

Road to Excellence



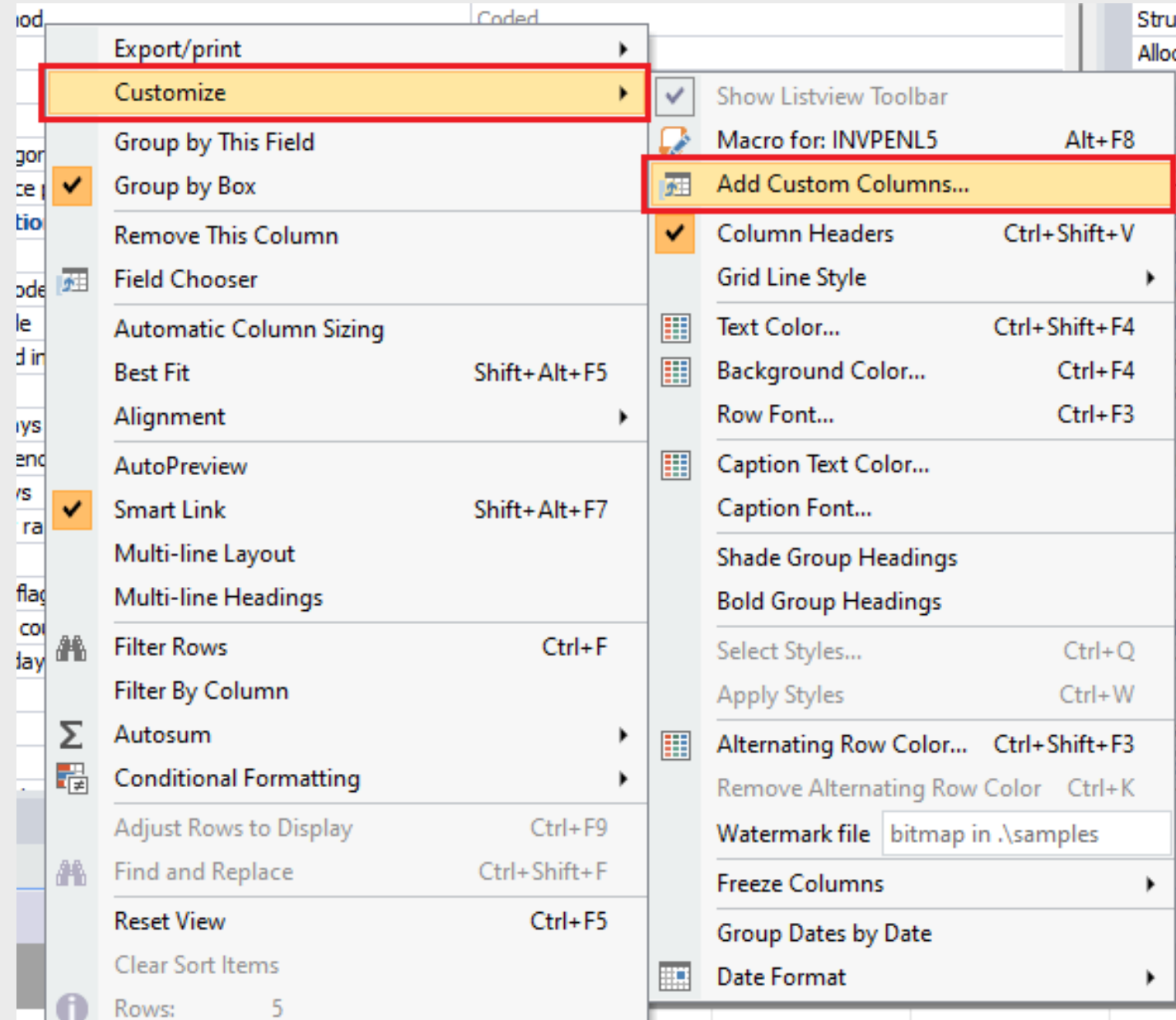
Tips and Tricks for quick business wins

Wietz Coetzer



Customisation

Adding custom columns to listviews

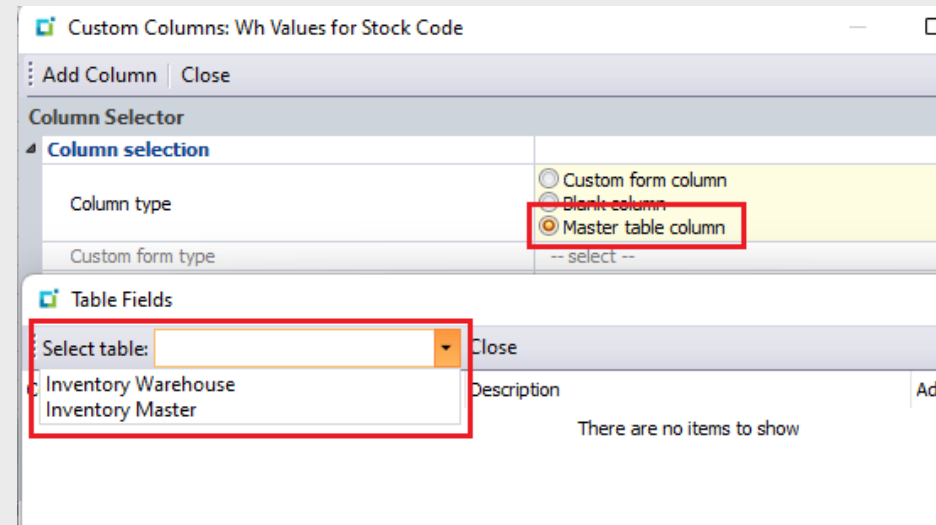
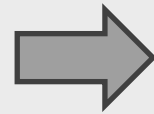
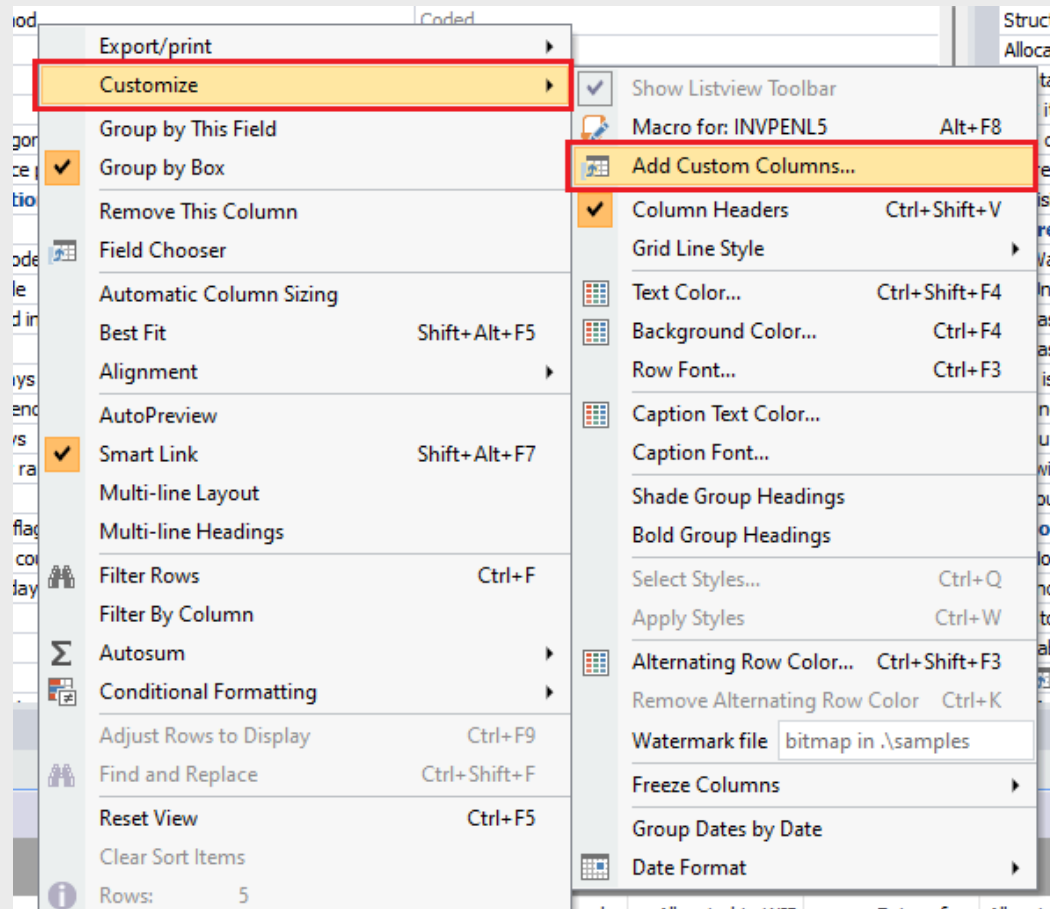


These customisations are role/operator specific.
“Design mode” needed to add these.

Available for: SYSPRO 7 - SYSPRO 8

Customisation

Adding custom columns to listviews



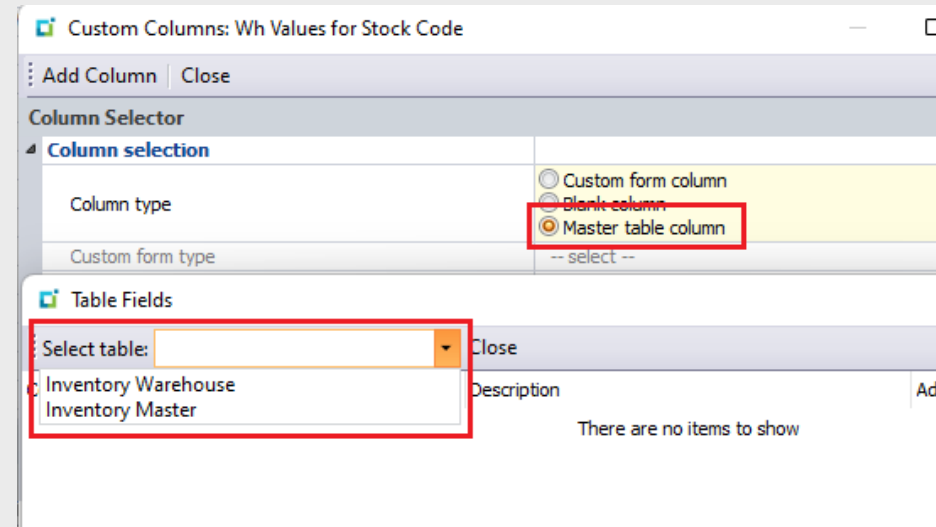
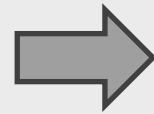
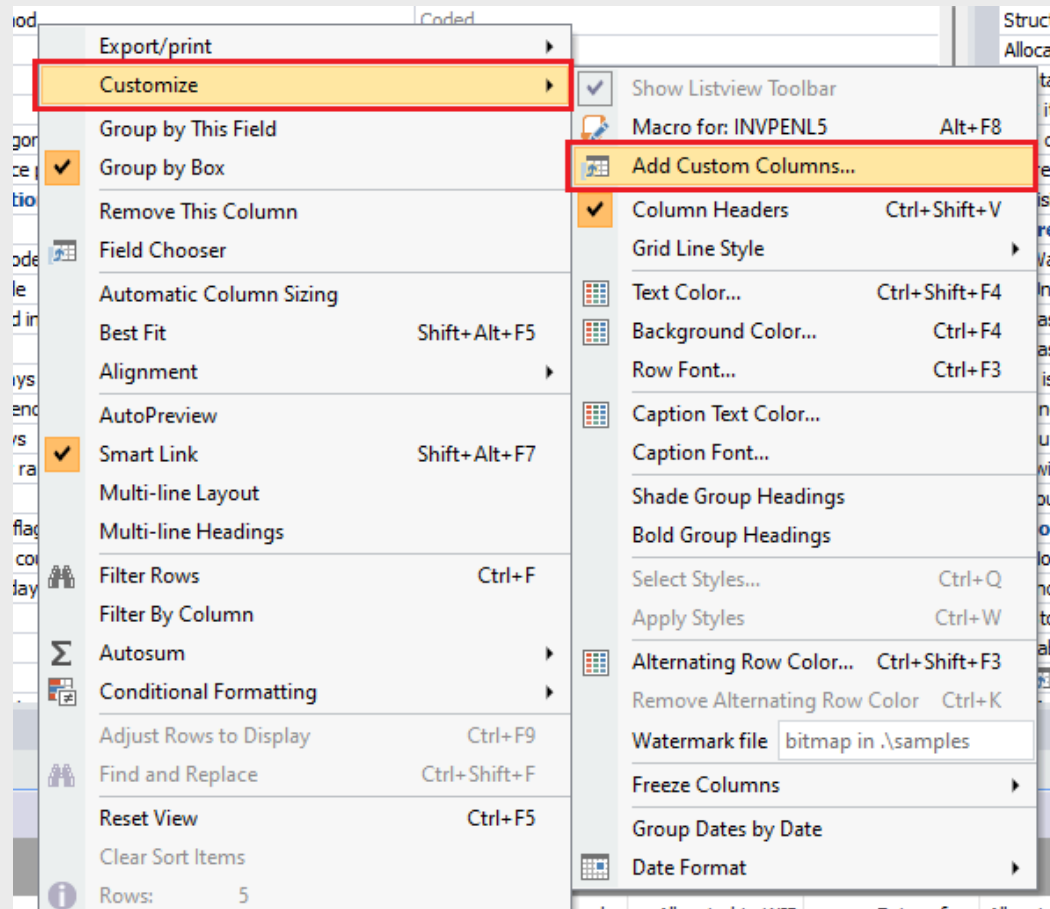
These customisations are role/operator specific.
"Design mode" needed to add these.

