



Announcing iSDM.4 Solution Pack 3



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Introduction

As promised with the release of **iSDM.4**, the SDM team has been executing an enhanced development strategy. The iSDM.4 platform now sees a continuous stream of enhancements designed to deliver new business functions and productivity improvements. The first such “Solution Pack”, **iSDM.4 Solution Pack 1**, was made available in 2018. The second, **iSDM.4 Solution Pack 2**, was made available in 2020 and we are now proud to announce **iSDM.4 Solution Pack 3. (iSDM4.3)**.

The SDM team has also been hard at work on developing a new User Interface, iSDM Connect, that will enhance your end user experience. iSDM Connect is a requirement to take advantage of some new options discussed in this announcement and is **available at no additional cost to all iSDM customers as long as you are on an active maintenance agreement**.

As always, we welcome and encourage suggestions from the SDM customer community for enhancements you would like to see in future iSDM releases. Please feel free to reach out to us if you have any questions about the content of Solution Pack 3 or the implementation process.

In addition, here are some links to information about other software released in the past few years.

[iSDM.4 Release](#)

[iSDM.4 Solution Pack 1](#)

[iSDM.4 Solution Pack 2 & iSDM Mobility Module V1](#)

Storing & Accessing Products Photos, PDF's, and Other Documents

When using the new SDM Connect User Interface, customers will now be able to attach media documents to products. These attachments can be accessed in;

- Product Inquiry
- Product Maintenance
- Order Process – Entry & Maintenance
- Purchasing – Entry & Maintenance
- Product Notepad Maintenance
- Standard Product Search
- Extended Product Search

For more information, please see the section on Product Master Maintenance in this document.

Purchase Order Processing

P/O Receiving & Invoicing Reconciliation

This new option allows you select up to 10 Purchase Orders to reconcile. The result is laid out in a spreadsheet containing the necessary information and can be sent by email.

27 OCT 21
P/O INV RECONCILIATION
13:29:50

P/O SELECTION

Company
Division

W
W

SYNTAX*CMP
SYNTAX WEST

Enter P/O numbers

330301

330306

330307



	A	B	C	D	E	F	G	H	I	J	K
1	Jrn_Type	Cmp	Div	Loc	P/O_Nbr	P/O_Status	Rec_No	Receipt_Status	G/L_Number	G/L_Description	G/L_Amount
2	PC	W	W	A	330301	C - Completely Received	1	R - Received	00000000045	(C)ACCRUALS MERCH	-\$2998.00
3	PC	W	W	A	330301	C - Completely Received	1	R - Received	00000000200	perpetual inventory	\$2998.00
4	PC	W	W	A	330306	R - Partially Received	1	T - Invoicing in process	00000000002	(B)a/p exchange sl1	-\$25.00
5	PC	W	W	A	330306	R - Partially Received	1	T - Invoicing in process	00000000004	(D)acc. for exc. pur	-\$100.00
6	PC	W	W	A	330306	R - Partially Received	1	T - Invoicing in process	00000000200	perpetual inventory	\$125.00
7	PC	W	W	A	330307	V - Partially Invoiced	1	X - Cancelled	00000000003	(C)acc. mer. pur.	-\$131.00
8	PC	W	W	A	330307	V - Partially Invoiced	1	X - Cancelled	00000000004	(D)acc. for exc. pur	-\$32.75
9	PC	W	W	A	330307	V - Partially Invoiced	1	X - Cancelled	00000000005	(E)acc. duty pur.	-\$9.17
10	PC	W	W	A	330307	V - Partially Invoiced	1	X - Cancelled	00000000006	(F)acc. sales tax 1	-\$1.07
11	PC	W	W	A	330307	V - Partially Invoiced	1	X - Cancelled	00000000008	(H)acc. brok. pur.	-\$2.59
12	PC	W	W	A	330307	V - Partially Invoiced	1	X - Cancelled	00000000010	(J)Tax1 GST	\$1.07
13	PC	W	W	A	330307	V - Partially Invoiced	1	X - Cancelled	00000000011	(K)Accrued Tax2	-\$3.46
14	PC	W	W	A	330307	V - Partially Invoiced	1	X - Cancelled	00000000200	perpetual inventory	\$178.97
15	PC	W	W	A	330307	V - Partially Invoiced	2	I - Completely Invoiced	00000000003	(C)acc. mer. pur.	-\$327.50

