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Good afternoon. My name is Adrian Ratcliffe. I'm a Business Analyst at K3 Syspro. I work with customers & colleagues alike on strategy, business cases, process mapping & improvement.

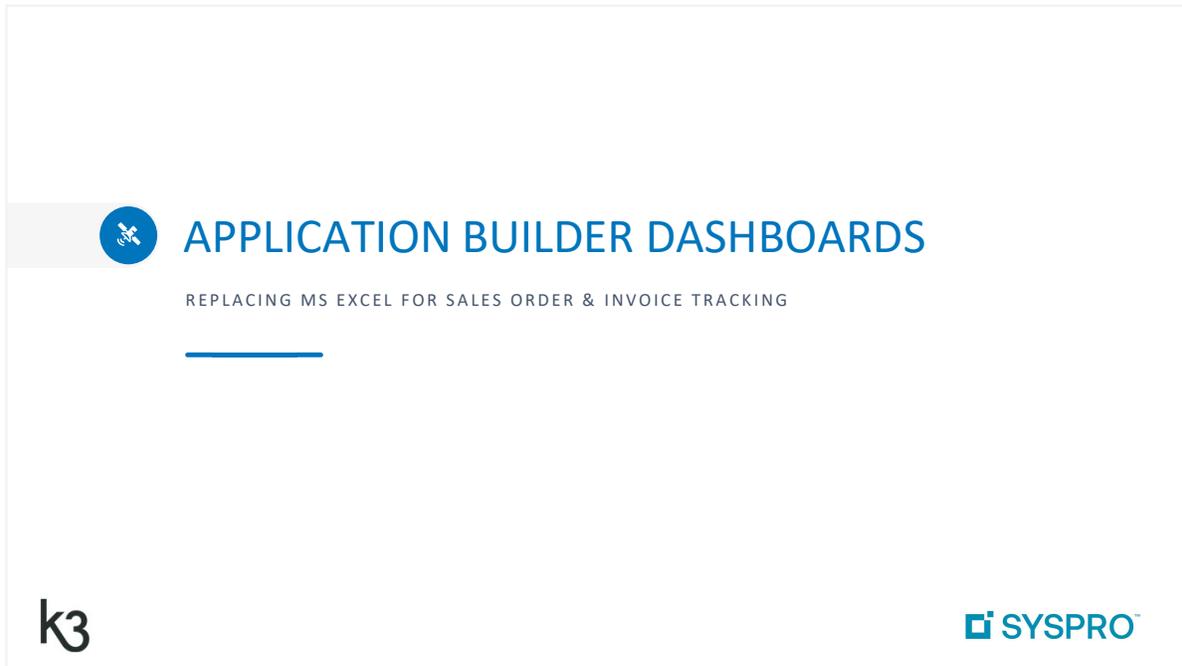
In this session I'll share 6 examples with you, showing how our ERP and A&I consultants have used SYSPRO automation tools to address everyday business problems.

As a BA my interest is in these underlying business problems, their impact and the positive outcomes that these solutions deliver.

That will be my focus today.

There are some common themes between the various use cases we'll review:

- Customer data may be recorded in SYSPRO but only typically across multiple programs/screens
- Users want to pull this data together into a single screen view
- Outcomes support individuals and teams to better perform their day-to-day activities:
 - increasing individual productivity & job satisfaction
 - increasing data accuracy & consistency
 - reducing business risk



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Let's start with a simple but powerful example that empowered the Sales Admin function to handle growth, while improving employee health & wellbeing.

I was involved in some early strategy development work, looking at growth opportunities and addressing the environmental & operational barriers to success.

With the Admin team already swamped by then current demand, old processes & systems were flagged as a key risk & deemed unfit to support the growth plan.

USE CASE 1

SALES ORDER/JOB TRACKING DATA

Recorded in Multiple Documents/Systems:

- SYSPRO Sales Order/Job
- MS Excel: Tracker & Job-specific Request Forms
- MS Outlook Calendar

BUSINESS CHALLENGES:

Existing Processes & Systems:

- Worked well at the start when volumes low
- Swamped by growth success over 10 years
- Not fit enough to cope with new growth plan
- Admin burden/risk of error rekeying data 4 times

Data in SYSPRO - simply needed to be surfaced



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This customer delivers field engineering services for utilities & their Contractors.

Jobs are relatively small, (1 or 2 days), but complex in terms of service scope, regulatory standards & approvals, parts, tooling & skills required.

Processes & systems were developed when the company launched over a decade ago. Since then, revenues had grown ten-fold.

Sales Order & Job Tracking was managed using 4 key tools:

- SYSPRO
- Excel for Order confirmation & job tracking &
- Outlook for calendars/scheduling.

Re-keying the same data many times was inefficient & introduced error risk.

While all the required data was recorded in SYSPRO, it was not readily visible in a useful format.

DASHBOARD PANE 1: SALES ORDERS

The screenshot displays a software interface for managing sales orders. A dialog box titled "Sales order options" is open, allowing users to filter the data. The dialog includes the following fields and options:

- Order dates:**
 - Line ship date from: 01/01/2020
 - Line ship date to: 16/01/2020
- Order status:**
 - Open:
 - Ready for invoice:
 - Suspense:

The background shows a table of sales orders with columns for Salesperson, SO line, Dispatch note, Order status, and various dates. The table is filtered based on the dialog box settings.

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Having understood the challenge, we quickly recommended the replacement of the Excel Tracker with 2 dashboards, created using Application Builder.

{CLICK}

The first dashboard aggregated Sales Order information into a single pane, driven by filter options on date range & order status.

DASHBOARD PANE 1: SALES ORDERS

The screenshot shows a software interface with a 'Sales orders' table. On the left, there are filter options: 'Order dates' (Line ship date from: 01/01/2020, to: 16/01/2020), 'Order status' (Ready for invoice: checked, Suspense: unchecked), and 'Open' (checked). The table has the following columns: Salesperson, Sales Order, SO line, Dispatch note, Order status, Dispatch status, Job, Job complete, Purchase order, Customer PO, SO due date, Job due date, Customer, Customer Name, Contact and tel, Ship addr 1, Ship addr 2, Ship addr 3, Ship addr 3loc, Ship ad.

