

Road to Excellence



SYSPRO 8 – Driving Your Business Forward

Maks Kaniuka

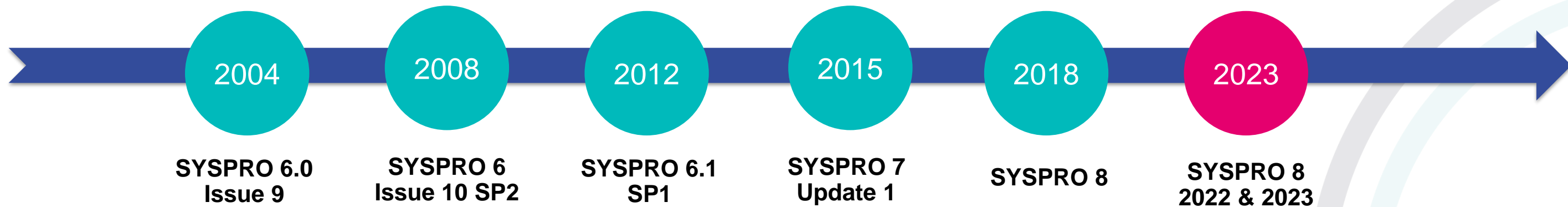


Agenda

- SYSPRO Lifecycle
- SYSPRO 8 Evolution
- SYSPRO 8 Key Features Review
- Demo
- Q & A



SYSPRO Lifecycle (last 20 years)

