



Announcing iSDM.4 Solution Pack 4



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Introduction

We are pleased to announce our brand new "Solution Pack iSDM4.4" release. This Solution Pack is part of the iSDM team's commitment to continuous improvement of our software. You will find several new applications/options enhancing the customer experience using iSDM. Please note that many of these improvements come from your suggestions.

It is also worth mentioning that the iSDM Connect user interface will also improve the user-friendliness of iSDM. The interface is based on the principles of a browser, improving user interaction by allowing them to always use their mouse. It is important to mention that experienced user can still use their keyboard the same way they were using their old "green screen". This new interface is faster to load and enables new SDM functions, not available on old "green screen". Do not wait any longer to install it on your system! iSDM Connect is available at no additional cost to all iSDM customers with an active package maintenance agreement. Have a look in appendix A to get an idea of what it has to offer.

If you missed any of our Solution Pack announcements, you can find them using the following links.

- [iSDM.4 Release](#)
- [iSDM.4 Solution Pack 1](#)
- [iSDM.4 Solution Pack 2 & iSDM Mobility Module V1](#)
- [iSDM.4 Solution Pack 3 iSDM Connect](#)

Purchase Order Processing

Work with Purchase Order Enhancements

- Control the default P/O statuses shown on the “Work with Purchase Order” screen with a new user group profile constant (new DTU6).
- You can now filter with more than 10 P/O statuses.

Temporary Replenishment Orders Maintenance – Additional Search Filters

Additional search filters have been added to the Temp R/O Maintenance.

18 JUL 23

TEMP R/O MAINTENANCE

11:56:57

Comp/Div

Ord Loc

Rec Loc

B/I

Type

Currency

Supplier

Customer

Cust Ord

W

A

A

KW

SYNTAX WEST

WWA MONTREAL E

WWA MONTREAL E

WAYNE KUZEK

New Search Filters

PO Inv - Additional Discountable Amounts

On the Supplier Credit Terms, you can define a terms discount or early payment discount. For example, if an invoice is paid within 10 days, an additional discount of 2% is given. We now can specify which amounts on the invoice are subject to the terms discount.

CHANGE UPD1

CONSTANTS MAINTENANCE: A/P CREDIT TERM

A

TABLE-APTR A/P CREDIT TERM

Long Description (EN)

Short Description (EN)

Discount Rate %

Discount Days

Net Days

Discount Ff Code

Net Ff Code

Long Description (FR)

Short Description (FR)

2%10 NET 30

2%10-N30

2.00

10

30

2% 10 NET 30

2%10-N30

Discountable Merch. 0,1

Discountable Duty 0,1

Discountable Brokage 0,1

Discountable Freight 0,1

Discountable G/L 1 0,1

Discountable G/L 2 0,1

Discountable G/L 3 0,1

Discountable Tax1 0,1

Discountable Tax2 0,1

1

1

1

1

1

1

1

1

1

Discountable Tax Amount

PO Inv - Compute Taxes on Summary Invoice

Taxes can now be automatically calculated at Invoice Summary level using the default Tax Rates defined for the supplier. This new functionality can be activated using the new “Tax Mode” parameter found in the “Purchasing Control” constant (1.1.14).

PO Inv - Allow Invoicing Freight in Other Currency

In P/O invoicing you can now allow to invoice the accrued freight amount in another currency than your company base currency. This new functionality can be activated using the new “POI Freight Other Cur” parameter found in the “Purchasing Control” constant (1.1.14).

Closing P/O Not Invoiced with Selection

This new application will let you close PO's that have been completely or partially received but not invoiced after a certain amount of time. The same will be affected on duty, brokerage, freight, and other accruals for a lengthy period of time. This new program will let you select the company, division, GL Number to use for accrual clean up and supplier number to include or exclude.

Sales Order Processing

Send Quote Order by Email

Quote Orders can now be sent by email.

Access Order Notes from Order Entry & Maintenance Program

When the WORK WITH Orders Enhanced program was introduced, we added the ability to add Customer Order Notes from this program only. You can now add order notes on the Order Summary screen as well.

Protect Allocated Quantity by Order Type

You can now protect the allocated quantity on an order by its type. This would prevent the user entering an order to change the quantity allocated on items if the order type forbids this activity (defined at the constant level 1.1. 10-Order Type).

Unique Customer PO Number in Order Entry

You can now make sure that a customer PO is unique when entering an order. A new parameter value was added on the "Order Req" field from the customer maintenance screen to control this. Values are now as follow:

- 0 – P/O Number not required
- 1 – P/O required
- 2 – P/O Required and must be unique**

Inventory Control

Physical Count – Variance Report – Only Print Counted Tickets

New option added on the Variance Report Selection to select counted tickets only when performing a partial inventory count.

Physical Count Entry – View Counted Tickets

In Physical Count Entry – Regular Tickets, a new selection has been added to allow the displaying of counted tickets only.