Salesperson	Sales Order	SO line	Dispatch note	Order status	Dispatch status	Job	Job complete	Purchase order	Customer PO	SO due date	Job due date	Customer	Customer Name	Contact and tel	Ship addr 1	Ship addr 2	Ship addr 3	Ship addr 3loc	Ship ad
C02-Jayne A.	U01-Dave S.	013778	1	013778/0001	1	7	00...Y	048861772	06/01/2020	13/12/2019		JCT HARDY - NOTTINGH...	KIMBER...						
C02-Jayne A.	U01-Dave S.	013780	1	1	1		00...N	POR001997	13/01/2020	13/01/2020		DIG VILL - EAST HEDL...	BISHOP AUCKL... HIGH H...						
C02-Jayne A.	U01-Dave S.	013795	2	013795/0001	1	9	00...Y	0000231574	08/01/2020	16/12/2019		LLANGADOG							
C02-Jayne A.	U01-Dave S.	013819	1	1	1		00...N	140120BARDS	16/01/2020	16/01/2020		RAVERNESS							
C02-Jayne A.	U01-Dave S.	013846	1	1	1		010936		16/01/2020			1 HANNAH - NEASDEN	LONDON						
C02-Jayne A.	U01-Dave S.	013887	1	1	1		00...N	6488625	15/01/2020	15/01/2020		LEICESTER							
C03-Liam G.	U01-Dave S.	013544	1	1	1		00...N	400009029	16/01/2020	16/01/2020		Hill Parkway - Wealdhope							
C03-Liam G.	U01-Dave S.	013554	2	1	1		00...N	KL356362	16/01/2020			1 KENNET - DARTFORD	KENT						
C03-Liam G.	U01-Dave S.	013598	8	013598/0003	1	9	00...N	KL3581384	13/01/2020			1 KENNET - DARTFORD	KENT						
C03-Liam G.	U01-Dave S.	013767	1	1	1		00...N		13/01/2020	13/01/2020		Ony Road - Leash	Leash						
C03-Liam G.	U01-Dave S.	013767	2	1	1		00...N		13/01/2020	13/01/2020		Ony Road - Leash	Leash						

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SYSPRO

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The larger pane displays key data for the filtered sales order lines, presenting all the information required to track & manage orders.

Surfacing data already stored in SYSPRO eliminated rekeying into Excel, saved time, increased accuracy & reduced business risk due to keying errors.

Alongside this development we also replaced the Excel Job Request forms, used to confirm job spec's back to the customer. We built on standard SRS report functionality, to present job data & dimensions on simple drawing templates for review & approval.

DASHBOARD PANE 2: INVOICES

Year	Month	Salesperson	Salesperson1	Invoice	Sales order	Customer PO	Invoice date	Customer	Customer Name	Building	Street	Town/City	Locality	County	Country	Post code	Product class	Stock code	Description	Job	Purchase order	Qty	Invoiced	Sales value	Cost value	
2020	1	U01-Dave S.	C01-Debra R.	014288	013952	NSG619062	06/01/2020										W001	POSTALL	400 X 300 P...			1.00	4,781.94	1,753.57	81	
2020	1	U01-Dave S.	C04-Hannah...	014290	013722	450004507	06/01/2020										NEW...	COUN...	DLS 6IQ	V70	FU046	REDUCING...	4.00	1,561.80	162.70	86
2020	1	U01-Dave S.	C04-Hannah...	014291	013723	450004640	06/01/2020										NEW...	COUN...	DLS 6IQ	V70	FU049	REDUCING...	1.00	1,812.43	302.00	72
2020	1	U01-Dave S.	C04-Hannah...	014292	013723	450004640	06/01/2020										NEW...	COUN...	DLS 6IQ	V70	FU046	REDUCING...	1.00	379.95	40.03	86
2020	1	U01-Dave S.	C04-Hannah...	014293	013723	450004640	06/01/2020										NEW...	COUN...	DLS 6IQ	V70	FU046	REDUCING...	1.00	1,852.37	301.86	81
2020	1	U01-Dave S.	C04-Hannah...	014294	013774	2619071456	06/01/2020										CHAR...	2816	W90	FL005	FLANGE HL...	1.00	50.77	33.15	54	
2020	1	U01-Dave S.	C04-Hannah...	014296	013825	20191143	07/01/2020										CHAR...	2816	W90	FL005	SUBCOTE F...	2,194.00	28,719.40	7,851.63	72	
2020	1	U01-Dave S.	C04-Hannah...	014296	013825	20191143	07/01/2020										CHAR...	2816	W90	FL006	SUBCOTE F...	3,276.00	43,079.40	22,795.26	47	
2020	1	U01-Dave S.	C04-Hannah...	014296	013825	20191143	07/01/2020										CHAR...	2816	W90	PREP	FOR SHIP...	11.00	795.52	0.00	10	
2020	1	U01-Dave S.	C04-Hannah...	014296	013825	20191143	07/01/2020										CHAR...	2816	W90	SHIPMENT	SEA FREE...	1.00	3,222.00	0.00	10	
2020	1	U01-Dave S.	C04-Hannah...	014297	013722	450004507	06/01/2020										NEW...	COUN...	DLS 6IQ	V70	FU040	REDUCING...	2.00	2,024.86	535.67	73
2020	1	U01-Dave S.	C04-Hannah...	014297	013722	450004507	06/01/2020										NEW...	COUN...	DLS 6IQ	V70	FU040	REDUCING...	1.00	1,022.07	267.64	73
2020	1	U01-Dave S.	C04-Hannah...	014297	013722	450004507	06/01/2020										NEW...	COUN...	DLS 6IQ	V70	FU046	REDUCING...	1.00	1,852.37	301.86	81

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SYSPRO

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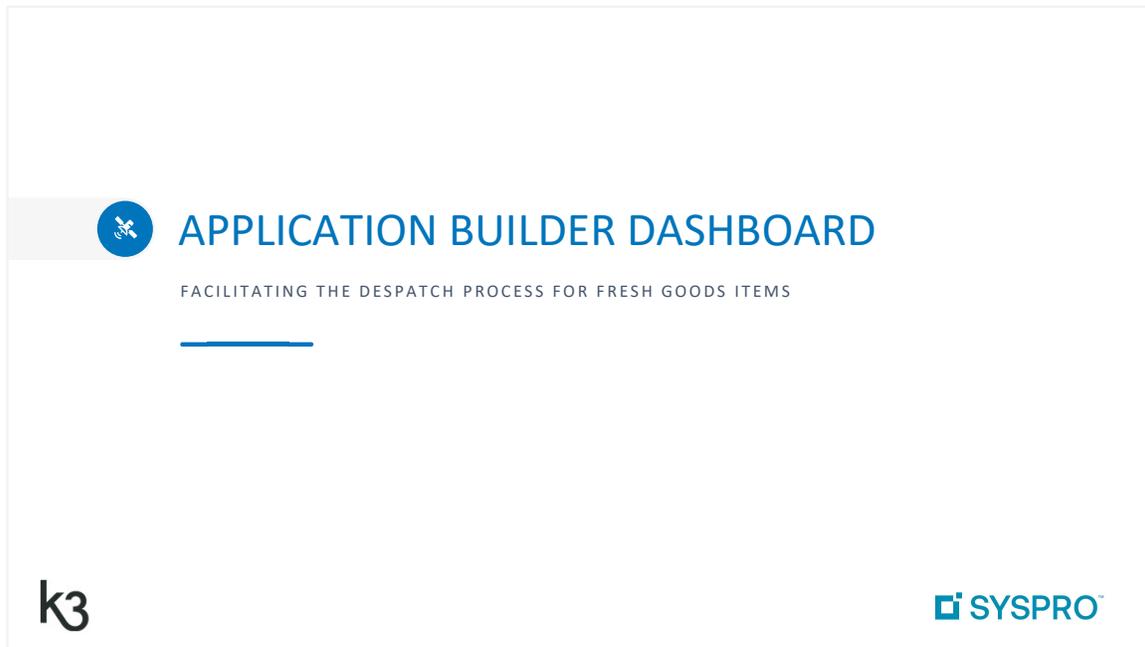
The 2nd Application Builder dashboard displayed similar tracking information but this time for Invoices, which enabled better:

- Payment tracking
- Cash recovery & forecasting

This project also delivered a welcome outcome from a people perspective

The Admin Manager was:

- delighted for team & self due to productivity gains (20%+ time savings)
- transformed:
 - **from:** stressed out & ready to retire early for a quiet life in the country
 - **to:** Job satisfaction restored, fully engaged & enthusiastic for further change & innovation.



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The second use case is from the food & beverage sector, where it's not uncommon for products from a full day's production to be despatched by 5pm on the same day.

The customer wanted to bring all relevant product, packaging & transport information together onto a single screen for despatch operators.

USE CASE 2

DATA VISIBILITY TO SUPPORT DESPATCH

- Stock availability
- Allocation of stock to sales orders
- Orders despatched
- Orders still to despatch

CAPTURING DATA AT POINT OF DESPATCH

- Sales Order
- Product
- Packaging
- Pallet
- Vehicle Quality Checks

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 SYSPRO™

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This customer supplies fresh confectionery items to major retailers.

During the discovery & design process, we confirmed:

- The despatch process is time-critical
- Operators need a complete, accurate and up to date view of key stock, order and despatch data to do their job.
- Data needs to be captured at the point of despatch – part system-driven & part-manual entry

ALL RELEVANT DESPATCH INFORMATION ON A SINGLE SCREEN

The screenshot displays the SYSPRO Dispatch dashboard with the following components:

- Selection Criteria Panel (Left):** Includes a 'Refresh Results' button and filters for 'Ship date from: 26/09/2021', 'Ship date to: 29/09/2021', and 'Warehouse: DIS-NI01'.
- Assigned Pallets to Sales order (Top Right):** A table listing pallets with columns for Sales, Pallet, Stock Code, Description, Lot, Quantity, Release, Unit of Measure, Allocation, Scanner, Login, and Name.
- Unassigned Pallets to Sales order (Middle Right):** A table listing unassigned pallets with columns for Pallet, Stock Code, Description, Lot, Quantity, Release, Unit of Measure, Allocation, Scanner, Login, and Assign to.
- Sales orders dispatch (Bottom Left):** A table listing sales orders with columns for Sales, SO line, Exp., Stock code, Description, Source wh, Order, Allocated qty, Outstanding qty, Dispatched qty, Line ship date, Action, Dispatch note, and DI status.
- Dispatch Vehicle Details (Bottom Right):** A form for vehicle information including Dispatch date, Time of check, Dispatch note, Trailer identification, Customer booking ref, Total pallet qty, and Vehicle checks (Vehicle to leading bay sealed, Free from taints and odours, Free from pests & infestations, General vehicle hygiene, Absence of allergenic material).
- Product Information (Bottom Center):** Three panels for Product Image 1, Product Image 2, and Product Pallet Layout.

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We agreed that Dispatch Operators required information from 6 sources to do their job effectively.

Various automations were developed to pull this data into a single-screen SYSPRO dashboard, comprising 6 panes.

I'll run through these quickly:

{CLICK}

The **Selection Criteria** pane is used to select orders for despatch by ship date & warehouse.

ALL RELEVANT DESPATCH INFORMATION ON A SINGLE SCREEN

The screenshot displays the SYSPRO Dispatch software interface. The main window is titled "Sales orders" and shows a list of sales orders with columns for Customer, Name, Instructions, S... O..., Customer PO, Target wareho..., Dispatch date, Progr..., and Order status. The first row is highlighted in yellow, showing a 62.50% progress status. Below this, there are sections for "Sales orders dispatch" and "Dispatch Vehicle Details". The "Sales orders dispatch" section shows a table of sales orders with columns for Sales no., SO line, Exp., Stock code, Description, Source wh, Order no., Allocated qty, Outstanding qty, Dispatched qty, Line ship date, Action, Dispatch note, and DI status. The "Dispatch Vehicle Details" section shows information about the dispatch date, time of check, dispatch note, trailer identification, customer booking ref, total pallet qty, and vehicle checks.

Customer	Name	Instructions	S... O...	Customer PO	Target wareho...	Dispatch date	Progr...	Order status
0007470	348690	TEST				27/09/2...	62.50%	1
0007471	348692					27/09/2...	0.00%	1
0007472	348691					27/09/2...	0.00%	1
0007473	348573					27/09/2...	0.00%	1
0007474	348689					27/09/2...	0.00%	1
00074	001					27/09/2...	0.00%	1

Sales no.	SO line	Exp.	Stock code	Description	Source wh	Order no.	Allocated qty	Outstanding qty	Dispatched qty	Line ship date	Action	Dispatch note	DI status
0007470	3		CA0100075	SB Cornflake Squares 8pk*12 SRP	DSE-NB01	1.00	1.00	0.00	0.00	27/09/2021			
0007470	1		CA0100074	SB Assorted Traybakes 8pk*12 SRP	DSE-NB01	2.00	2.00	0.00	0.00	27/09/2021			
0007470	2		CA0100072	SB Cornflk Squares 8pk*12 SRP	DSE-NB01	2.00	2.00	0.00	0.00	27/09/2021			
0007470	5		CA0100080	Scotts Rasp Ruffery Cakes 6pk SRP	DSE-NB01	5.00	5.00	0.00	0.00	27/09/2021			
0007470	4		CA0100086	SB Variety Fairy Cakes 12pk*9 SRP	DSE-NB01	6.00	0.00	6.00	0.00	27/09/2021			

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The filtered **Sales Orders** pane then displays all the Sales Order Headers for despatch in the ship date range.

This acts as an operator **'work to list'** for the day.

(This pane auto-refreshes every 5 secs or so, showing what's despatched & what's still to go.)