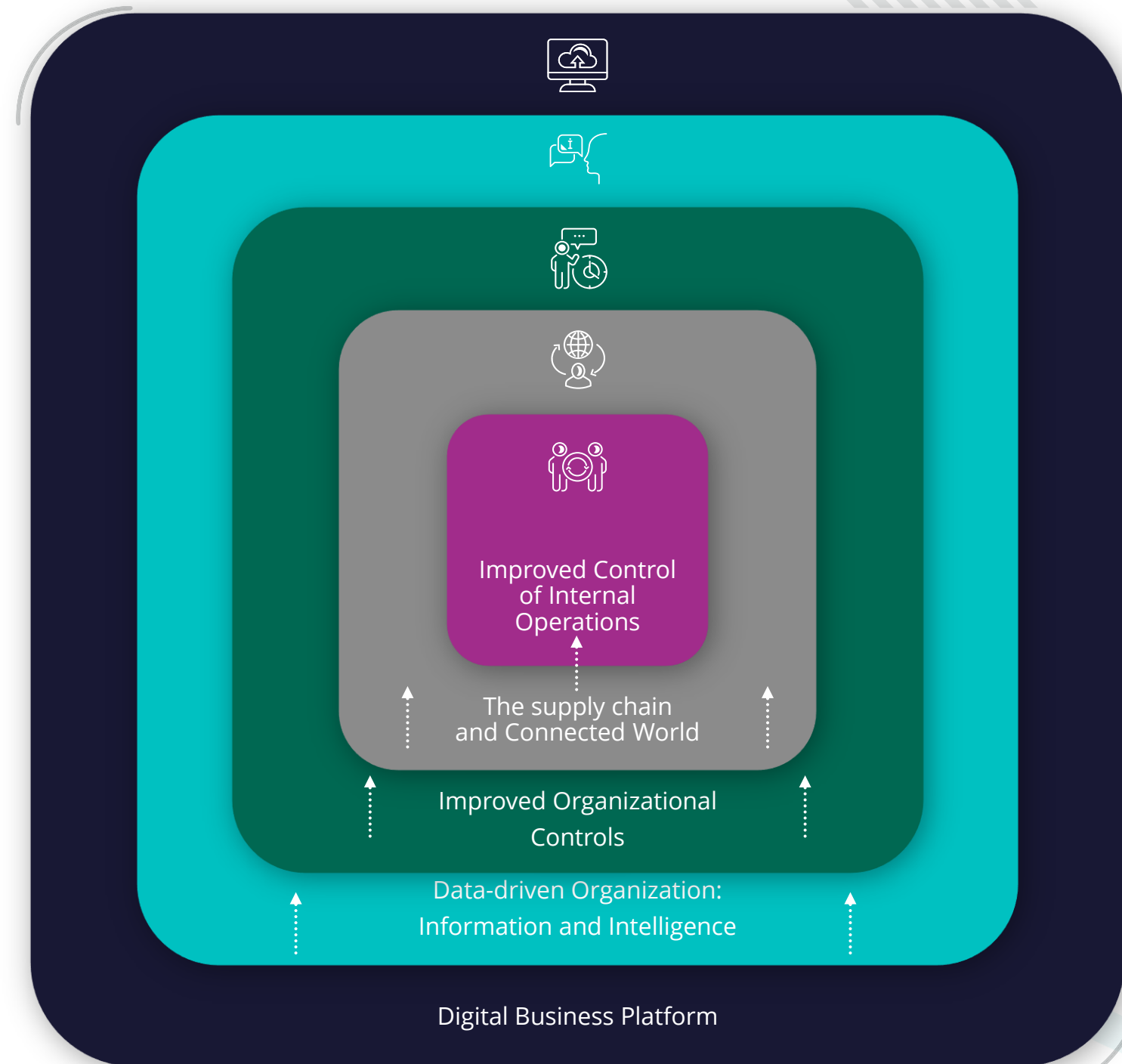


SYSPRO 7 retired July 2023! No more ports updates.

SYSPRO 8

SYSPRO's view of Business Systems into the future: Business Transformation

Key Areas driving Digital Transformation



Evolution of SYSPRO 8



	2018	2019	2020	2021	2022	2023
Improved Control of Internal Operations	<ul style="list-style-type: none"> Job Nesting Espresso SFDC Manufacturing Operations Management (MOM) 	<ul style="list-style-type: none"> QMS – Recorded Dates QMS – Recall Management Return to Supplier Cycle Counts Order Picking 	<ul style="list-style-type: none"> Job Nesting QMS – Recorded Dates MRP Optimized for SQL Server 	<ul style="list-style-type: none"> QMS – Recall Management MRP: Warehouse Order Policies 	<ul style="list-style-type: none"> Web UI Product Configurator Transactional Form Fields – WIP and Inventory Espresso Pack Size Scanning 	<ul style="list-style-type: none"> Quality Management Module – Combining Recall Management, Complaints Management, and Inspection Engine QMS – Inspection Engine
The Supply Chain and Connected World	<ul style="list-style-type: none"> SYSPRO Harmony 	<ul style="list-style-type: none"> Supply Chain Portal Request for Quote System 	<ul style="list-style-type: none"> Request for Quote System Quick Quotes 	<ul style="list-style-type: none"> WMS – Missions and Tasks Sales Pricing Engine Customer & Supplier a/c Management 	<ul style="list-style-type: none"> WMS – Kanban Auto Replenishment Sales Order Hierarchy & Pricing Priority 	<ul style="list-style-type: none"> Pricing Engine – Pricing Catalogue
Improved Organizational Controls	<ul style="list-style-type: none"> Electronic MTD Tax Submissions Dunning System 	<ul style="list-style-type: none"> Customer Complaint System MFA & SSO Digital Tax Tool 	<ul style="list-style-type: none"> Intrastat Triangulation WIP by Branch Digital MTD Tax Developments SQL Server encryption 	<ul style="list-style-type: none"> WIP Shift Patterns Tax Connectors AP Group Payments AR Group Payments 	<ul style="list-style-type: none"> AP & AR Group Payments Dimension Analysis 	<ul style="list-style-type: none"> Single Sign-on Identity Provider Integration Enhanced MTD Connector
Information and Intelligence	<ul style="list-style-type: none"> Business Insights Open Reporting KPI AI and Machine Learning 	<ul style="list-style-type: none"> SRS Document Printing Security Setting Dashboard 	<ul style="list-style-type: none"> Web UI SRS Document Printing AI and Machine Learning 	<ul style="list-style-type: none"> OData Connector Business Activity Queries Business Insights Tile Builder 	<ul style="list-style-type: none"> Embedded Analytics Application Designer 	<ul style="list-style-type: none"> Embedded Analytics: Big Data Connectors Feature Toggles Seamless Dashboard Migration
Power Tailoring and Customization	<ul style="list-style-type: none"> Web Views Avanti Workspaces Avanti Flow Graphs 	<ul style="list-style-type: none"> SYSPRO Rules Engine SYSPRO Web UI 	<ul style="list-style-type: none"> Web UI Power Tailoring Web UI SDK SYSPRO Rules Engine 	<ul style="list-style-type: none"> Operator and Role customization across any machine 	<ul style="list-style-type: none"> Web UI: Business Activity Query Builder Web UI: Business Insight Tile Builder 	<ul style="list-style-type: none"> Document Services – AP Invoice Automation (life of)



