

THE SKY'S THE LIMIT

20 TIPS IN 40 MINUTES – QUICK BUSINESS WINS

IMPORT FROM EXCEL

- GL journals
- Sales order entry express
- Quantum Architecture – Master Data Imports

IMPORTING LISTS FOR REVIEW SCREENS

Ctrl+Alt+F9 - shortcut to paste to the grid

 Stock Take Selection

▶ Start Processing
 | 
|  Save Form Values

Stock Take Selection

Function

Select stock codes for stock take

Warehouses

Warehouse selection

☒ Single
 ☐ List

N

Northern Warehouse

[Define list](#)

Options

Include zero quantities on hand

☒

Include stock on hold

☒ Yes
 ☐ No
 ☐ Only

Include stock with a supersession date

☐

From supersession date

Part category

All

Show results in the list view

☐

Stock codes

Stock code selection

☐ All
 ☐ Range
 ☐ Single
 ☒ List

From stock code

To stock code

List of stock codes

[Define list](#)

GRIDVIEW ENTRY

- Stock take capture by stock code
- Sales order entry express
- GL journal entry

BATCH ON HOLD MAINTENANCE

- Stock codes
- Lot numbers
- Serial numbers
- Bins

GROUP PAYMENT RUN AR

Multiple customers from the same group

AR Group Customer Maintenance

New X Primary customer: 0000001

Primary Customer Details

Customer [0000001](#)

Customer name Bayside Bikes

Customer currency \$

Secondary Customer

X search text

Customer	Name	Currency
0000002	Bikes & Blades - North	\$ - Dollar
0000009	Grand Adventures	EUR - Euros

AR Group Payment Run

File

New Payment run: 1 Authorize Cancel Refresh

Payment Options

Transaction options

Change posting period [Edit](#)

Reset credit status ☐

Payment run details

Primary customer 0000001

Payment currency \$

Bank FB

Payment amount 10,000.00

Payment date 09/04/2020

Transaction Payment Allocation

Customer Payment Allocation

Add Customer X Remove Customer search text

Customer	Balance	Allocated amount	Currency	Payment amount	Exchange rate
▶ 0000001	1,969,183.05	3,000.00	\$	3,000.00	1.000000
0000002	1,079,068.72	1,000.00	\$	1,000.00	1.000000
0000009	64,000.00	6,000.00	EUR	6,961.36	0.861900

ARRANGE SCREENS AND FIELDS TO REDUCE NAVIGATION

RELEASE MULTIPLE SALES ORDERS FROM SUSPENSE

LICENCE MANAGER

License Manager

Select New License Apply to All Companies Apply to Selected Companies

Parameter	Current value	New value
Customer name	K3 SYSPRO LIMITED	
Customer id	GBR-K003	
License expiry date	01/12/2021	
License issue date	16/11/2020	
License type	Annual	
License user type	Concurrent	
Number of Licensed users	8	
Number of CMS only users	1	
Number of Point of Sale users	2	
Number of ODBC seats	1	
Number of U/SQL Manager seats	1	
Number of Dialog System seats	0	
Number of CALs	0	
Number of Analytics Viewer seats	5	

CUSTOMISE HYPERLINKS

DETAIL POSTINGS TO CONTROL ACCOUNTS

General Ledger Integration > General Ledger Codes	
▲ Accounts payable integration methods	
Integration level	Control account in detail
Create general ledger journal	☒
Post general ledger journal	☒
Force check no	☐
Force general ledger analysis	Transaction entry
▲ Accounts receivable integration methods	
Integration level	Control account in detail
Create general ledger journal	☒
Post general ledger journal	☒
Force general ledger analysis	Transaction entry

DETAIL POSTINGS TO CONTROL ACCOUNTS

Details

Balances	Movements	Details	Commitments	Analysis			
 More Lines	 Rows: 100			search text			
Peri...	GL journal source	GL journal	Date	Reference	Amount	Customer	Invoice customer
02	Accounts receivable sales	62	15/11/2021	GLJ:0000000062	1,120.00		
02	Accounts receivable sales	63	15/11/2021	GLJ:0000000063	1,680.00		
02	Accounts receivable sales	66	15/11/2021	GLJ:0000000066	1,120.00		
02	Accounts receivable sales	67	15/11/2021	GLJ:0000000067	560.00	0000001	000000000100541
02	Accounts receivable sales	67	15/11/2021	GLJ:0000000067	560.00	0000001	000000000100542

Zoom on AR Invoice Register					
AR Invoice Register Details			AR Invoice Register Entries		
Register num	0000000045				
Source	Sales order entr				
Operator	ADMIN				
Month numb	2021/02				
Customer invoi...	Customer	Amount	Document t...		
100539	0000001	560.00	Invoice		
100540	0000001	560.00	Invoice		

SHOW LIST VIEW TOOLBAR

- Modify toolbar

AT A GLANCE



SHORTCUT KEYS



FAVOURITE SHORTCUTS TO EXTERNAL APPLICATIONS

ELECTRONIC SIGNATURES

- Audit trails
- Governance
- Triggering other business processes

ELECTRONIC SIGNATURES

Electronic Signatures Setup: Michelle Lewis

Module **Purchase Orders** Show filter

Transactions

Transaction description	Edit	D...	Acces...	Add ...
PO Kit receipt	Edit		Allowed	Add c...
PO Import receipts	Edit		Allowed	Add c...
PO Reverse inspection receipt	Edit		Allowed	Add c...
PO Add purchase order	Edit		Allowed	Add c...
PO Maintain purchase order	Edit		Allowed	Add c...
PO Cancel purchase order	Edit		Allowed	Add c...
PO Add purchase order merchandise line	Edit		Allowed	Add c...
PO Change purchase order merchandise l...	Edit		Allowed	Add c...
PO Cancel purchase order line	Edit		Allowed	Add c...
PO Complete purchase order	Edit		Allowed	Add c...
PO Add non-merchandise line	Edit		Allowed	Add c...
PO Print purchase order	Edit		Allowed	Add c...
PO Copy purchase order	Edit		Allowed	Add c...
PO Batch print purchase order	Edit		Allowed	Add c...
PO Batch print purchase order details	Edit		Allowed	Add c...
PO Change non-merchandise line	Edit		Allowed	Add c...
PO Balance	Edit		Allowed	Add c...
PO Purge	Edit		Allowed	Add c...
PO Add supplier contract	Edit		Allowed	Add c...

