



# SYSPRO Office Automation and Messaging



SYSPRO Office Automation and Messaging improves workflow communication and response times, both internally and externally. It allows you to proactively identify, report and respond to critical situations and events in real-time. The messaging can accelerate actions on critical events by automatically notifying key people via e-mail or the internal SYSPRO messaging functions. Alternatively, SYSPRO Office Automation and Messaging will run a program as events occur or when data reaches a pre-defined level. Furthermore, it provides for e-mailing or faxing from directly within SYSPRO.

## Office Automation and Messaging features

- Emailing and faxing of transactional documents and reports from within SYSPRO
- Email notifications from within Electronic Signatures and Event Management
- Events for triggering emails, running SYSPRO or other applications, and writing to a log file for later review
- Emailing via Microsoft Exchange or any MAPI-compliant product (e.g. Lotus Notes)
- Support for other mail transport protocols (e.g. SMTP) via VBScripting
- Validation against Microsoft Exchange Address Books for accurate delivery of messages and reports

## Event management

- Monitor events as they happen and automatically notify one or more people
- Conditional logic adds intelligence to notification, e.g. only the buyer of an item is emailed
- Customize triggers, with effective dates
- Place standard variables in the command line to specify desired events

## Sample events

- Stock on hand negative
- Stock less than safety or minimum
- Stock above maximum

- Goods receipt
- Bank balance less than specified parameter
- Customer balance is greater than percentage of allowed credit limit
- Supplier balance greater than specified parameter
- Job costs exceed expected levels
- Lot quantity on hand falls to zero
- New stock item added
- Customer now within credit limit
- Sales order released from credit check
- Access security breach attempt
- General ledger YTD actual greater than YTD budget by specific percentage
- New supplier added
- New customer added
- Requisition routed to another user
- Estimate available for use

## Integration with SYSPRO

- Integrates with any SYSPRO program that emails or faxes reports or documents
- Integrates with Event Management
- Requires Microsoft Fax, WinFax Pro or any other MAPI compliant product for faxing
- Fax and email documents are saved to the mail client (e.g. Microsoft Outlook) where they are queued for mailing
- Requires Microsoft Exchange, Microsoft Outlook or any MAPI compliant product (alternatively VBScripting allows any other mail technology to be used - such as SMTP)
- Microsoft Word required to fax or email documents

# SYSPRO Office Automation and Messaging



## Audit trails and reporting

- All events are automatically saved to a log file which can be queried on-screen and printed

Report Preview - AR List of Customer Details

[Email](#) | [Stop](#) | [Export to Excel](#) | [Export to Text](#) | [Select Expert](#) | [Refresh](#) | [Export to CSV](#) | [Advanced Export](#)

[Main Report](#)

### AR List of Customer Details

Customer	Customer name	Branch	Geoq	Class	Balance type	Sales	Credit limit	Currency	Telephone	Terms
0000001	Bayside Bikes! 1	10	N	A	Op-item	100	999999999999.00	\$	206-555-4562	2 60 Days - Net
Contact: Karen Saunders		Ship to: 3 Beach Road		Tax No:		Line / Invoice discount: /				
Sold to: P O Box 8		Bayside North		Seattle		GST number:				
WA		WA		USA		Default price code: A				
98111		98101				Company tax registration number:				
No finance charges						Price cat: :				
0000002	Bikes and Blades - Northr	10	N	M	Op-item	100	0.00	\$	416-555-8256	1 30 Days - 2.5%
Contact: Susan Brown		Ship to: 32 Fifteenth Street		Tax No:		Line / Invoice discount: /				
Sold to: P O Box 57895		Northern Region		Richmond		GST number:				
Ontario		Ontario		Canada		Default price code: A				
L4B 1B4		L4B 1B4				Company tax registration number:				
Price cat: :										
Master account										
0000003	Bikes and Blades - South	20	S	S	Op-item	201	0.00	\$	011-555-4262	1 30 Days - 2.5%
Contact: Helen White		Ship to: 1789 Box Street		Tax No:		Line / Invoice discount: /				
Sold to: P O Box 756895		Southern Area		South Sooton		GST number:				
						Default price code: A				