Available for: SYSPRO 7 - SYSPRO 8



Customisation

Adding custom columns to listviews



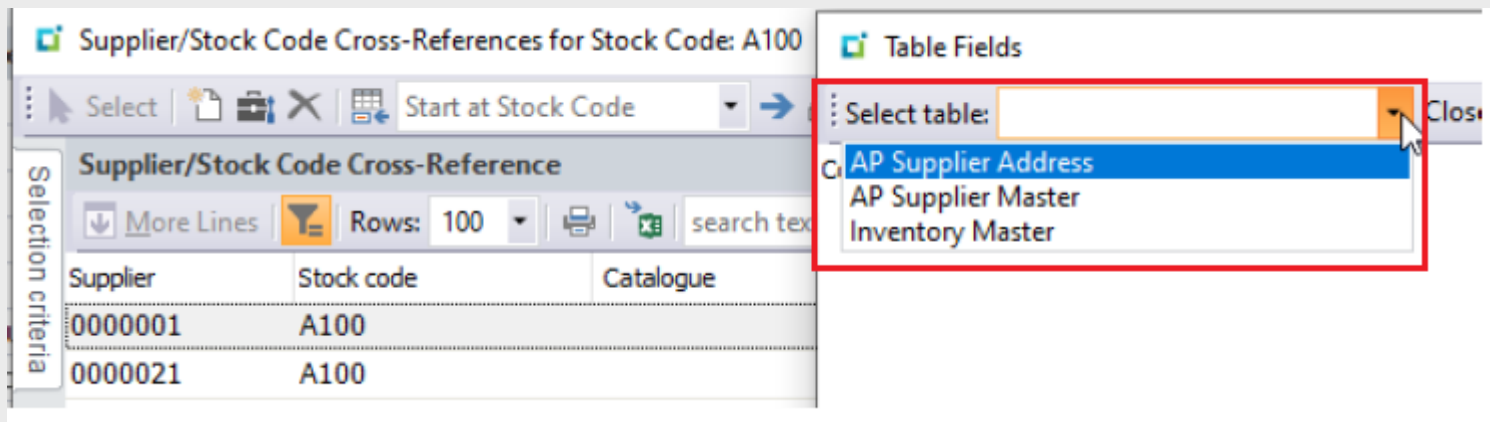
Warehouse Values				
Warehouse Values Warehouse History Movements				
Drag a column header here to group by that column				
Warehouse	Transfer supplie...	Unit cost	Available	Unallocated
Combined		0.00	423.000	423.000
E	Y	350.00	177.000	177.000
N	N	350.00	235.000	235.000
S	Y	350.00	11.000	11.000

These customisations are role/operator specific.
"Design mode" needed to add these.

Available for: SYSPRO 7 - SYSPRO 8

Customisation

Adding to custom tables Master list



Supplier/Stock Code Cross-References for Stock Code: A100

Table Fields

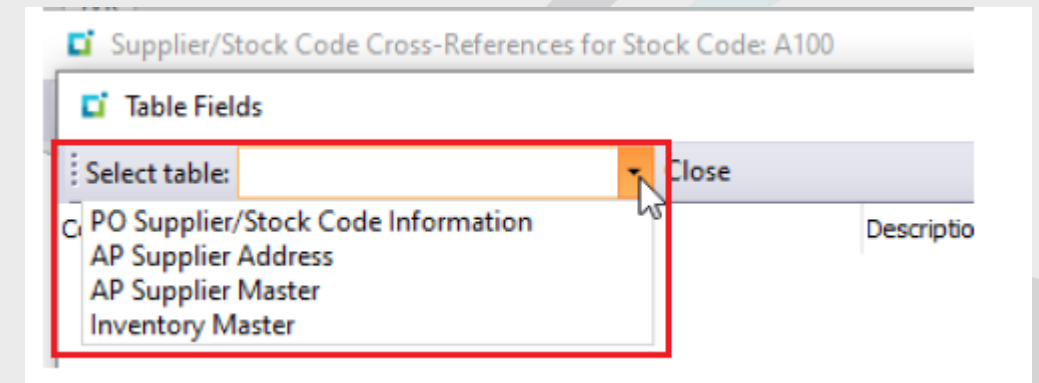
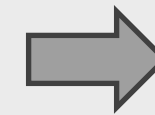
Select table: Close

- AP Supplier Address
- AP Supplier Master
- Inventory Master

Supplier/Stock Code Cross-Reference

More Lines Rows: 100 search text

Supplier	Stock code	Catalogue
0000001	A100	
0000021	A100	



Supplier/Stock Code Cross-References for Stock Code: A100

Table Fields

Select table: Close

- PO Supplier/Stock Code Information
- AP Supplier Address
- AP Supplier Master
- Inventory Master

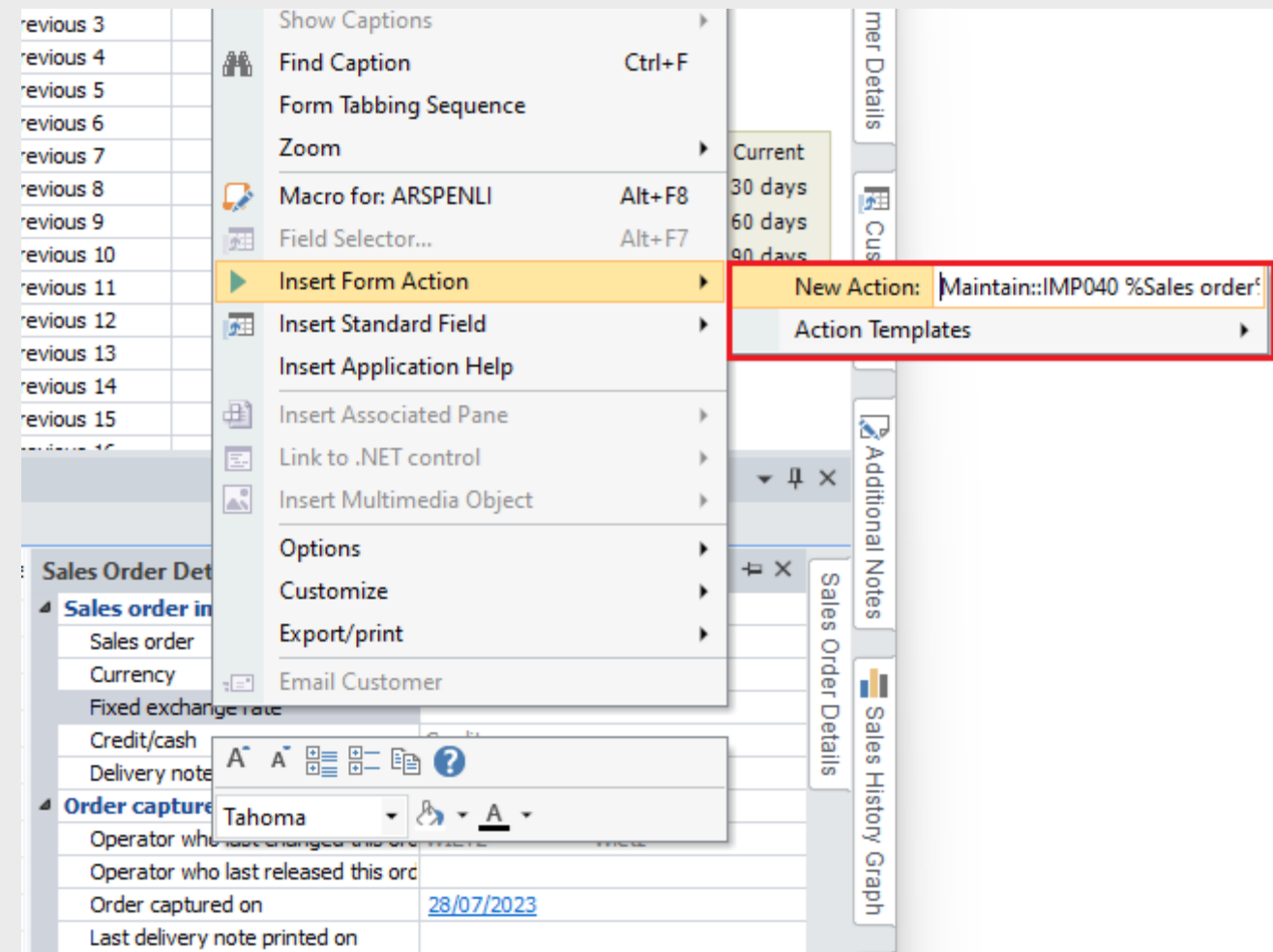
PO Supplier/Stock Code Information Description

These customisations are role/operator specific.
“Design mode” needed to add these.

Available for: SYSPRO 7 - SYSPRO 8

Customisation

Adding form actions

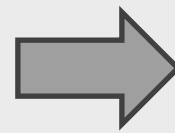
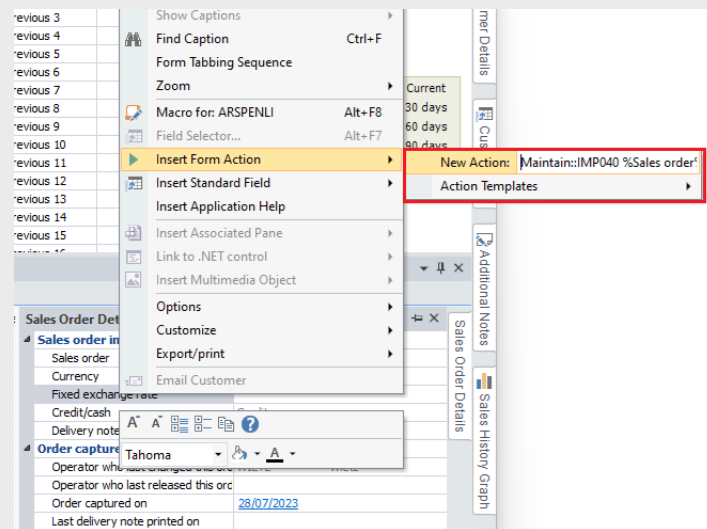


These customisations are role/operator specific.
“Design mode” needed to add these.

Available for: SYSPRO 6 - SYSPRO 6.1 - SYSPRO 7 - SYSPRO 8

Customisation

Adding form actions



Sales Order Details

Sales order information	
Sales order	000941
Currency	\$
Fixed exchange rate	
Credit/cash	Credit
Delivery note	
Order capture information	
Operator who last changed this ord	WIETZ - Wietz
Operator who last released this ord	
Order captured on	28/07/2023
Last delivery note printed on	

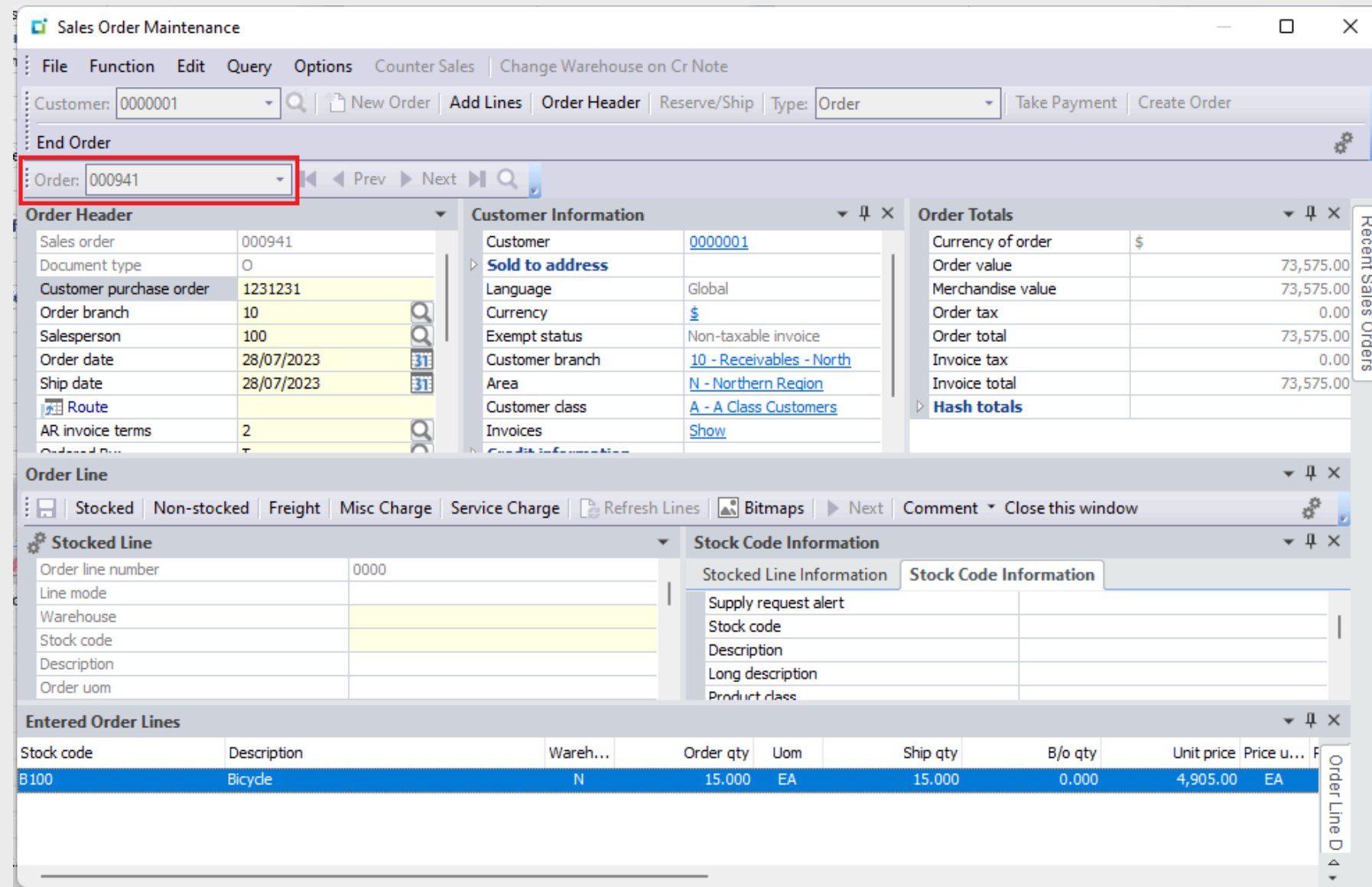
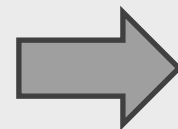
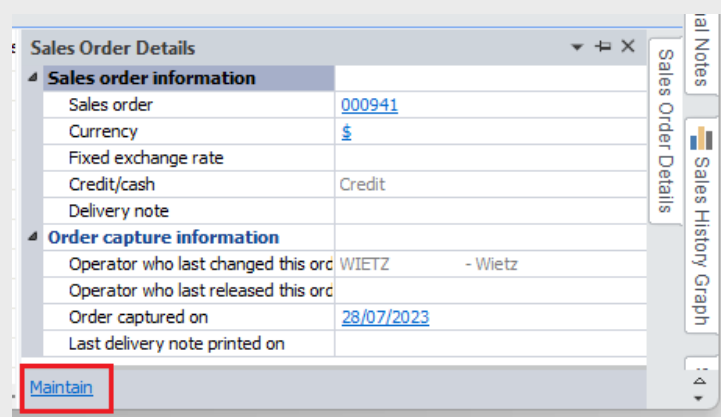
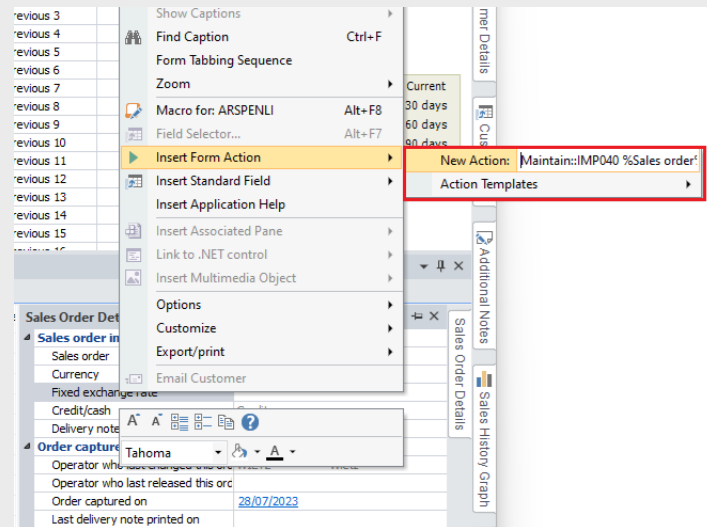
[Maintain](#)