L	M	N	O	P	Q	R	S	T
Fisc_Per	Transaction	Seq	Trans Date	Trans Type	Jrn_Nbr	Inv_Nbr	Supplier	Sypplier_Name
21-07	I-0008673	1	2021-08-12	PC - P/O Receipt	1979		01946	ADRIAN MONTREAL
21-07	I-0008673	2	2021-08-12	PC - P/O Receipt	1979		01946	ADRIAN MONTREAL
21-07	I-0008680	1	2021-08-15	PC - P/O Receipt	1985	I-0330306-1	01998	ADRIAN NEW YORK
21-07	I-0008680	2	2021-08-15	PC - P/O Receipt	1985	I-0330306-1	01998	ADRIAN NEW YORK
21-07	I-0008680	3	2021-08-15	PC - P/O Receipt	1985	I-0330306-1	01998	ADRIAN NEW YORK
21-07	I-0008682	1	2021-08-17	PC - P/O Receipt	1987		01998	ADRIAN NEW YORK
21-07	I-0008682	2	2021-08-17	PC - P/O Receipt	1987		01998	ADRIAN NEW YORK
21-07	I-0008682	3	2021-08-17	PC - P/O Receipt	1987		01998	ADRIAN NEW YORK
21-07	I-0008682	4	2021-08-17	PC - P/O Receipt	1987		01998	ADRIAN NEW YORK
21-07	I-0008682	5	2021-08-17	PC - P/O Receipt	1987		01998	ADRIAN NEW YORK
21-07	I-0008682	6	2021-08-17	PC - P/O Receipt	1987		01998	ADRIAN NEW YORK
21-07	I-0008682	7	2021-08-17	PC - P/O Receipt	1987		01998	ADRIAN NEW YORK
21-07	I-0008682	8	2021-08-17	PC - P/O Receipt	1987		01998	ADRIAN NEW YORK
21-07	I-0008683	1	2021-08-17	PC - P/O Receipt	1988	3 INVOICES	01998	ADRIAN NEW YORK

Temporary Replenishment Order Enhancement

Sales periods including promotional sales will now be highlighted. This will provide with more information and may prompt to react differently.

REG PO				ITEM DETAIL				HEAD OFFICE	
Supplier	11958	SPRING LOADED	DARTMOUTH	LISTED	IM	Func			
Seq	Product No	Quantity	UOM	Ref Price	Adj %	Net Price	UOM		
003	DANNFILEDP-3BULK	1	EA	13.2000	0.00	13.2000	EA		
DP-3BULK FILE BLK/GRN (50 PACK) 100/180 Suppl Prod									
Case Qty	50	Min Qty		Wght	0.95	LB (LB/KG)	Tot Wght		0.95
Ref No		Dept					Date Req	011821	
AMD	239	Type 1	REGULAR	Landed	13.2000		Date Prom		
MBSLIST	LOYALTY	DNU	DNU	ZERO	MSLP VALUE	SAL RET	EDU-CST		
23.99	23.99	.00	.00	.00	23.99	.00	.00	11.40	
On Hand	Alloc	B/O	Avail	On Ord	B/K	Net	MIN	EOQ	
209	10	0	199	300	0	499	306	287	
Monthly Sales / Usage									
2102	2103	2104	2105	2106	2107	2108	2109	2110	
7	117	386	268	327	277	249	263	282	
YTD	YTDL	MTD				2011	2012	2101	
2289	2425	120				176	218	104	
Lead	21	Out Freq	0	Out Days	19	Mov	1	Freq	1
ADD						9.56	Trend		
Surplus									
Qty	201	Value Act	1438.20	Min	0	Weight Act	20.79	Min	0

Sales Order Processing

Work with Orders - Enhanced

- New Customer Order Notes
- New filtering capabilities:
 - Date From/To
 - Customer PO #
 - Product No
- Expanded Order type filters from 6 to 10 selections
- Expanded Order status filters from 6 to 10 selections
- Preset of Order type & status selection can be done at the User Group – 3 level.

New Order Entry Function – Select Product from Customer Purchase History

In Order Entry;

1. Use function key F10 for the Action Bar.
2. Enter 92A which will take you to the Customer Purchase History Inquiry.
3. Position your cursor on the product number and press enter.
4. This will select the product and take you back to Order Entry, where you will then enter the quantity ordered

Batch Order Entry (API) Error Report Sent by Email

It will now be possible to get the error report emailed once a day or once a week on a desired day and at a desired time of the day, if at least one order in error is present.

Show All Types of Sales on One CSI Screen

This new functionality will provide the ability to show all sales types on one screen by using the 91K option from the CSI Inquiry menu or while entering an order by using the 91K action bar selection.