Progress is colour-coded (62.5% = packed & **SYSPRO despatched** – i.e.: loaded on truck but not yet left)

ALL RELEVANT DESPATCH INFORMATION ON A SINGLE SCREEN

The screenshot displays the Syspro software interface for managing sales orders and despatches. The main window is titled 'Dispatch' and is divided into several panes:

- Selection criteria:** Shows filters for Refresh Results, Ship date to (26/09/2021), Warehouse (DIS-NB01), and Dispatch criteria (Device Default Warehouse).
- Sales orders:** A table listing sales orders with columns for Customer, Name, Instructions, S. No., Customer PO, Target warehouse, Dispatch date, Progr., and Order status. The first row is highlighted in yellow.
- Assigned Pallets to Sales order:** A table listing assigned pallets with columns for Sales, Pallet, Stock Code, Description, Lot, Quantity, Release, Unit of Me., Alloc., Scanner, Login, and Name.
- Unassigned Pallets to Sales order:** A table listing unassigned pallets with columns for Pallet, Stock Code, Description, Lot, Quantity, Release, Unit of Me., Alloc., Scanner, Login, and Assign to.
- Sales orders despatch:** A table listing sales orders with columns for Sales o., SD line, Excl., Stock code, Description, Source wh, Order, Allocated qty, Outstanding qty, Dispatched qty, Line ship date, Action, Dispatch note, and DN status. The first row is highlighted in yellow.
- Product Information:** A section for Product Image 1, Product Image 2, and Product Pallet Layout.
- Vehicle checks:** A section for vehicle checks including Vehicle to leading bay sealed, Free from taints and odours, Free from pests & infestations, General vehicle hygiene, and Absence of allergenic material.

The Syspro logo is visible in the bottom right corner.

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When a Sales Order Header is highlighted in the **Sales orders** pane the individual lines for that sales order are displayed in the **Sales orders despatch** pane (for info only at this time)

ALL RELEVANT DESPATCH INFORMATION ON A SINGLE SCREEN

The screenshot displays the SYSPRO software interface for managing despatch information. The main window is titled "Assigned Pallets to Sales order" and is divided into several sections:

- Assigned Pallets to Sales order:** A table listing pallets assigned to a sales order. Columns include Select, Sales, Pallet, Stock Code, Description, Lot, Quantity, Unit of Measure, Scanner, Login, and Name. The table shows four rows of pallets, all with a quantity of 2.00 or 5.00.
- Unassigned Pallets to Sales order:** A table listing stock that can be assigned to fulfill the sales order. Columns include Select, Pallet, Stock Code, Description, Lot, Quantity, Release Date, Unit of Measure, Allocation, Scanner, Login, and Assign to. The table shows multiple rows of stock, including "SB Variety Fairy Cakes" and "SB Assorted Traybakes".
- Sales orders:** A section on the left side of the interface showing sales order details, including "Refresh Results", "Ship date from", "Ship date to", and "Warehouse".
- Product information:** A section at the bottom of the interface showing product details, including "Stock Code", "UPD", "Cases per Layer (TL)", and "Number of Layers (TL)".

The SYSPRO logo is visible in the bottom right corner of the interface.

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Stock and pallet information are displayed in the two panes:

Unassigned Pallets to Sales order - shows only the stock that can be assigned to fulfil the Sales Order.

(Business rules can be applied that I won't go into here).

Stock is selected line by line & assigned to the Sales Order using the **Assign pallets/stock** button

Once assigned, these lines then move to the **Assigned Pallets to Sales order** pane.

At the same time:

- the selected stock is allocated to the Sales Order &
- all the Sales Order lines in the despatch section are refreshed.

ALL RELEVANT DESPATCH INFORMATION ON A SINGLE SCREEN

Dispatch

Refresh Results

Ship date to: 26/09/2021

Warehouse: DIS-NB01

Sales orders

Customer	Name	Instructions	S. b.	Customer PO	Target warehouse	Dispatch date	Prog.	Order status
0007470	348690	TEST			DIS-NB01	27/09/21	62.50%	1
0007471	348692				DIS-NB01	27/09/21	8.00%	1
0007472	348691				DIS-NB01	27/09/21	8.00%	1
0007473	348573				DIS-NB01	27/09/21	8.00%	1
0007474	348889				DIS-NB01	27/09/21	8.00%	1
00074	p. 001				DIS-NB01	27/09/21	8.00%	1

Assigned Pallets to Sales order

Select	Sales ...	Pallet	Stock Code	Description	Lot	Quan...	Unit of ...	Sc...	Login	Name
<input type="checkbox"/>	0007470	**No pallet**	CA0100072	SB Car...	0000007143	2.00	Case			
<input type="checkbox"/>	0007470	**No pallet**	CA0100074	SB Ass...	0000007139	2.00	Case			
<input type="checkbox"/>	0007470	**No pallet**	CA0100075	SB Car...	0000007140	1.00	Case			
<input type="checkbox"/>	0007470	**No pallet**	CA0100082	Scotts ...	0000007142	5.00	Case			

Unassigned Pallets to Sales order

Assign pallets/stock X Delete pallet

Select	Pallet	Stock Code	Description	Lot	Quantity	Releas...	Unit of Me...	Alloc...	Scanner	Login	Assign L...
<input type="checkbox"/>	**No pallet	CA0100086	SB Variety Fairy Cakes ...	5000001492	5.00		Case				Y
<input type="checkbox"/>	00000205	CA0100086	SB Variety Fairy Cakes ...	5000001428	56.00		Case	13/09...	TL_1	KM	N
<input type="checkbox"/>	00000206	CA0100086	SB Variety Fairy Cakes ...	5000001428	56.00		Case	13/09...	TL_1	KM	N
<input type="checkbox"/>	00000328	CA0100086	SB Variety Fairy Cakes ...	5000001455	56.00		Case	16/09...	TL_3	RE	N
<input type="checkbox"/>	00000327	CA0100086	SB Variety Fairy Cakes ...	5000001455	56.00		Case	16/09...	TL_3	RE	N
<input type="checkbox"/>	00000328	CA0100086	SB Variety Fairy Cakes ...	5000001455	56.00		Case	16/09...	TL_3	RE	N
<input type="checkbox"/>	00000414	CA0100086	SB Variety Fairy Cakes ...	5000001455	56.00		Case	16/09...	TL_3	RE	N

Sales orders despatch

Create despatch

Sales o...	SD line	Excl...	Stock code	Description	Source wh	Order ...	Allocated qty	Outstanding qty	Dispatched qty	Line ship date	Action	Dispatch note	DN status
0007470	3	<input type="checkbox"/>	CA0100075	SB Cornflake Squares 8pk*12 SRP	DIS-NB01	1.00	1.00	0.00	0.00	27/09/2021			
0007470	1	<input type="checkbox"/>	CA0100074	SB Assorted Traybakes 8pk*12 SRP	DIS-NB01	2.00	2.00	0.00	0.00	27/09/2021			
0007470	2	<input type="checkbox"/>	CA0100072	SB Caramel Squares 8pk*12 SRP	DIS-NB01	2.00	2.00	0.00	0.00	27/09/2021			
0007470	5	<input type="checkbox"/>	CA0100082	Scotts Rasp Butterfly Cakes 6pk SRP	DIS-NB01	5.00	5.00	0.00	0.00	27/09/2021			
0007470	4	<input checked="" type="checkbox"/>	CA0100086	SB Variety Fairy Cakes 12pk*9 SRP	DIS-NB01	6.00	0.00	6.00	0.00	27/09/2021			

Product Information

Stock Code

UPO

Cases per Layer (TL)

Number of Layers (TL)

Product Image 1

Product Image 2

Product Pallet Layout

Vehicle checks

Vehicle to leading bay sealed

Free from taints and odours

Free from pests & infestations

General vehicle hygiene

Absence of allergenic material

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Once lines have been assigned, the operator can select which lines to despatch in the **Sales orders despatch** pane.