These customisations are role/operator specific.
“Design mode” needed to add these.

Available for: SYSPRO 6 - SYSPRO 6.1 - SYSPRO 7 - SYSPRO 8

Customisation

Adding form actions

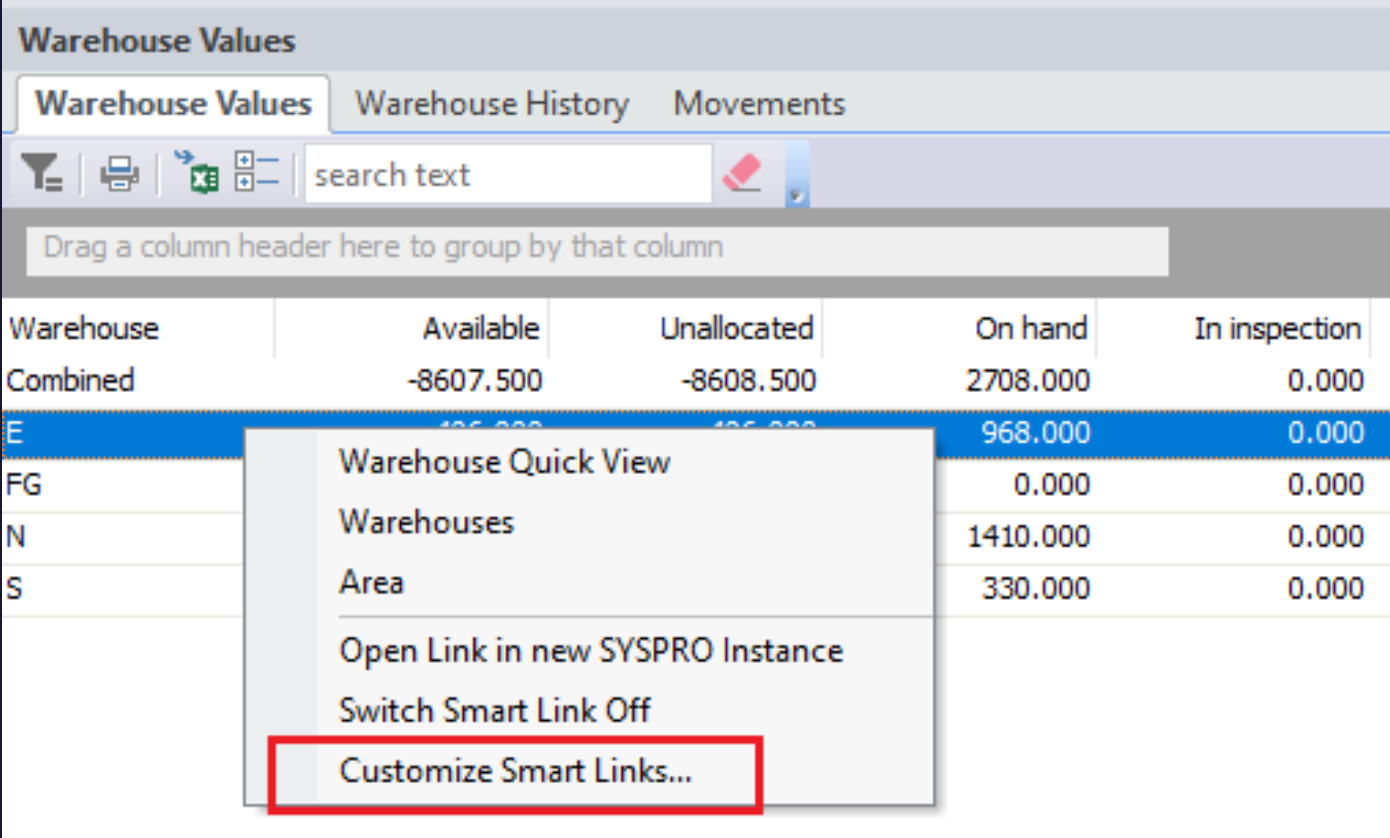


These customisations are role/operator specific.
 "Design mode" needed to add these.

Available for: SYSPRO 6 - SYSPRO 6.1 - SYSPRO 7 - SYSPRO 8

Customisation

Adding smart links



Warehouse	Available	Unallocated	On hand	In inspection
Combined	-8607.500	-8608.500	2708.000	0.000
E	406.000	406.000	968.000	0.000
FG			0.000	0.000
N			1410.000	0.000
S			330.000	0.000

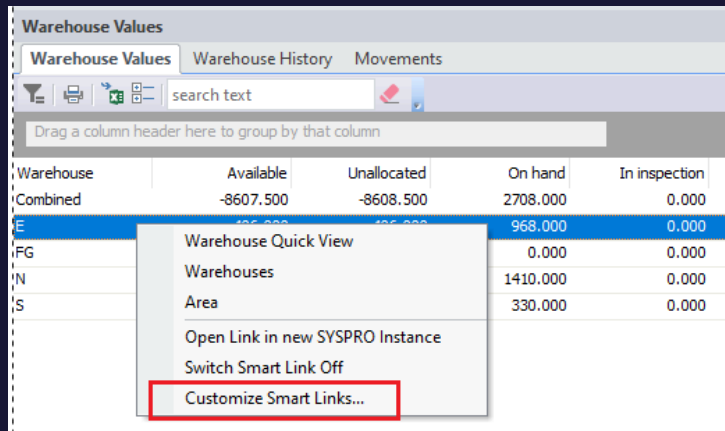
- Warehouse Quick View
- Warehouses
- Area
- Open Link in new SYSPRO Instance
- Switch Smart Link Off
- Customize Smart Links...

These customisations are role/operator specific.
“Design mode” needed to add these.

Available for: SYSPRO 7 - SYSPRO 8

Customisation

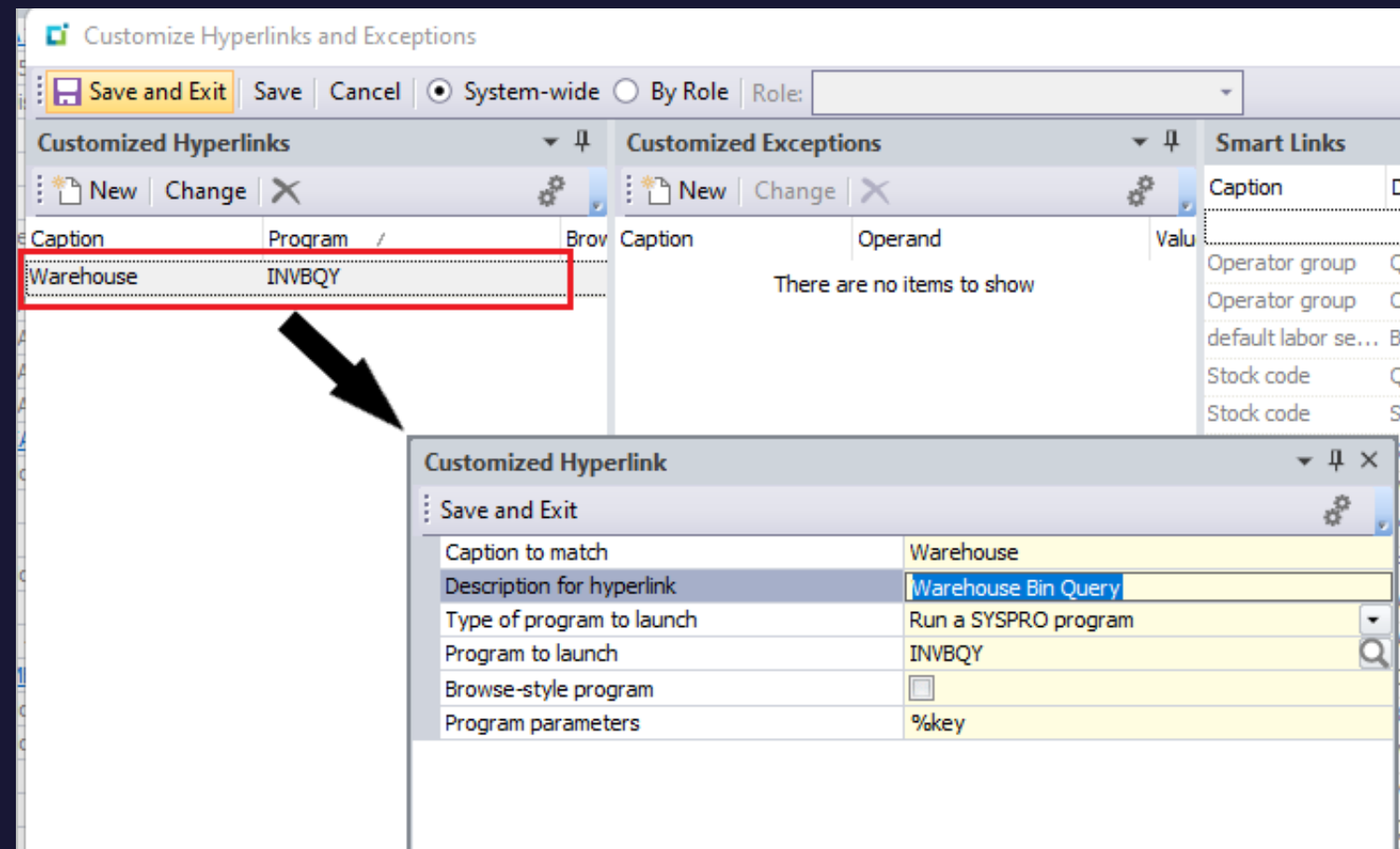
Adding smart links



Warehouse Values

Warehouse	Available	Unallocated	On hand	In inspection
Combined	-8607.500	-8608.500	2708.000	0.000
E	196.000	196.000	968.000	0.000
FG			0.000	0.000
N			1410.000	0.000
S			330.000	0.000

- Warehouse Quick View
- Warehouses
- Area
- Open Link in new SYSPRO Instance
- Switch Smart Link Off
- Customize Smart Links...