SYSPRO 8

Improved Control of Internal Operations



Operations
Management



Warehouse
Management



Quality
Management



SYSPRO 8

Quality Management

Quality Management

Inspection

Inspection Dashboard

Transaction Processing

Setup

Recall Management

Product Recall Query

Product Recall Selections Review

Transaction Processing

Reports

Browses

Customer Complaints

Complaint Query

Complaint Processing

Reports

Browses

Setup

Complaints Purge

Inspection Dashboard

Stock code: B100-MK1

☒ Include Completed

☐ View Archived

Inspections

Inspection type	GRN	WIP inspection reference	Lot	Wh
WIP inspections		0000000011		FG

Inspection Information

QM inspection	0000000011
Lot	
Stock code	B100-MK1
Description	Bicycle MK1
Revision	
Release	
Warehouse	FG
Branch	EDU1
Job	1000
Purchase order	

Inspection Quantities

Inspection details

Inspection level	GII - General level 2
Sample basis	Full quantity
Unit of measure	EA

Inspection quantities

Quantity in inspection	1.000
Sample quantity	1.000
Quantity inspected	1.000
Quantity passed	1.000
Quantity failed	0.000

Inspection Test Queue

Start Review

Change Criteria

Review Criteria

Include

WIP inspections

☒

PO inspections

☒

Test complete

☐

Inspection complete

☐

Inspection on hold

☐

Stock code on hold

☐

Exceeds expected end date

☐

Warehouses

Warehouse selection

All

Range

Single

List

From warehouse

To warehouse

List of warehouses

Stock codes

Stock code selection

All

Range

Single

List

From stock code

To stock code

List of stock codes

WIP inspection

WIP inspection reference selection

All

Range

Single

From WIP inspection reference

To WIP inspection reference

Sample Tests

Assign serial	Assign inspector	Expected end date	Instructions
Inspection type	QM inspecti...	Lot	Sample ...
WIP inspect	0000000012	1	None
WIP inspect	0000000012	2	None
WIP inspect	0000000012	3	None
WIP inspect	0000000012	4	None
WIP inspect	0000000012	5	None

Inspection Details

Inspection type	WIP inspect
QM inspection	0000000012
Lot	
Stock code	B100-MK1
Stock code description	Bicycle MK1
Revision	
Release	
Warehouse	FG
Warehouse description	Finished Goods Warehous
Job	1001
Purchase order	
Branch	EDU1
Supply chain type	
Supply chain	