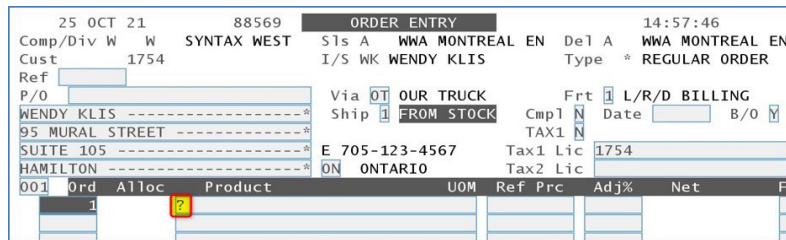
K 0=New Parameters 1-9=Service Inquiries A-Z=Stock Inquiries									
(K) SALES INQUIRY BY SALES TYPES									
WKA	WKA	PRODUCT	CHANGE	DESCRIPTION	TEST*-	WWA	MONTREAL	EN	
On Hand	1547	Alloc	1696	B/O	1137	Available		1286-	
Booking	45	On Order	1829			Net Available		498	
	2109	2108	2107	2106	2105	2104	AvgSls	AMD	
REGULAR SALES	171	300		513	209	1	199		
PROMOTION SALES			333		555		148		
SPECIAL SALES		10		20			5		
ISSUED PRODUCTION									
ASSORTMENT SALES									
TRANSFERS		160					26		
TOTAL	171	470	333	533	764	1	378	346	
	2103	2102	2101	2012	2011	2010	AvgSls	AMD	
REGULAR SALES	66				37	32	22		
PROMOTION SALES	777		999			121	316		
SPECIAL SALES									
ISSUED PRODUCTION				225			37		
ASSORTMENT SALES			321				53		
TRANSFERS									
TOTAL	843		1320	225	37	153	429	346	

Product Master Maintenance

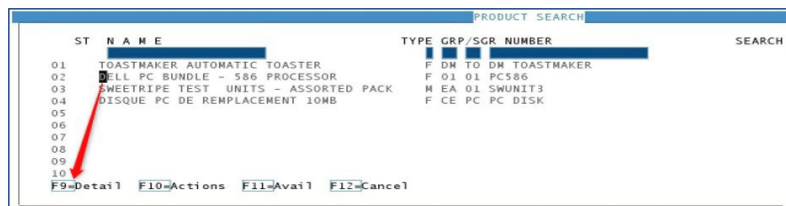
Documents Can Be Attached to Products

This allows the storage of documents to the Product database (photographs, PDF's and more) so that they can be consulted from many different applications where the product information can be searched. These include:

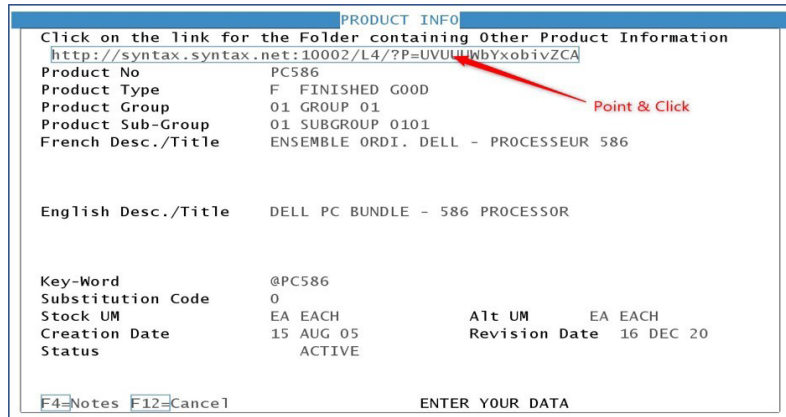
- Product Inquiry, Product Maintenance, Order Process – Entry & Maintenance, Purchasing – Entry & Maintenance, Product Notepad Maintenance, Standard Product Search, Extended Product Search.