Customize Hyperlinks and Exceptions

Save and Exit Save Cancel System-wide By Role Role: []

Customized Hyperlinks	Customized Exceptions	Smart Links	
Caption	Program	Operand	Valu
Warehouse	INVBQY		

There are no items to show

Customized Hyperlink

Save and Exit

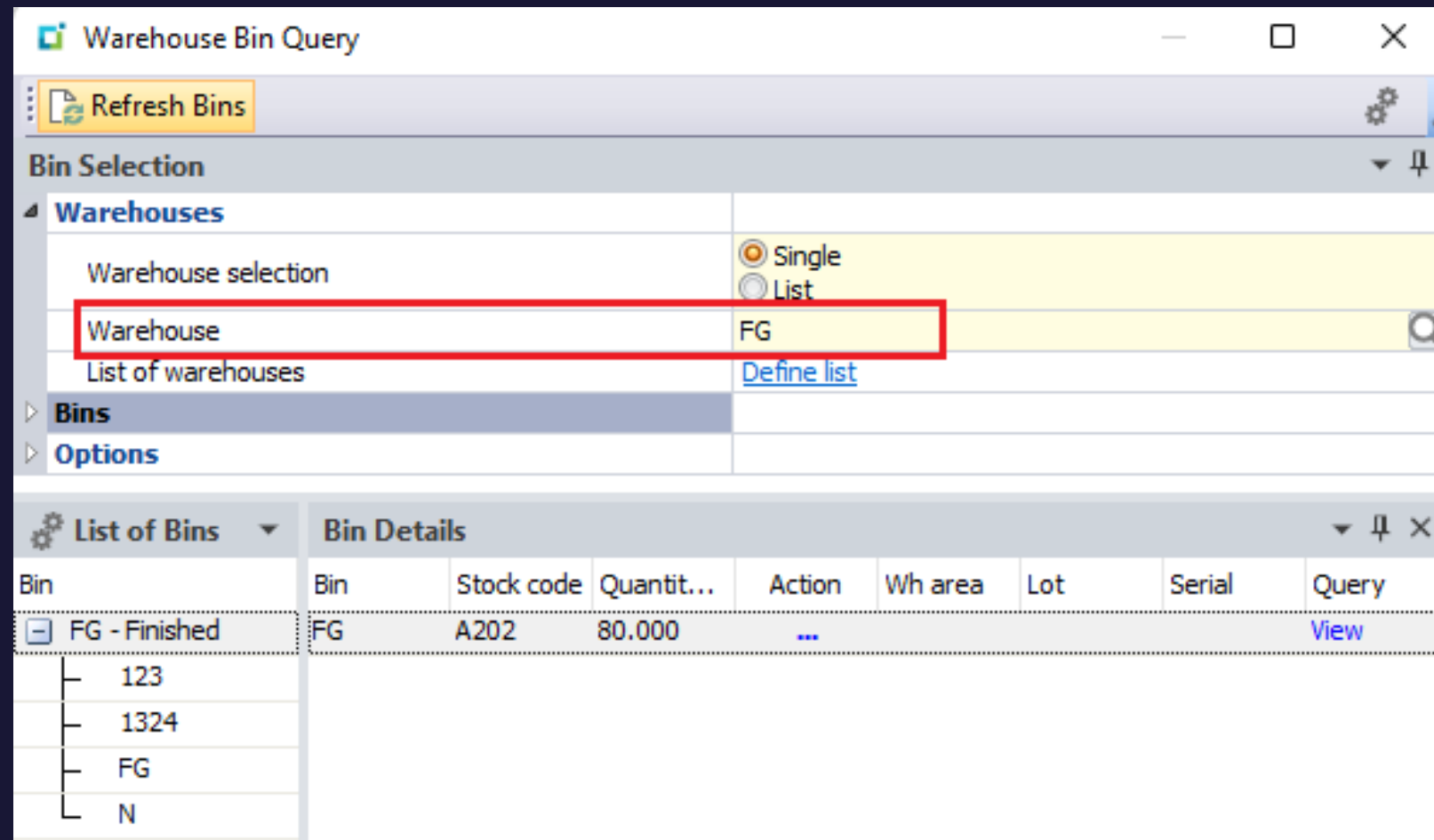
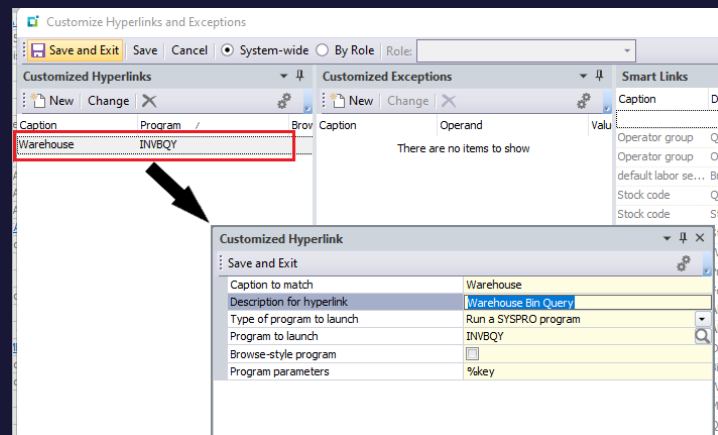
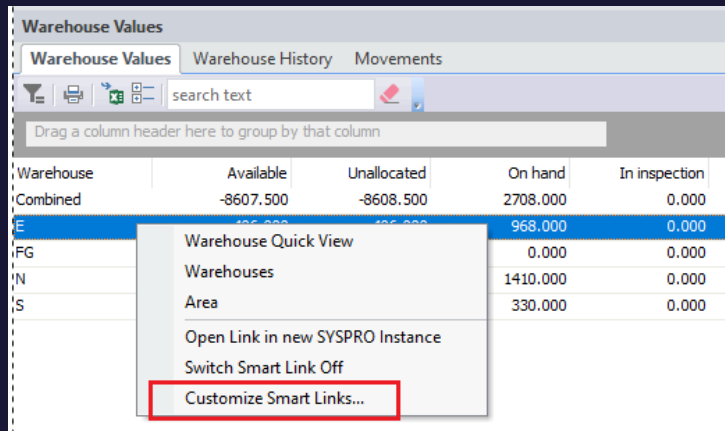
Caption to match	Warehouse
Description for hyperlink	Warehouse Bin Query
Type of program to launch	Run a SYSPRO program
Program to launch	INVBQY
Browse-style program	<input type="checkbox"/>
Program parameters	%key

These customisations are role/operator specific.
"Design mode" needed to add these.

Available for: SYSPRO 7 - SYSPRO 8

Customisation

Adding smart links



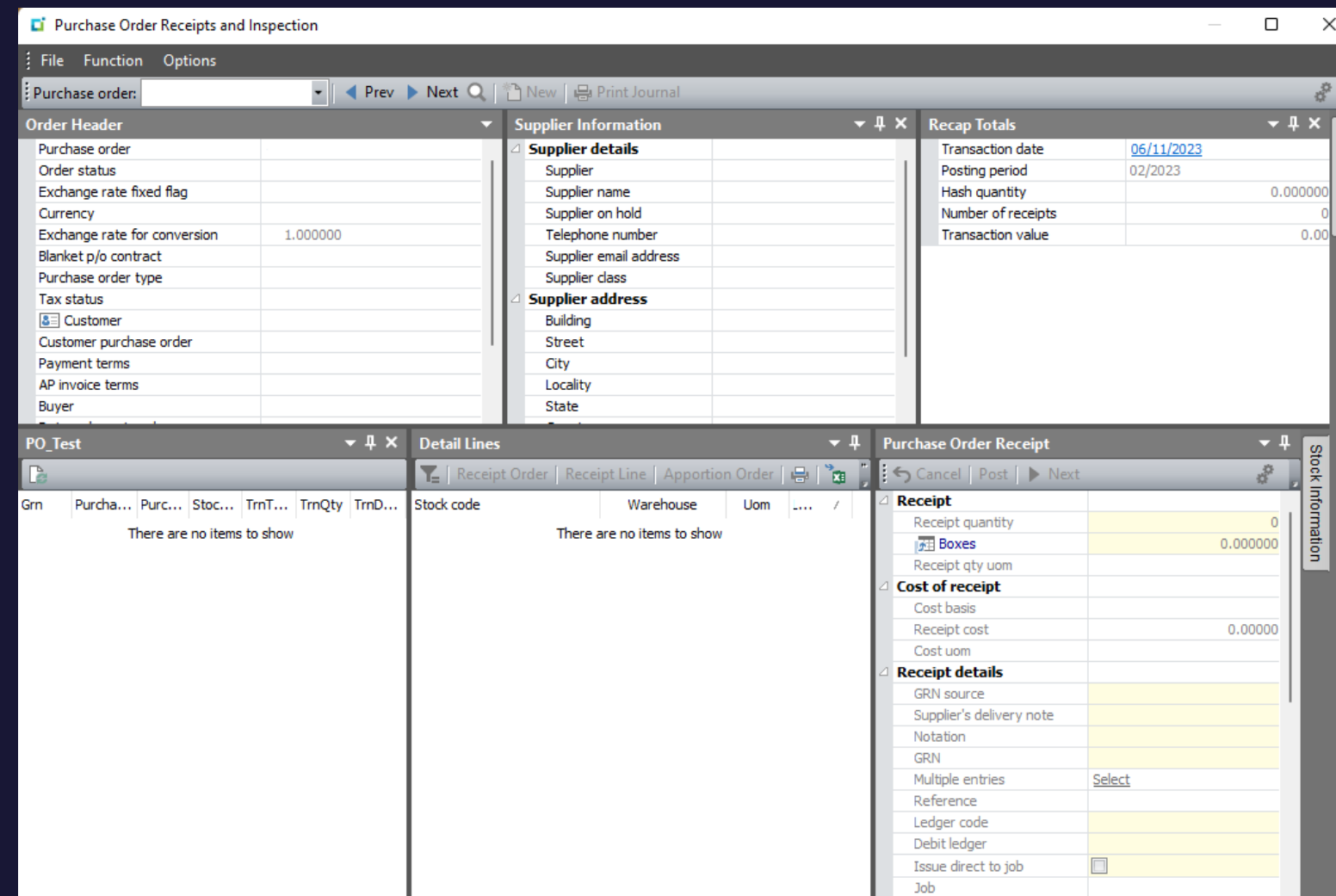
Pass **%key** as a program parameter to contextualise your link

These customisations are role/operator specific.
 "Design mode" needed to add these.