ALL RELEVANT DESPATCH INFORMATION ON A SINGLE SCREEN

The screenshot displays the SYSPRO software interface for despatch management. The main window is titled 'Dispatch' and contains several panes:

- Selection criteria:** Shows 'Refresh Results' and 'Ship date to 26/09/2021'.
- Sales orders:** A table with columns for 'Customer Name', 'Instructions', 'S. No.', 'Customer PO', 'Target warehouse', 'Dispatch date', 'Prog.', and 'Order status'. It lists several orders with their respective dates and statuses.
- Assigned Pallets to Sales order:** A table with columns for 'Sales', 'Pallet', 'Stock Code', 'Descri...', 'Lot', 'Quan...', 'Unit of ...', and 'Sc... Login Name'. It shows assigned pallets for various sales orders.
- Unassigned Pallets to Sales order:** A table for unassigned pallets.
- Sales orders dispatch:** A table with columns for 'Sales', 'SO line', 'Stock code', 'Description', 'Source wh', 'Order ...', 'Allocated qty', 'Outstanding qty', 'Dispatched qty', and 'Line ship date'. It lists dispatch details for various sales orders.
- Dispatch Vehicle Details:** A pane highlighted with a yellow border, containing fields for:
 - Dispatch date: 28/09/2021
 - Time of check: 00:00
 - Dispatch note
 - Haulier
 - Trailer identification
 - Customer booking ref
 - Total pallet qty: 0
 - Despatched by
 - Vehicle checks:
 - Vehicle to leading bay sealed
 - Free from taints and odours
 - Free from pest & infestations
 - General vehicle hygiene
 - Absence of allergenic material

The SYSPRO logo is visible in the bottom right corner of the interface.

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When the vehicle has been loaded with the relevant pallets, the operator then used the **Despatch Vehicle Details** pane to capture data for quality mandatory checks:

- Sales Order-specific information is auto-populated by SYSPRO
- Other quality information is entered or selected manually by the operator.

This quality information provides an audit trail which can be searched should any issues arise.

ALL RELEVANT DESPATCH INFORMATION ON A SINGLE SCREEN

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Finally, at the bottom, the **Product Information** pane – provides useful visual cues to the operator, as follows:

- **Product Info:** about the product
- **Product Image 1:** how each individual item is packed
- **Product Image 2:** how these items are then packed in boxes
- **Product Pallet Layout:** how the boxes should be stacked on the pallet.

In summary, the real business value delivered by this dashboard is that Despatch Operators never need to leave this screen – it is their **'work to list'** containing everything they need for each SO on their shift.

At any time they can review the status of each Sales Order/Sales Order line to check progress towards despatch, to highlight & deal with any issues as they arise.

Once despatched in the **Sales Orders Despatch** pane, the operator can print all the lines allocated for that SO and hand these, showing the contents of each pallet, to the lorry driver.

The Action column allows print & reprint later if needed.



APPLICATION BUILDER DASHBOARD

GETTING THE BEST DEAL WHEN SUB-CONTRACTING OPERATIONS

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 SYSPRO™

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This next use case looks at a manufacturer operating on longer production timescales of 1 to 6 weeks, where specific components are sent out to one or more sub-contractors, for painting.

USE CASE 3

SUB-CONTRACT OPERATIONS

- Sub-contract operations (component paint jobs)
- Ensuring components including sub-contract operations are available to meet the production schedule

BUSINESS CHALLENGES:

- Complex supply chains
- Dynamic production schedules
- Buyers require a forward view of sub-contract operations to understand what needs to be
 - sent out
 - in what quantity &
 - when
- Grouping sub-contract orders to get the best price

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 SYSPRO™

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Planners schedule all the manufacturing operations, including sub-contracted operations.

Buyers simply ensure that parts, including sub-contract operations, are available when needed to meet the wider production schedule.

This is a common problem that a lot of our customers face.

Sure, raising Purchase Orders is easy!

But what we're often asked is... *'How do I know what to raise and when?'*

This is made more difficult by dynamic production schedules & complex supply chains.

What buyers need is:

- a forward view of production schedule (especially sub-contract operations)
- to understand what needs to be
 - sent out
 - in what quantity &
 - when
- to group orders & secure the best price from the sub-contractor when raising the Purchase Order.