Transaction: 250204 - PO Change purchas

Condition

Name

Description

User condition

Access control level

Access level

eSignature configuration

Effective period

Period

From date

To date

Logging and trigger options

Detail log required

Configure details

Transaction successful

Setup trigger

Transaction: 250204 - PO Change purchas

PO Change purchase order merchandise

Trn1

PO Change purchase order merchandise

Define

Log only

Confirm with password

Always

Range

Configure details

Setup trigger

AUTOMATION

Automation Design

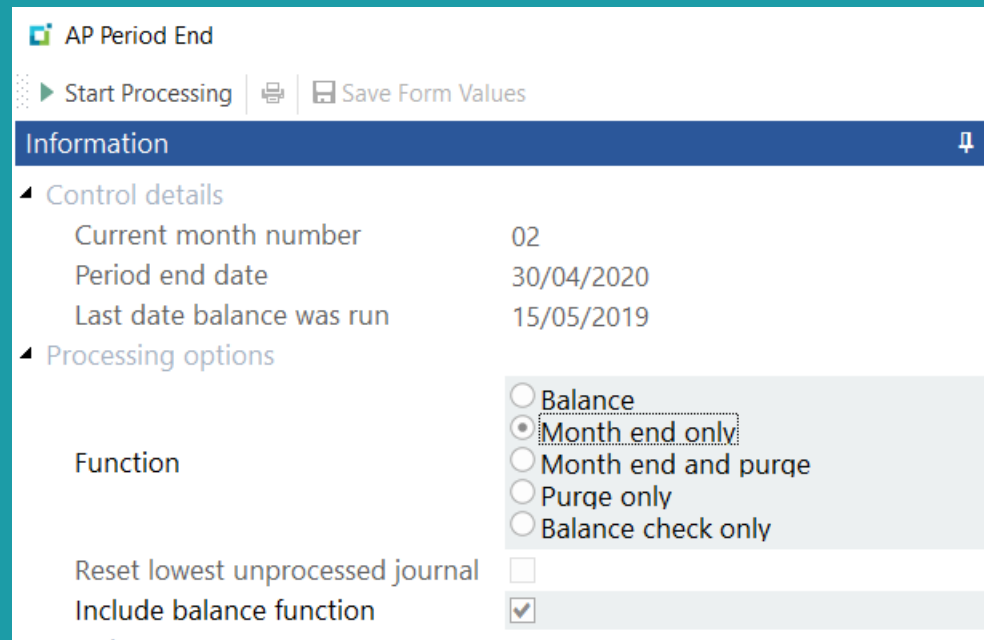
Close

Automation Entries

Program	Description
ARSPGI	AR Invoice GL Integration
APSPGP	AP Payments GL Integration
APSPGI	AP Invoice GL Integration
APSP99	AP Check and Remittance Print
APSP09	AP Permanent Entries Posting
APSP80	AP Registered Invoice Purge
ARSP80	AR Finance Charge Calculation
ARSPGP	AR Payments GL Integration
CSHPGI	Cash Book GL Integration
CSHP09	CB Permanent Entries Posting
ARSP01	AR Period End
ARSP23	AR Bank Deposit Slip
APSP01	AP Period End
ASSP01	Asset Period End
ASSPDC	Asset Depreciation Calculation
BOMP01	Structure Validation
BOMP40	Cost Implosion
BOMP70	Lead Time Calculation
CSHP01	Cash Book Period End
EFTPRL	EFT Cash Book Payment Release
GENP01	GL Period End

SPLIT BALANCE FROM MONTH END FUNCTIONALITY

E.net object in SYSPRO 8



AP Period End

Start Processing | [Printer Icon] | Save Form Values

Information

Control details

Current month number	02
Period end date	30/04/2020
Last date balance was run	15/05/2019

Processing options

Function

- ☐ Balance
- ☒ Month end only
- ☐ Month end and purge
- ☐ Purge only
- ☐ Balance check only

Reset lowest unprocessed journal ☐

Include balance function ☒

SHOW CAPTIONS & FIELD SELECTOR

SEARCH WINDOWS EXTENDED TO SRS

OPEN LINK IN NEW SYSPRO INSTANCE

RESOURCES



SUPPORT
ZONE

[HTTPS://INFOZONE.SYSPRO.COM/SUPPORT/SYSPRO8/](https://infozone.syspro.com/support/syspro8/)

All stop shop for SYSPRO

F1

ONLINE HELP

NEWSLETTER

IN YOUR INBOX

Ask your Account Manager to add you to the mailing list

HELPDESK

K3SYSPROSUPPORT@K3BTG.COM

Contact our helpdesk for support queries

CUSTOMER
CARE

SYSPROCUSTOMERCARE@K3BTG.COM

Contact our Customer Experience Team for any questions/concerns/feedback



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