Available for: SYSPRO 7 - SYSPRO 8

Customisation

Running SYSPRO programs discreetly

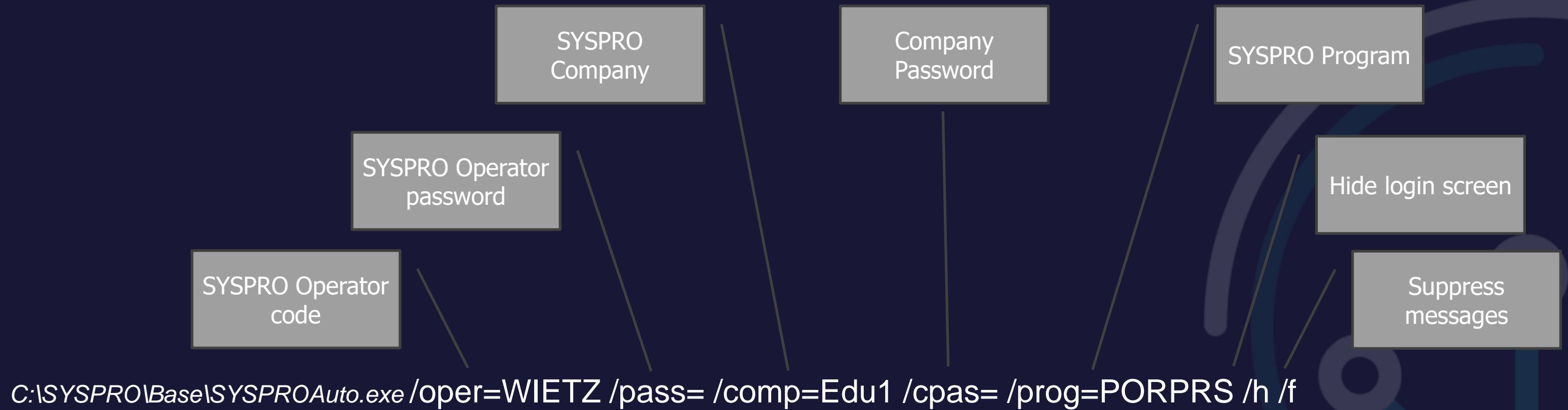


Available for: SYSPRO 6 - SYSPRO 6.1 - SYSPRO 7 - SYSPRO 8



Customisation

Running SYSPRO programs discreetly

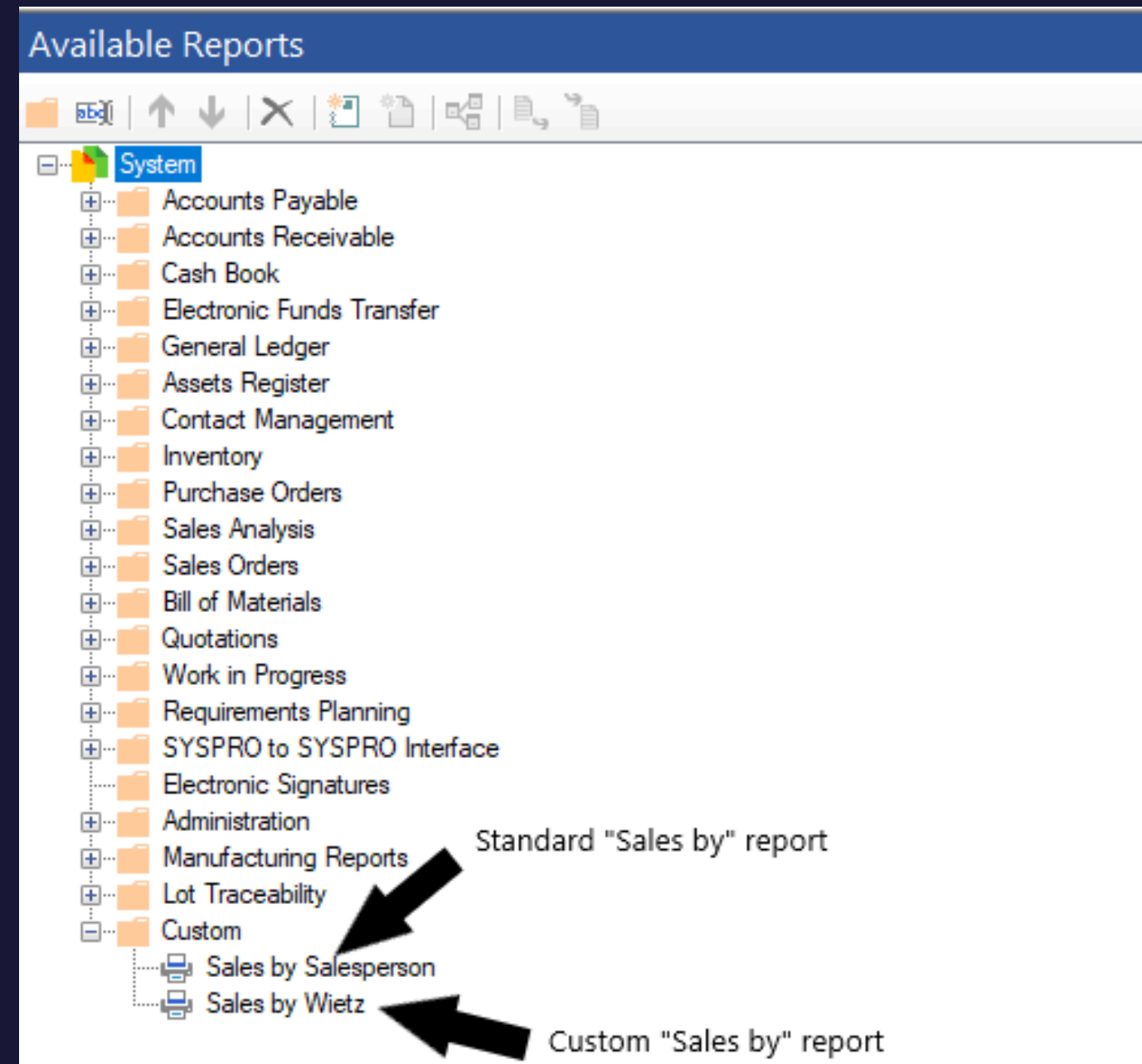


Available for: SYSPRO 6 - SYSPRO 6.1 - SYSPRO 7 - SYSPRO 8



Reporting

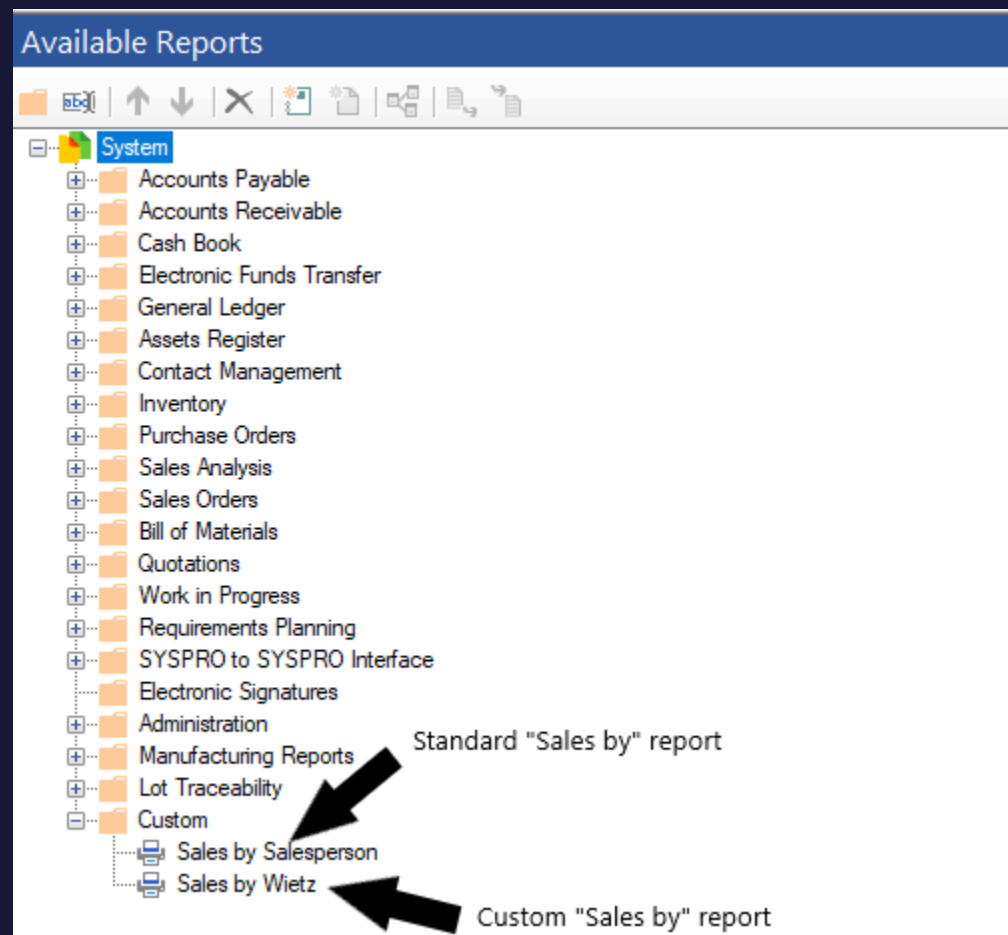
Copying a standard SYSPRO report



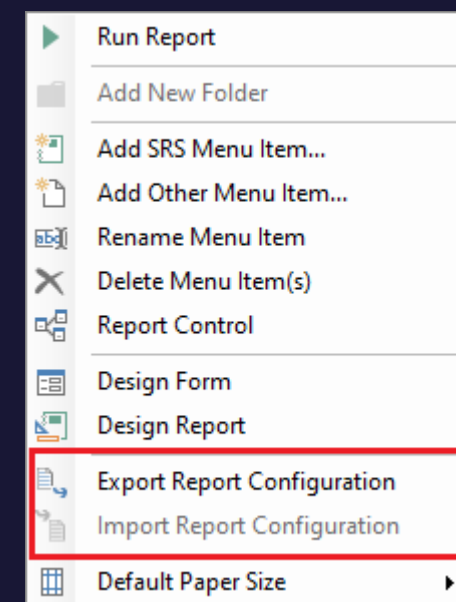
Available for: SYSPRO 6 - SYSPRO 6.1 - SYSPRO 7 - SYSPRO 8

Reporting

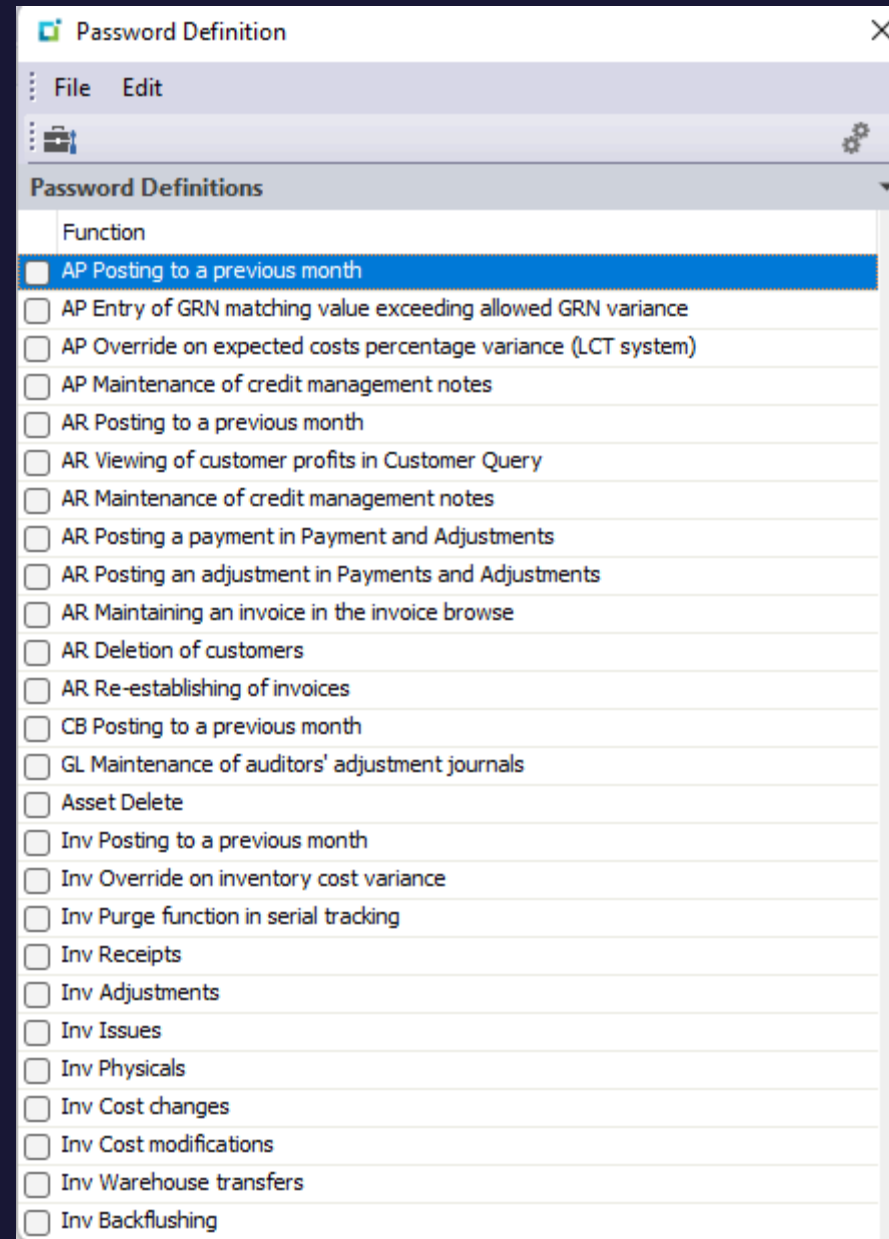
Copying a standard SYSPRO report



Using the export/import function to ensure that the control files are also copied



Password definitions



Available for: SYSPRO 7 - SYSPRO 8

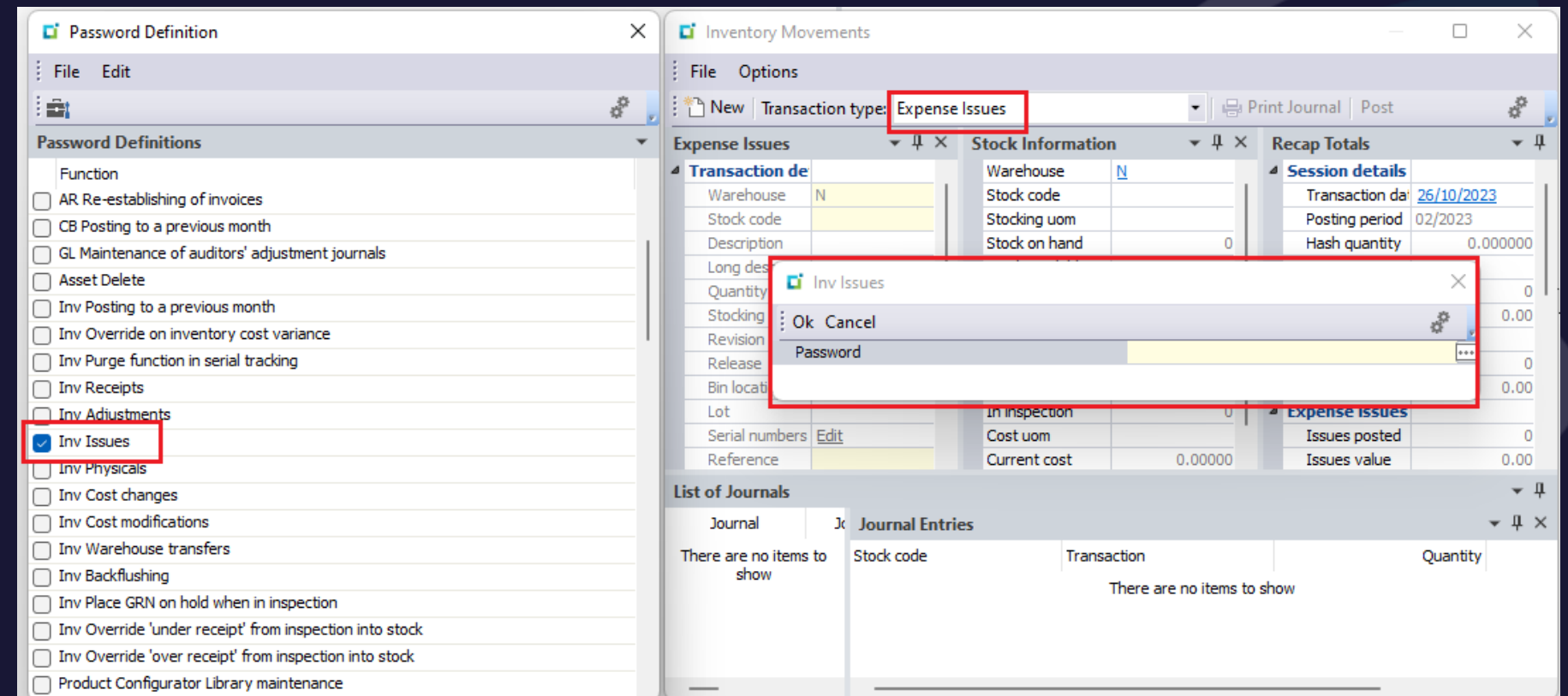
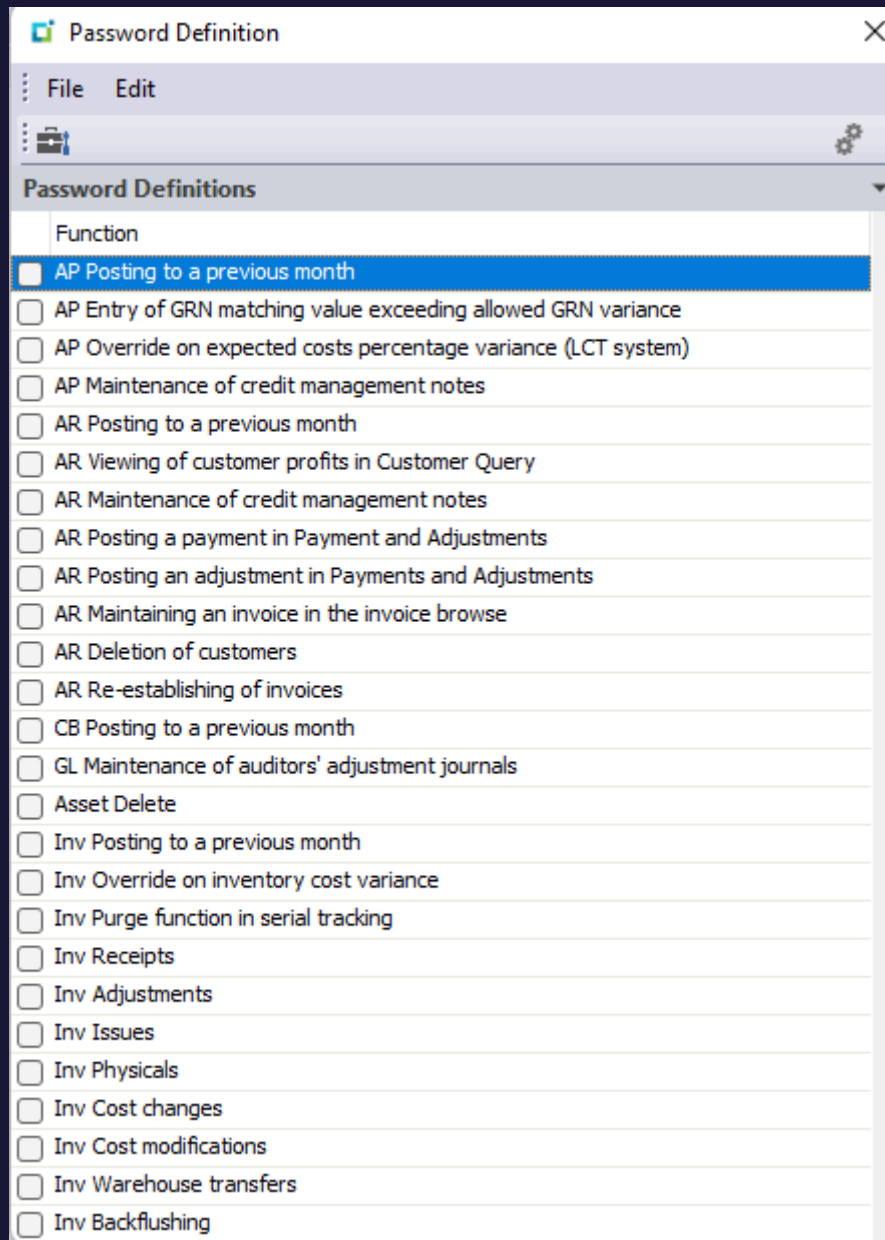


Security

Password definitions



These password are company wide.
Will need to be set for each separate SYSPRO company.