SUB-CONTRACT OPERATIONS

Select	Supplier	Job	Operation	Work centre	Work cent...	Stock code	Stock descr...	Buyer	Qty	Unit price	Req start...	Req due ...	Lead time	Purchase ...	PO line	Customer name	Leonardo proces...
<input type="checkbox"/>	50102	000000000000018	7	SUBCON	Subcon	0821507			1.00	200.00	15/04/2021	02/07/2021	14				No
<input type="checkbox"/>	50002	000000000000045	1	SUBCON	Subcon	4018274			1.00	120.00	05/05/2021	04/06/2021	20				No
<input type="checkbox"/>	50102	000000000000074	14	SUBCON	Subcon	464-22480-100-01			1.00	0.00	20/07/2021	06/08/2021	2				No
<input type="checkbox"/>	50062	000000000000083	3	SUBCON	Subcon	464-0000-020-01			1.00	300.00	12/10/2021	12/10/2021	2				Yes
<input type="checkbox"/>	50102	000000000000127	10	SUBCON	Subcon	472-22636-000-01			1.00	100.00	21/06/2021	08/07/2021	14				No
<input type="checkbox"/>	50102	000000000000131	9	SUBCON	Subcon	472-22636-100-01			1.00	50.00	07/06/2021	11/06/2021	14				No
<input type="checkbox"/>	50102	000000000000132	9	SUBCON	Subcon	472-22636-200-01			1.00	20.00	07/06/2021	11/06/2021	14				No
<input type="checkbox"/>	50062	000000000000153	9	SUBCON	Subcon	429-22178-000-04			1.00	200.00	17/05/2021	08/06/2021	14				Yes
<input type="checkbox"/>	50062	000000000000155	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	15/07/2021	03/08/2021	14				Yes
<input type="checkbox"/>	50062	000000000000186	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	12/07/2021	26/07/2021	14				Yes
<input type="checkbox"/>	50062	000000000000186	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	28/09/2021	15/10/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007011	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	19/07/2021	17/12/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007031	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	21/09/2021	08/10/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007063	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	07/09/2021	24/09/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007075	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	27/07/2021	13/08/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007087	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	27/07/2021	13/08/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007099	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	13/10/2021	27/10/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007121	8	SUBCON	Subcon	464-0000-012-01			1.00	0.00	19/08/2021	10/09/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007123	8	SUBCON	Subcon	464-0000-012-01			1.00	0.00	18/08/2021	30/09/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007125	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	02/11/2021	19/11/2021	14				Yes
<input type="checkbox"/>	50102	0000000000007172	2	SUBCON	Subcon	464-22697-100-01			1.00	0.00	23/06/2021	13/07/2021	14				No
<input type="checkbox"/>	50102	0000000000007173	3	SUBCON	Subcon	464-22697-200-01			1.00	0.00	24/06/2021	13/07/2021	14				No
<input type="checkbox"/>	50062	0000000000007177	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	08/09/2021	27/09/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007178	9	SUBCON	Subcon	429-22178-000-04			1.00	0.00	08/09/2021	27/09/2021	14				Yes
<input type="checkbox"/>	50062	0000000000007184	8	SUBCON	Subcon	464-0000-034-01			1.00	0.00	16/09/2021	24/09/2021	3				Yes
<input type="checkbox"/>	50062	0000000000007231	8	SUBCON	Subcon	464-0000-034-01			1.00	0.00	30/09/2021	30/09/2021	3				Yes

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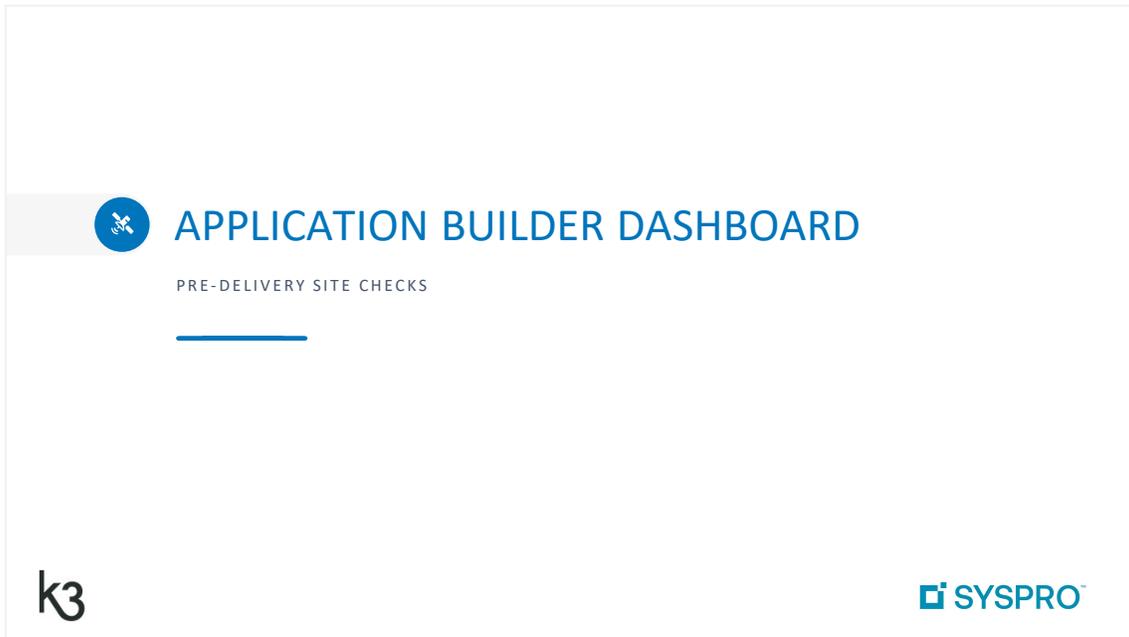
Once again, a dashboard was developed using Application Builder.

The **Selection Criteria** pane filters production operations by start/end-date. Typically this customer would look at a 1 to 2 week planning horizon.

The buyer selects a date range to view all the sub-contract operations that need to be sent out.

These can be grouped by dragging & dropping column headings into the grey bar, so as to see the total quantity of a given part number by sub-contractor across multiple jobs.

Increasing volume by grouping jobs allows the buyer to negotiate the best price possible for that planning period and raise the PO accordingly.



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The fourth use case relates to a manufacturer of bulky items, where the Customer Services team carries out a telephone site-check prior to despatch/delivery.

USE CASE 4

PRE-DELIVERY SITE CHECKS

- Delivery time restrictions
- Unloading equipment
- Unloading space
- Hazards
- One-off comments

BUSINESS CHALLENGE

Improve process for managing SOs requiring site checks:

- Presenting CSRs with SO information
- Capturing correct site check data once
- Avoiding costly returns
- Improving poor CX

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Many site-specific characteristics need to be checked, including delivery restrictions, machinery & space to unload, hazards, etc.

Historically, this was completed using printed SYSPRO reports that Customer Service Representatives, (CSRs), would add their handwritten notes to during the phone call, before keying them into SYSPRO later.

{CLICK}

This risked things being missed or key data overlooked, resulting in deliveries being turned away, a poor customer experience & unnecessary cost to the business.

PRE-DELIVERY SITE CHECKS

The screenshot displays the SYSPRO software interface for 'PRE-DELIVERY SITE CHECKS'. The main window is titled 'SalesOrders' and shows a list of sales orders. The interface includes a 'Show complete' and 'Show outstanding' toggle at the top. The list of sales orders is organized by salesperson, with columns for Sales Order, Customer, Ship Date, Site Check, Contacted, and Requires up... The 'Site Check' column contains checkboxes, some of which are checked. A summary table at the bottom right shows the total quantity reserved and the status of site checks.

Qty reserved	Line ship date	Reserved	Site check complete
22.000000	26/11/2019	F	<input type="checkbox"/>
2.00.000000	26/11/2019	F	<input type="checkbox"/>
156.000000	26/11/2019	F	<input type="checkbox"/>

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On the left, the **Sales Orders** Pane displays all sales orders requiring a site check, where the ship date is within 5 working days.

The **'Show Complete'** and **'Show Outstanding'** buttons make it easy for CSRs to toggle between filtered views of the SOs requiring site checks.

(Tick boxes displayed here reflect information captured in other panes, e.g.: identifying when all the SO line Site Checks have been completed.)

