experienced team of consultants, project managers, developers, trainers and support staff.

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