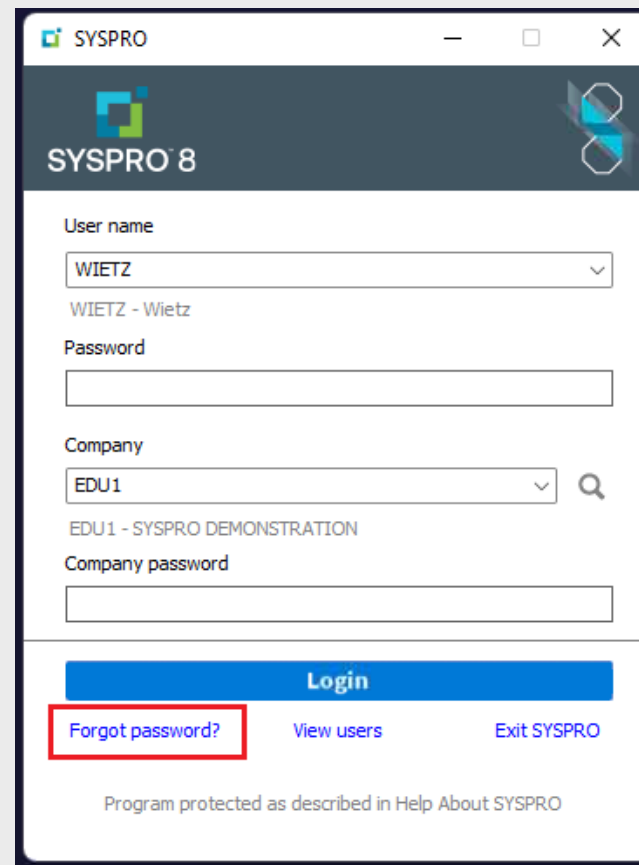
“Password Definition” program code is **IMPPAC**

Available for: SYSPRO 7 - SYSPRO 8



Security

Reset your own password – forgotten password



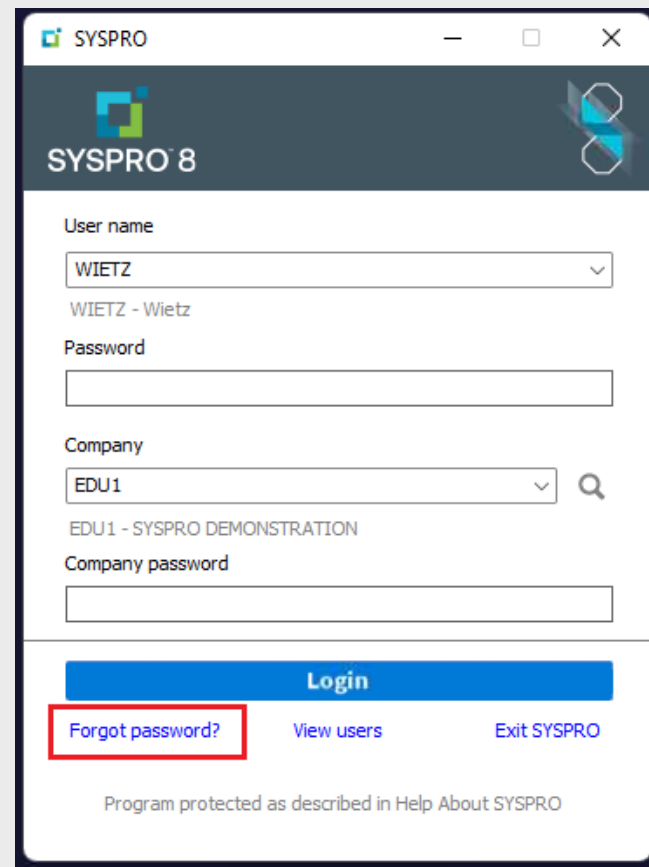
The screenshot shows the SYSPRO 8 login window. At the top, the SYSPRO 8 logo is displayed. Below it, there are four input fields: 'User name' with a dropdown menu showing 'WIETZ' and 'WIETZ - Wietz' below it; 'Password' with an empty text box; 'Company' with a dropdown menu showing 'EDU1' and 'EDU1 - SYSPRO DEMONSTRATION' below it; and 'Company password' with an empty text box. A blue 'Login' button is positioned below the fields. At the bottom of the form, there are three links: 'Forgot password?' (highlighted with a red box), 'View users', and 'Exit SYSPRO'. A footer note states 'Program protected as described in Help About SYSPRO'.

Available for: SYSPRO 8

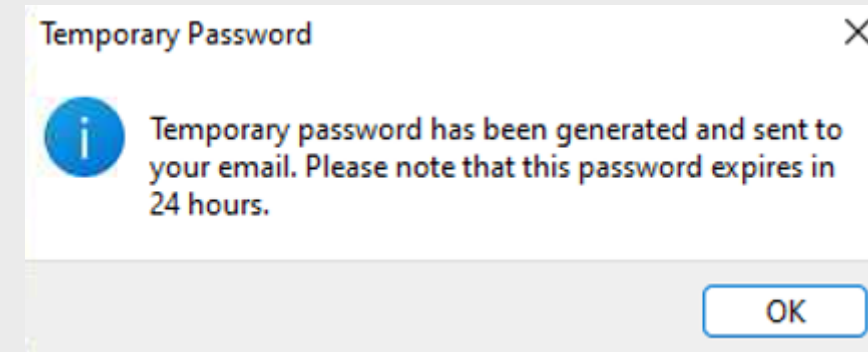
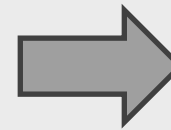


Security

Reset your own password – forgotten password



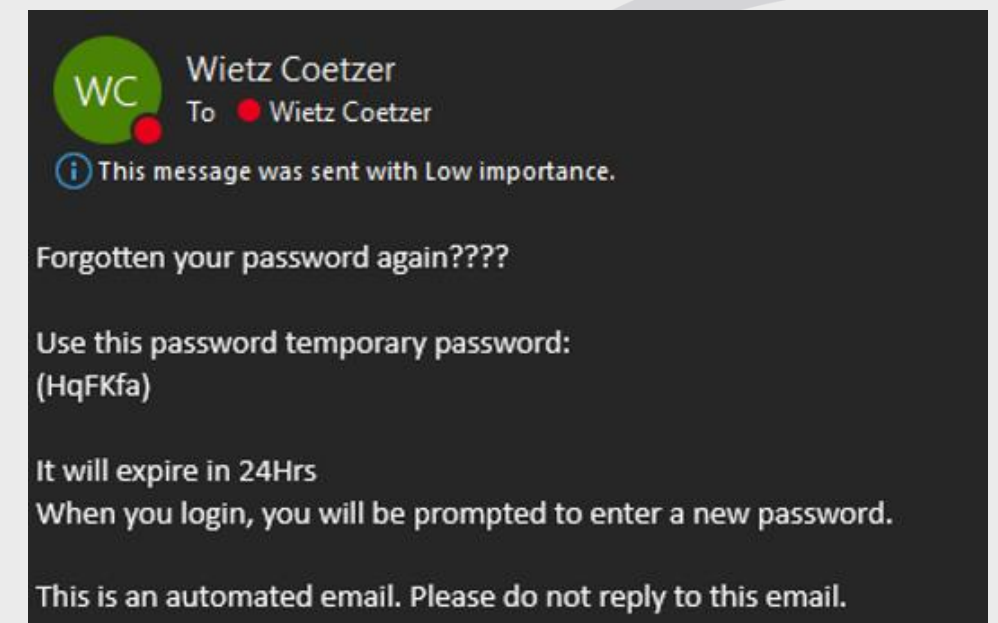
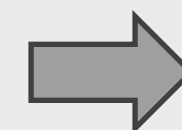
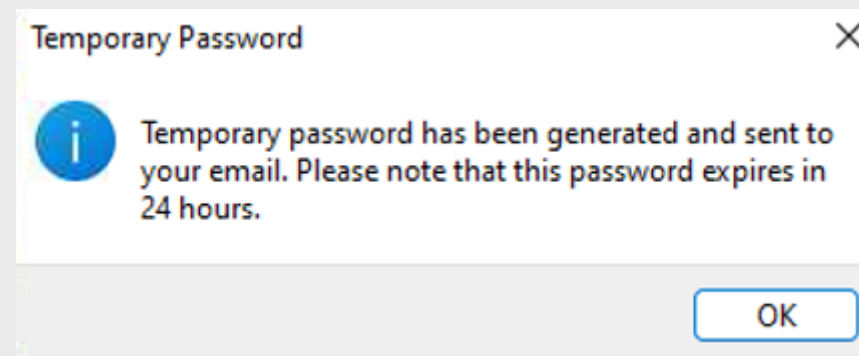
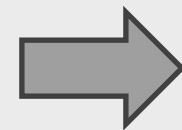
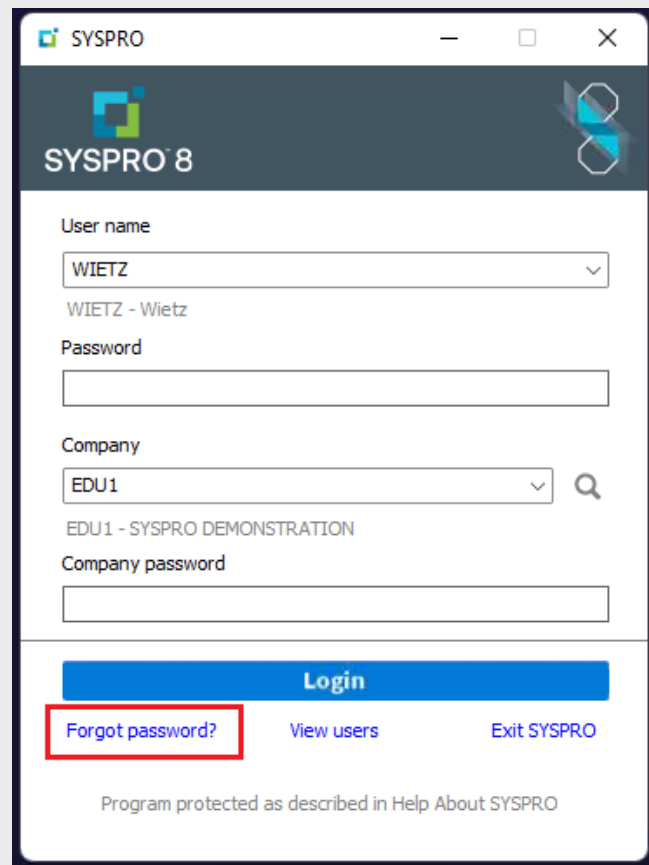
The image shows a screenshot of the SYSPRO 8 login interface. At the top, the SYSPRO 8 logo is displayed. Below it, there are four input fields: 'User name' with a dropdown menu showing 'WIETZ', 'Password', 'Company' with a dropdown menu showing 'EDU1', and 'Company password'. A blue 'Login' button is positioned below the fields. At the bottom of the form, there are three links: 'Forgot password?' (highlighted with a red box), 'View users', and 'Exit SYSPRO'. The footer text reads 'Program protected as described in Help About SYSPRO'.