PRE-DELIVERY SITE CHECKS

The screenshot displays the SYSPRO software interface for pre-delivery site checks. The central pane, titled "Site check details", is highlighted with a yellow border and shows the following information for sales order 173758:

Sales order header	
Sales order	173758
Salesperson 2	
Customer	
Customer name	
Customer PO	
Contact Name	
Telephone	
Email	
Ship address 1	
Ship address 2	
Ship address 3	
Ship address 4	
Ship address 5	
Ship post code	G11 6PA

Pipe Site access Requirements	
Crane	Y
Rigid Access Only	N
Road closure required	N
Six meter clearance	Y
Earliest Delivery time	00:01
Latest Delivery Time	16:30
Site Hazard	
One off comments	

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The central **Site check details** pane displays contact details for that sales order.

The **Pipe Site Access Requirements** section displays existing custom fields from the Sales Order Header, allowing the results of the product-specific checks to be recorded.

The drop downs provide custom field-specific options which the CSR selects.

The **'Update SO'** button triggers the sales order to be updated with the details populated within the pane

Sometimes issues require escalation to Sales. The second **'Requires update'** button updates the Sales Order header emails the salesperson with the sales order containing notes on the action required.

PRE-DELIVERY SITE CHECKS

The screenshot displays the SYSPRO software interface for 'PRE-DELIVERY SITE CHECKS'. The main window is titled 'Site Checks' and contains several panes:

- SalesOrders:** A list of sales orders with columns for Sales order, SO line, SO int line, Warehouse, Stock code, Stock description, Order qty, Order uom, Qty reserved, Line ship date, Reserved, and Site check complete.
- Site check details:** A table showing details for a specific sales order, including Sales order, SO line, SO int line, Warehouse, Stock code, Stock description, Order qty, Order uom, Qty reserved, Line ship date, Reserved, and Site check complete.
- SO Notes:** A text area containing a note dated 21/11/19: "no site check required as vehicle requires booking in made a note to email Pam on Monday with the details Email from Pam asking for date to be put back to the 28th".

The SYSPRO logo is visible in the bottom right corner.

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Lastly, on the right, the **SO Notes** pane displays the Sales Order header notes.

In addition to reading historical notes, the CSR will be able to add more notes here on the basis of their call.

I hope this illustrates how structuring daily tasks and presenting complete, accurate and up-to-date information in a single view can make it much easier for the customer services team to perform their daily routine.

This in turn provides a more complete picture to downstream functions such as planning & logistics. This minimises business risk and avoids unnecessary costs, while maintaining a positive customer experience.



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Next we'll look at two use cases relating to inter-company trading.

We'll see how automation can:

- Take the manual effort out of intercompany transactions
- Manage documentation required when selling to customers in different a company/jurisdiction

USE CASE 5 - CONTEXT



Several global divisions & distributors but 3 key countries, each with own SYSPRO Company

Major Sales Order Processing hub in UK: selling & shipping to customers worldwide

Complex intercompany trading arrangements & documentation (more so since 1-Jan-21)

Today's example is for UK <> FR transactions only, but similar approach for other jurisdictions

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We've pulled several real-life cases into a fictional customer.

The business has several global divisions & distributors but operates in 3 key countries (US, FR & UK), each with own SYSPRO Company, marketing & selling locally.

The business operates major Sales Order Processing hub in UK selling & shipping to customers worldwide

This requires complex intercompany trading arrangements & associated documentation (more so since 1-Jan-21)

{CLICK}

This example relates to UK <> FR transactions only, but similar automations can operate for other jurisdictions.

I'll quickly outline 3 specific automations covering:

- Sales Order transactions
- Dispatch transactions
- Supporting documentation



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The French company sells a product to a French customer, but that needs to be supplied from UK company, who ship direct to the customer.

{CLICK}

In the FR Company, a Sales Order is raised with price of €100

Automation 1: Sales Order Processing then kicks in

{CLICK}

Creating the Sales Order triggers two things:

- creation of a Back-to-Back Purchase Order in the FR company
- the Purchase Order received by the UK company to supply a product at the internal transfer price of €50

{CLICK}

- creation of an equivalent Sales Order in the UK company for the same price of €50

{CLICK}

In this way, Margin & Cost of Sale are applied, correctly, in the FR company.



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The 2nd automation applies to the **Despatch Process**:

{CLICK}

As the Sales Order is despatched from UK

The Purchase Order is receipted in the FR company

{CLICK}

The Goods Received Note is created that transfers financial liability from the UK company to the FR company

{CLICK}

These are then matched using K3 **dataswitch**

In the final **Automation 3**: SYSPRO reports have been configured to handle **Documentation**

{CLICK}

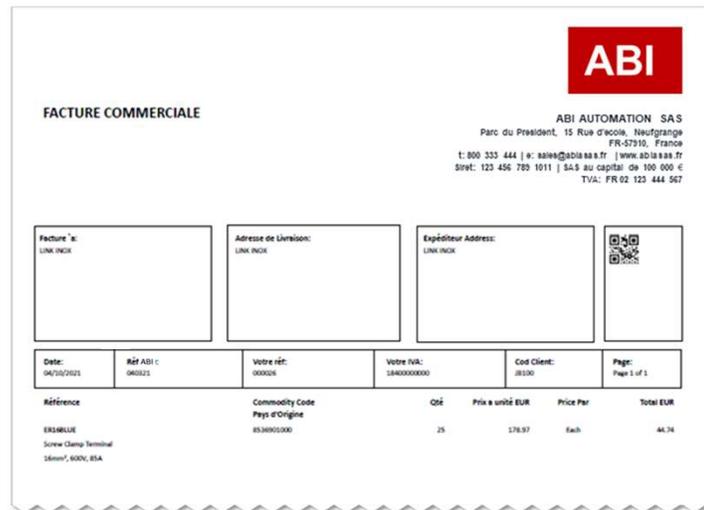
The Commercial Invoice is generated from the UK company and packed in the box.

But this must be in the name of the FR company, in French with the correct end-customer sale price of €100 and French Terms & Conditions

{CLICK} to show *Commercial Invoice*

DOCUMENTATION

COMMERCIAL INVOICE
(TEST SAMPLE ONLY)



The image shows a sample commercial invoice from ABI Automation SAS. The invoice is titled 'FACTURE COMMERCIALE' and includes the company's logo and contact information. It features several fields for invoice details, a QR code, and a table of items.