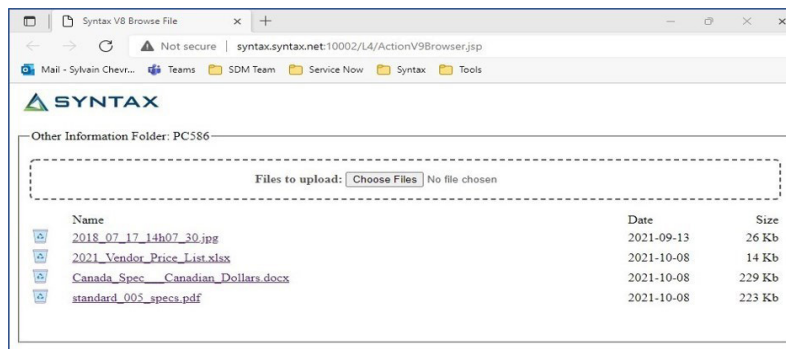
25 OCT 21 88569 ORDER ENTRY 14:57:46
 Comp/Div W W SYNTAX WEST Sls A WWA MONTREAL EN Del A WWA MONTREAL EN
 Cust 1754 I/S WK WENDY KLIS Type * REGULAR ORDER
 Ref []
 P/0 [] Via 01 OUR TRUCK Frt 1 L/R/D BILLING
 Ship 1 FROM STOCK Cmpl N Date [] B/O []
 WENDY KLIS [] TAX1 N
 95 MURAL STREET [] E 705-123-4567 Tax1 Lic 1754
 SUITE 105 [] ON ONTARIO Tax2 Lic []
 HAMILTON []
 001 0rd Alloc Product UOM Ref Prc Adj% Net F



PRODUCT SEARCH
 ST NAME TYPE GRP/SGR NUMBER SEARCH
 01 TOASTMAKER AUTOMATIC TOASTER F DR TO DR TOASTMAKER
 02 DELL PC BUNDLE - 586 PROCESSOR F 01 01 PC586
 03 SWEETRIPE TEST UNITS - ASSORTED PACK M EA 01 SWUNIT3
 04 DISQUE PC DE REMPLACEMENT 10MB F CE PC PC DISK
 05
 06
 07
 08
 09
 10
 F9=Detail F10=Actions F11=Avail F12=Cancel



PRODUCT INFO
 Click on the link for the Folder containing Other Product Information
<http://syntax.syntax.net:10002/L4/?P=UVUUWbYxobivZCA>
 Product No PC586
 Product Type F FINISHED G00D
 Product Group 01 GROUP 01
 Product Sub-Group 01 SUBGROUP 0101
 French Desc./Title ENSEMBLE ORD. DELL - PROCESSEUR 586
 English Desc./Title DELL PC BUNDLE - 586 PROCESSOR
 Key-Word @PC586
 Substitution Code 0
 Stock UM EA EACH Alt UM EA EACH
 Creation Date 15 AUG 05 Revision Date 16 DEC 20
 Status ACTIVE
 F4=Notes F12=Cancel ENTER YOUR DATA



Syntax V8 Browse File
 Not secure | syntax.syntax.net:10002/L4/ActionV8Browser.jsp
 Mail - Sylvain Chev... Teams SDM Team Service Now Syntax Tools
 SYNTAX
 Other Information Folder: PC586
 Files to upload: Choose Files No file chosen
 Name Date Size
 2018_07_17_14h07_30.jpg 2021-09-13 26 Kb
 2021_Vendor_Price_List.xlsx 2021-10-08 14 Kb
 Canada_Spec_Canadian_Dollars.docx 2021-10-08 229 Kb
 standard_005_speca.pdf 2021-10-08 223 Kb

The new iSDM Connect user interface must be used to access this function.

Enhanced Product Extended Search Information

Additional information can now be searched from the Product Extended Search screen;

- Product titles, Extended Product Descriptions and Product Comments.

Inventory Transactions

Additional user transaction tracing has been added for cost and quantity adjustments

Inventory Update Pre-verification

To avoid updating the inventory of a location that has not, or partially been counted, a warning indicates that the count may not be finished. The warning does not prevent the update from proceeding.

08 OCT 21			INVENTORY UPDATE SELECTION					06:56:22				
Cmp	Div	Loc		C/L/P	Eff Date	Per	S/D	Status	Upd	Total Tickets	Not Counted	Warning Messages
14 W	W	A	WWA MONTREAL EN	C	211008	2110	Scan	SNAPSHOT GEN	<input type="checkbox"/>	31	25	! 080% NOT COUNTED !

Inventory Management by Group/Sub-group

When defining the “Inv Mgmt by Product Gr/Sbgrp” constant, the Product Group and/or Product Subgroup can be left blank. This means that every program using this constant will be able to apply its parameters at the

- Location level
 - and/or Location + Group level
 - and/or Location + Group + Subgroup level.

Import/Export Module (API) Additional Features

New databases are now available in the Export/Import tool that was introduced in iSDM 4. and enhanced in Solution packs 4.1 & 4.2.