Tests Assigned to Sample Test

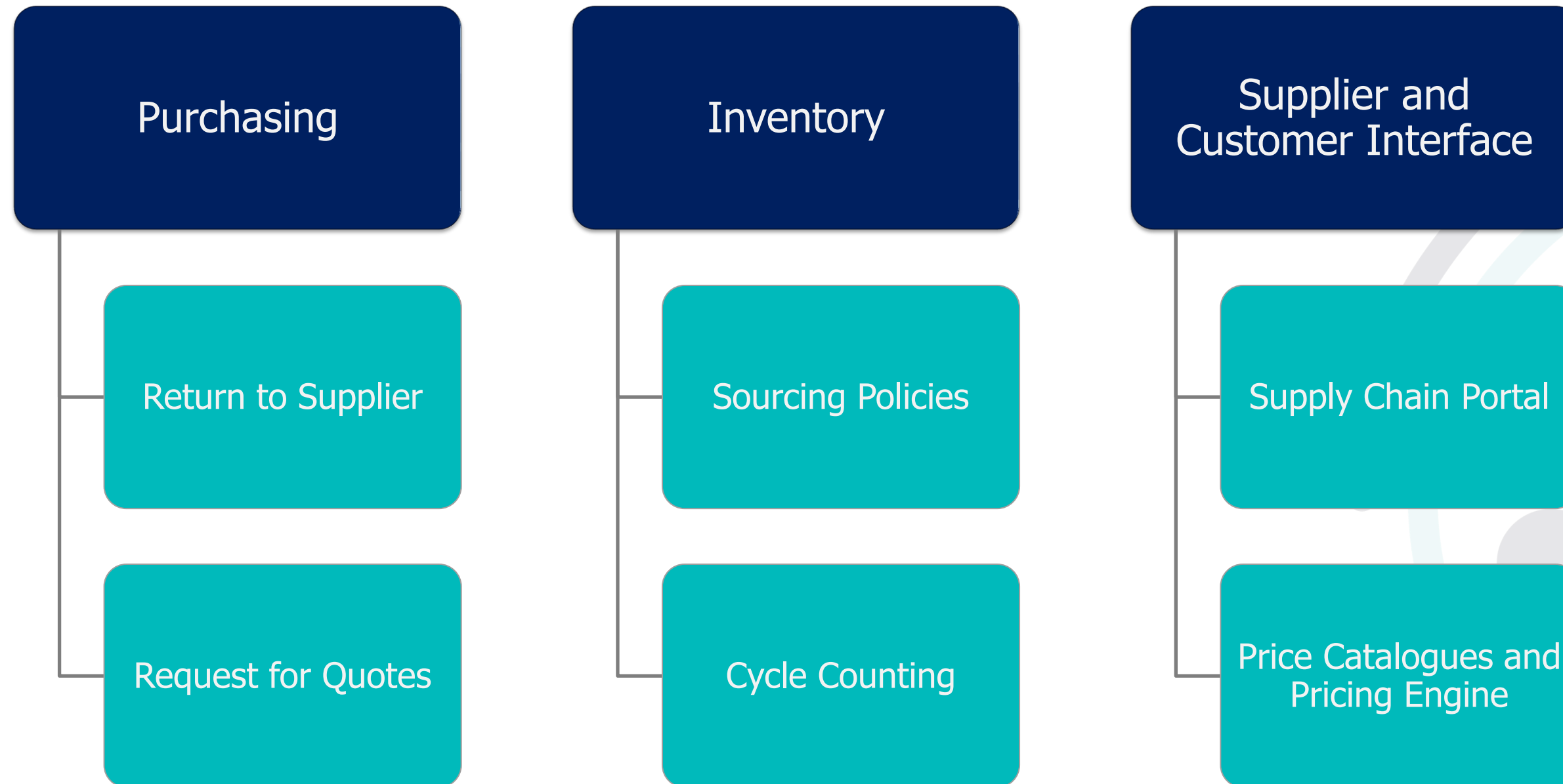
Post	Inspector	Amend test
Inspection type	QM in...	Sampl...
WIP inspect	000000...	1 BIKETEST

SYSPRO 8

Demonstration



Supply Chain and Connected World



SYSPRO 8

Request For Quotes

- ▲ Purchase Orders
 - 🔍 Purchase Order Query
 - ▷ Purchase Order Processing
 - ▷ Blanket Purchase Orders
 - ▷ GRN system
 - ▷ Requisition System
 - ▲ Request for Quote System
 - 🔍 Request for Quote Query
 - ▲ Transaction Processing
 - 🔍 Request for Quote Review
 - 🔍 Request for Quote Maintenance
 - 🔍 Supplier Quote Entry
 - ▷ Browsers

Request for Quote Maintenance

RFQ reference: 0000000501 🔍 📝 Notes 📎 Attachments ⚙️ Configure Email Template ✖️ Cancel RFQ ⏹ End RFQ

RFQ Header

RFQ reference

Description

Status

User

Date created

Closing date

0000000501

Racing Bikes

Approved and submitted

JD

12/09/2019

24/04/2020

RFQ Lines

✖️ Cancel Line ⚙️

Line	Status	Requisition	Requisition I...	Stock code	Warehouse	Quantity	📝 Notepad	📎 Attachme...
1	In progress	0000000163	1	A100	E	6	Show	Show

RFQ Suppliers for Line: 0001

📄 ✖️ Accept Supplier Quote

Supplier	Status	Lead time	Supplier price
0000001	Quote submitted	5	760.50
0000021	Waiting for quote	0	0.00
0000071	Quote submitted	14	750.00
0000075	Quote submitted	8	710.00

RFQ Suppliers for Line: 0001

📄 ✖️ Accept Supplier Quote

Supplier	Status	Lead time	Supplier price
▶ 0000001	Quote accepted	5	760.50
0000021	No submisison	0	0.00
0000071	Quote rejected	14	750.00
0000075	Quote rejected	8	710.00