Master Files Purge

Supplier Deletion Master Files

The new Supplier Purge will allow the cleanup of suppliers from all files based on selection criteria. This will allow the end user to maintain the supplier database and delete suppliers that no longer have historical transactions in the database.

Supplier Master Change Log Audit Report

The new Supplier Master Change Log Audit Report will allow a user to request a report or an Excel spreadsheet showing the activities that happened over a period of time (NEW, CHANGES, DELETIONS or ALL).

Reporting Enhancements

Extract Reports to Excel and Send Them by Email

The following reports can now be extracted to Excel and sent by email:

- Product Deletion Analysis (2.1.9) and Work with Product Deletions (2.1.10)
- Customer Deletion Analysis (10.1.7) and Work with Customer Deletions (10.1.8)
- Inventory Valuation Report (2.2.14).
- Purchase Orders Received Not Invoiced (7.7.14)
- Accounts Payable Aging (11.1.6.3)

Extract ATB Summary Report to Excel

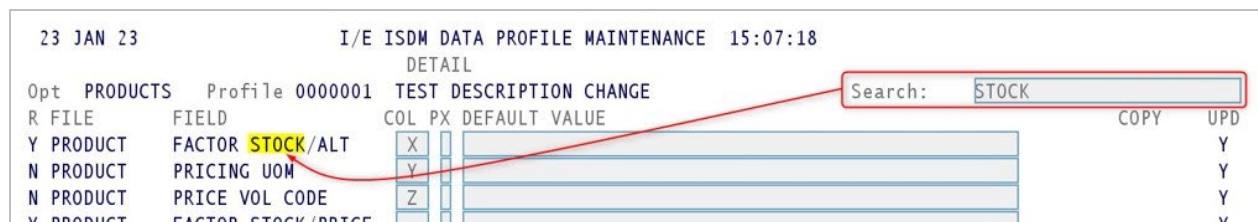
When selecting the “10.4.5. Aged trial balance Reports” option, a new “Detailed/Summarized” field lets you specify the type of information to extract to an Excel spreadsheet. Before, the only option available was to extract the detailed information, which could result in a large file.

Import/Export Module (API) Additional Feature

Additional Search Feature

While defining or searching within a profile (the profile is defining every aspect of an Import/Export action on the SDM databases), there could be many files and fields involved for a transfer. It could be time consuming to identify/find a specific field from a large list of fields included in a profile.

A new search function has been added to allow searching for a field name, description, file name... You just need to type in the information you want to search in the new Search field.



The screenshot shows the 'I/E ISDM DATA PROFILE MAINTENANCE' screen. At the top, it displays '23 JAN 23' and '15:07:18'. Below this, there's a 'DETAIL' section with 'Opt PRODUCTS' and 'Profile 0000001'. A 'TEST DESCRIPTION CHANGE' button is visible. A search bar on the right contains the text 'STOCK'. Below the search bar, there's a table with columns: 'R FILE', 'FIELD', 'COL PX', 'DEFAULT VALUE', 'COPY', and 'UPD'. The table lists several fields: 'FACTOR STOCK/ALT', 'PRICING UOM', 'PRICE VOL CODE', and 'FACTOR STOCK/PRICE'. A red arrow points from the search bar to the 'STOCK' text in the 'FACTOR STOCK/ALT' field.

R FILE	FIELD	COL PX	DEFAULT VALUE	COPY	UPD
Y PRODUCT	FACTOR STOCK/ALT	X			Y
N PRODUCT	PRICING UOM	Y			Y
N PRODUCT	PRICE VOL CODE	Z			Y
Y PRODUCT	FACTOR STOCK/PRICE				Y

General Productivity Enhancements

Send Email to a Specific Support Email Address When a Report Distribution is in Error

When a report cannot be distributed by the Document Dispatch, an email will be sent to a pre-defined support email address to identify the issue.

Retrieve Previous Search Selection (Product – Customer – Supplier)

When navigating on the Product – Customer - Supplier extended search screen, and a line is selected to display the detail information, it is now possible to return to the previous search screen page where the last selection was made.

View Only iSDM Constants Options < INQUIRY>

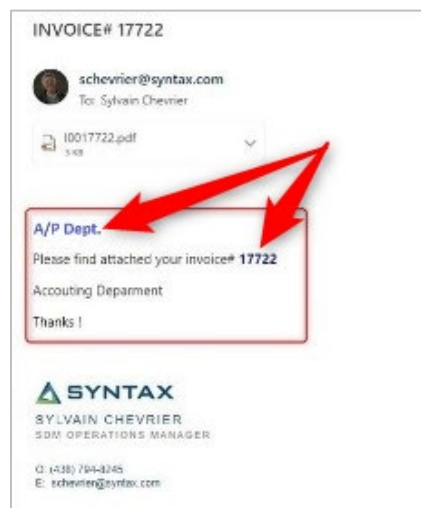
You can now give INQUIRY access to the content of an iSDM constant to a regular user.