Product Data

- Sales Quantity Price Maintenance

Constants

- Inventory Management by Product Group and Subgroup
 - This constant is used to compute a sales forecast for each product through the weighted Average method and establish the minimum quantity to carry in stock for each product (reorder point) and the economic order quantity to reorder. Based on this information, suggested orders can be generated in the Suggested Order module.

Reporting Enhancements

Send Financial Report by Email

We can now send every financial report by email. When requesting for a report in the financial application, a new field prompt you to indicate if you want this report to be sent by Email.

End of Day / End of Month

Purge Documents Archived in IFS

In the past, the IFS document cleanup (AS400 folders) had to be done manually. Now, you can define the folders that needs to be purged by indicating a duration, number of days, and the type of document that needs to be deleted within a constant. You can then schedule the cleanup job to run at Day End and/or Month End.

General Productivity Enhancements

Constant Search Functionality Added

Every field validated by a constant (like the Country Code, Salesman Code, Ship Via, Terms Code...) in the Product/ Customer/ Supplier applications can be searched by using the “?” or “/” in their selection fields.

On-line Job Start-up to Run with a Pre-defined User

On-line jobs are always running under the authorized user who started them. As an example, the On-line Pick Slip Print or the On-line Invoice Print will be stopped and restarted by the End of Day procedure. The user normally running this procedure has all the necessary authorities to control these on-line jobs. During the day, if these jobs are stopped and restarted by another user, they will run under this new user's authority. The access authority can vary between users and, as a result, could have prevented programs from running. We can now define a preselected user to avoid these conditions.

iSDM Report Manager Enhancements

A new feature, Basic Assistance Level, has been added to simplify and enhance the information displayed on the working screen.

21 OCT 25 iSDM Report Manager Basic									
Type options, press Enter									
1=Copy 2=Change 3=Hold 4=Delete 5=Display 6=Release 8=Attributes 9=Detail M=Mailing									
Opt	Device or Queue	User	Reference	Sts	Total Pages	Copy	Creation Date	Creation Time	File Name
<input type="checkbox"/>	E1286OUTQ	E1286	E1286-H	RDY	1	1	25/10/21	13:57:27	Invoice Update
<input type="checkbox"/>	E1286OUTQ	E1286	I1171828	RDY	1	1	25/10/21	13:57:27	Invoice Print
<input type="checkbox"/>	E1286OUTQ	E1286	I1171829	RDY	1	1	25/10/21	13:57:28	Invoice Print
<input type="checkbox"/>	E1286OUTQ	E1286	I1171830	RDY	1	1	25/10/21	13:57:28	Invoice Print
<input type="checkbox"/>	E1286OUTQ	E1286	I1171831	RDY	1	1	25/10/21	13:57:29	Credit Note Print
<input type="checkbox"/>	PRT16	E1286	AR2310	RDY	2	1	25/10/21	13:58:01	Invoice Update Daily Invoice Register
<input type="checkbox"/>	PRT16	E1286	AR2330	RDY	2	1	25/10/21	13:58:02	Invoice Update Daily sales journal
<input type="checkbox"/>	OUTQERRSY	E1286		RDY	16	1	25/10/21	13:58:03	Invoice Update
<input type="checkbox"/>	PRT16	E1286	GP2550-IN	RDY	1	1	25/10/21	13:58:03	Invoice Update
<input type="checkbox"/>	E1286OUTQ	E1286	ER3020	RDY	11	1	25/10/21	14:00:16	Eq Rental re-pricing eq rental
<input type="checkbox"/>	E1286OUTQ	E1286	GE6000	RDY	1	2	25/10/21	14:00:17	REPORT 5 QPADEV000X
<input type="checkbox"/>	E1286OUTQ	E1286	IN2060	HLD	1	1	25/10/21	13:56:42	Invoice Print - Package versio
<input type="checkbox"/>	E1286OUTQ	E1286	IN2060	HLD	1	1	25/10/21	13:56:43	Invoice Print - Package versio
<input type="checkbox"/>	E1286OUTQ	E1286	IN2060	HLD	1	1	25/10/21	13:56:43	Invoice Print - Package versio

New FTP App Feature – Define Dynamic Folder Destination

The destination directory based on the Year or Year-Month of an FTP transfer can now be dynamically defined when transferring files with the use of a mask like %YY% or %YYMM%. In this example, the file will be copied to a directory name ending by the actual year and month:

Destination Directory	ARCHIVE/CMD/%YYMM%
-----------------------	--------------------

Appendix A – iSDM Connect

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