SYSPRO 8

Supply Chain Portal

The Outdoor Company > AR Customer Account Query

Customer 0000001

Bayside Bikes
0000001

Info



Active



Credit available

Credit standing

1963702.05

Outstanding balance

60 Days - Net

Invoice terms

9999999999.00

Credit limit

Dates

05/06/2023

Last sale

14/04/2021

Last payment

Sales history

Statements

Filter		
Year	Statement date	
2020		
	31/05/2020	Download
	29/04/2020	Download
	31/03/2020	Download
	27/02/2020	Download
	31/01/2020	Download
2019		
	29/12/2019	Download
	30/11/2019	Download
	31/10/2019	Download
	30/09/2019	Download
	31/08/2019	Download
	30/07/2019	Download
	30/06/2019	Download

Improved Control of Internal Operations – System Management

Installation and Deployment



Improved Installation
& Updates



SQL Only

Security



Single Sign-On



Multi-Factor
Authentication

Administration



Administrative Dashboards



Support for Office 365

SYSPRO 8

Administration Dashboards

Security Settings Dashboard

Refresh

Securables

Securable	Level	Total	Secured
System information		0	0
EDU1 - SYSPRO DEMONSTRATION	Operator	1	0
Programs	Role	3180	3180
Activities	Role and Operator	390	390

Company Information

Company information

Company

Name

Reference

Company password set

System Audit

File

Time filter: Past month

Category filter: {All categories}

Transactions

Operator Report: K3MK

File Options

Operators

Operator	Name
ADMIN	SYSPRO Administrator
K3MK	K3 Maks
__ADSYNC	SYSPRO AD Sync Service
__BOT	SYSPRO Bot
__DFM	Document Flow Manager
__ESP	SYSPRO Espresso
__POS	Point of Sale Operator
__Portal_000001	Maks Kaniuka
__Portal_000002	Max
__SAI	SYSPRO AI
__SCHEDULER	SYSPRO Scheduler Service
__SRS	SYSPRO SRS Server
__Template_Portal	Template Portal

Activities

Activities

Fields

Programs

Access Control

eSignatures

Workflow

Groups

Roles

Allowed	Module	Activity description	Configuration
Module: Accounts Payable			
<input checked="" type="checkbox"/>	Accounts Payable	AP Posting to previous period	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Invoices	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Credit notes	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Debit notes	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Adjustments	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Register invoice	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Approve invoices	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Contra invoices	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP LCT register invoice	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Supplier EFT custom forms	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP EFT supplier invoice payment	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Supplier add	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Supplier change	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Supplier delete	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Supplier change defaults	Operator: K3MK
<input checked="" type="checkbox"/>	Accounts Payable	AP Untick GRN matching required	Operator: K3MK
<input type="checkbox"/>	__SCHEDULER	SYSPRO Scheduler Service	No role defined ADMIN Yes
<input type="checkbox"/>	__SRS	SYSPRO SRS Server	No role defined ADMIN Yes
<input type="checkbox"/>	__Template_Portal	Template Portal	No role defined ADMIN Yes

- Maks Kaniuka' (user 10, PID , SPID 64) killed by '__Port...
a@k3btg.com'

.O Administrator' (user 289, PID , SPID 54) killed by 'ADM...

ord

Powering business growth for 40 years

SYSPRO 8

Single Sign-On and Multi-factor Authentication

Setup Options: SYSPRO DEMONSTRATION (EDU1)

Save Save and Exit Cancel Company: EDU1 - SYSPRO DEMONSTRATION Functions Define Information Quick search ?

Categories

- Accounts Payable
- Accounts Receivable
- Assets
- Bill of Materials
- Cash Book
- Company Tax
- Contact Management
- Dispatch Notes
- Electronic Fund Transfer
- Enterprise Asset Management
- General Ledger
- Inventory
- Inventory Optimization
- Keys
- Lot Traceability
- Purchase Orders
- Quotations
- Return to Supplier
- Requirements Planning
- Return Merchandise Authorization
- Sales Analysis
- Sales Orders
- Trade Promotions
- Work in Progress
- Company
- General Ledger Integration
- System Setup
 - General
 - Login
 - SQL
 - Reporting
 - E.Net Service Details
 - Connectivity
 - Rules Engine/Harmony
 - Artificial Intelligence
 - Password Definition
 - System-Wide Personalization