Available for: SYSPRO 8



Reset your own password – forgotten password



Prerequisites:

- SMTP relay required
 - Setup Options -> System Setup -> Connectivity
- Allow operator to reset password
 - Setup Options -> System Setup -> Password Definition

Available for: SYSPRO 8

Sales Order Commitment report

Sales Order Commitment Report										
Sales order	Customer	Past due	July 2023	August 2023	September 2023	October 2023	November 2023	December 2023	January 2023 and beyond	
000828	0000001	184000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000834	0000001	1140.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000836	0000001	318373074.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000855	0000001	24525.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000859	0000001	29430.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000862	0000001	24525.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000868	0000001	4480.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000873	0000001	2100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000891	0000001	14715.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000897	0000001	18240.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000901	0000001	31300.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000911	0000001	5649050.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000912	0000001	3560.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000915	0000001	560.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
000933	0000001	0.00	0.00	0.00	10036.20	0.00	0.00	0.00	0.00	0.00
000935	0000001	0.00	0.00	0.00	0.00	49050.00	0.00	0.00	0.00	0.00
000936	0000001	0.00	0.00	0.00	0.00	0.00	12043.44	0.00	0.00	0.00
000937	0000001	0.00	0.00	0.00	0.00	0.00	0.00	73575.00	0.00	0.00
Total :		324360699.04	0.00	0.00	10036.20	49050.00	12043.44	73575.00	0.00	0.00
Valid orders processed		: 18								

In-process orders only – completed and cancelled orders or order lines are ignored

Usability

Sales Analysis Order Intake



Sales Analysis Order Intake

Start Processing | Close

Options

Date selection

From date: 01/01/2022

To date: 31/12/2022

Filter by Key: Sales Order Lines

search text

Key	Sales order	Line	Transaction date	Transaction time	Value	Action	Customer	Branch
All	000791	1	01/26/2022	10:28	2,452,500.00	New	0000013	20
Branches	000791	2	01/26/2022	10:29	2,452,500.00	New	0000013	20
Customers	000791	3	01/26/2022	10:29	1,471,500.00	New	0000013	20
Geographic areas	000791	4	01/26/2022	10:29	1,471,500.00	New	0000013	20
Operators	000844	1	04/08/2022	18:44	2,800.00	New	0000013	20
Product classes	000844	4	04/08/2022	18:45	248.00	New	0000013	20
Salespersons	000917	1	04/09/2022	13:54	560.00	New	0000013	20
100 - Tony Dean	000825	1	04/13/2022	14:13	56,000.00	New	0000013	20
101 - Sandra Jenkins	000825	2	04/13/2022	14:13	56,000.00	New	0000013	20
102 - Diane Ferry	000825	3	04/13/2022	14:13	4,960.00	New	0000013	20
103 - Cash Sales	000825	4	04/13/2022	14:13	560.00	New	0000013	20
200 - Barry Jones	000826	1	04/13/2022	14:14	22,400.00	New	0000014	20
201 - Victor Patterson	000826	2	04/13/2022	14:14	22,400.00	New	0000014	20
300 - Jenny James	000826	3	04/13/2022	14:14	57,600.00	New	0000014	20
700 - Jessica Sampson	000826	4	04/13/2022	14:15	57,600.00	New	0000014	20

Total intake :8,129,128.00

Available for: SYSPRO 8



Usability

Sales Analysis Order Intake



Sales order	Line	Transaction date	Transaction time	Value	Action	Customer	Branch
000791	1	01/26/2022	10:28	2,452,500.00	New	0000013	20
000791	2	01/26/2022	10:29	2,452,500.00	New	0000013	20
000791	3	01/26/2022	10:29	1,471,500.00	New	0000013	20
000791	4	01/26/2022	10:29	1,471,500.00	New	0000013	20
000844	1	04/08/2022	18:44	2,800.00	New	0000013	20
000844	4	04/08/2022	18:45	248.00	New	0000013	20
000917	1	04/09/2022	13:54	560.00	New	0000013	20
000825	1	04/13/2022	14:13	56,000.00	New	0000013	20
000825	2	04/13/2022	14:13	56,000.00	New	0000013	20
000825	3	04/13/2022	14:13	4,960.00	New	0000013	20
000825	4	04/13/2022	14:13	560.00	New	0000013	20
000826	1	04/13/2022	14:14	22,400.00	New	0000014	20
000826	2	04/13/2022	14:14	22,400.00	New	0000014	20
000826	3	04/13/2022	14:14	57,600.00	New	0000014	20
000826	4	04/13/2022	14:15	57,600.00	New	0000014	20

Shows all orders placed, regardless of status including cancelled. Value will reflect cancelled and changed orders.

All records are grouped by key and changing keys will re-evaluate the summed total

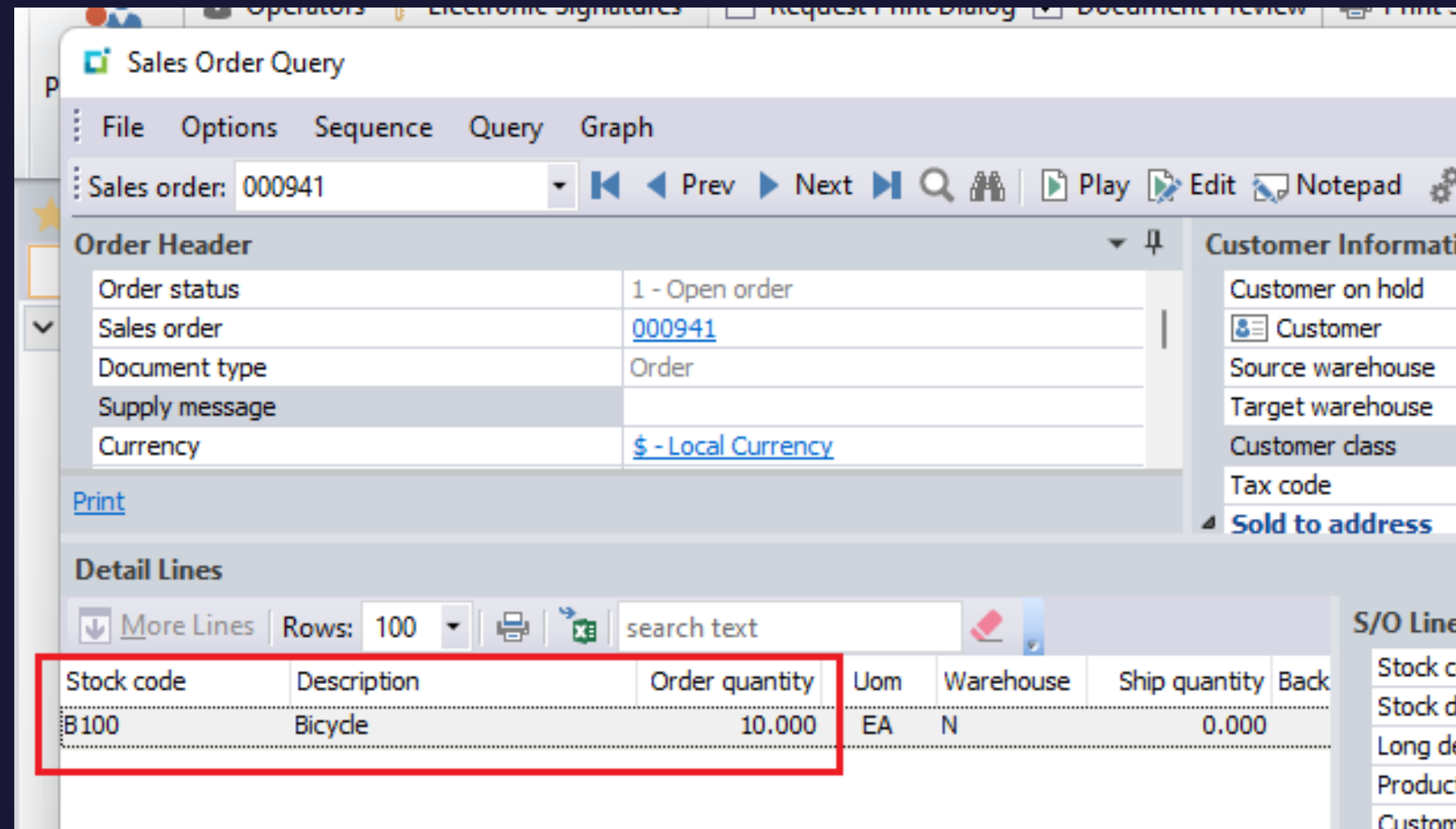
Sales Analysis module must be licenced and Sales Analysis update must be run regularly.

Setup options -> Configuration -> Distribution -> Sales Orders -> Items to include

Available for: SYSPRO 8



Sales Order quantity vs. Job Receipt quantity



This option is company wide. Will need to be set for each separate SYSPRO company.

Available for: SYSPRO 7 - SYSPRO 8

Usability

Sales Order quantity vs. Job Receipt quantity



Sales Order Query

File Options Sequence Query Graph

Sales order: 000941

Order Header

Order status	1 - Open order
Sales order	000941
Document type	Order
Supply message	
Currency	\$ - Local Currency

Customer Information

Customer on hold	
Customer	
Source warehouse	
Target warehouse	
Customer class	
Tax code	
Sold to address	

Detail Lines

Stock code	Description	Order quantity	Uom	Warehouse	Ship quantity	Back
B100	Bicycle	10.000	EA	N		0.000



Job Receipts

File Options

Job: 00000633

Job Details

Job	00000633
Job description	Bicycle
WTP Ledger code	01-1510
Quantity	15.000
Inspection quantity	0.000
Job complete	<input type="checkbox"/>
Co-product complete	<input type="checkbox"/>
Cost basis	Current cost
Receipt cost	2,674.22500
Cost uom	EA
Reference	
Notation	

Job In...

Gener	
Jour	0
Sub	No
Has	No
Mas	
Issu	
Stoc	B100
Co-p	
Stoc	Bicycle
Long	Parent
Rev	
War	N - No
WTP	

Available for: SYSPRO 7 - SYSPRO 8



Usability

Sales Order quantity vs. Job Receipt quantity



Sales Order Query

Sales order: 000941

Order Header		Customer Information	
Order status	1 - Open order	Customer on hold	
Sales order	000941	Customer	
Document type	Order	Source warehouse	
Supply message		Target warehouse	
Currency	\$ - Local Currency	Customer class	
		Tax code	
		Sold to address	

Stock code	Description	Order quantity	Uom	Warehouse	Ship quantity	Back
B100	Bicycle	10.000	EA	N	0.000	



Job Receipts

Job: 00000633

Job Details		Job In...
Job	00000633	Gener
Job description	Bicycle	Jour 0
WIP Ledger code	01-1510	Sub No
Quantity	15.000	Has No
Inspection quantity	0.000	Mas
Job complete	<input type="checkbox"/>	Issu
Co-product complete	<input type="checkbox"/>	Stoc B100
Cost basis	Current cost	Co-f
Receipt cost	2,674.22500	Stoc Bicycle
Cost uom	EA	Long Parent
Reference		Rev
Notation		War N-No



Job Linked to Sales Order

OK | Cancel

Job Linked to Sales Order

Sales order information	
Sales order	000941
Sales order line	0001
Linked sales order quantity	<input checked="" type="radio"/> Increase to equal receipt qty <input type="radio"/> Leave as is

Available for: SYSPRO 7 - SYSPRO 8



Usability

Sales Order quantity vs. Job Receipt quantity



Sales Order Query

Sales order: 000941

Order status	1 - Open order
Sales order	000941
Document type	Order
Supply message	
Currency	\$ - Local Currency

Stock code	Description	Order quantity	Uom	Warehouse	Ship quantity	Back
B100	Bicycle	10.000	EA	N	0.000	



Job Receipts

Job: 00000633

Job	00000633
Job description	Bicycle
WIP Ledger code	01-1510
Quantity	15.000
Inspection quantity	0.000



Job Linked to Sales Order

OK | Cancel

Job Linked to Sales Order	
Sales order information	
Sales order	000941
Sales order line	0001
Linked sales order quantity	<input checked="" type="radio"/> Increase to equal receipt qty <input type="radio"/> Leave as is

Sales Order Query

Sales order: 000941

Order Header		Customer Information	
Sales order	000941	Customer on hold	
Document type	Order	Customer	
Supply message	Jobs/PO/Req/SCT attached	Source warehouse	
Currency	\$ - Local Currency	Target warehouse	

Stock code	Description	Order quantity	Uom	Warehouse	Ship quantity	Back
B100	Bicycle	15.000	EA	N	15.000	