Pre-defined User PRINT or EMAIL Parameter

When generating a report, the user is prompted in the PRINTING PARAMETERS window if they want to send the report to a printer or as an attached file in an email. This new option will set the user default to the prompt for “send the report to a printer” or “email the report”.

Enhance the Look of Emails Sent by iSDM

A new function allows to users enhance the look of emails body sent through iSDM. We can now add colors, change fonts and sizes.



Manufacturing

New Roll Costs Components Functionality

A new parameter “Roll Costs Components (Y/N)” has been added on the Manufacturing Control constant (1.6.05) to determine if the cost of the finished goods should be calculated by rolling up the actual costs of the component or not.

Logging Changes on the Bill of Material Application

A new enhancement to log changes to the Bill of Materials (BOM) in the Bill of Materials maintenance has been added. Any addition, deletion or change to a BOM record will be logged with the user having the option to perform an inquiry on these changes.

You can also set the number of months you would like to keep the log entries.

Improve functionality on the Production Order Entry and Maintenance Option

A new search functionality has been added to the **Production Order Entry and Maintenance** program. You now can review and make changes to production orders from a single search screen.

Facilitate Inventory Transaction Inquiry for Manufactured Products

When performing an **Inventory Transaction Inquiry** on either type of transaction

RP – Receipt from Production for the finished product

or

IP – Issued to Production for the components used to produce the finished product

you can now place your cursor on the reference number of the transaction and view the components of the manufactured products.

New Mobile Archive Application

As you may know, the archiving application has been available free of charge with your iSDM software since Release 3.0. We have greatly improved the internal data collection process on reports to enable faster searching. We have also made the application more mobile than ever. You can now use it on your phone, tablet or simply from your favorite browser. Do not hesitate to contact us if you have any questions about this application.

Granular Security & Faster Access

There are many types of documents (reports) that can be archived, from customer orders to pick slips, customer invoices and more. So, it is important to control who has access to what when using the search program. Access to archived document types can now be managed by user groups or specific users.

Sending Archived Document through Email

When an archived document is viewed, it can now be e-mailed with a simple "click". All iSDM email security will be observed according to the user's or group's settings.

Appendix A – iSDM Connect

Enhanced readable Fonts

GUI look and feel

White Background like WEB

Point and Click

Highlighted Information

330342

P/O ENTRY

SYNTAX WEST

REGULAR 1 P/O

ITEM DETAIL

WWA MONTREAL EN

Supplier 01040 TURNER & SEY

LINDSAY

LISTED

IM

Func

Seq	Product No	Quantity	UOM	Ref Price	Adj %	Net Price	UOM
001	WKA	1	EA	14.9900	0.00	14.9900	EA

WKA PRODUCT CHANGE DESCRIPTION TEST*---*

Suppl Prod

Case Qty 12 Min Qty

Wght 99.001 LB (LB/KG) Tot Wght 99.001

Ref No

Dept

Date Req 281021

AMD 346 Type 1 REGULAR

Landed 14.9900

Date Prom

LIST SPECIAL WHOESL DEALER MSRP WEB

----- CST+100 LANDED

2000.00 24.00 12.99 22.00 5.00 21.00 20.00 19.00 18.00

On Hand	Alloc	B/O	Avail	On Ord	B/K	Net	MIN	EOQ
1647	1699	1141	1193-	2029	45	791	0	100

Monthly Sales / Usage

2101	2102	2103	2104	2105	2106	2107	2108	2109
1320		843	1	764	533	333	470	171

YTD YTDL MTD

2010 2011 2012

21522 15502 7343

153 37 225

Lead 16 Out Freq 0 Out Days 331 Mov 9 Freq T ADD 12.34 Trend

Surplus

Qty 0 Value Act 0.00 Min 0 Weight Act 0 Min 0

F3=Exit F10=Act F11=Disc F12=Prev F23=Del PRESS <ENTER> TO PROCEED

PRODUCT INFO

Click on the link for the Folder containing Other Product Information

<http://syntax.syntax.net:10002/L4/?P=UVUUUWbYxtbEUVUV>

Product No #0101

Product Type F FINISHED GOOD

Product Group 45 MAJOR GROUP 45

Product Sub-Group 02 4502

French Desc./Title 512MB PC133 SDRAM RDIMM

English Desc./Title 512MB PC133 SDRAM RDIMM

Key-Word 512MB PC13

Substitution Code 0

Stock UM EA EACH Alt UM EA EACH

Creation Date 27 MAY 02 Revision Date 19 DEC 18

Status ACTIVE

F4=Notes F12=Cancel

ENTER YOUR DATA

Executable links

Select Cut and Paste Feature

Point and Click

When using the new SDM Connect User Interface, customers are also able to attach media documents to products.

For more information, please refer to the following iSDM 4.3 announcement:

iSDM.4 Solution Pack 3 iSDM Connect