System Setup > Login

Company prompt

Company history

Single sign-on identity providers

Identity providers required

User applicability

Single sign-on

Active Directory sync required

AD sync service endpoint

Review email required

Failure email required

Success email required

Multi-factor authentication

Multi-factor authentication required

User applicability

Multi-factor authentication methods

Email authentication required

Operator can set own email address

Email must match pattern

Show email address during login

Google authenticator required

Company enabled

Remember successful company logins

Specific operators

[Configure identity providers](#)

[Define specific operators](#)

☒

[Test AD connection](#)

☐

[Configure review email template](#)

☐

[Configure failure email template](#)

☐

[Configure success email template](#)

☐

000000000

[Define specific operators](#)

☐

☐

☐

☐

[Configure PIN email template](#)

☐

Active Directory sync required

Enable this option if you require SYSPRO operators to be managed by Active Directory. This lets you control SYSPRO operator access using Active Directory services.



SYSPRO 8

Improved Control of Internal Operations - Financial and Enterprise Management



Multi-Currency



Group Payments
(AR and AP)



Detail Posting to
Control Accounts



Balancing &
Month End
Improvements



Dunning



AP Invoice
Automation



SYSPRO 8

AP and AR Group Payments

AR Group Payment Run

File

New

Payment run: 2

Q

Authorize

Cancel

Refresh

Print

Post

Payment Options

Transaction options

Group financial period

[View periods](#)

Change posting period

[Edit](#)

Reset credit status

☐

Payment run details

Primary customer

0000001

Q

Payment currency

Bank

FB

Q

Payment amount

2,000.00

Payment date

04/11/2023

31

Reference

Test

Journal notation

1

Payment narration

1

Exchange rate details

Exchange rate method

☒ Default rate for entire run
 ☐ Original invoice rate

Exchange rate

1.000000

Bank Deposit Details

Bank deposit slip details

Bank

FB

Account description

First United Bank

Account number

541762315

Payment type

☐ Check
 ☒ Cash
 ☐ Other

Drawer's name

Drawer's bank

Drawer's branch

Bank currency

\$

Bank charges amount

0.00

Bank exchange rate

1.000000

Information

Payment Information

Payment run information

Status

0 - New

Date created

[04/11/2023](#)

Date authorized

Date posted

Total payment received

2,000.00

Total allocated amount

0.00

Total unallocated amount

2,000.00

Other information

Post year

2021

Post month

3

Current AR balance

15,249,097.29

Journal

GL Journal

Transaction Payment Allocation

Customer Payment Allocation

Add Customer

Remove Customer

Filter

Print

Excel

search text

Reset

Help

Company	Customer	Balance	Allocated amount	Currency	Payment amount	Distributed amount	Exchange rate	Exchange rate variance	Undistributed amount	Allocation
EDU1		0.00	0.00		0.00	0.00	0.000000		0.00	Allocation



SYSPRO 8

GL Balancing

GL Integration Utility

Start Processing

Save Form Values

Information

Report

Journal options

Function	
<input type="radio"/> Reset GL integration flag	
<input type="radio"/> Reset lowest unprocessed jnl	
<input checked="" type="radio"/> Reset in process flags	

Integration flag setup

☒ All

☐ Single

☐ Range

Selection

2021

2

2021

2

AP invoices

AP payments

AR invoices

AR payments

Assets

Cash book

GRN journals

Inventory

TPM journals

WIP labor

WIP part billings

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

☐

After processing completed

Print the report

Email the report

Email recipients

Close this application

☐

☐

☐

☐

Description

There are no items to show

GL Balancing Tool

Start Processing

Select sub module and period to balance. The period defaults to period for sub module.

Select to include or exclude returning zero transactions.

Select to use FIFO costing for inventory balancing.

Options

Module	Accounts Payable
Year	2021
Period	03
Include zero value transaction	<input type="checkbox"/>
Use FIFO costing method	<input type="checkbox"/>



SYSPRO 8

Information and Intelligence – Reporting and Search



Embedded Analytics



Insights



Business Activity
Query



Improved Search



Improved Reporting
(Crystal 2020)



Data Access and
Subscription
(oData)

Business Activity and Business Tile Builder

Business Activity Query Builder

New

Save and Publish

View

bq_DispatchNotes5

Validate SQL

Preview data

View Properties

View

Description

Custom SQL statement

Primary data source

TOP clause

TOP number

Distinct values

WHERE clause

Properties

Published in SQL

Available to use

Standard SYSPRO BAQ

bq_DispatchNotes5

Dispatch Notes in Status 5

MdnMaster

None

0

Edit SQL where expression

WHERE clause

Select this option to return rows with distinct column values

Data Sources

Name

Alias

Join

Join details

MdnMaster

MdnMaster

Columns

Data Source

Column

Alias

MdnMas...