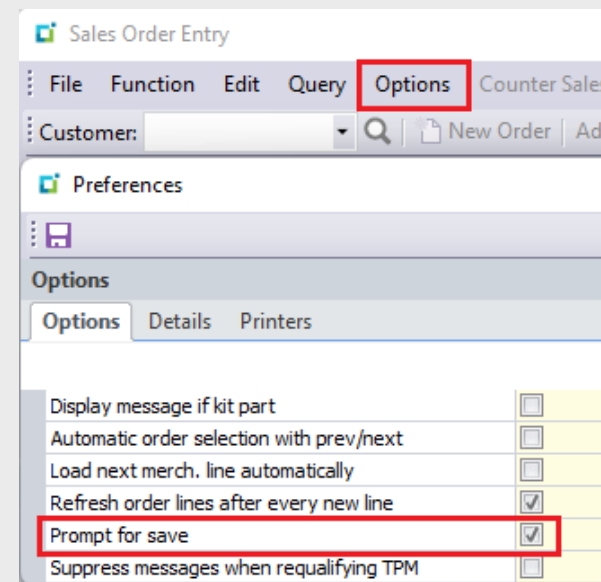


Available for: SYSPRO 7 - SYSPRO 8



Usability Quick fire

Speed up transaction entry

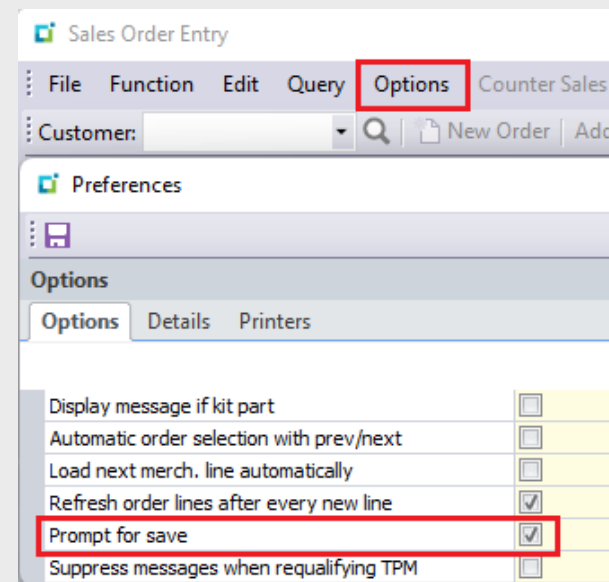


Found in
Preferences

Usability Quick fire

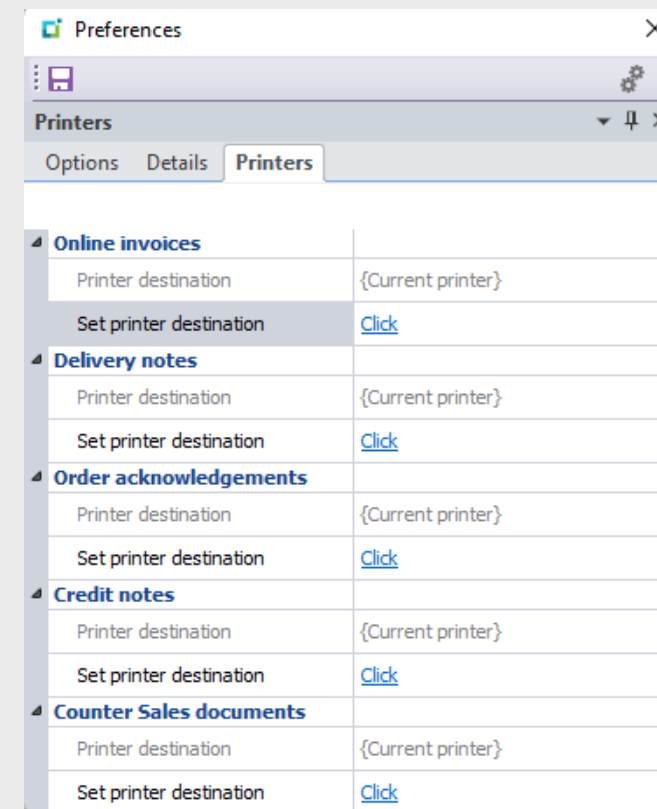


Speed up transaction entry



Found in Preferences

Set default printers for doc generation



Found in Preferences

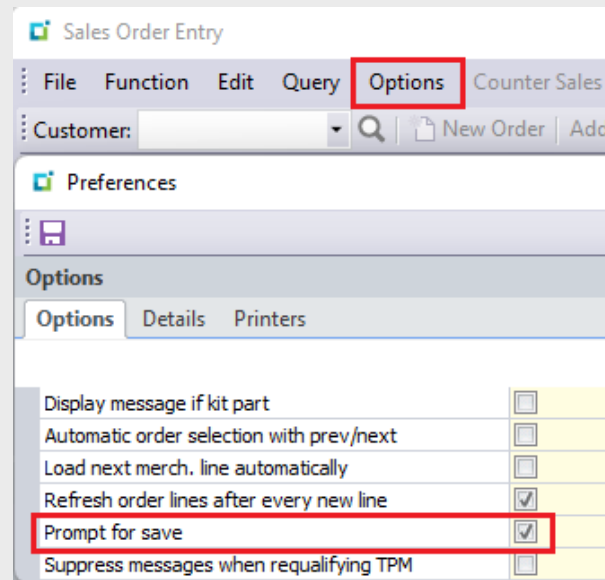
Available for: SYSPRO 6 - SYSPRO 6.1 - SYSPRO 7 - SYSPRO 8



Usability Quick fire

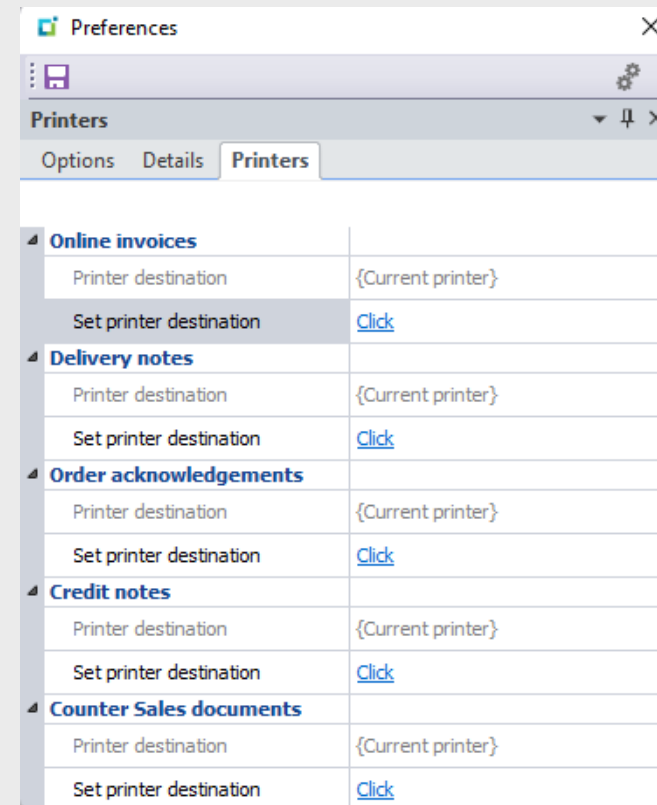


Speed up transaction entry



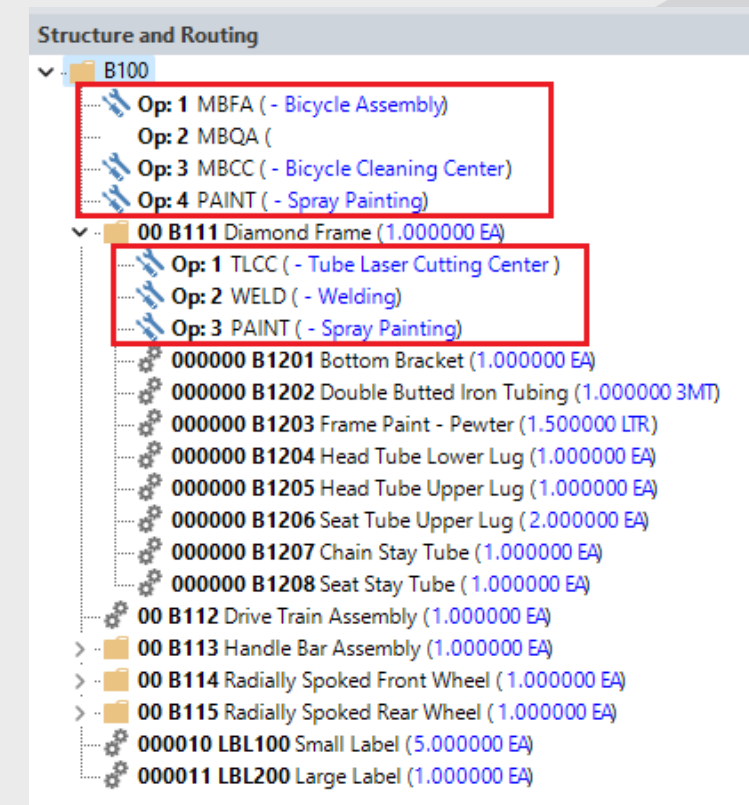
Found in Preferences

Set default printers for doc generation



Found in Preferences

Show operations in BOM tree



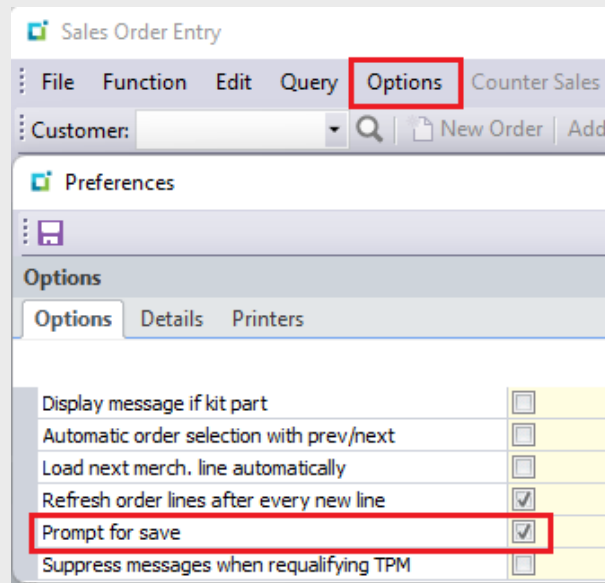
Found in Preferences



Usability Quick fire

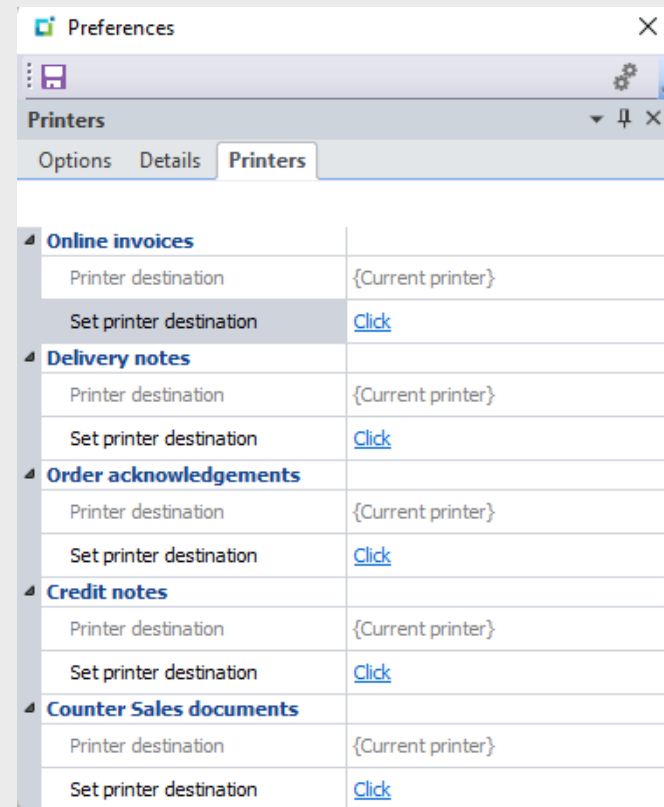


Speed up transaction entry



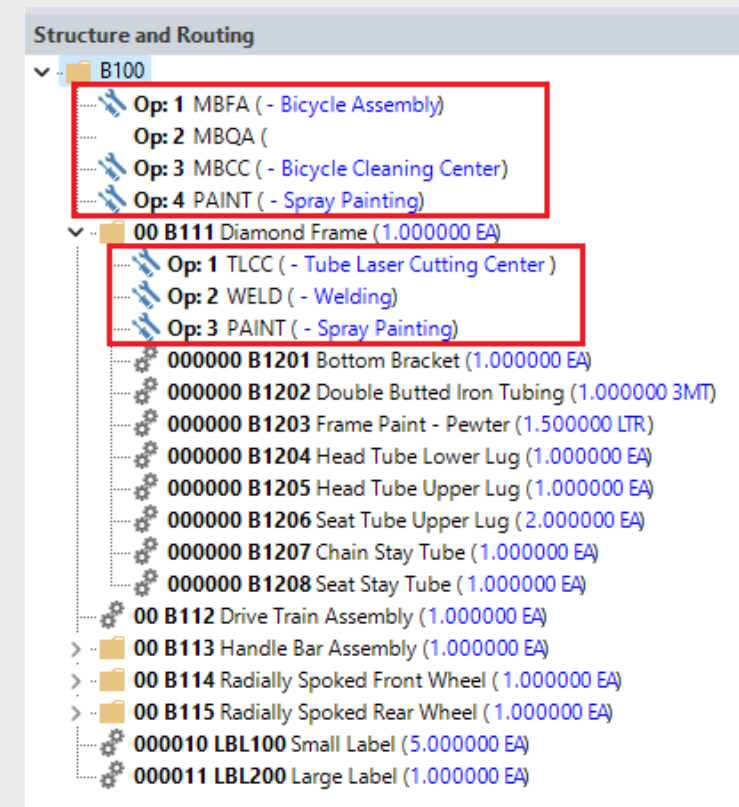
Found in Preferences

Set default printers for doc generation



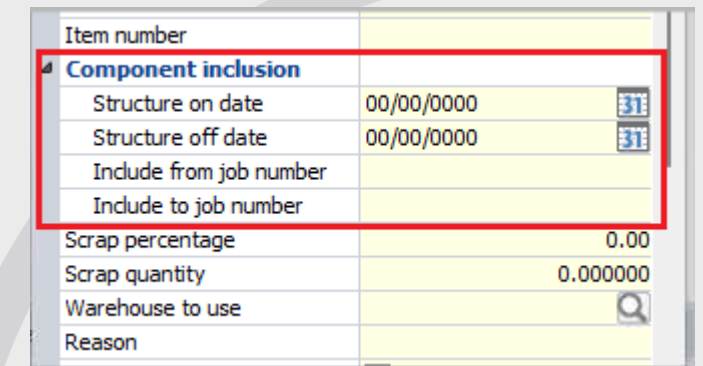
Found in Preferences

Show operations in BOM tree



Found in Preferences

Inclusion criteria for components



Found in component configuration



Online Help – outside of your version



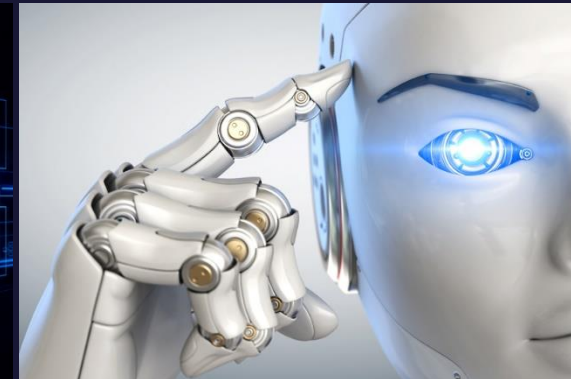
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- Command Line Parameters: <https://help.syspro.com/syspro-7-update-1/ovr-command-line-parameters.htm>
- Adding Master tables: <https://nexsys.support.k3btg.com/PublicData/GetFile?id=996717f7-7709-11ee-a312-005056b365bc>

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