ABI
ABI AUTOMATION SAS
Parc du Président, 15 Rue d'arcade, Neufgrange
FR-57310, France
T: 800 325 444 | e: sales@abi.a.s.fr | www.abi.a.s.fr
Siret: 123 456 789 1011 | S.A.S au capital de 100 000 €
TVA: FR 02 123 444 567

Facture n°:
LINK INCK

Adresse de Livraison:
LINK INCK

Expéditeur Address:
LINK INCK

QR Code

Date:	Réf ABI :	Votre réf:	Votre IVA:	Cod Client:	Page:
19/10/2021	980321	00000	1880000000	00100	Page 1 of 1

Référence	Commodity Code Pays d'Origine	Qté	Prix à unité EUR	Price Par	Total EUR
ERS8BLUE Screw Clamp Terminal 16mm², 600V, BSA	8538020900	25	178.97	Each	44.74

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This is a sample Commercial Invoice for test transaction.

Key points are the standard generation of the Commercial Invoice but specific to the end-customer situation:

- French language (and terms)
- Pricing in Euros
- etc.

To summarise:

- Of course, intercompany trading is nothing new, and many of our customers run multiple international manufacturing, sales & distribution hubs
- What we **are** seeing is customers expanding their geographic presence – especially post-Brexit
- If you're thinking about this and you're looking to minimise the administrative burden then we can help you to think about potential problem areas, and plan to avoid them or mitigate their impact.
- Like so much of what I've shared so far, this is all about challenging the status quo...

...applying Continuous Improvement principles to make Business As Usual better!

 **RULES OF ORIGIN**

CALCULATING & REPORTING YOUR VALUE-ADD

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I'd like to conclude by looking at how SYSPRO automations can support Rules of Origin value calculations, in order to claim tariff exemption when exporting to the EU.

USE CASE 6

To claim zero tariffs on exports from UK to EU requires you to:

- **Classify** your goods (by Commodity Code)
- **Check** your goods meet rules of origin
 - 'product-specific rules' (PSRs)
- **Prove** your goods meet rules of origin
 - Statement on Origin

Proof means:

- Originating status of materials used in production
- % value-add (labour & manufacture)

Rules are generally

- Complex
- Subject to interpretation
- Prone to revision

SYSPRO can be configured to provide the SKU-level data you require to help you prepare your Statement on Origin, using automation in the BOM:

- At sub-assembly/component level
- Aggregating through the BOM to the parent saleable finished goods



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To claim zero tariffs you must:

- **Classify** your goods (by Commodity Code)
- **Check** your goods meet rules of origin
 - 'product-specific rules' (PSRs)
- **Prove** your goods meet rules of origin
 - Statement on Origin

{CLICK}

This is a complex area I am most definitely **NOT** an expert in international trade rules. But K3 Syspro Consultants do have the knowledge & experience to support you in this task.

{CLICK}

We do this by building collection of the data required into your manufacturing process, using SYSPRO to perform the relevant cost & value-add calculations within the BOM:

- 1st at sub-assembly/component level
- Then aggregating through the BOM up to the parent saleable finished goods SKU

RULES OF ORIGIN: AUTOMATION

SYSPRO automation can be used to support Rules of Origin calculations
 Current Government guidelines* state the Rules of Origin of saleable items needs to be specified as:

- UK origin or
- Non-UK origin

Classification based on:
weighted portion of components & labour for a saleable item
 saleable item ex-works price (excluding VAT)

To calculate costs/value-add at SKU level:

- SYSPRO automation in the BOM performs value-add calculations for all sub-assemblies & components
- These are aggregated up to the parent SKU:

BomStructure	BomStructure	InvMaster	InvMaster	BomStructure	InvWarehouse	BomStructure	BomStructure	BomStructure
StockCode	Description	Part Category	Country Of Origin	Quantity per	Unit Cost	Stock quantity per	Scrap quantity	Scrap %
B111	Sub assembly	M	To be calculated					
B1201	Component A	B	NN	1.00	£22.00	1.00	0.00	0.00
B1202	Component B	B	UK	1.00	£250.00	1.00	0.00	2.00
B1203	Component C	B	NN	1.50	£50.00	1.50	0.00	10.00
B1204	Component D	B	UK	1.00	£4.64	1.00	0.00	0.00
B1205	Component E	B	UK	1.00	£3.33	1.00	0.00	0.00
B1206	Component F	B	UK	2.00	£3.15	2.00	0.00	0.00
B1207	Component G	B	NN	1.00	£95.00	1.00	0.00	0.00
B1208	Component H	B	UK	1.00	£82.00	1.00	0.00	0.00

BomStructure	Material		Labour and other				Calculations				
	InvMaster	InvMaster	InvMaster	InvMaster	InvMaster	InvMaster	A	B	C	D	E
StockCode	MaterialCost UK	MaterialCost Non-UK	Labour Cost	Sub Contract Cost	Fix Overhead	Variable Overhead	UK Material	UK Labour & Sub-contr & Overhead	Non-UK Material	TotalCost	% UK (A+B)/D
B111	£351.27	£199.50	£50.40	£0.00	£79.50	£31.80	£351.27	£161.70	£199.50	£712.47	72.00%
B1201		£22.00							£22.00		
B1202	£250.00						£250.00				
B1203		£82.50							£82.50		
B1204	£4.64						£4.64				
B1205	£3.33						£3.33				
B1206	£6.30						£6.30				
B1207		£95.00							£95.00		
B1208		£82.00							£82.00		



* Government Guidelines are subject to change as circumstances change. It is a customer responsibility to interpret the guidelines. K3 Syspro consultants will then work with the customer to implement their interpretation of the guidelines.

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SYSPRO Automation performs the necessary value calculations based on a Customer's interpretation of Rules of Origin regulations.

NOTE:

- *Interpreting the regulations is a customer responsibility*
- *K3 Syspro consultants will then work with the customer to implement that interpretation*

{CLICK}

SYSPRO calculates the relevant costs and value-add at SKU level based on:

- Automation in the BOM for sub-assemblies & components
- Prompting the capture of all relevant cost data on the factory floor.

{CLICK}

- Once calculated at sub-assembly/component level, these are aggregated up to the parent SKU



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That's it for this session. Thanks for your attention.

I hope that this has provided a flavour of the work we do to help customers like you address emerging business challenges and generally strive for continuous improvement.

The key is to leverage the information already held in SYSPRO by:

- making it more accessible by bringing it to the surface
- presenting it in dashboards relevant to a specific user or role
- using automation to trigger actions in other business areas or even companies

In short, making people better informed & their day-to-day work more manageable & their lives more fulfilling.

It is important to note that some of our larger customers have the necessary skills and experience in-house to deliver automations like these.

However, many lack the capability to make these changes themselves and are reliant upon the skills of the K3 Syspro Consultants in the room today.

If you have any questions my colleagues and I will do our best to answer them either now or in the break.

Thanks again for being here and enjoy the rest of your day.

THANK YOU TO OUR SPEAKERS

SONIA FREED
EUROPA COMPONENTS

EUROPA

CHRIS RUSSELL
MANUFACTURERS
ALLIANCE



SEAN CULEY



KEVIN DHERMAN
SYSPRO