DispatchNote

DispatchNote

MdnMas...

SalesOrder

SalesOrder

MdnMas...

Customer

Customer

MdnMas...

CustomerNa...

CustomerName

SQL Statement

Refresh SQL statement

1

2

3

4

5

6

7

8

SELECT

[MdnMaster].[DispatchNote] AS [DispatchNote]

,[MdnMaster].[SalesOrder] AS [SalesOrder]

,[MdnMaster].[Customer] AS [Customer]

,[MdnMaster].[CustomerName] AS [CustomerName]

FROM [MdnMaster] AS [MdnMaster]

WHERE ([MdnMaster].[DispatchNoteStatus] = 5)

Insight Tile Builder

Save and Close

Create From

Edit Tile Summary

Edit Tile Detail

Refresh Preview

Delete Tile

Tile Properties

Tile header

Tile Id

USR001

Tile type

Text

Description

Dispatch notes for company

Help text

Key type

Category

Activity

In development

Detail columns (0=Default)

Summary tile

Title

Subtitle

Value

Footer

Summary tile - Alternate

Chart tile

Parameters

Configure parameters

Tile preview simulated values

Preview variable: {SubTitle}

Preview variable: {Value}

Preview variable: {Footer}

Description

The Description is used to identify the tile during maintenance, assigning it to a workspace or when configuring a KPI.

Assign activities

Custom tile

0

Dispatch notes for company

{Value}

Assign parameters

100

Standard Tile Preview

Large Tile Preview

Dispatch notes for company

100

Dispatch notes for company

100

Powering business growth for 40 years

SYSPRO 8 Embedded Analytics



- 2022 & 2023 Release
 - Dashboard designer
 - Out-of-the-box templates
 - Big Data Connectors
 - Feature Toggles
 - Seamless Dashboard Migration
- Licenced module
- Requires additional infrastructure



SYSPRO 8

Power Tailoring and Customisation - Application Designer

Application Designer: Customer Credit Review (ARDUNS)

File

Save Open Close Edit Application Details Edit Script Data Sources Run Project View Design M

Toolbox

Data Source Explorer Application Explorer Project Explorer Toolbox

Controls

Chart

Flowgraph

Form

Image viewer

Listview

Notepad

Document Viewer

Syntax Text Editor

Tile

Treeview

User Control

WebBrowser Control

XAML control

Drop Files control

Customer Credit Review

Customer 0000001 Identify Company

Customer Details

Customer 0000001

Branch 10

Customer name GORMAN MANUFACTURING

Credit limit 120,000

Company tax registration

Credit checking method

Date of last payment 09/04/2020

Dunning e-mail address

Dunning group

Customer e-mail address Lucas.Molepo@syspro.com

Outstanding order value 319,989,284.14

Postal/Zip code 981110000

1st line sold to address P O Box 8

2nd line sold to address Bayside North

Dun & Bradstreet Info

Registered name GORMAN MANUFACTURING

D.U.N.S. 804735132

D&B rating date 28/07/2021

D&B rating 3A4

Payment % in terms 94

Avg. Owing to Suppliers 6,176.00

PAYDEX 3 mnths Days Late 60

PAYDEX (24mths) Days Late 58

Recommendation date 27/08/2022

Credit Limit (Low) 85,000.00

Credit Limit (High) 200,000.00

Set Credit Limit 0

Dun & Bradstreet BIR Report

1 of 8

GORMAN MANUFACTURING COMPANY, INC. BIR

Executive Summary

Company Info

2020 D&B Rating

3A4

3A4 Visibility Score

Business Information

Business Summary

Credit Capacity Summary

3A4

D&B Visibility Rating

2

6

3A

4

5

Application title
The title will appear in the Window heading.



SYSPRO 8

Questions & Answers

- <https://help.syspro.com/>
- <https://help.syspro.com/syspro-8-2022/e-home-links/home-page-links-news-product-themes.htm>
- <https://www.nexsys.co.uk/syspro-8-update-request/>



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